MicroEdge

GIFTS® Alta

Administrator's Guide

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Contents

Welcome to the GIFTS ALTA Administrator vii
About the Administrator Module viii
Conventions Used in This Manual ix
Chapter Summaries xi
Using the GIFTS Documentation Set xiii
Using Online Help xv
Maintenance and Support Program xvi
Using the Documentation xvii

1 Getting Started 1
Setting Up GIFTS 2
About Classifications 4
Defining Your Workflow 5
Delegating Tasks 7
About Request Type, Disposition, and Status 8
Entering or Importing Historical Data 10
Starting the Administrator Module 11

2 Maintaining the Open Classification System 13
About the Open Classification System 14
Maintaining the Code Tables 17
Maintaining Codes 23

Transferring Codes 28
Replacing Codes 33
Sorting Codes 40
Setting Up Tax Status Codes 41
Viewing and Printing Code Reports 47

3 Setting the System Preferences 49

About the Preferences 50
General Preferences 51
Security Preferences 62
Request Preferences 67
Coding Sheet Preferences 74
Salutation/Payments Preferences 79
External Preferences 84
Using the Preferences Editor 89

4 Controlling Access to GIFTS 93

About GIFTS Security 94
Managing Permission Sets 96
Managing User Groups 104
Setting Approval Restrictions 106
Managing User Accounts and Passwords 109
Global Client/Server Login Options 116
Setting Up Windows NT Login Integration 121
Setting Up Windows NT Login Integration with GCS 122

5 Setting Default Grant Requirements 123

About Default Requirements 124
Setting Default Requirements 125

6 GIFTS Alta Extended Settings 127
The GIFTS Alta Extended Settings Tool 128

7 Setting Up Multi-Currency Options 143
About Currencies and Exchange Rates 144
Setting Up Your Multi-Currency Preferences 150
Adding Currencies 164
Updating Exchange Rates 167
Maintaining and Using Historical Rates 174
Deactivating a Currency 178
Reporting Exchange Rate Information 179

8 Defining Correspondence Templates 181
Planning Your Templates 182
Accessing the Template Library 188
Creating a New Template 190
Working with E-mail Templates 196
Working with Letter Templates 198
Working with Letter/E-mail Templates 199
Editing Templates 202
Copying Templates 204
Renaming a Template 205
Deleting a Template 206
Working with Table Merge Fields 207

Event-Specific Document Subdirectories 212

9 Managing GIFTS Reports 215

About the Report Library 216
Managing the Report Library 218
Ad Hoc Reports in the Report Library 224
Global Report Formatting for Ad Hoc Reports 225

10 Maintaining Your GIFTS Data 231

Consolidating Duplicate Records 232
Recalculating Data 235
Purging Removed Documents 238

11 Customizer Planning 239

About Customizer Planning 240
Planning Data Fields 242
Planning Calculated Fields 246
Field Planning Worksheet 247
Field Planning Worksheet 248
Creating Database Fields 249

12 Building Custom Forms 255

Planning the Form Layout 256
Form Design Worksheet 257
Form Design Worksheet 258
Adding Custom Forms 259

Working in the Form Customizer Environment 264
Adding and Arranging Data Fields 270
Adding and Configuring Calculated Fields 275
Adding and Configuring Web Clippings 279

13 Importing Matching GIFTS Summary Data 283

About the Matching GIFTS Summary Import 284
About the GIFTS Import Module 285
Considerations for Summary Imports 287
Avoiding the Creation of Duplicate Records 290
Running the Import 296
Matching GIFTS Summary Import File Layout 304

14 Setting Up Branch Security 311

About Branch Security 312
Activating Branch Security 316
Managing Branch Codes 317
Assigning Groups to Branches 319
Branch/Division Correspondence Templates 322
Branch-Specific G/L Account Codes 323

15 Creating IGAM Review Rules 325

About Review Rules 326
Creating Review Rules 327

Welcome to the GIFTS Alta Administrator

Congratulations for choosing GIFTS Alta!

GIFTS Alta is a highly flexible software application that you can customize to meet the needs of your organization. This manual includes step-by-step instructions for using the GIFTS Alta Administrator Module to set up your installation of GIFTS Alta.

This manual also contains information about the optional GIFTS Alta Customizer Module. The Customizer Module allows administrators to add custom data fields to GIFTS Alta records. Data in these fields can then be added, viewed, modified, and reported on in GIFTS Alta.

In This Chapter

About the Administrator Module ..... **viii**

Conventions Used in This Manual ..... **ix**

Chapter Summaries ..... **xi**

Using the GIFTS Documentation Set..... **xiii**

Using Online Help ..... **xv**

Maintenance and Support Program..... **xvi**

Using the Documentation ..... **xvii**

About the Administrator Module

In most organizations, the staff member designated as the GIFTS administrator is responsible for setting up and administering GIFTS. The administrator should understand the use of the Code Tables, classification codes, security, letter templates, grant requirements, and other system options described in this manual.

For more information about planning the implementation of your system, please refer to the *GIFTS Alta Setup Course Manual* that you received during your GIFTS Alta training; the accompanying *GIFTS Alta Setup Implementation Workbook* includes worksheets that can help you plan and track your implementation.

Conventions Used in This Manual

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

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

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

Procedural and Typographic Conventions

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

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

Different Types of Notes

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

Note: A note with this format and the heading "Note" provides information that applies to some users. Notes apply to special situations. For example, a Note might explain minor differences in setup procedures among network and standalone systems.

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

that is essential to the completion of a task. Important notes should not be disregarded.

Caution: A note with this format and the heading "Caution" provides important information that applies to all users. Pay special attention to these notes.

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

Chapter Summaries

Use the procedures in this manual to set up and maintain your GIFTS system. Following is a brief description of the chapters in this manual.

Chapter	Description
“Getting Started” on page 1	Describes the basics of defining your GIFTS workflow, GIFTS setup, and entering historical data into the system. It also describes how to start the Administrator Module.
“About the Open Classification System” on page 14	Develop the Code Tables and codes used in the coded fields throughout the system and in the Coding Sheets used to classify Requests, Organizations, and Contacts.
“About the Preferences” on page 50	Set system options, including the location of your word processor and spreadsheet programs so that they may work in conjunction with GIFTS.
“About GIFTS Security” on page 94	Each authorized user of GIFTS must be identified to the system. You can determine the level of access granted to each user *group* on your system.
“Setting Default Requirements” on page 125	To streamline your data entry, this facility allows you to set up default Requirements that are automatically attached to new proposals and grants.
“Setting Up Your Multi-Currency Preferences” on page 150	If you engage in international grant-giving, you may want to track the value of your giving to your recipients using another currency. This chapter explains how to set up and maintain exchange rates for other currencies.
“Planning Your Templates” on page 182	All grant makers send letters and correspondence to the Organizations that request funding and to other people associated with the grant making process. You can create correspondence templates that merge your standard letters with information in the GIFTS database.

Chapter	Description
“Managing the Report Library” on page 218	The GIFTS Report Library contains more than 200 templates for generating presentation-quality reports. This section discusses how to manage your Report Library.
“Maintaining Your GIFTS Data” on page 231	Describes the utilities that you can use to consolidate “duplicate” data records, recalculate summary fields, and purge old documents from your system.
“Customizer Planning” on page 239	This and the following chapter provide information to clients using the optional GIFTS Customizer Module. The Customizer Module allows you to create custom forms for GIFTS records, in which you can record data specific to your needs. Before you create custom forms, it is a good idea to plan your needs for data fields and other elements on paper first. This chapter describes how to plan the customizing of your GIFTS system.
“Building Custom Forms” on page 255	This chapter describes how GIFTS Customizer Module users design the data entry forms used to enter their custom data.
“Setting Up Branch Security” on page 311	Branch Security allows grantmakers with multiple sites to capture all of their information in a centralized database, while preventing users from different branches from editing (or viewing, if desired) each other’s data.
“Importing Matching GIFTS Summary Data” on page 283	Describes how to import matching gifts summary data from an external system into GIFTS.

Using the GIFTS Documentation Set

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

GIFTS Alta includes the following documentation.

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

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

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

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

Related Documentation

If you use optional GIFTS Alta modules such as the Internet Grant Application Manager, you will receive additional documentation.

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

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

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

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

The GIFTS Connections Documentation Set

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

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

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

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

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

Using Online Help

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

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

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

Maintenance and Support Program

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

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

Phone	1-877-704-3343
E-mail	*helpdesk@microedge.com*
Web	Go to *www.microedge.com* and login to the PowerME portal to access the knowledgebase and submit a new case if necessary.

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

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

Using the Documentation

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

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

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

1 Getting Started

This chapter describes the major steps needed to implement GIFTS before you begin to enter your grant making data.

In This Chapter

Setting Up GIFTS **2**

About Classifications **4**

Defining Your Workflow **5**

Delegating Tasks **7**

About Request Type, Disposition, and Status **8**

Entering or Importing Historical Data **10**

Starting the Administrator Module **11**

Setting Up GIFTS

Please keep the following considerations in mind as you plan the implementation of your GIFTS Alta system. For information about installing or upgrading GIFTS, please refer to the *Installation and Technical Reference Guide*.

- ✔ For each of your giving programs, such as "cash grants" or "in-kind giving," define a workflow. Each workflow should encompass the entire life cycle of requests—from receipt, to approval or declination, to final closure.
- ✔ Define the roles and responsibilities of each member of your staff for each giving program.
- ✔ Define and set up the classification codes you will be using for your Coding Sheets. For example, Request Coding Sheets enable you to set up classifications like "Program Area is Education."
- ✔ Define and set up the System Code Tables. (The System Code Tables define the options—like the Request Status categories and Contact Roles—available in the pull-down lists used throughout GIFTS.)
- ✔ Set up your system preferences. In particular, you should determine whether GIFTS should search for duplicate Organization or Contact records during data entry.
- ✔ Identify which reports from the GIFTS Report Library you will use and define how and when your staff will use them. For samples of the GIFTS reports, please refer to *Using GIFTS Reports*.
- ✔ Set up your correspondence templates. GIFTS can merge your data into both printed letters and e-mail messages.
- ✔ Set up GIFTS user accounts based on the responsibilities of your staff.
- ✔ Create a procedures guide for your staff. This should include your data entry, reporting, and grant management procedures—as well as any other GIFTS functions used by your organization.

✔ Create a realistic time frame for your implementation. Given the items listed here and the other matters you may be handling, how long do you need to make the appropriate decisions and put them in place?

Once you have determined your workflow and procedures, you can set up the GIFTS options as described in this manual.

Note: If you are using the optional GIFTS Budget Module, you must plan and allocate your Budget for the current or coming year before any data entry begins. Complete instruction is provided in the *Budget Module User's Guide*.

About Classifications

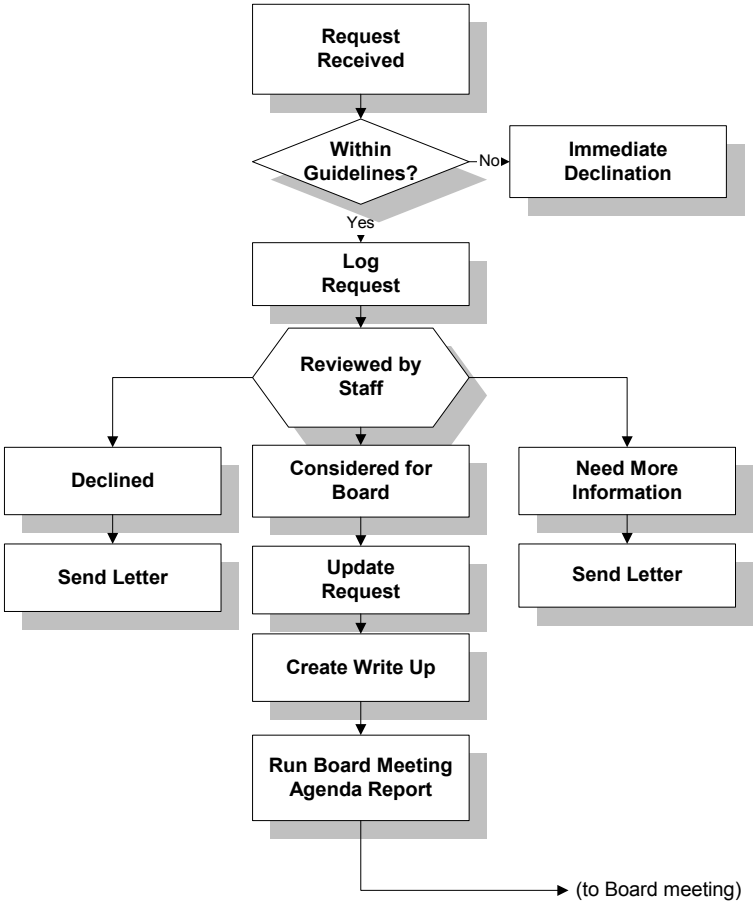
The GIFTS Open Classification System (OCS) is the means by which you can classify the Requests, Organizations, and Contacts in your database. To do this, you set up *Coding Sheets* that describe these entities, and you can define the individual categories and classification codes used within these Coding Sheets.

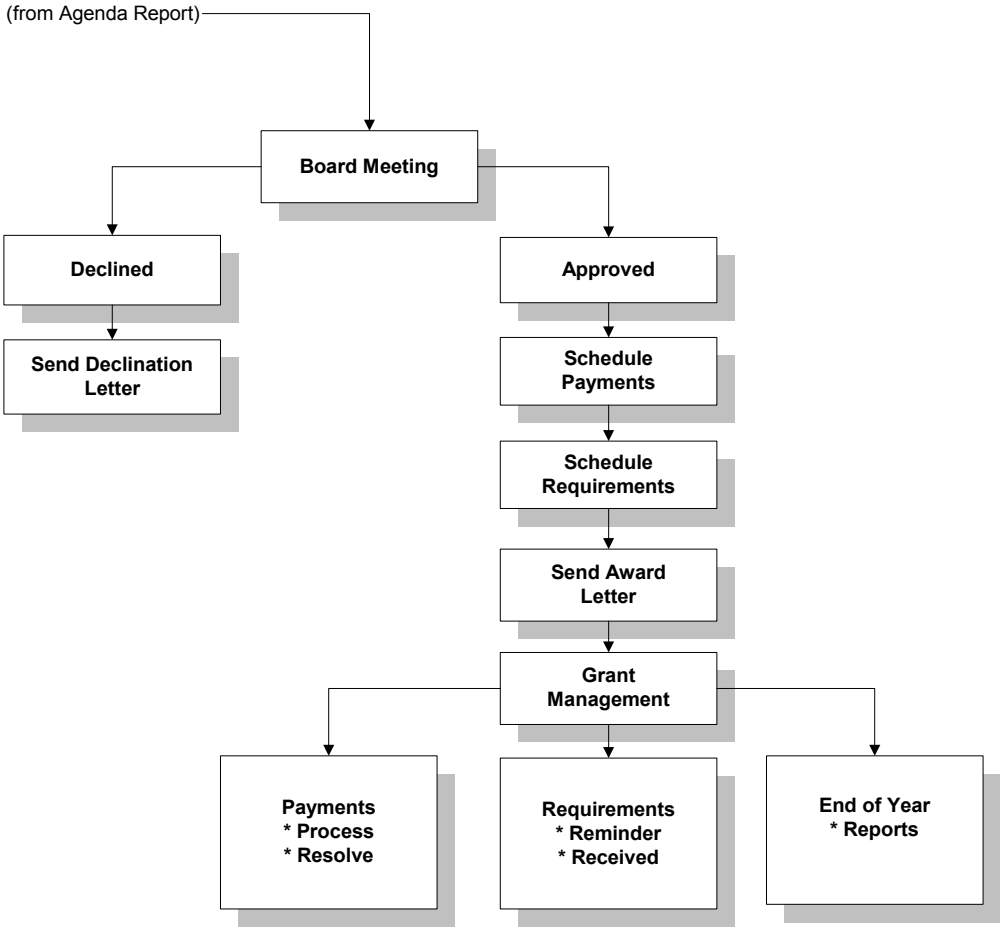
For instance, the Coding Sheet for Organizations can have a 'Organization Type' category with classifications like 'Civic & Community' or 'Education.' You could then use these classifications to identify Organizations as either Civic & Community organizations or Education Organizations.

Most grantmakers already have a manual classification system in place, where they categorize each entry according to certain criteria. Others have inherited a classification system from another software program. Setup is the perfect time to make sure that your current classification system meets your needs, and to expand or modify it as necessary.

Defining Your Workflow

For each of your giving programs, you should define a workflow that describes how requests are to be handled—from receipt, to approval or declination, to the conclusion of grants management. The following diagram illustrates the workflow of a cash grants giving program; you can refer to this example when planning your own workflow:




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

Delegating Tasks

Once you have defined your workflow, determine how you will divide specific tasks and responsibilities among your staff. This ensures consistency in data entry, and prevents duplication of effort.

To assist you, the following table is an example of how the daily tasks for a typical grantmaker can be divided among staff members. Refer to this example as you delegate your responsibilities

Task	Performed By
Review incoming requests and separate immediate declinations from those to be reviewed.	Program Staff
Enter declinations into the system and produce declination correspondence.	Assistants
Enter proposals with all relevant information, and assign each to a specific member of your staff.	Assistants
Gather information on proposals through site visits, telephone calls, meetings, and so forth.	Program Staff
Update proposal information.	Assistants
Prepare write-ups for board meetings.	Assistants
Record board decisions and produce approval and declination correspondence.	Assistants
Produce reports of payments due and check requests, update payments.	Finance
Monitor grants.	Program Staff
Track payments.	Finance

About Request Type, Disposition, and Status

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

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

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

Disposition	Type of Request
Pending	Proposals
Approved	Grants
Declined	Declinations

The Status of a Request gives more detail about its progress in your workflow. For example, assume a Request has a Disposition of "Declined" and a Status of "Declined by Staff." With this information, you could tell exactly where this Request resides within the sample workflow illustrated on page 5.

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

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

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

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

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

Entering or Importing Historical Data

If you intend to enter historical data, you should decide what information from your previous automated or manual system you wish to maintain in GIFTS. Develop clear procedures for your data entry staff.

Make sure that your historical data is entered in the same manner as the new information you will be tracking; data consistency is essential for accurate reporting. For information about the GIFTS Quick Entry feature for historical data, please refer to the *GIFTS User's Guide*.

If you are using the optional Budget Module, you should also determine the extent of the historical budget information you wish to enter. Most organizations do not enter budget information for historical data.

If you have converted data from another grants management system, you should review your data and/or coding structure.

If you want accurate reports that reflect both your current and historical information, it is important that the data is entered in the same places within the system and that it uses the same classification system.

Starting the Administrator Module

The first time you log in to the Administrator Module, use the Admin Login ID that comes with GIFTS. To prevent unauthorized use of the Administrator Module, you should protect the Admin user name with a password, as described in "Setting, Resetting, or Clearing a User Password" on page 113.

You can also create other users that are permitted to log in to the Administrator Module; for more information about system security, please refer to "Controlling Access to GIFTS" on page 93.

Tip: You can also integrate your Windows NT logins with GIFTS. For more information, please refer to "General Preferences" on page 51.

Logging In

You can start the Administrator Module from within GIFTS Alta or from the Microsoft® Windows® desktop. To log in from within GIFTS Alta:

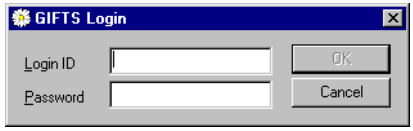
1. Log in to GIFTS Alta as the Admin user.

2. Go to Modules ➤ Administrator from the ribbon menu. The Administrator Module starts. (Since you are already logged into GIFTS as a user with permission to use the Administrator Module, you are not prompted to log in.)

To start the Administrator Module from Windows:

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

   You are prompted to log in:



2 Enter Admin into the Login ID field (or your user name if you or someone else has already set up your system security).

3 Enter your password, if necessary.

4 Click **OK**. The Administrator Module starts.

Logging in as a Different User

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

1 From the Administrator module, choose Options ➤ Change User. You are prompted to enter a Login ID to the system.

2 Log in and click **OK**.

2 Maintaining the Open Classification System

This chapter describes how to set up and maintain the Open Classification System used for Coding Sheets and coded data entry fields.

In This Chapter

About the Open Classification System **14**

Maintaining the Code Tables **17**

Maintaining Codes **23**

Transferring Codes **28**

Replacing Codes **33**

Sorting Codes **40**

Setting Up Tax Status Codes **41**

Viewing and Printing Code Reports **47**

About the Open Classification System

In order to produce meaningful reports and queries, it is necessary to classify the records in your database. For instance, if you want to see all of the grants awarded to programs in Education, these grants would have to be classified as Education grants in order for you to see this information.

In addition, you need to use consistent terms to classify information. For example, you may want to use the following terms to describe your giving programs: Cash Grants, Dinners & Events, and In-kind Giving.

If users could enter anything to describe the giving program for a grant—such as 'Cash Grants,' 'Cash,' 'Dinners and Events,' 'Dinners,' and so forth—you'd never be able to retrieve all the grants of a certain type.

To address these issues, the GIFTS Open Classification System (OCS) allows you to create a set of categories and classifications that your users can use to consistently classify your data. For example, for the category of 'Program Area' you can include such classifications as 'Arts & Culture' or 'Education.'

GIFTS stores your categories in Code Tables, and stores the classifications within each Code Table as codes. To set up your classification system:

1. Set up your Code Tables (you can use some or all of the tables provided with the system).
2. Enter the appropriate codes into each of your Code Tables.

The following sections describe the two areas of the system in which the OCS codes are used:

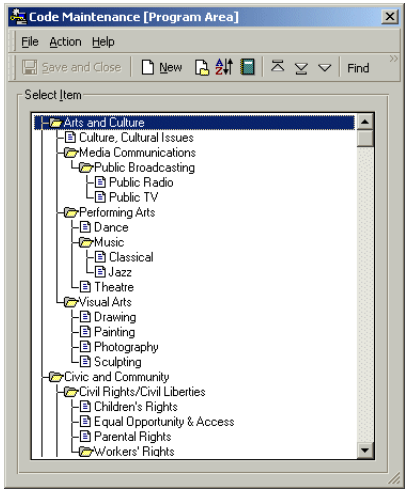
- Coding Sheets for Requests, Organizations, and Contacts
- Coded fields for data entry

About Coding Sheet Setup

GIFTS allows you to classify Requests, Organizations, and Contacts with a Coding Sheet. You define the Coding Sheets for each type of record to include Code Tables that represent the categories of information that are

important to you. During data entry, users enter classification codes into these tables so that those records can be included in reports and queries.

The Open Classification System gives you full control over both the Code Tables included on the Coding Sheets, and the classification codes in each table. For example, these are the codes for the Program Area Code Table:



Note that this Code Table has multiple levels, or "tiers"; you can define the number of levels for each user-defined Code Table to meet your needs. By using different levels to classify increasingly specific information, you increase the flexibility you have in reporting.

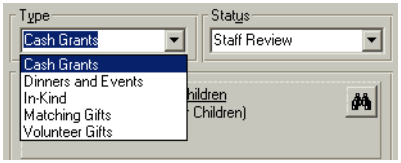
You can choose to see information based on the broad categories on the top level, or the very specific codes on the bottom level.

Important: Modifying your coding structure after you already have data in your system can be complicated, so it is best to plan your classifications in advance. The result will be an efficient, easy-to-use system.

Use the *Implementation Workbook* for the "GIFTS Setup" training course to plan your classification system in writing.

About Coded Field Setup

In addition to the Coding Sheet Code Tables used to classify Organizations, Requests, and Contacts, GIFTS uses System Code Tables to define the items—such as the Request Status categories, Contact Roles, and G/L Account Codes—available in the coded fields used throughout the system. For example:



You can modify the codes in System Code Tables in order to determine the items that your users can use in the coded fields. However, you cannot add or remove System Code Tables since each table corresponds to a specific field within the GIFTS database.

Note: Unlike most coded data entry fields, the available values in the Support Type and Fund fields displayed on Payment records are defined in Coding Sheet Code Tables, not by System Code Tables. GIFTS is designed this way so that these values can default to those chosen on the Request's Coding Sheet.

To plan the implementation of your system codes, you can use the worksheets provided with your *GIFTS Setup* training course.

Maintaining the Code Tables

This section describes how to add, modify, and delete Coding Sheet Code Tables so that the appropriate categories will be available for your Coding Sheets. In addition, you can edit the classification codes in each table.

Tip: You can add user-defined Coding Sheet Code Tables, but keep in mind that many of the reports in the GIFTS Report Library use the *pre-defined* Code Tables that come with the system. When practical, you should use the pre-defined Code Tables so that your users can take advantage of as many reports as possible.

Refreshing GIFTS Code Tables

You should keep in mind that whenever you make changes to the Code Tables, they will not be available in the other GIFTS modules until you refresh your system. Any other users who are logged into GIFTS when you make changes will also need to refresh before they can see your changes.

To refresh GIFTS, choose User Menu ➤ Refresh System Settings. GIFTS may also be refreshed by logging out of the system, then logging back in.

Default Preferences for Coding Sheets

GIFTS includes the following Code Tables for use on your Coding Sheets. You can modify these tables, but please note that the table name and the number of levels for pre-defined Code Tables cannot be modified. You can also add tables if these do not meet your needs.

The check marks (✔) indicate which tables are used on each Coding Sheet type (Organization, Request, or Contact). For information about adding and

removing Code Tables from the Coding Sheets, please refer to "Coding Sheet Preferences" on page 74.

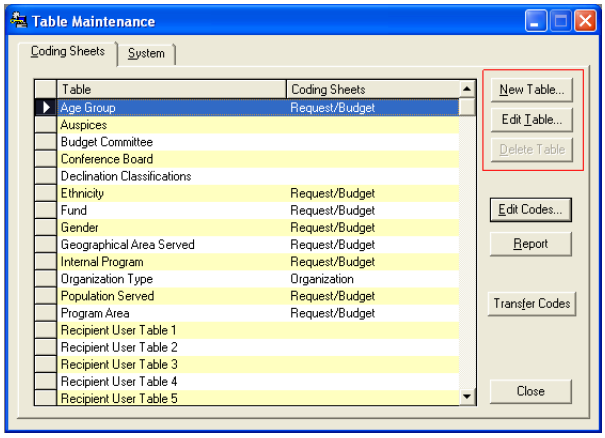
		Coding Sheets		
Table Name	**Description**	**Org**	**Req**	**Con**
Age Group	The age group served by the Request or Organization	✔	✔	
Auspices	The overall auspices of the Organization.	✔		
Budget Committee	An internal committee whose jurisdiction the Organization or Request is under.	✔	✔	
Conference Board	The Conference Board's classification.	✔		
Decline Classifications	For Requests that are declined.		✔	
Ethnicity	The ethnicity of the population served by the Organization or Request, or the ethnicity of the Contact	✔	✔	✔
Fund Donor	The fund donor from which the funds for the Request or Organization will be drawn.	✔	✔	
Gender	The gender of the population served by the Organization or Request, or the gender of the Contact.	✔	✔	✔
Geographical Area Served	The geographic location served by the Organization or Request (not necessarily the Organization's location).	✔	✔	
Internal Program	An internal category, usually used to track initiatives and projects distinct from the Program Area.	✔	✔	
Organization Type	The type of institution.	✔		
Population Type	A general category used to track a target population; often used to track economic status or specific disabilities.	✔	✔	

		Coding Sheets		
Table Name	**Description**	**Org**	**Req**	**Con**
Program Area	The program under which the efforts of the Organization or Request fall, such as Education or Environment.	✔	✔	
Support Type	The type of support requested, such as project or endowment support.	✔	✔	

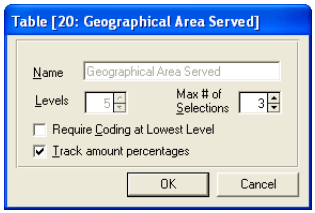
Adding or Modifying a Code Table

To add or modify a Code Table, use the following procedure:

1 From the Administrator menu, choose Setup ➤ Code Tables. The Table Maintenance window opens. On the Coding Sheets tab, the Coding Sheet Code Tables are displayed:



2 To add a new Code Table, click New Table. Or, to modify an existing table, highlight it and click Edit Table. The Table window opens:



Field	Description
Name	The name of the Code Table. Names can contain more than one word. This field is limited to 50 characters, including spaces. You cannot modify the name of a pre-defined Code Table.
Levels	The number of levels in the Code Table; each table can have as many as five levels. The number of levels for pre-defined tables cannot be modified.
Max # of Selections	The number of codes that users can supply in this Code Table during data entry. **Example:** Many grantmakers allow users to enter more than one code in the Geographical Area Served table so they can reflect the fact that a grant serves more than one area. In most cases, only one code should be provided in each field on the Coding Sheet. When multiple selections are allowed, the GIFTS Reports use the *primary code* to sort or group data. When you search for records or select a group of records to include in a report, on the other hand, both the primary and secondary codes are used.
Require Coding at Lowest Level	Use this option to require that users enter codes at the lowest (most detailed) level of this table.

Field	Description
Track Amount Percentages	Checking this box enables Percentage Coding for the code values in the specific table. This then allows users to allocate Request/Grant amounts by percentage in GIFTS, IGAM, and MyGIFTS to selected code values. Percentage Code Requirements: ❖ This option is only available on tables associated with the Request/Budget Code Sheet. ❖ The Max # of Selections must be set to 2 or greater to enable this field. ❖ If using GCS, you must have version 3.6 or higher.

3 Click **OK** to save the Code Table. You can add another Code Table, or click Cancel to exit.

4 If you added a new table, add codes to the table as described in "Adding Codes" on page 24.

Deleting a Code Table

You can delete a user-defined Code Table from your system at any time. The codes within the Code Table are deleted as well, and all references to those codes in your database records are removed. If you have used the Code Table in a Coding Sheet, GIFTS warns you.

Caution: There is no way to retrieve a Code Table and its codes once you have deleted them.

To delete a Code Table:

1 From the Administrator menu, choose Setup ➤ Code Tables. The Coding Sheet Code Tables are displayed on the Coding Sheet tab.

2. Highlight the table you wish to delete, and click Delete Table. If you have already included the Code Table on a Coding Sheet and used it to classify Requests, Organizations, or Contacts, a warning message is displayed.
3. Click Yes to delete the table.

Maintaining Codes

You can add, edit, deactivate, delete, or replace codes in order to maintain the integrity of your coding system and to match your needs as they evolve. As with your Code Tables, be sure to plan how you will use your classifications in advance, and use the *Implementation Workbook* for the "GIFTS Setup" training course to plan your classification system in writing.

The following sections describe how to maintain the codes in your Code Tables:

Adding Codes **24**
Editing Codes **25**
Deactivating and Activating Codes **26**
Deleting Codes **27**
Transferring Codes **28**
Replacing Codes **33**
Sorting Codes **40**
Setting Up Tax Status Codes **41**

Note that if you are working with a System Code Table or a pre-defined Coding Sheet Code Table, there may be restrictions on the changes you can make. For instance, you cannot delete certain pre-defined codes.

Refreshing GIFTS Codes

Remember that whenever you make changes to the Codes, they will not be available in the other GIFTS modules until you refresh your system. Any other users who are logged into GIFTS when you make changes will also need to refresh before they can see your changes.

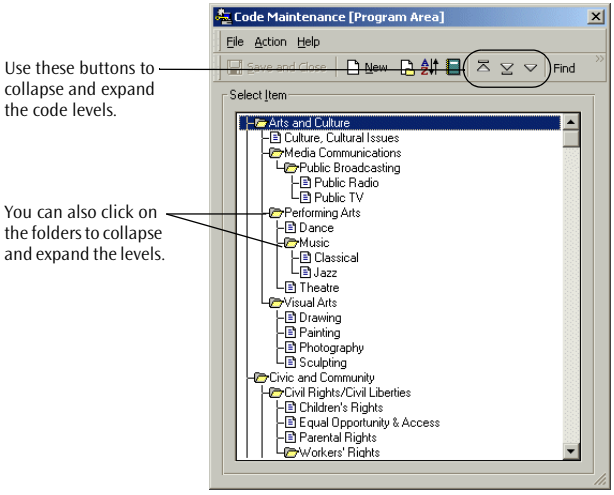
To refresh GIFTS, choose User Menu ➤ Refresh System Settings. GIFTS may also be refreshed by logging out of the system, then logging back in.

Adding Codes

To add classification codes to a table:

1 Select Setup ➤ Code Tables from the Administrator menu. The Table Maintenance window opens.

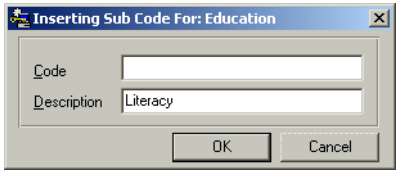
2 Highlight the table you wish to edit and click Edit Codes. The Code Maintenance window opens:



3 In a single-level table, choose File ➤ New to add a new classification. In a multiple-level table, you can:

❖ Choose File ➤ New to create a new classification at the current level (the same level as the highlighted classification).

❖ Highlight a code and File ➤ New Sub to create a subordinate classification. For instance, if you create a subordinate classification for a Level 1 code, you are creating a Level 2 classification beneath it:



4 Enter the new classification:

- The **Description** is the full name of the classification that appears on screen during data entry and in the GIFTS Reports. This field is required. (75 characters maximum)
- The **Code** is an optional value that can be used as an alternative to the full description. If you choose to enter a Code, it will be displayed next to the **Description** during data entry. It is used by grant makers who enter data into GIFTS from paper forms that use code abbreviations. Note that Codes are not displayed in the GIFTS Reports. (50 characters maximum)

5 Click **OK**. You are returned to the Code Maintenance window.

6 Click **Save and Close** to save your changes, or choose File ➤ Close to cancel your changes.

Editing Codes

When you edit a code, every instance of that code in the system is updated to reflect the change. All occurrences of the code within your reports, searches, and data entry will use the new terminology.

Be sure to consider whether you are simply changing the terminology used in its description, or whether you are also changing the meaning of the code. If the term's meaning is changing then all historical uses of the term should be reviewed to ensure that they are consistent with the meaning of the new term.

For example, changing the Organization Type classification's Description from 'College' to 'Colleges & Universities' does not affect its relationship to your existing data. All of the Organizations that were coded as 'Colleges' are described by 'Colleges & Universities' as well.

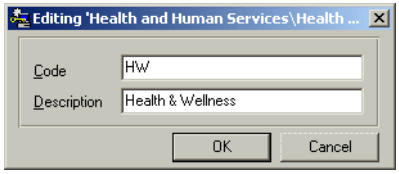
As another example, suppose the Organization Type 'Education' was initially used to classify any Organization which was involved in education or (as in the case of many public radio and television stations) that was owned by an educational institution.

Later it was decided that this was not sufficiently precise and the term 'Education' would only be used for schools. Each organization would have to be examined to see if it qualified. A new Organization Type would have to be created to classify the public radio and television stations, and the codes of those Organizations would have to be changed to reflect the new type.

You can also replace codes with other codes in the database and revise the structure of the codes in a table. For more information, please refer to "Replacing Codes" on page 33.

To edit a classification code:

1. Select Setup ➤ Code Tables from the Administrator menu. The Table Maintenance window opens.
2. Highlight the table you wish to edit and click Edit Codes. The Code Maintenance window opens.
3. Highlight the classification code and choose File ➤ Edit. The Editing '[Code]' window opens:



4. Edit the **Description** and/or **Code**.
5. Click **OK**. You are returned to the Code Maintenance window. Please note that the changes you make to the Code Table are not saved until you exit the Code Maintenance window.
6. Click **Save and Close** to save your changes, or choose File ➤ Close to cancel your changes.

Deactivating and Activating Codes

To keep your coding structure up-to-date and still maintain accurate codes for historical data, GIFTS allows you to specify codes as inactive. A code marked as inactive is available on reports containing historical information

and for queries, and will appear in existing data with "(Inactive)" beside the Description. Inactive codes are not available during data entry.

To make a code inactive:

1. Go to the Code Maintenance window for the table in which the code resides and click on the code to select it.
2. From the Code Maintenance menu, choose Action ➤ Deactivate. The word "(Inactive)" appears following the code description:

For a code that is already inactive, the Deactivate menu option is replaced with the Activate option. Choose Action ➤ Activate to return the code to an active status.

Deleting Codes

When you delete a code from the Code Table, GIFTS removes all references to that code from your data. This means that any records classified with that code will have no value in that field after the deletion takes place.

Important: In most cases, deactivating classification codes is preferable to deleting them in order to preserve your historical code data for reporting.

To delete a classification code:

1. Go to the Code Maintenance window for the table in which the code resides and click on the code to select it.
2. From the Code Maintenance menu, choose File ➤ Delete. The code is deleted.

   Note: If GIFTS cannot allow deletion of the code because its removal would impair operation of the system, you are given the option to mark the code as inactive instead. Click Yes to deactivate the code.

Transferring Codes

The GIFTS Administrator Module includes a Transfer Codes feature that you can use to transfer all of the codes in a "source" Coding Sheet Code Table to a "target" Coding Sheet Code Table; all references to the codes you transfer are updated.

When Should I Transfer Codes?

This feature is useful for clients who have converted their data from a legacy system, and who need to transfer the codes so that their data in GIFTS accurately reflects their data in their legacy system. It is also useful for clients who wish to change the implementation of their system.

GIFTS is shipped with pre-defined tables used for commonly used classifications like "Geographical Area Served." You can also create, modify, and use user-defined tables to meet your needs. Note that if you wish to change the use of a user-defined table, you can simply change its name.

However, if a pre-defined table exists for the classification data with which you're working, avoid creating or renaming a similar table for that data (such as "Geographic Region") whenever possible.

For example, if the "Region" codes from your legacy system were converted to a user-defined table in GIFTS, you should use this feature to transfer the codes to the pre-defined "Geographical Area Served" table in GIFTS instead of renaming the user-defined table.

Many GIFTS reports group on pre-defined Code Tables or contain information from them, but few reports contain information from user-defined tables. The pre-defined tables are:

Age Group	Auspices	Budget Committee
Ethnicity	Fund	Gender
Geographical Area Served	Internal Program	Organization Type
Population Served	Program Area	Type of Support

Note: You cannot change the names of the pre-defined tables.

Task 1: Make a Backup of Your Database

Caution: Before transferring codes from one table to another, make a backup of your database. The transfer process cannot be reversed, and involves major changes to your data.

Task 2: Prepare the Target Table

Before you transfer codes to a table, ensure that it does not contain any codes. If the table includes any codes, you must move them to another table or delete them before using it as a target. For information about deleting codes from a table, please refer to "Deleting Codes" on page 27.

The following conditions also apply to the target table; you can set these parameters in Task 3 as part of the transfer process.

Allows the same number of selections as the source table. The number of selections allowed determines whether users can enter only one code for the Code Table per record, or if they can enter secondary codes onto Coding Sheets that use that table.

For instance, with secondary codes a user can enter "Arts & Culture / Performing Arts" as the primary Level 1 and Level 2 Program Area codes for a grant that funds a community theater, and "Civic and Community / Community Events" as the grant's secondary codes.

When multiple selections are allowed, the GIFTS reports use the primary code to sort or group data. However, when you use search criteria to determine which records are included in a report, both the primary and secondary codes are recognized.

Note that the Transfer Codes process allows you change the number of selections allowed by the target; it is not necessary to change it before you begin.

Has at least as many levels as the source table. If the target table has fewer levels than the source table, the levels not supported by the target table are

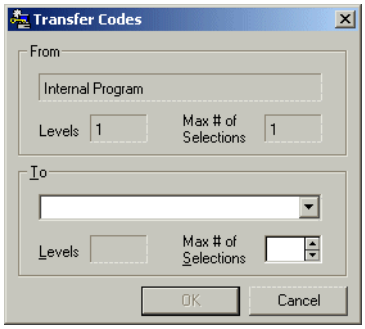
deleted. Note that the Transfer Codes process allows you change the number of levels allowed by the target; it is not necessary to change it before you begin.

Note: You cannot change the number of levels for certain pre-defined tables. The Program Area and Geographical Area Served tables have five levels, and all other pre-defined tables have one level—including the Request User Tables and the Recipient User Tables.

Task 3: Transfer the Codes

To transfer codes from a source table to a target table:

1. From the Administrator menu, select Setup ➤ Code Tables. A list of the Coding Sheet Code Tables is displayed.
2. Highlight the source table and click Transfer Codes. You are reminded that the transfer cannot be undone and that you should have a backup of your database.
3. Click Yes. The Transfer Codes window opens:



4. In the To field, choose the target table.
5. Adjust the target table's levels and maximum number of selections so that they match the properties of the source table. Note that if the target table is a pre-defined table, you may not be able to change these properties.
6. Click OK. You are prompted to confirm the source and target tables that you have selected.

7 Click OK to transfer the codes. If any conditions exist that can cause the loss of data, you are informed and given the opportunity to cancel the transfer.

8 When the transfer is complete, a confirmation message is displayed.

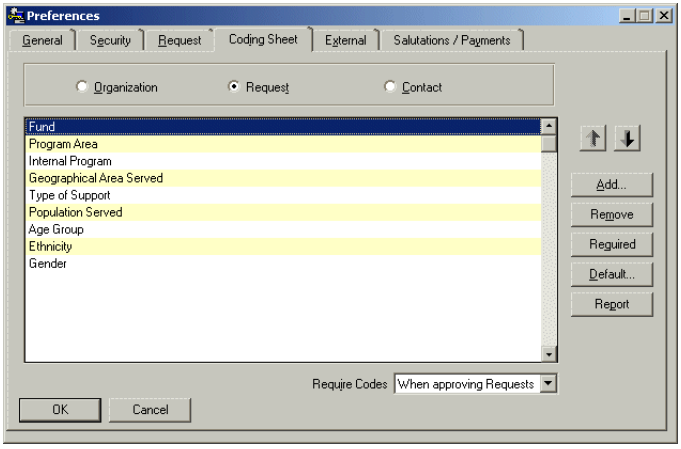
Task 4: Add the Target to Your Coding Sheets

In order to view the data that has been transferred to the target Code Table, you must use the Coding Sheet Preferences to add the target table to the Coding Sheet for which it is intended.

Tip: The Coding Sheet Preferences determine which tables are displayed by the system; changes to the preferences do not alter your data. You can work with the preferences at any time—before or after you transfer your codes.

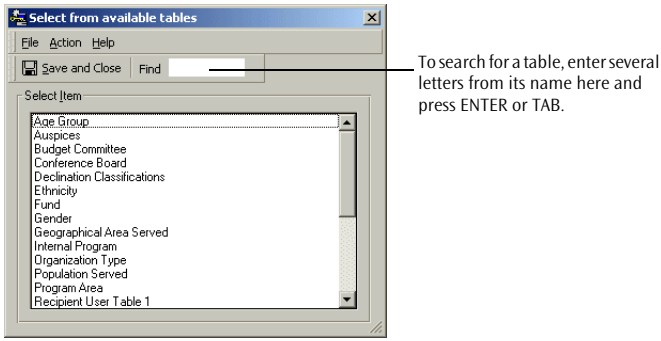
To add the target table to a Coding Sheet:

1 Choose Setup ➤ Preferences from the Administrator Module menu, and go to the Coding Sheet tab:



2 Click the Request, Organization, or Contact button to display the Coding Sheets for the relevant type of record.

3 Click Add. A list of available tables is displayed:



4 Highlight the target table and click Save and Close. It is added to the Coding Sheet and you are returned to the Coding Sheet Preferences.

Note: You can make data entry for this table required or set up a default code. For details on these features, please refer to "Requiring a Category" on page 76 or "Adding Default Classification Codes" on page 77.

5 If the source table is on the Coding Sheet and you wish to remove it, you can highlight it and click Remove. The Code Table is removed from the Coding Sheet.

6 Click OK to close the preferences and save your changes.

Task 5: Verify the Results

Open several of your Request, Organization, Contact and/or Donor records and review their Coding Sheets to verify that the transfer yielded the desired results.

Replacing Codes

Within a particular Code Table, you can replace all occurrences of one code with another. Then, since all references to the obsolete code have been removed from the system, you can delete it from the GIFTS Code Table without any loss of data.

Coding Sheet classification codes flagged as primary or secondary inherit these settings when they are replaced. In other words, primary codes are always replaced by primary codes, and secondary codes are always replaced by secondary codes.

Note: The Code Replacement feature is not available for the Country and Branch/Division tables.

Planning a Code Change

Careful advance planning is essential when using this feature. Consult the following examples for assistance in planning your code replacements.

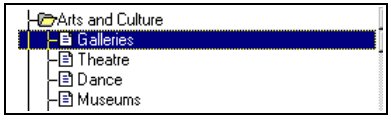
Example: Single-tier Code Table

Assume your database has two Fund classifications: 'Foundation Grants' and 'Foundation.' There was a distinction between these two codes in the past, but now you want to retain the code for 'Foundation Grants' and eliminate the code for 'Foundation.'

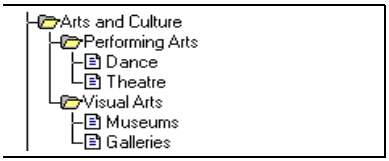
Using the Code Replace feature, you can replace all instances of 'Foundation' with 'Foundation Grants.' After the replacement is complete, there should no longer be any records referencing the 'Foundation' code; you can delete the code without any loss of data.

Example: Multi-tiered Code Table

A more complex example involves multi-level tables, such as 'Program Area.' Assume you want to change a two-tiered coding structure to a three-tiered coding structure. Initially, you have the following codes:



You have decided to change over to the following structure:



To accomplish this, you would first enter the new codes into your Code Table. For the moment, the table looks like this:

Tip: If you are going to have to leave the table in this state for any length of time, consider marking your "old" codes as inactive until you are ready to delete them. This ensures that users entering new data see only the new coding structure, and do not become confused.

Then, replace each code with its new version. In this example, you would perform the following replacements:

Old Code	New Code
Arts & Culture/Museums	Arts & Culture/Visual Arts/Museums

Old Code	New Code
Arts & Culture/Galleries	Arts & Culture/Visual Arts/Galleries
Arts & Culture/Theater	Arts & Culture/Performing Arts/Theater
Arts & Culture/Dance	Arts & Culture/Performing Arts/Dance

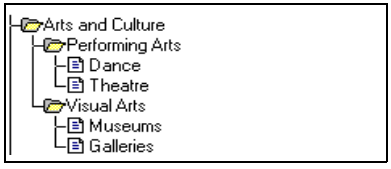
When you perform these replacements, each record currently coded with the value in the left column is re-coded with the corresponding value in the right column.

Once the replacements are complete, the codes in the left column are no longer used; you can delete these codes from the 'Program Area' Code Table without any loss of data.

After you have deleted the "old" codes, the Code Table reflects your new coding structure:

Considerations for Multi-tiered Tables

If you are replacing codes in a multi-tiered table, please be aware that only the specific code you choose will be replaced. For instance, assume you have a 'Program Area' Code Table with the following structure:



If you replace 'Arts & Culture/Visual Arts' with another code, the records coded for 'Arts & Culture/Visual Arts/Museums' and 'Arts & Culture/Visual Arts/Galleries' are not affected. Only those records coded exactly with 'Arts & Culture/Visual Arts' are affected.

Likewise, if you replace 'Arts & Culture/Visual Arts/Museums' with another code, records coded with 'Arts & Culture/Visual Arts' and records coded with 'Arts & Culture/Visual Arts/Galleries' are not affected. Only those records coded exactly with 'Arts & Culture/Visual Arts/Museums' are affected.

If you need to replace many codes in a hierarchical table—for instance, to replace an entire "branch" of the hierarchy—the simplest approach is to start at the lowest level of the hierarchy and work your way up. Replace all of the codes in each tier before moving up to the next.

Replacing Codes in the State Table

For all of the Code Tables besides State, both the Code field and the Description field of a classification are replaced—even if the classification has the same value in the Code field or Description field as another classification in that table. For instance, assume you have the following codes in your Fund table:

- [FND] Foundation Grant
- [FND] Foundation
- [FOUND] Foundation Grants Program

If you replace '[FND] Foundation' with '[FOUND] Foundation Grants Program,' '[FND] Foundation Grant' is entirely unaffected.

However, in the State table, the replacement of one Code or Description affects all of the classification codes in that table with the same Code or Description value. For instance, assume you have the following classifications:

- [WASH] Washington, DC
- [WASH] Washington, District of Columbia
- [DC] Washington, DC

If you replace '[WASH] Washington, DC' with '[DC] Washington, DC', all of the records coded for "[WASH] Washington, District of Columbia" are affected as well. Likewise, if you replace '[WASH] Washington, DC' with

'[WASH] Washington, District of Columbia', all of the records coded for '[DC] Washington, DC' are affected as well.

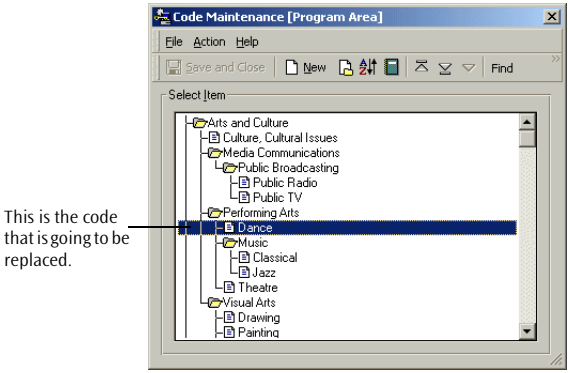
Replacing Codes

Before You Begin: Make sure that you have thought about your coding structure and planned your replacements carefully. In addition, make sure you have a current backup of your GIFTS database. In case of error, you may need to restore this backup in order to continue working. You cannot restore the codes that you have replaced.

To illustrate the code replacement process, the screens in this procedure show the process of replacing the Level 2 'Media Communications' code (which is subordinate to the Level 1 'Arts & Culture' code) with a Level 1 'Media Communications' code.

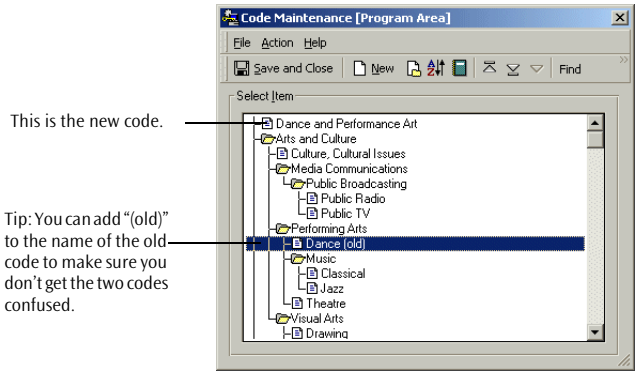
To replace a code:

1. From the Administrator menu, choose Setup ➤ Code Tables. The Table Maintenance window opens.
2. Highlight the table containing the code you wish to replace and click Edit Codes. The Table Maintenance window opens:



3. If you are going to replace the code with a new code, create the new code as described in "Adding Codes" on page 24.

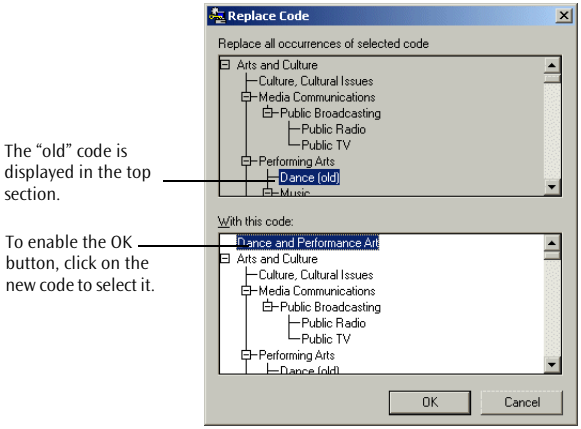
Example: Create the Level 1 'Media Communications' code.



4 Highlight the "old" code you wish to replace (not the code with which you wish to replace it) and choose Action ➤ Replace from the menu. A message warns that a backup of your database should be available before you continue.

Note: If you have made any changes to the Code Table, such as the addition of new codes, GIFTS prompts you to save your changes to the table before continuing.

5 Click Yes. You are prompted to select the code with which you will replace the original code:



6 Select the code with which you wish to replace the first code, and click OK. A message describes the replacement that is to be made. Read this description carefully and make sure it accurately reflects your intentions. The message also indicates the approximate number of records that will be affected by the change.

7 Click Yes. The code is replaced and all occurrences of the code are updated.

8 When the replacement is complete, a message indicates that the process is finished. Click OK. You are returned to the Code Maintenance window.

9 Delete the codes you are no longer using, if necessary. (To delete a code, select it and choose File ➤ Delete from the menu.

Example: Delete the Level 2 'Media Communications' code.

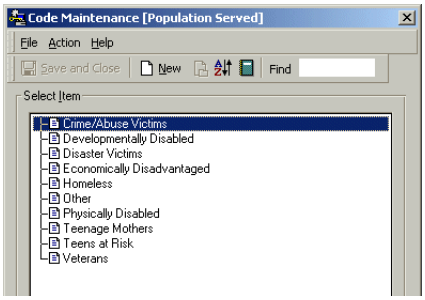
You can repeat the steps in this procedure as needed to restructure your coding. When you are finished, click Save and Close.

Sorting Codes

You can alphabetically sort the classifications in a table by either their Code name or Description name:

1 From the Administrator menu, choose Setup ➤ Code Tables. The Table Maintenance window opens.

2 Highlight the table containing the codes you wish to sort and click Edit Codes. The Code Maintenance window opens:



3 From the menu, choose Action ➤ Sort. You are prompted to specify whether you want to sort the codes by their Codes or their Descriptions.

4 Choose Description or Code and click Sort. The codes are sorted.

5 Click Save and Close to save your changes, or choose File ➤ Close to cancel your changes.

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, you 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

GIFTS Administrators can add tax codes using the steps below.

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 the Tax Status Codes table below.
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.

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.

NOTES:

- Codes **F05-F08** and **F19-20** are not defined by default but may be used as custom codes if desired.
- If upgrading from GIFTS 6.x, your **F02-03** and **F10-15** codes may be combined in your tax codes table. **In GIFTS Alta, these codes must be entered separately.**
- If such detail is not required, **F10-15** may be entered with a just a description of "509(a)(1)" for all.

Secondary Code	Description
F02	Private Operating Foundation
F03	Private Operating Foundation
F04	Private Non-operating Foundation
F05	Not used by the IRS
F06	Not used by the IRS
F07	Not used by the IRS
F08	Not used by the IRS
F09	Suspense
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)
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

Canada Revenue Agency secondary codes can also be defined as follows:

Secondary Code	Description
FA	Public Foundation
FB	Private Foundation
FC	Charitable Organization

Viewing and Printing Code Reports

You can print a report listing all of the classification codes in your system, or a list of the codes in a single Code Table.

To Print All Codes

1. From the Administrator menu, choose Setup ➤ Code Tables. The Table Maintenance window is displayed.
2. Click the Report button. The report is generated and displayed.

3. Click the Print button to print the report.

To Print the Codes for a Single Code Table

1. From the Administrator menu, choose Setup ➤ Code Tables. The Table Maintenance window is displayed.
2. Select a table and click Edit Codes. The Code Maintenance window is displayed.
3. From the Code Maintenance menu, choose the Action ➤ Report. The report is generated and displayed.

4. Click the Print button to print the report

3 Setting the System Preferences

GIFTS has been designed to meet the needs of a wide variety of grant making organizations. Since your giving program is unique, you can use the preferences to help tailor the system to meet your needs.

In This Chapter

About the Preferences **50**

General Preferences **51**

Security Preferences **62**

Request Preferences **67**

Coding Sheet Preferences **74**

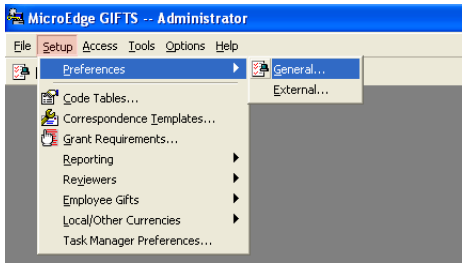
Salutation/Payments Preferences **79**

External Preferences **84**

Using the Preferences Editor **89**

About the Preferences

In GIFTS Alta, the Administrator Preferences are accessed by going to Setup ➤ Preferences. The Preferences are divided into a General and External window.

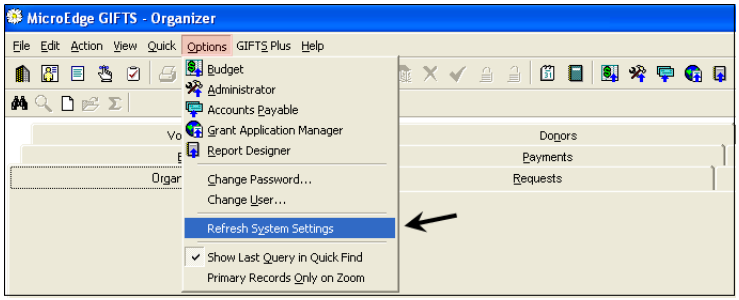


Refreshing GIFTS Preferences

You should keep in mind that whenever you make changes to the Administrator preferences, they will not be available in the other GIFTS modules until you refresh your system.

Any other users who are logged into GIFTS when you make changes will also need to refresh before they can see your changes.

To refresh all your GIFTS modules, go to the GIFTS Workspace and choose User Menu ➤ Refresh System Settings.



GIFTS may also be refreshed by logging out of the system, then logging back in.

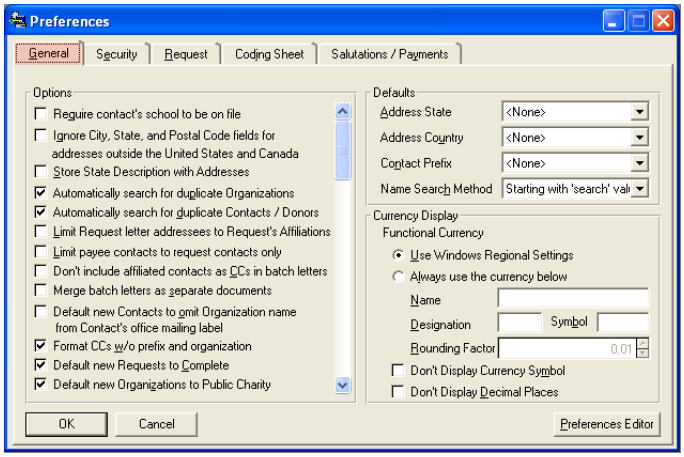
General Preferences

These preferences include general system options, including default options relating to data entry, settings for online research, request processing, and grant term end date definitions. Options that do not apply to your configuration of GIFTS are deactivated.

International settings, such as the currency format and date format used by GIFTS, are managed by the Regional Settings control panel of the Windows® operating system. For more information, refer to the "regional settings" index entry of the Windows online help.

To edit the General Preferences, choose Setup ➤ Preferences ➤ General from the Administrator menu.

The General Preferences window is divided into five tabs.



Section	Description
General	General system options; includes default options relating to data entry, settings for online research, and grant term end date definitions.
Security	This tab has options for Branch Security (if enabled), Extended Password Security, and GIFTS Login requirements.

Section	Description
Request	Default options relating specifically to Requests, including default payment options, grant reference numbers, and the handling of payment receipts.
Coding Sheet	This is where you define which Code Tables are included in the Coding Sheets for Requests, Organizations, and Contacts. You can control which Code Tables appear on which Coding Sheets, the order in which they appear, and any default or required codes to stream-line data entry.
External	These preferences control the paths to the different external programs that can be used with GIFTS, including word processors, spreadsheets, e-mail programs, and document viewers.
Salutations/ Payments	Use these preferences to define default formats for the salutations used in merged correspondence and to define default information that is automatically added to new Payments—including default wire transfer, general ledger account, and Payment Type information.

You can click on the folder tabs to move between the sections. When you are finished setting the preferences, click OK to save them.

Options

You can select from the following options:

Require contact's school to be on File The School field in the Contact record allows you to record the school attended by the Contact. This option determines whether the School field is a text field or a "pointer" to an Organization in the database.

If the School is an Organization, you can track its address, grant, and other information—but you have to create an Organization record for each school used. If School is a simple text field, users can type in any name during data entry and no further information is maintained.

Ignore City, State, and Postal Code fields for addresses outside the United States and Canada If you have Contacts or Organizations with addresses outside the United States or Canada, this option omits these fields when users generate correspondence.

Store State Description with Addresses Displays the Description field of state, county, or province classifications (such as 'Arkansas') instead of the Code field ('AR').

Automatically search for duplicate Organizations Each time a user enters the name for a new Organization, GIFTS automatically searches for that name. If no match is found, the user can continue entering the new record. If a match is found, GIFTS lists the Organizations that met the search.

Automatically search for duplicate Contacts/Donors Each time a user enters the last name of a new Contact or—if you use Employee GIFTS—Donor, GIFTS automatically searches for a name "starting with" the name entered. If no match is found, the user can continue entering the new record. If a match is found, GIFTS lists the Contacts or Donors that met the search.

Limit Request letter addresses to Request's Affiliations Limits the list of Contacts available as CCs during the letter merge process to those Contacts associated *directly* with the Request. Otherwise, this list contains *all* the Contacts associated in any way with the Organization as well as those associated directly with the Request.

Limit payee contacts to request contacts only Limits the list of Contacts available as recipients of Payment event letters to those Contacts associated *directly* with the Payment's Request (i.e., the Request with which the Payment is associated). Otherwise, this list contains *all* the Contacts associated in any way with the Payment's Organization as well as the Payment's Request.

Don't include affiliated contacts as CCs in batch letters By default, the Contacts affiliated with each letter in a batch are included in the CC list for each letter. For instance, the Contacts affiliated with the Request to which a Payment letter belongs are included in the CC list. Use this option to omit the CC lists in batch letters.

Merge batch letters as separate documents When saving a batch of merged GIFTS correspondence to disk, use this option to create a separate word processor document for each letter in the batch. Otherwise, all of the letters in the batch are saved to a single word processor document file—with each letter separated by a section break.

Default new Contacts to omit Organization name from Contact's office mailing label This option controls whether the "Omit Organization name from label" option is selected for new Contacts. It does not affect the setting of this option for your existing Contacts.

This option, which is located on the Address tab of each Contact record, omits the Contact's Organization Name from the "Mailing Label" merge field used in correspondence. It can be used for individuals who are tracked as both a Contact and an Organization, and for Contacts whose division name is different than that of their Organization's.

Format CCs w/o prefix and organization By default, the Contacts in the CC list of merged letters are formatted with their prefix and Organization name—such as "cc: Dr. Mattingly Fisher, Brooklyn Ballet." Use this option to format names in the CC list without their prefix or Organization—such as "cc: Mattingly Fisher."

Default New Requests to Complete Use this option to determine whether new Requests are flagged as Complete when they are created.

Default New Organizations to Public Charity Use this option to determine whether new Organizations are flagged as charitable Organizations when they are created.

Dump Transactions During Batch Procedures If your GIFTS system uses Microsoft SQL Server as its back end, GIFTS will dump your SQL transaction log before users perform large batch operations. This prevents the log from becoming full, which can interrupt the operation. If your network security guidelines do not permit users to dump the transaction log, you can disable this option. However, be sure that your network administrator regularly dumps the transaction log.

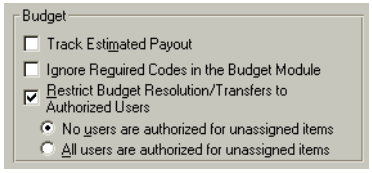
Default Report Sub-title 1 to selection criteria This option defaults the first subtitle of reports run from the Report Library to the search criteria (such as "Program Area is 'Human Services'") that the user used when generating the report.

Enable Document Properties This option will enable the addition of Request_ID, Organization_ID, Contact_ID, and Staff_ID as Custom Properties in Word documents created using GIFTS Correspondence Templates. Please contact MicroEdge Custom Programming Services to update existing documents created as GIFTS correspondence with

Request_ID, Organization_ID, Contact_ID, and Staff_ID as Custom Properties with the corresponding field values.

Budget

The options in this section only apply to clients with the optional Budget Module.

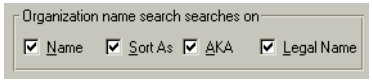


Track Estimated Payout This option allows you to turn the Estimated Payout feature on or off. Only users with appropriate permissions will have access to this feature.

Ignore Required Codes in the Budget Module Select this option if you want to require codes for Requests without enforcing the requirements in the Budget Module.

Restrict Budget Resolution/Transfers to Authorized Users Individual budget items may be assigned authorized users who have permissions to access and edit them. Select the check box to enable this feature, and then select one of the option buttons to determine the permissions for budget items without authorized users.

Organization Name Search Searches On



Organization searches are performed in many areas of the system, such as in the Quick Find search and when you search for an Organization from within a data entry form. Check each of the Organization name fields you would like GIFTS to search for: Name, Sort As, A.K.A., and Legal Name.

"Requests from Individuals" Organization

GIFTS is designed to track giving *per Organization*. If you make grants to individuals and want to track the giving histories for these grantees, you

should create an Organization record *and* a Contact record for *each* of these grantees.

Therefore, you can use their Organization records to track their giving histories and their Contact records to address their letters and enter more information about the individuals.

If you don't make grants to individuals, however, there is no giving history to track: every proposal from an individual is immediately declined. To streamline the entry of immediate declinations, you can enter a "Requests from Individuals" Organization record with which these declinations can be associated.

Therefore, when GIFTS users enter immediate declinations using the Quick Entry feature described in the *GIFTS User's Guide*, they can associate proposals from individuals to the "Requests from Individuals" Organization.

To set up the "Requests from Individuals" Organization:

1. Use GIFTS to create the Organization.
2. In the "Requests from Individuals" Organization section of the General Preferences, click the Find button to select the Organization you created in Step 1.

Postal Code Maintenance

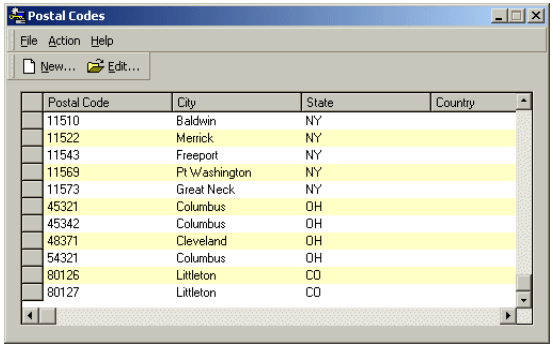
When you enable this option, GIFTS maintains a lookup list of Postal Code/City/State/Country combinations that simplify data entry.

Users entering new addresses can skip the City, State, and Country fields. If the Postal Code the user enters is in the lookup list, GIFTS fills the City, State, and Country fields automatically. If this information is not correct, the user can edit it.

Use the following settings to enable the postal code data entry shortcut and specify how existing postal codes are updated in the lookup list.

Setting	Description
Off	Disables both the lookup list and postal code list updates. When you select this option, users must enter the City, State, and Country manually. New Postal Code/City/State/Country combinations are not added to the list.
Use latest	As users enter data, GIFTS updates the Postal Code list with the most recent Postal Code/City/State/Country combinations. **Example:** In your lookup list, Postal Code 11231 is defined as "New York, NY." If a user enters an address for a Contact in Brooklyn, NY 11231; GIFTS changes the lookup list entry to "Brooklyn, NY." The next time a user enters 11231, GIFTS populates the City and State fields with "Brooklyn, NY."
Use first	If a user enters a Postal Code/City/State/Country combination that differs from the Postal Code information already on file, GIFTS does not update the list.
Ask user	If a user enters a Postal Code/City/State/Country combination that differs from the Postal Code information already on file, GIFTS prompts the user to confirm that they want to change the list before updating the lookup list.

The postal code list is updated when users create or edit an address in GIFTS. To view or edit the Postal Code list, click Edit Postal Codes:



- If your data was converted from another source—or you upgraded from an earlier version of GIFTS—your list may contain few (if any) postal codes. You can populate the postal code list with addresses that are already in your database.

  To populate the list, choose Action ➤ Populate from the Postal Codes menu and then click Continue. You are prompted before any existing Postal Code/City/State/Country combinations in the list are changed. If there is more than one city/state/country combination for a postal code in your database, the list is populated with the first combination found.

  Note that this process modifies the postal code list only; no changes are made to your address data in GIFTS.

- You can also click New or Edit from the Postal Code list to manually add or edit postal codes.

When you are done, choose File ➤ Close from the Postal Codes menu to save your changes.

Setting the Telephone Number Format

You can help users speed their data entry by defining a telephone number format and/or a default area code.

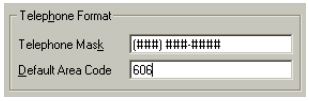
- When users enter an unformatted telephone number, GIFTS adds the formatting—like dashes, spaces, and parentheses—that you specify.

- When users enter a telephone number without an area code, GIFTS adds the default area code. If the default is not appropriate, the user can edit it manually.

To define a telephone number format:

1. Enter the format (or Telephone Mask) exactly as you want telephone numbers to appear in GIFTS. Use "#" to take the place of the numerals.

2. Enter the default area code that you want added to telephone numbers that are entered without an area code:



In the example above:

If a user types...	The telephone number is displayed in GIFTS as...
1234567890	(123) 456-7890
4567890	(606) 456-7890
011-000-11-2222	011-000-11-2222

GIFTS applies formatting to telephone numbers when no non-numeric characters—such as spaces, parentheses, and hyphens—are entered and:

- The number of digits entered equals the number of pound signs ("#") in the mask.
- The number of digits entered equals the number of pound signs ("#") in the mask *minus* the length of the default area code. In this case, GIFTS also appends the default area code to the front of the digits entered.

Otherwise, no formatting is applied.

Note: If the mask is "(###) ###-####" and a user enters a seven-digit number with a hyphen separating the first three digits from the last four digits, GIFTS appends the default area code and formats the number according to the mask. This is to take into account that many users will enter U.S. numbers as ###-####.

Research Settings

As users review grant applications in GIFTS, they can link to a research Web site of your choice for information on applicant Organizations. If you have a subscription to a research site, you may configure the GIFTS link to automatically log your users in to the site for access to subscriber content. In the Research section of the General Preferences tab, you will need to select a

research site and provide its URL, as well as your GuideStar subscriber e-mail address and password (if applicable):

Research sites drop-down Use this drop-down menu to select either GuideStar or a version of RevenueCanada (French or English) as your Internet research site. You may also select "Other" if you wish to use a different research site.

URL If you have selected GuideStar or RevenueCanada as your research site, this field will automatically populate with the appropriate URL. Note that the default URL for GuideStar integrates the U.S. Tax ID of your target Organization, along with your subscription information (e-mail address and password). Even if you are not a GuideStar subscriber, you *do not* need to change this URL for the GuideStar link to function properly.

If you have selected "Other" in the research site drop-down menu, the URL field will be left blank. You must supply the appropriate URL for other research sites.

Reset to Default URL If you have made changes to the GuideStar or RevenueCanada URL and it no longer works correctly, click this button to reset the URL field to the system default.

Subscriber E-mail If you have a GuideStar subscriber account, enter your subscriber e-mail address in this field. GIFTS will use this information, along with your password in the next field, to automatically log you in to the GuideStar site when you link from GIFTS.

Subscriber Password If you have a GuideStar subscriber account, enter your subscriber password in this field. GIFTS will use this information, along with your e-mail address in the previous field, to automatically log you in to the GuideStar site when you link from GIFTS.

Grant Term

When users approve grants, they must enter a grant term. GIFTS will automatically designate an End Date for the grant based on the Start Date, the grant term, and whichever option you choose in this preference. With the first option selected, GIFTS will designate an End Date on the same numerical day as that of the Start Date. For example, a 12-month grant that starts on 1/1/2011 will end on 1/1/2012.

If you select the second option, GIFTS will designate an End Date on the numerical day before that of the Start Date. In this case, the same 12-month grant that starts on 1/1/2011 will now end on 12/31/2011.

Defaults

To ease data entry, the default values you enter for Address State, Address Country, and Contact Prefix are entered automatically each time a new address or a new Contact is created. If there is no consistency to your data in these areas, supply the defaults as "None."

The Name Search Method allows you to choose the default method for Organization searches in GIFTS. Note that this option does not apply to Advanced searches.

Currency Display

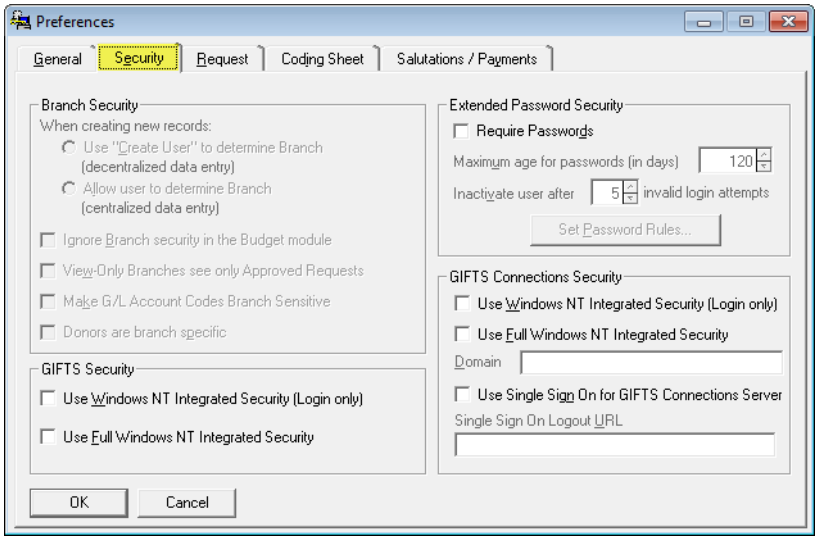
The currency display options determine how monetary values are displayed by the system. You can choose to omit either the currency symbol, such as a dollar sign or pound sign, or decimal places.

By default, your functional currency is determined by your Windows Regional Settings. If you use GIFTS multi-currency features and want to designate a different currency as your functional currency, you can specify the currency here. For more information, please see "Choosing Your Functional Currency" on page 146.

Security Preferences

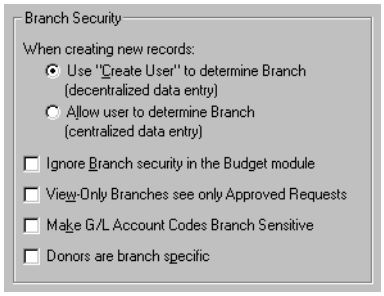
The Security Preferences allow you to set up your Branch Security options, establish extended password security, and choose to use or ignore Windows NT Integrated Security.

To edit the Security Preferences, choose **Setup ➤ Preferences ➤ General** from the Administrator menu and go to the Security tab.



Branch Security

If your organization has a number of divisions and you use Branch Security to establish user rights for each division, here you choose which Branch Security model you are going to use:



Select "Use 'Create User' to determine branch" if your organization plans to use the decentralized data entry model. Select "Allow user to determine branch" if you follow the centralized data entry model.

Note: For information about these two data entry models, please see "About Branch Security" on page 312.

In the same section of the Branch Preferences tab, you can also set the following Branch Security options:

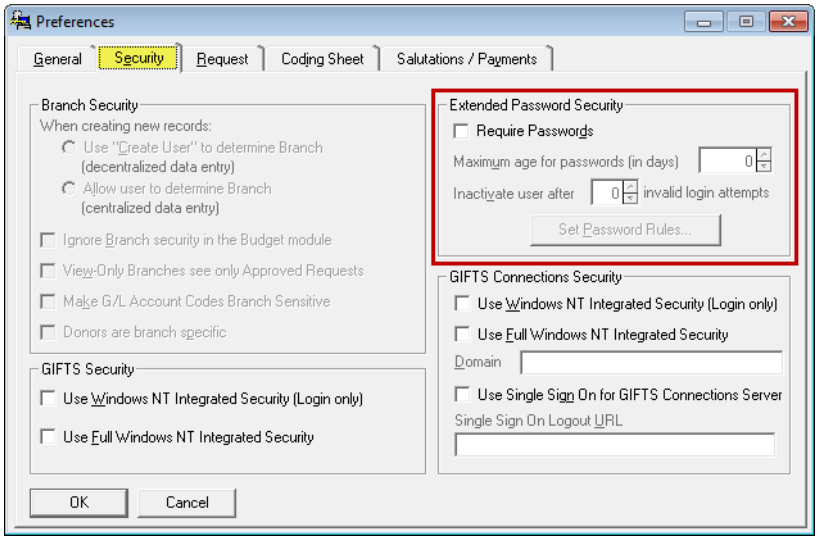
Ignore Branch security in the Budget module Users who have both the Budget Module and Branch Security can use this option to allow users to access the entire Budget without the restrictions imposed by Branch Security.

View-only Branches see only Approved Requests For systems with Branch Security, you can specify that users with view-only privileges for a Branch's Requests can see only those Requests that have a Disposition of Approved.

Make G/L Account Codes Branch Sensitive In organizations with multiple branches, each branch typically has a set of general ledger account codes that are valid for that branch only. You can *stamp* the G/L account codes in GIFTS with the name of the branch to which they are assigned; users at each branch can see and work with only the codes assigned to their branch. For information about Branch Security, please refer to "Setting Up Branch Security" on page 311.

Donors are branch specific If your system uses Employee GIFTS and Branch Security, this option restricts users from viewing information about Donors that were entered by other branches.

Extended Password Security



By default, passwords are not required in GIFTS. By selecting **Require Passwords**, you can require users to enter a password each time they log in.

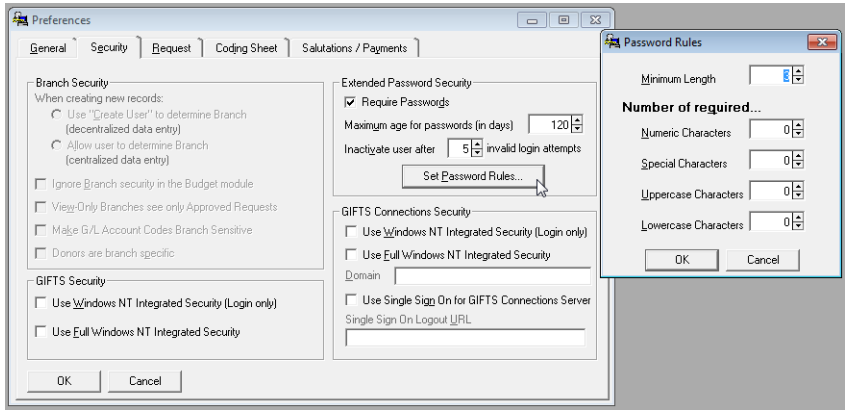
With GIFTS Alta 1.6 installed, a number of additional security options become available for configuration.

Passwords will now support uppercase, lowercase and special characters as well as higher encryption strength standards.

Important: If already enabled previously, once you upgrade to GIFTS Alta 1.6, users will need to enter current passwords as all lowercase until they change their passwords to reflect case sensitivity (depending on current preferences). **NOTE:** All external reviewers should be advised of this as well.

Note: Once Extended Password Security is enabled, all users will be required to have a password before login. You may assign a temporary password for other users after saving the changes. To assign passwords, go to the Users form and use the **Set All Pwsds** button.

- Once the **Require Passwords** box is checked, the **Maximum Age for Passwords** setting and the **Set Password Rules…** button are enabled.
  - **Maximum age for passwords (in days)**: You can set the password expiration time limit from one to 365 days. Entering zero indicates no password expiration limit. Users are notified five days before their password expires that they should change it; upon expiration, users cannot log in until they change their password.
  - **Inactivate user after X invalid login attempts:** This setting allows you to configure the number of attempts a user has to login before their account is deactivated. The user will need to contact an administrator to activate their user account.
  - **Set Password Rules:** Clicking this button will open an additional Password Rules form.



This form includes numeric entry fields for minimum length and required number of numeric characters, special characters, upper and lowercase characters.

General Security

With Windows NT Integrated Security active, GIFTS retrieves the user's Windows NT Login ID and—if there is a matching ID in GIFTS—automatically logs the user into GIFTS. (The user's GIFTS password, if any, is ignored.) If the Login ID is not found, the user is prompted to log in to GIFTS.

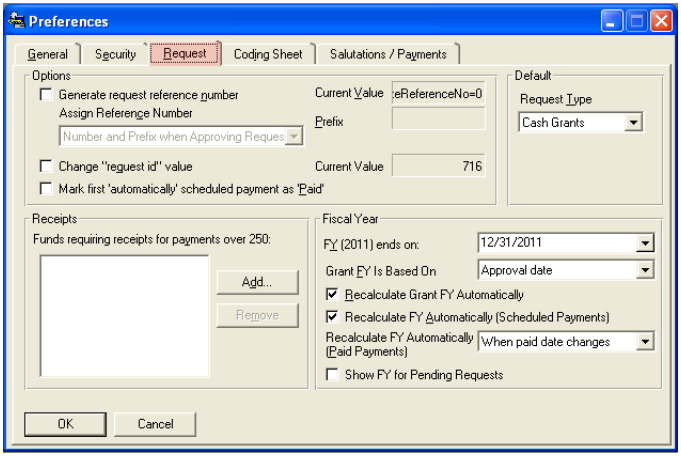
With Windows NT Integrated Security for GCS active, MyGIFTS users can log into MyGIFTS using their Windows NT Login ID and/or password (select User ID Only or User ID and Password, depending on your preference). If the IIS server is on a different domain than the GIFTS database/application directory, it must be specified in the Domain field.

Important: You must select the Windows NT Integrated Security checkbox for this option to be available.

For more information about setting up this feature, please refer to "Setting Up Windows NT Login Integration" on page 121.

Request Preferences

The Request Preferences allow you to set options related to how Request and Payment information is tracked and how fiscal year is determined. To edit the Request Preferences, choose Setup ➤ Preferences ➤ General from the Administrator menu and go to the Request tab:



Options

You can enable or disable the following options:

Generate grant reference number While many grant makers identify grants with the unique Request IDs generated by GIFTS, some grant makers have an internal reference numbering system for their grants. You can use this option to set up GIFTS to automatically assign a reference number to each Request, beginning with the number you define. You can specify that GIFTS assign this number either when the Request is created or when it is Approved. You can also specify that GIFTS assign the reference number when a Request is created, then add a prefix when the Request is approved.

Note: If a user assigns a reference number to a Request manually, GIFTS does not overwrite the user-assigned reference number.

The Current Value field indicates the next reference number that will be used. You can also specify a prefix to precede the reference number. For

example, if you want to track your grants by fiscal year, you could enter the following information in these fields at the beginning of Fiscal Year 2001.

In this case, the first Request approved in fiscal year 2011 is assigned the Reference Number FY2011-0001. You could then maintain this numbering system from year to year by simply changing the prefix at the start of each fiscal year.

Change 'request id' value Use this option to change the value used to generate Request IDs. To prevent duplicate IDs from being entered, GIFTS ensures that the value you enter is greater than the Request IDs currently used by the system.

Mark first 'automatically scheduled' payment as 'Paid' When a grant is approved, GIFTS can automatically create a Payment Schedule based on the number of Payments you specify. If you enable this option, GIFTS also marks the first (or only) Payment in the schedule as Paid.

Grant makers who cut the check for the first Payment immediately can save data entry time with this option. GIFTS uses the Request Approval Date as the Payment date; however, no check number information is supplied.

Default Request Type

The Request Type describes the giving program to which the Request belongs, such as "cash grants" or "in-kind." Many grantmakers use only one Request Type, and still others use one much more frequently than they use the others. To speed data entry, all Requests are automatically assigned to the default Request Type (which can be modified, if necessary).

Payment Receipts

The U.S. Internal Revenue Service (IRS) requires that each non-profit organization receiving a grant payment of over $250 must furnish the donor with a receipt verifying that the contribution was received. GIFTS can schedule these receipts automatically by creating a Payment Requirement indicating that a receipt is required.

Certain Funds may not require these receipts, and each Payment contains a Fund code such as 'Corporation' or 'Foundation.' This option allows you to specify which Funds require receipts, and which do not.

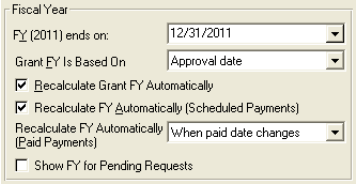
- Click Add to open the Fund code table, listing all your giving funds (such as 'Corporate' or 'Foundation'). For each Fund that requires a receipt, highlight the code and click Insert. The Fund is moved to the Receipts area.
- If the fund does not require a receipt and has been incorrectly added to the list, you can highlight the Fund in the Receipts area and click Remove. The Fund is removed from the area.

For more information about Payment Requirements, please refer to the *GIFTS User's Guide*.

Fiscal Year

Fiscal Year fields appear in Requests, Payments, and Grant Amendment Activities. Fiscal year information from these fields is used by the Budget Module and in standard financial reports.

If your organization's fiscal year is different from the calendar year, you can set up the end date and other characteristics of your fiscal year here. You can also specify how Request and Payment Fiscal Years are determined and updated:



Note: If you change your fiscal year specifications after you have been working with GIFTS, please refer to "Recalculating Data" on page 235 for information on how to recalculate fiscal years assigned to your existing grants and Payments, so they coincide with your new fiscal year setup.

First, define your Fiscal Year (FY) by specifying its end date:

Field	Description
FY [current calendar year] ends on:	Enter the last day of the fiscal year shown in the field label. The default date is 12/31/[current calendar year]. For example, if you are setting up your Fiscal Year in December 2010, the field label will read "FY 2010 ends on:". If your fiscal years run from October 1 through September 30, and last year was considered fiscal year 2010, enter 09/30/2010 in this field. This field is required. If cleared, it will reset to the default date specified above.

Next you can determine how the Fiscal Year for each grant (i.e., approved Request) is initially determined during the approval process.

Field	Description
Grant FY Is Based On	Select one of the following options: ❖ Approval date - The fiscal year in which the Request's Approved Date falls is saved as the grant Fiscal Year. ❖ First Payment date - The fiscal year in which the earliest Payment's Date Paid falls is saved as the grant Fiscal Year. If no Payments are marked as Paid before or during Request approval, the Request's Approved Date will determine the grant Fiscal Year.

Tip: If you select "First Payment date" to determine your grant Fiscal Year, you will probably want to set up your GIFTS system to recalculate grant Fiscal Year automatically (as shown following this tip). Suppose no Payments are Paid when you approve the Request; the Request Fiscal Year is determined by the approval date instead. But if GIFTS is set up to recalculate grant fiscal year, it will be updated automatically when the grant's Payments *are* paid later.

You can use the next options to allow your GIFTS system to update Fiscal Year fields automatically when Requests or Payments change:

Field	Description
Recalculate Grant FY Automatically	Select this check box to allow GIFTS to recalculate an approved Request's Fiscal Year when and if certain dates are changed. Which events cause Fiscal Year to be updated depend on what your grant Fiscal Year is based on. If in the "Grant FY Is Based On:" field you select approval date, grant Fiscal Year will be recalculated if the Request's Approved Date is changed. If you base your grant Fiscal Year on first Payment date, grant Fiscal Year will be recalculated when: ❖ the first Payment is marked Paid. ❖ another Payment is marked Paid (if this Payment's Date Paid is now the earliest, the grant Fiscal Year could change). ❖ the Date Paid of the Payment paid earliest is changed (if the Date Paid is now earlier, or another Payment becomes the earliest paid, the grant Fiscal Year could change). If this check box is cleared, the Request Fiscal Year determined during grant approval will not be updated automatically, even if approval or Payment dates change.
Recalculate FY Automatically (Scheduled Payments)	GIFTS can also be set up to recalculate the Fiscal Year of scheduled, contingent, or canceled Payments, or Payments on hold. Select this check box and GIFTS will recalculate a Payment's Fiscal Year when its Schedule Date changes. If you clear this check box, the Payment's Fiscal Year will remain what it was when first calculated.

Field	Description
Recalculate FY Automatically (Paid Payments)	The Fiscal Year of paid Payments can also be recalculated automatically. From the drop-down menu, select when you want paid Payments' Fiscal Years to be updated: ❖ Never - the Fiscal Year of paid Payments will remain what it was when first calculated. ❖ When paid date changes - any change to the Date Paid of a paid Payment, Date Voided of a voided Payment, or Check Date of a refunded Payment will trigger an update to that Payment's Fiscal Year. ❖ When schedule date changes - any change to the Schedule Date of a paid or voided Payment, or the Received Date of a refunded Payment will trigger an update to that Payment's Fiscal Year

The last fiscal year option allows you to add the Fiscal Year field to pending Requests (normally, the Fiscal Year field is only shown in approved Request):

Field	Description
Show FY for Pending Requests	Select this check box to include the Fiscal Year field on the Page 2 tab of pending Request records. If selected, the Fiscal Year field of pending Requests will be populated with the current fiscal year. This field may be left blank, and will only be recalculated when and if the Request is approved.

Note: A user can manually change the Fiscal Year in Requests, Payments, and Grant Amendment Activities, if his or her permission set allows it. This ability is controlled by the following four permissions, listed under GIFTS in the Permissions window:

- ❖ Update Payment Fiscal Year (Paid, Void, Refund)
- ❖ Update Payment Fiscal Year (Scheduled, Hold, Canceled, Contingent)
- ❖ Update Grant Fiscal Year
- ❖ Update Amendment Fiscal Year

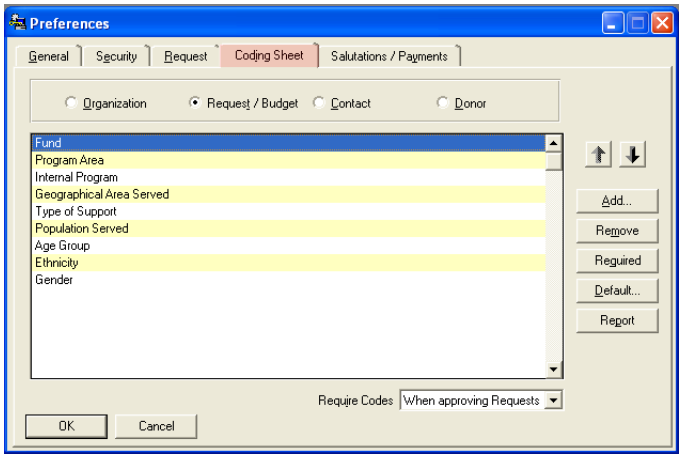
In each case, select Execute to allow users assigned the permission set to change Fiscal Year when editing those records.

For information on working with GIFTS permission sets, please see "Managing Permission Sets" on page 96.

Coding Sheet Preferences

Users of GIFTS can use the Coding Sheet preferences to:

- Specify which categories (Code Tables) are used on the Coding Sheets for Organizations, Requests/Budget, and Contacts. To this end, you can add, remove, and arrange the categories.
- Specify that a category must be coded during data entry.
- Enter default classification codes so that when new records are created they are automatically coded with the default information.
- Print a Coding Sheet report for your records.

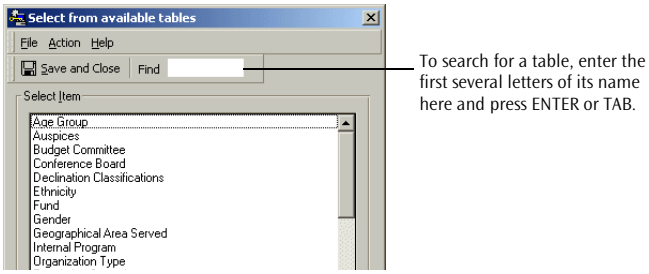


Adding a Category

To add one or more categories (Coding Sheet Code Tables) to a Coding Sheet:

1. Choose Setup ➤ Preferences ➤ General from the Administrator menu and go to the Coding Sheet tab.
2. Click the button that indicates which Coding Sheet you are working with: Organization, Request/Budget, or Contact.

3 Click Add. The "Select from available tables" window opens:



4 Highlight each Code Table you wish to add to the Coding Sheet (to deselect a Code Table, click it again).

Note: If the category you want is not available, refer to "Maintaining the Code Tables" on page 17 for information about adding or modifying the Coding Sheet Code Tables that are used as categories on your Coding Sheets.

5 Click Save and Close. The Code Tables you selected are displayed on the Coding Sheet as categories.

Arranging Categories

The order of the categories shown in the preferences is the same order in which they are presented to users. You can arrange them in the order most appropriate for your users. To arrange the categories:

1 Choose Setup ➤ Preferences ➤ General from the Administrator menu and go to the Coding Sheet tab.

2 Click the button that indicates which Coding Sheet you are working with: Organization, Request/Budget, or Contact.

3 Highlight the category you wish to move.

4 Click the Up or Down button to move the category.

Removing a Category

You can remove a category from a Coding Sheet at any time.

Caution: If any user has classified records using a category, please be advised that those classification codes, along with the category itself, are removed from the existing Coding Sheets for the record type (Organization, Request, or Contact) you are working with.

Removing a category from the Coding Sheet does not remove its Coding Sheet Code Table or its associated codes from the system, nor does it remove the category from the Coding Sheets for the other record types (Organization, Request, or Contact) where it may be used. If you wish to remove the Code Table from your system entirely, please refer to "Deleting a Code Table" on page 21.

To remove a category from a Coding Sheet:

1. Choose Setup ➤ Preferences ➤ General from the Administrator menu and go to the Coding Sheet tab.
2. Click the button that indicates which Coding Sheet you are working with: Organization, Request/Budget, or Contact.
3. Highlight the category you wish to remove.
4. Click Remove. If any user has used the category to classify records, a warning message is displayed.
5. Click Yes. The category is removed, and any classifications that were used in that category are deleted from your records.

Requiring a Category

In order to maintain your database, it is important to have consistent data entry. If you wish to run accurate reports based on a certain category, such as Program Area, it is important that every relevant record be coded. Otherwise, relevant records won't appear under the appropriate heading in the report, and their absence creates errors in your count and total information.

To prevent this, you can require that users code specific categories. For Organization and Contact Coding Sheets, users cannot save new records unless they first code the required categories.

For Requests, you can require coding either when Requests are created or when they are approved, as determined by the setting at the bottom of the preference screen:

To make a category required or optional:

1. Choose Setup ➤ Preferences from the Administrator menu and go to the Coding Sheet tab.
2. Click the button that indicates which Coding Sheet you are working with: Organization, Request/Budget, or Contact.
3. Highlight the category.
4. Click the Required button to make it required, or the Not Required button to make it optional. If the category is required, it is displayed in bold type.

   Note: You can also require that users enter a code at the lowest (most detailed) level for a category. For details, please see "Adding or Modifying a Code Table" on page 19.

Adding Default Classification Codes

Default classifications can save data entry time and provide consistency in your coding. Each time a user creates a new Request, Organization or Contact record, the default codes you have specified are entered into the Coding Sheet for the record.

For instance, the kind of grantmaking you are involved in may mean that most of the Organizations that you enter are schools. Rather than have to code each Organization's Organization Type as 'School,' you can set 'School' as the default Organization Type classification. Each new Organization created will be assigned an Organization Type of School; users would only need to modify the coding for the exceptions.

It is not necessary to enter any default codes; if the default coding is going to be corrected more often then not, then a default code should not be defined.

To add a default code:

1. Choose Setup ➤ Preferences from the Administrator menu and go to the Coding Sheet tab.
2. Click the button that indicates which Coding Sheet you are working with: Organization, Request/Budget, or Contact.
3. Highlight the category for which you wish to supply a default code.
4. Click Default. A list of the codes in that category is displayed.
5. Highlight the code you wish to supply as the default, and click Insert. (Even if the category allows more than one code, you can only supply one code as the default.)
6. Click Done.

If you wish to change the default code value, select the current default code and click Remove. Then, add a new default code.

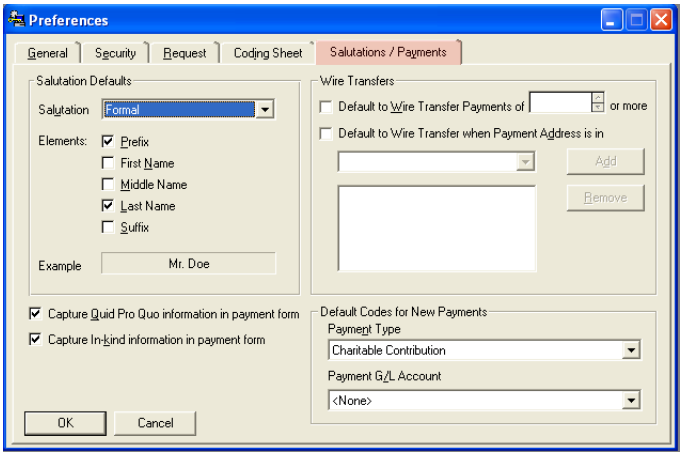
Printing the Coding Sheet Report

To print the Coding Sheet Report for a Coding Sheet:

1. Choose Setup ➤ Preferences from the Administrator menu and go to the Coding Sheet tab.
2. Click the button that indicates which Coding Sheet report you want to print: Organization, Request/Budget, or Contact.
3. Click Report. The report lists the categories, along with their parameters, that have been assigned to the Coding Sheet.

Salutation/Payments Preferences

You can define default formats for the salutations that are used for your correspondence. You can also specify default payment information that is applied to each new Payment you generate, including wire transfer, quid pro quo and in-kind tracking, and/or G/L account information and Payment Type.



Salutation Defaults

When you create letter templates, you can include salutations that contain merged information from your Contact records. Use this preference to define the default format of these salutations; users with proper permission can edit the salutations from the Contact record.

Note: The default Salutation format is only applied to Contacts that are added or imported *after* you define it.

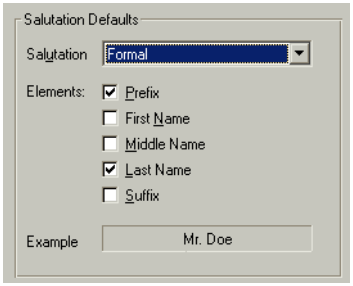
Type	Description
Formal	The standard salutation that begins most correspondence. The default is: Prefix and Last Name. **Example:**"Mr. Rogers"

Type	Description
Informal	You might include this in correspondence to a contact that is closely affiliated with your organization. The default is: First Name. **Example:**"Henry"
Addressee	This appears at the beginning of Address Block merge fields. The default is: Prefix, First Name, Middle Name, Last Name, and Suffix. **Example:**"Mr. Henry Lee Rogers, Jr."

Note: In conformance with the *Chicago Manual of Style,* 14th ed., GIFTS excludes the Contact's Prefix from salutations when the Suffix is "Ph.D", M.D.", or "Esq."

To define a salutation format:

1. Choose Setup ➤ Preferences ➤ General from the Administrator menu and go to the Salutation/Payments tab.
2. Choose a Salutation Type from the Salutation list.
3. Select the elements you want to include for the salutation.



4. Click OK to save your changes.

Quid Pro Quo Information

Many grant makers, particularly corporations, make donations for which a service or a product is rendered in return, such as a dinner. The actual

monetary value of the dinner received is not tax deductible, and must be tracked separately.

If you make grants of this nature, use this option to activate the Quid Pro Quo tracking fields of your Payments, which are described in the *GIFTS User's Guide*.

In-kind Information

Many grant makers, particularly corporations, donate products and wish to track separate values for tax purposes. If you make grants of this nature and wish to track a Book Value, Tax Value, and Fair Market Value for each gift, use this option to activate the In-kind tracking fields of your Payments, which are described in the *GIFTS User's Guide*.

Wire Transfer

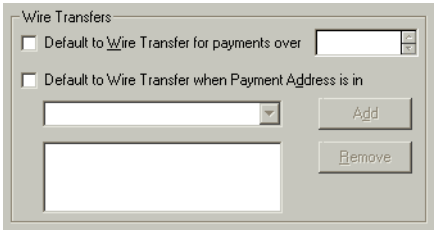
Some organizations prefer to make payments by wire transfer when the payment is over a certain amount or the payee is in another country. You can use these options to automatically flag Payments as wire transfers when they are greater than a specified amount, or paid to payees in countries that you define.

Users can also define default wire transfer information for Organizations and Requests. When a Payment is created for the Organization or Request, this default wire transfer information is automatically added to the Payment when it is flagged as a wire transfer.

Note: The Organization's default wire transfer information is only added to the Payment if no default information was specified for the associated Request.

To set up the list of countries to which Payments should be made by wire transfer:

1 Choose Setup ➤ Preferences ➤ General from the Administrator menu and go to the Salutation/Payment tab:



2 Select the "Default to Wire Transfer when Payment Address is in" check box.

3 Select a country from the list, or type a country name into the list. The Add button is enabled.

4 Click Add. The country is added to the list and displayed in the box beneath the country list.

Default Payment Codes

To set up default Payment codes:

1 Choose Setup ➤ Preferences ➤ General from the Administrator menu and go to the Salutation/Payment tab.

2 You can edit the following defaults:

Payment Type If most of the Payments that your staff generates are of a particular Type, you can save data entry time by defining a default Payment Type that is added to each new Payment. If the default does not apply to the Payment, users can change it.

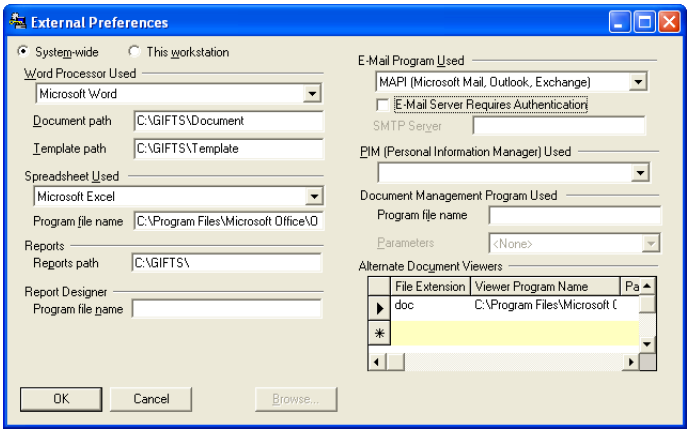
Payment G/L Account If your organization uses a general ledger accounting system to track grant payments, you can define a default G/L account number that is added to each new Payment by selecting it from the list. If the default account number you specify does not apply to a Payment, the user can search for another G/L account.

Note: The Support Type and Fund fields on Payment records default to the Support Type and Fund classifications, if any, entered onto the Coding Sheet of the Request associated with the Payment.

External Preferences

GIFTS can interface with external word processor, spreadsheet, and e-mail software packages. In order to take advantage of this functionality, you can install the compatible software and set the appropriate External Preferences. If you are using the optional Document Manager, you can also configure alternate viewers for specific file types.

Before You Begin: Read the following section, "Using System-wide and Local Preferences".



Using System-wide and Local Preferences

If you have installed GIFTS on a network, you may need to set up External Preferences that are specific to your workstations.

Example: You want each of your GIFTS workstations to link the spreadsheet program located on the workstation hard drive. If the spreadsheet's program file is not in the same location on every workstation, you need to set up *local* External Preferences on each workstation to "point" to the correct location of the spreadsheet's program file.

Setting System-wide External Preferences

If you need to set up *local* preferences for any of your workstations, first use the following procedure to set your *system-wide* External Preferences:

1. On any GIFTS workstation, log in to the Administrator Module.
2. From the Administrator menu, choose **Setup ➤ Preferences ➤ External.**
3. Select the "System-wide" radio button and set up the system-wide External Preferences (specific instructions for each setting are given in the sections that follow) that apply to most workstations.
4. Click **OK** to save the system-wide preferences.

At this point, your system-wide preferences have been saved and you can edit the local preferences on each of your workstations, as necessary.

Setting Workstation External Preferences

To edit the local preferences for a workstation:

1. On the workstation for which you are setting the local preferences, log in to the Administrator Module.
2. From the Administrator menu, choose **Setup ➤ Preferences ➤ External.**
3. Select the "**This workstation**" radio button and set preferences that are specific to the workstation. Note that some preferences are not available; for example, since all workstations must use the same spreadsheet, you cannot change the spreadsheet used. You are only permitted to edit the specific path used by the workstation to locate the spreadsheet's .EXE file.
4. Click **OK** to save the workstation's local preferences. The paths you entered are used by that workstation. Note that the system-wide preferences are the default values: the workstation uses the system-wide preferences where you do not enter local values.

Repeat the preceding procedure on each workstation that needs local preference settings.

Word Processor Used

The GIFTS correspondence system links with Microsoft Word in order to create merged letters, write-ups, and batch correspondence. Choose Word from the list.

- The Document Path is where merged documents saved to the system are stored. Typically, this is a directory within the GIFTS directory, such as F:\GIFTS\DOCUMENT. Network users who wish to share documents must have the documents stored on an accessible network drive.

  If you want to organize your merged documents by correspondence event, you can create a document subdirectory for an event and save documents for the event to the subdirectory. For details, see "Event-Specific Document Subdirectories" on page 212.

- The Template Path is where the templates used to create merged documents are stored. Typically, this is a directory within the GIFTS directory, such as F:\GIFTS\TEMPLATE. Network users who wish to share templates must have the templates stored on an accessible network drive.

Spreadsheet Used

The spreadsheet interface is used with the Workspace and the optional Budget Module. Users who have a compatible spreadsheet installed can export ad hoc reports and Budget information to a spreadsheet for further manipulation. To link GIFTS to your spreadsheet:

1. Choose your spreadsheet from the Spreadsheet Used list.
2. In the Program file name field, enter the path to the spreadsheet application file. You can click Browse to choose the file from your directory structure. A common location for Microsoft Excel, for example, is C:\Program Files\Microsoft Office\ Office\EXCEL.EXE.

Reports Path

The Reports path specifies the location of your report (.RPT) files.

- On most standalone systems, the reports are stored in the GIFTS directory on the workstation's hard drive.

- On most network systems, the report files are stored in the GIFTS directory on a network file server.

If you have moved your report files to another directory, you can edit the report path by placing the cursor in the Report Path field and clicking Browse.

Report Designer

If you have the optional GIFTS Report Designer, you must provide the location of the CRW32.EXE file for Crystal Reports, the software used by the Report Designer.

If you do not know the location of the CRW32.EXE file, click Browse to choose the file from your directory structure.

E-Mail Program Used

The GIFTS Correspondence system links with external e-mail programs to send e-mail messages to Contacts with Internet addresses, as well as contacts that are part of your internal e-mail system.

You can manually change this setting if you think it is incorrect, or enter the name of your SMTP server (if applicable):

- The MAPI protocol is used by Microsoft Mail, Microsoft Outlook, Microsoft Exchange, Groupwise, and Rumba Mail.
- The SMTP/POP Internet protocol is used by Eudora, Emissary, E-mail Connection, Netscape Mail, Microsoft Internet Mail, Pegasus, Pronto, Spry Mail, and Z-mail.

  Enter the name of your SMTP server—such as smtp.model.org—in the available field.
- The VIM protocol is used by cc:Mail and Lotus Notes.

PIM(Personal Information Manager) Used

If you use Microsoft Outlook to maintain contact information, appointments, and other personal data, you can specify it here.

Document Management Program Used

This option is not available for use with GIFTS Alta.

Configuring Alternate Viewers

If you have the optional Document Manager, users can link external documents to GIFTS Alta.

You can then configure the system to use viewers—such as word processors, Internet browsers, and graphics-editing applications—to view specific file types. For instance, you can use your Internet browser to open images in standard formats like PDF, JPG, and GIF.

Note: GIFTS Alta uses the following internal command to launch the alternate viewer: <Program Name> <File Name> . The names are separated by a single space; if your viewer does not support this command format, it cannot be used as an alternate viewer.

To configure an alternate viewer for a specific file type:

1. In the **File Extension** column of the Alternate Document Viewers table, enter the three-letter file extension of the document type.
2. Press **TAB**. The **Browse** button is activated because the cursor in the Viewer Program Name column of the Alternate Document Viewers table.
3. Click **Browse** and highlight the EXE file you wish to launch when users open this file type from within GIFTS.
4. Click **Open** to return to GIFTS. The file path is displayed in the Viewer Program Name column.

Using the Preferences Editor

In addition to the preferences described in the preceding sections, GIFTS maintains a variety of system and user preferences. Occasionally, you may need to use the Preferences Editor to edit these preferences.

Caution: In most cases, the Preferences Editor should be used only under the direction of MicroEdge Technical Support. *Never* delete a preference unless you are specifically instructed to do so by a MicroEdge Support Specialist. The removal of preferences can disable GIFTS.

The following section describes how to use the Preferences Editor to set the maximum number of entries permitted in the "Table" fields used in GIFTS correspondence.

Setting the 'TableMax' Limit

Several correspondence merge fields in GIFTS generate tables with data merged from GIFTS. For instance, the Giving History Table merge field for Organization correspondence merges a detailed history of an Organization's Requests into your correspondence.

If there are more than 200 entries in these tables, a summary is automatically merged in place of this detailed listing. Many clients use this limit to prevent their correspondence from being too cluttered. This limit can be increased using the TableMax preference.

Note: You may receive an error message when generating correspondence if too much data is loaded into the merge field because of a higher limit. This error can occur regardless of whether the letter you are working with contains one of the affected merge fields (such as the Giving History Table). If you receive errors while generating correspondence, please lower the TableMax limit.

The TableMax limit does not apply to the Grant Requirements Table, Payment Requirements Table, and Payments Schedule Table merge fields.

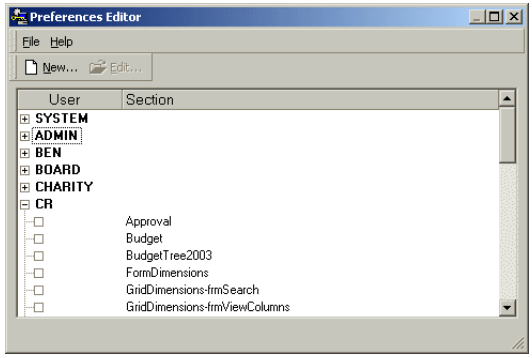
To use the Preferences Editor to set the TableMax limit:

1 Log in to the GIFTS Administrator as a member of the Admin user group. (Only users in the Admin group have access to the Preferences Editor.)

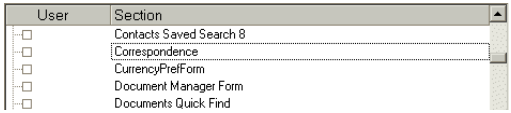
2 Choose Setup ➤ Preferences ➤ General from the Administrator menu.

3 On the General tab, click the Preferences Editor button. You are prompted to save the preferences.

4 Click Yes to save the preferences and continue. The Preference Editor lists the preference sections for the SYSTEM (all users) and for each user. In the following example, the user logins CR, LW, and SS are shown:

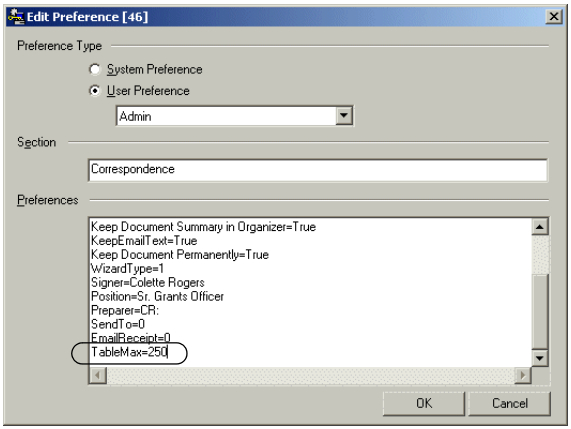


5 Expand the list of sections for the user, and click the Correspondence section:



6 Click Edit. The user's Correspondence preferences are displayed.

7 On a new line within the list of preferences, enter TableMax= followed by the number of entries you want to permit in the merge fields before a summary list is used:



8 Click OK to save the preference.

9 From the Preferences Editor menu, choose File ➤ Close.

4 Controlling Access to GIFTS

GIFTS has a detailed internal system security feature. You can control the View, Edit, Add, Update, and Execute access rights for all major functions and sensitive fields in the system.

In This Chapter

About GIFTS Security **94**

Managing Permission Sets **96**

Managing User Groups **104**

Setting Approval Restrictions **106**

Managing User Accounts and Passwords **109**

Global Client/Server Login Options **116**

Setting Up Windows NT Login Integration **121**

Setting Up Windows NT Login Integration with GCS **122**

About GIFTS Security

To simplify the process of setting up your security permissions, the security rights for each staff member are determined by the group to which they belong.

A *group* is simply a group of staff members with identical security access rights. The group's security access rights are determined by the *permission set* assigned to the group. If you intend to use security, you must first decide which sets of access rights are necessary to your organization.

For example, a foundation might have the following groups:

Group	Description/Access Rights
Administrator	The administrator and the backup administrator need full access rights to all areas of the system.
Program Officers	Program officers need to be able to view and modify information and run reports.
Program Assistants	Assistants need to enter and update records, run reports, create letters, and so forth.
Executives	The president and other executives only wish to view information.

Each of these groups will require different security access rights and hence be assigned a different permission set.

You can also place Approval Restrictions on a group in order to block users from approving any Request of a given Type, such as 'Cash Grants' or 'In-kind Giving,' or from approving Requests over a specific amount.

Tip: Approval Restrictions are particularly useful for grantmakers with "officer" or "discretionary" grant programs where some personnel can approve certain types of Requests up to a certain amount.

In the *Implementation Workbook* for the GIFTS setup training course, you should have defined your users and groups—as well as the permissions granted to each group. If you have not, please take the time to do so now.

Then you can set up your system security as follows:

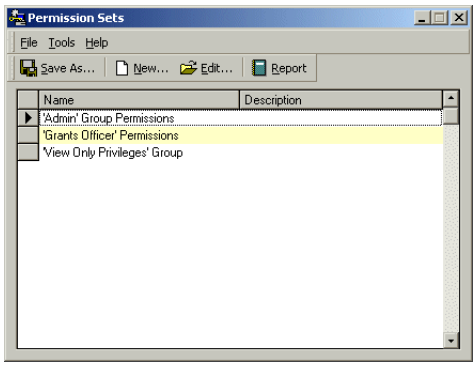
1. Create permission sets that define users' system access rights.
2. Create your user groups and assign a permission set to each user group.
3. Define the Approval Restrictions that apply to any of your groups.
4. Create a user account for each member of your staff and assign each to his or her appropriate user group.

Note that if a member of your staff will no longer use the system, you can mark their user account 'Inactive' so that it cannot be used but will remain in your historical data.

Managing Permission Sets

Permission sets allow you to create a set of permissions for specific job types and tasks and apply them to one or more user groups. You can also copy and edit an existing permission set, and print a report of permissions in a set.

To view your permission sets, choose Access ➤ Permissions from the Administrator menu. The Permissions Sets window opens; existing permission sets are displayed:



Please refer to the following sections to learn how to:

- Create, edit, or copy a permission set.
- Use field-level and staff override permissions.
- Delete a permission set.
- Print a permission set report.

Creating and Editing Permission Sets

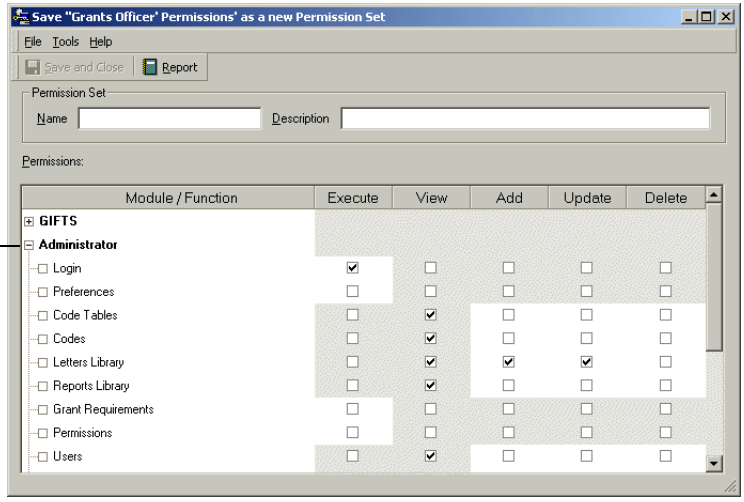
To create or edit a permission set:

1. Click Access ➤ Permissions from the Administrator menu. The Permission Sets window opens.

2 To edit a permission set, highlight it and click Edit. To create a new set, you can click New or highlight an existing set and click Save As.

Tip: If you want to create a new set with permissions that are similar to those of an existing set, highlight the existing set and click Save As to minimize the number of permissions that you'll have to change.

To view the permissions that you can set for each GIFTS module, click here to expand the permissions grid.



3 Enter or edit the set's Name and Description.

4 Use the check boxes to set the following permissions for each function. The permissions grid displays permissions for individual modules much in the same manner that Windows® Explorer® displays the directories and files on your computer. To work with the permissions for a GIFTS module, expand them by clicking on the box to the left of the module.

Check boxes shaded gray are not available.

Permission	Description
View	Permission to display the data. Without view access no other access (add, update, or delete) is possible. When setting most security permissions, you cannot disable the View permission. To restrict the ability of users to view information in GIFTS, you can use the field-level permissions described in "Limiting Dashboard Parts Access" on page 98.
Update	Permission to edit existing entries of the type selected.

Permission	Description
Add	Permission to create new entries of the type selected. A user needs both add and update privileges to create and edit entries.
Delete	Permission to delete existing entries of the type selected.
Execute	Permission to perform the function selected. Employee GIFTS users can disable the Login permission for the Matching GIFTS and/or Volunteer GIFTS modules to prevent users from viewing employee gifts-related data.

Tip: With the optional Branch Security feature, you can restrict the ability of users to access data from other branches or divisions. For more information, please refer to "Setting Up Branch Security" on page 311.

5 Click Save and Close to save your changes.

Limiting Dashboard Parts Access

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.

Using the Field Level and Staff Override Permissions

Field-level permissions enable you to restrict users from updating the following Request fields: Requested Amount, Recommended Amount, Approval Amount, and Project Title. To restrict access to these fields, use the permissions that begin with "Field:"

Module / Function	Execute	View	Add	Update	Delete
Export Payments	☑	☐	☐	☐	☐
Import Payments	☑	☐	☐	☐	☐
Field - Requested Amount	☐	☑	☐	☑	☐
Field - Recommended Amount	☐	☑	☐	☐	☐
Field - Approved Amount	☐	☑	☐	☐	☐
Field - Project Title	☐	☑	☐	☑	☐
Staff Override (field-level permissions and Request/	☐	☐	☐	☐	☐

Often, grantmakers want to restrict user groups from updating these fields in other people's Requests, but would like these users to have the ability to edit these fields in their own Requests. By enabling the Request - Staff Override permission, you can override the restrictions on these sensitive fields when users are working with their own Requests.

Note: To prevent users from assigning Requests to themselves in order to access these fields, users are denied access to the Staff field of Requests that are not assigned to them.

Limiting Review Updates

A new permission added to GIFTS Alta is available under the Reviewers section called **Update Other Staff Reviews**.

This permission by default is set to ON to emulate functionality in prior versions of GIFTS. If you would like to limit review updates to only the assigned reviewer, then uncheck this box.

IGAM and GIFTS Alta Resubmissions Permissions

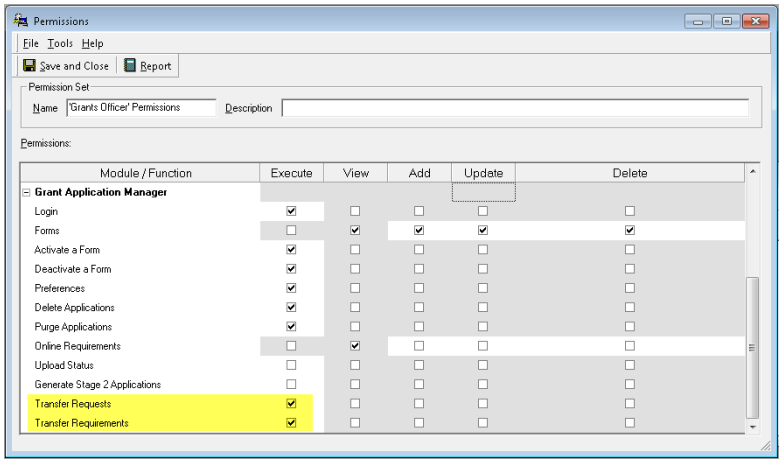
Two permissions under the Grant Application Manager set control whether a user has the ability to request a resubmission of an application or requirement either in IGAM during the consideration process or when

working with a Request or Requirement in GIFTS Alta- **Request Application Resubmission** and **Request Requirement Resubmission**. These permission are on by default for users of the Administrators group.

IGAM Transfer Permissions

Two permissions under the Grant Application Manager set control whether a user has the ability to Transfer Requests or Requirements to a new grantee owner.

For more information on this functionality, please refer to the latest GIFTS Alta User's Guide or IGAM User's Guide.



Limiting Blueprint Access

If the GIFTS Alta Blueprint module is installed, a Set Up Taskboard permission will be available in the GIFTS section and a Blueprint section will be available at the bottom of the permissions set with several options.

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:

Permissions	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.

Permissions	Controls...
Workflow Library	If Login-Execute permission is granted, users with these permissions can always view the Workflow Library.
(View, Add, Update, Delete)	View is selected and cannot be edited. Add, Update, and Delete permissions determine whether the user can add, update, or delete workflows.

Deleting a Permission Set

You can delete a permission set as long as it is not assigned to any user group. If you attempt to delete a permission set assigned to any user group, you are notified that you must remove the user groups from the permission set before deleting it.

To delete a permission set:

1. Click Access ➤ Permissions from the Administrator menu. The Permission Sets window opens.
2. Highlight the permission set and choose File ➤ Delete from the Permission Sets window menu.

Printing the Permission Set Reports

You can print reports listing permissions for all permission sets in the system or for an individual permission set.

To print a report summarizing all permissions sets in the system:

1. From the Administrator menu, choose Access ➤ Permissions. The Permission Sets window opens.
2. Click Report.

To print a report listing permissions for a single permission set:

1. Choose Access ➤ Permissions from the Administrator menu. The Permission Sets window opens.

2 Highlight the permission set in the list and click Edit. The permission set grid opens.

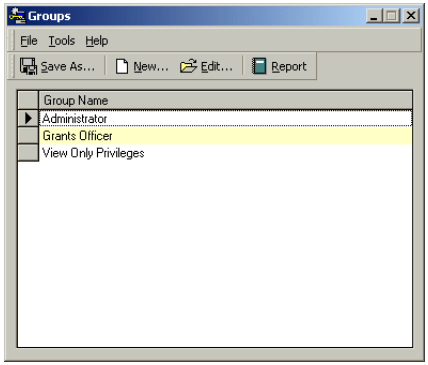
3 Click Report.

Managing User Groups

The access rights for a user group are determined by the permission set to which it is assigned. If all of your staff members will have equal unlimited access to GIFTS, they can use the permission set for the Admin group that comes with the system. For details on creating a new permission set, please refer to "Managing Permission Sets" on page 96.

Caution: Do not modify the Admin group or its permission set. You should always have a user group with unlimited administrative privileges; each Admin group user should use a password to prevent unauthorized use of his or her account.

To work with the GIFTS user groups, choose Access ➤ Groups from the Administrator menu. The Groups window opens, listing the currently-defined groups:



❖ ***To create a new group***, click New. You are prompted to enter the name of the group, and the group's permission set.

Note: Users with Branch Security also specify the Branch Security permissions for the group at this point. For more information, please refer to "Assigning Groups to Branches" on page 319.

Click Save and Close. You are returned to the list of groups, which now displays the group you created.

- ***To create a new group with the same permissions as an existing group***, highlight the existing group and click Save As. You are prompted to enter the name of the new group, and its permission set. If you have Branch Security, you also specify the Branch Security permissions for the group. When you are finished, click Save and Close.

- ***To edit the name of a group***, highlight it and click Edit. You are prompted to edit the group name. When you are finished, click Save and Close.

- ***To change the permission set of a group***, highlight it and click Edit. Select a new permission set and click Save and Close.

- ***To delete a group***, highlight it and choose File ➤ Delete from the Groups menu. You are prompted to confirm that you want to delete the group or, if there are users assigned to the group, you are notified that you cannot delete the group unless no users are associated with it.

  If you want to delete a group that has users associated with it, you must either assign those users to another group or remove them from the system.

- ***To print a report*** of the permissions and approval restrictions for all groups listed, click Report.

When you are finished working with your groups, choose File ➤ Close from the Groups menu.

Setting Approval Restrictions

You can place Approval Restrictions on any user group in order to block users in that group from Approving any Request of a given Type, such as Cash Grants or In-kind Giving, or from Approving Requests over a specific amount. This section describes how Approval Restrictions work, and then how to enter them into the system.

About Approval Restrictions

The following lists detail the restrictions applied when a group either has no approval rights to a particular Request Type, or approval rights only up to a specified amount.

No Access If users are restricted from access to a particular Request Type, they cannot:

- Add, approve, or modify the Payment Schedule of a Request of that Type.
- Change the Type of existing Requests from that Type to another, or vice versa.
- Use the Request Type in the Budget Module.

Limited Access If users are restricted to a particular amount for a certain type, they cannot:

- Approve a grant over the limited amount or modify a grant's Payment Schedule in such a way that would cause the Grant Amount to exceed the limit.
- If an existing grant of another Type exceeds the limited amount: change the Type of the existing grant to the restricted Type.

Setting Up Approval Restrictions

Before You Begin: The permission to Approve a Request must be available to a group in order for the Approval Restrictions to be effective; otherwise, users in that group cannot approve any Request. The Admin group is used

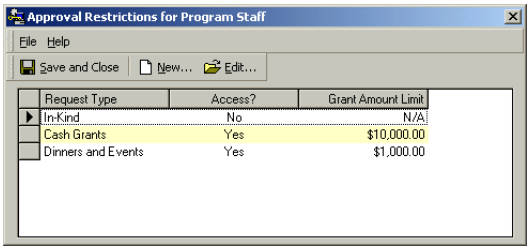
as an override to this feature. No Approval Restrictions can be applied to the Admin group.

To set up the Approval Restrictions, use the following procedure:

1 From the Administrator menu, choose Access ➤ Groups. The Group list is displayed.

2 Highlight the group for which you want to define Approval Restrictions, and click Edit.

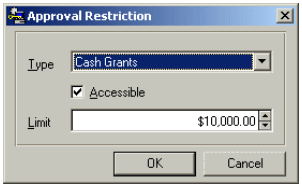
3 Click Approval Restrictions. The Approval Restrictions for [Group] window opens:



Initially, this window is empty since no Approval Restrictions exist. For each Request Type for which you wish to specify restrictions, you will add an item to this list. Once added, you can edit or delete them at any time.

Note: By default, no restrictions are applied to Request Types. If you do not need restrictions for a particular Request Type, do not add it to the list.

4 Click New. The Approval Restriction window opens:



5 Use the Type field to choose the Request Type for which you are creating restrictions.

6 Set the restrictions for the Request Type:

- To block users from approving any Requests of this Type, ensure that the Accessible check box is cleared.
- To place a limit on the value of Requests that this user group can approve, select the Accessible check box and enter the limit amount in the Limit field.

7 Click Save and Close. The restrictions are displayed in the Approval Restrictions list for the group.

8 You can set up your remaining Approval Restrictions for the group as follows:

- ***To add restrictions*** for other Request Types, click New.
- ***To modify a restriction***, highlight it and then click Edit.
- ***To delete a restriction***, highlight it and choose File ➤ Delete from the Approval Restrictions menu.

Managing User Accounts and Passwords

Every person who will have access to GIFTS must be identified as a user with a valid login ID. In addition, you may have other members of your staff whom you wish to be able to associate with Requests, Activities, or other items, but should not have access to the system. In both cases, each individual must be entered as a user.

If you selected the Extended Password Security option in the General Preferences tab, you should set a password for each user. If you did not select this option, users are responsible for creating their own passwords as described in the *GIFTS User's Guide*. In either case, be sure to protect your administrative account with a password.

With the Administrator Module, you can:

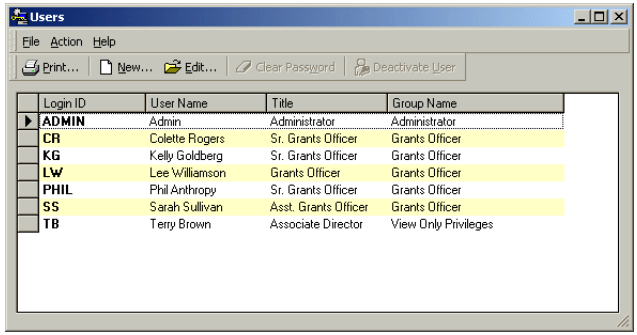
- Add and modify user accounts.
- Mark a user account as inactive or reactivate an inactive account.
- Delete user accounts.
- Set, reset, or clear a user's password.
- Print a user summary report listing the users on your system.

Note: If you are using the client/server version of GIFTS or you are running GIFTS on Windows NT, please refer to "Global Client/Server Login Options" on page 116 and "Setting Up Windows NT Login Integration" on page 121 for additional information before setting up your user accounts.

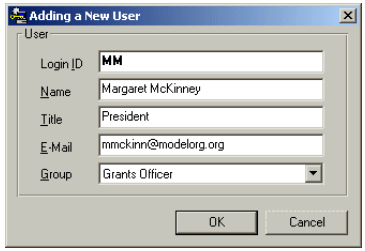
Adding and Modifying User Accounts

Before defining your users, make sure that you have entered your user groups and set up the appropriate permissions for each group. To work with your users:

1 Choose Access ➤ Users from the Administrator menu. The Users window opens, listing all users currently defined in your system:



2 Click New to add a user, or highlight a user and click Edit to modify an existing user. The Adding a New User window or Editing an Existing User window opens:



Field	Options
Login ID	The name the user enters when he or she logs in to GIFTS—usually the initials of the user or an abbreviation of his or her name.
Name	The full name of the user.
Title	The user's title.
E-Mail	The user's e-mail address, which can be included in reports and exports.

Field	Options
Group	The group to which this user is assigned.

3 When the information is complete, click OK.

Important: To prevent unauthorized account access, you should create a password for each user. Otherwise, anyone can use his or her account without entering a password.

Deactivating or Reactivating a User Account

If a member of your staff will no longer use the system, you can mark their user account 'Inactive' so that it cannot be used but remains in your historical data. You can mark a user account as inactive at any time using the following procedure:

1 From the Administrator menu, choose Access ➤ Users. The Users window opens.

2 Highlight the user you wish to delete and click Deactivate. The user's Login ID is displayed in red, indicating that the account is inactive. All lists of users will either omit this user or mark it as inactive, as appropriate.

When this user is selected, the Deactivate button is replaced by Activate. You can click Activate to reactivate the user account.

Replacing a User Account

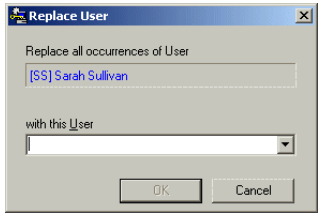
You can replace one user account with another. All GIFTS records associated with the former user account will now be associated with the new account.

For example, Sarah Sullivan, a staff member within your organization, has gotten married and assumed her husband's surname. You can create a new user account (with her new last name), then replace her old user account with the new one:

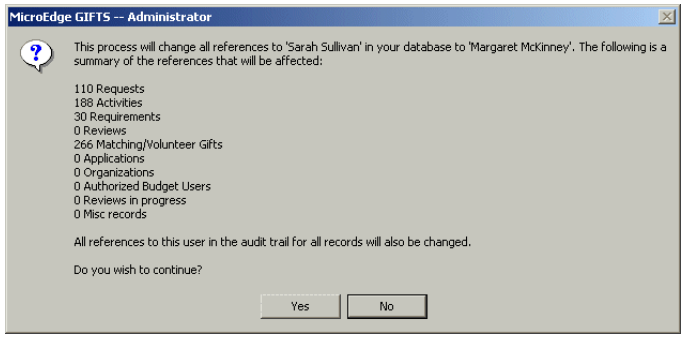
1 Create a new user account, as described in "Adding and Modifying User Accounts" on page 110.

2 From the Administrator menu, choose Access ➤ Users. The Users window opens.

3 Select the user account you want to replace and choose Action ➤ Replace User from the Users window menu. The Replace User window opens:



4 From the drop-down menu, select the user account that will replace the other. Click OK. A summary of your proposed changes appears, asking you to confirm the replacement:



5 Click Yes. A message informs you when the replacement has been completed.

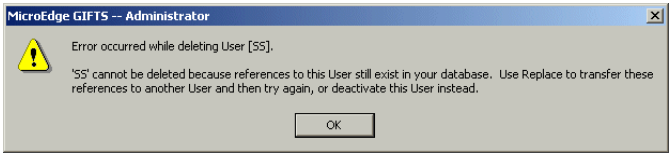
Deleting a User Account

You can delete a user account at any time using the following procedure:

1 From the Administrator menu, choose Access ➤ Users. The Users window opens.

2 Highlight the user account and Choose File ➤ Delete from the Users menu.

- If there are no records in your GIFTS database associated with this user account, the account is now deleted.
- If any GIFTS records are still associated with this user account, your will receive the following message:



Click OK to clear the message. The user account is not deleted.

If you need to delete a user account that still appears in your GIFTS records, first replace the user account with a new one, then delete the account. For more information on replacing user accounts, see "Replacing a User Account" on page 111.

Important: To maintain a user's presence in your historical data while not permitting access to the system, you can mark their user account inactive as described in "Deactivating or Reactivating a User Account" on page 111.

Setting, Resetting, or Clearing a User Password

If you select the Extended Password Security option in the General Preferences, you can set and reset user passwords. Passwords that you set or reset are temporary. Users are prompted to change the new password the next time they log in.

If you do not select Extended Password Security, you can only clear an existing password. After you clear a user's password, he or she can log on to GIFTS without entering a password.

Setting an Individual User's Password

You can set an individual password by using the following procedure:

1. From the Administrator menu, choose Access ➤ Users. The Users window opens.

2 Highlight the user and click Set Password. You are prompted to enter and verify the new password.

3 Click OK to set the password.

Setting All User Passwords

You can set a global password for all users (except yourself) by using the following procedure:

1 From the Administrator menu, choose Access ➤ Users. The Users window opens.

2 Click Set All Passwords. You are prompted to enter and verify the new password.

3 Click OK to set the global password.

Resetting a User's Password

If a user forgets his or her password, you can reset it using the following procedure:

1 From the Administrator menu, choose Access ➤ Users. The Users window opens.

2 Highlight the user and click Reset Password. You are prompted to enter and verify the new password.

3 Click OK to reset the password.

Clearing a User's Password

If you did not select Extended Password Security in the General Preferences, you may only clear user passwords. Once you clear a user's password, he or she can log on without entering a password. To clear a password, use the following procedure:

1 From the Administrator menu, choose Access ➤ Users. The Users window opens.

2 Highlight the user and click Clear Password.

3 Click OK to clear the password, or Close to cancel.

Printing a User Summary Report

You can print a user summary report that lists the Login ID, User Name, Title, and User Group Name for the users on your system.

To print a user summary report:

1 From the Administrator menu, choose Access ➤ Users. The Users window opens.

2 Click Print and specify your print setup options as described in the *GIFTS User's Guide*. (Note that for the user summary report, there are no report grouping options.)

3 When you are finished, click Print from the Print Setup menu.

Global Client/Server Login Options

By default, GIFTS uses a single, global Login ID and encrypted password to log users on to your client/server database (Microsoft SQL Server or Oracle server). This User ID and password are maintained in the Connect string in the [SQL Server] section of the GIFTS.INI file on each workstation.

To change the database Login ID or password, you must edit the GIFTS.INI file on each workstation. You can streamline this editing process by maintaining a single login for all users, as described in "Maintaining a Global Client/Server Login" on page 116.

For information about changing the database login ID and password, please refer to "Changing the Client/Server Login ID and Password" on page 117.

Rather than use a global client/server database login ID and password, you can require that GIFTS users log on to the database individually. You can accomplish this with either of the following approaches:

- "Client/Server Login Integration" on page 119
- "Requiring Individual Database User Logins" on page 119

Maintaining a Global Client/Server Login

You can streamline this editing process by moving the [SQL Server] section (including the Connect string) from GIFTS.INI to the GIFTS.SYS file. Once you have copied this section to GIFTS.SYS, the [SQL Server] section in GIFTS.INI is ignored; you can change the database login ID or password for all users by editing the Connect string in the GIFTS.SYS file, rather than by editing GIFTS.INI on each workstation.

To copy the database login information to the GIFTS.SYS file, use the following procedure:

1. In a text editor such as Notepad, open the GIFTS.INI file (this file resides in the C:\WINDOWS or C:\WINNT directory).
2. Locate the [SQL Server] section. It should resemble the example below:

```
[SQL Server]
DatabaseName=f:\GIFTS\gifts.mdb
```

```
Connect=ODBC;UID=[LOGIN ID];PWD=Ù¥ÕCÝ,©Œ;DSN=GIFTS;DATABASE=GIFTS
PWDEncrypted=-1
```

3 Copy the entire [SQL Server] section (including the Connect string) to the GIFTS.SYS file.

4 Save the GIFTS.SYS file with your changes.

Note: Whether you choose to maintain your global database login information in the GIFTS.INI or GIFTS.SYS file, GIFTS always encrypts the database password.

Changing the Client/Server Login ID and Password

For security reasons, you may want to periodically change your client/server database login ID or password. Remember, whether you maintain this information in the Connect string of the GIFTS.INI or GIFTS.SYS file, the database password is automatically encrypted by GIFTS.

To Change the Client/Server Database Password If you maintain your database login information in the GIFTS.INI or GIFTS.SYS file, you can change the encrypted password using the following procedure:

1 In a text editor such as Notepad, open the GIFTS.INI or GIFTS.SYS file.

2 Locate the [SQL Server] section. It should resemble the following example:

```
[SQL Server]
DatabaseName=f:\GIFTS\gifts.mdb
Connect=ODBC;UID=[LOGIN ID];PWD=Ù¥ÕCÝ,©Œ;DSN=GIFTS;DATABASE=GIFTS
PWDEncrypted=-1
```

3 Type the new unencrypted client/server database password after PWD= in the Connect string. For example, if you want to change the password to NEWPWD the Connect string should look like this:

```
Connect=ODBC;UID=[LOGIN ID];PWD=NEWPWD;DSN=GIFTS;DATABASE=GIFTS
```

4 Delete the password encryption key that reads PWDEncrypted=-1 or change it to read PWDEncrypted=0. The [SQL Server] section should now look like the following example:

```
[SQL Server]
DatabaseName=f:\GIFTS\gifts.mdb
```

```
Connect=ODBC;UID=[LOGIN ID];PWD=NEWPWD;DSN=GIFTS;DATABASE=GIFTS
PWDEncrypted=0
```

5 Save the file with your changes.

If you are changing the GIFTS.SYS file, immediately log on to GIFTS. Doing so automatically encrypts the new password and resets the password encryption key to PWDEncrypted=-1. If you are changing the GIFTS.INI file, you must repeat steps 1–5 for each workstation that runs GIFTS.

After you change GIFTS.INI, GIFTS automatically encrypts the password and resets the encryption key the next time the user logs on to GIFTS from his or her workstation.

Caution: Do not remove or change the password encryption key (PWDEncrypted=-1) without first typing a password in the Connect string. Removing the password encryption key without typing a new password in the Connect string could result in an encrypted password that the encryption algorithm is unable to read.

To Change the Client/Server Login ID If you maintain your database login information in the GIFTS.INI or GIFTS.SYS file, you can change the database login ID using the following procedure:

1 In a text editor such as Notepad, open the GIFTS.SYS file.

2 Locate the [SQL Server] section. It should resemble the example below:

```
[SQL Server]
DatabaseName=f:\GIFTS\gifts.mdb
Connect=ODBC;UID=[LOGIN ID];PWD=Ù¥ÕCÝ,©Œ;DSN=GIFTS;DATABASE=GIFTS
PWDEncrypted=-1
```

3 Type the new login ID after UID= in the Connect string. For example, if you want to change the login ID to NEWLOGID, the Connect string should look like this:

```
Connect=ODBC;UID=NEWLOGID;PWD=Ù¥ÕCÝ,©Œ;DSN=GIFTS;DATABASE=GIFTS
```

4 Save the file with your changes. If you are maintaining your client/server database login ID in the GIFTS.INI file you must repeat steps 1–4 for each workstation that runs GIFTS.

Client/Server Login Integration

If you remove the client/server database login information from the GIFTS.INI or GIFTS.SYS file, users are required to log in to the server by means of Microsoft SQL Server or Oracle server. When you remove the database login information, the login process for users is as follows:

1. When the user attempts to open GIFTS, the server prompts them for their SQL or Oracle user name and password.
2. If the user name and password are valid, GIFTS checks its database for the same user name and password. If these are found in GIFTS, the user is logged in.
3. If the user name and password are not found in the GIFTS database, the user is prompted to log in to GIFTS.

Important: Considerations for Oracle Server The Oracle database is organized in such a way that each user ID has its own schema. Tables created by a given user belong to the schema for that user.

GIFTS assumes that all users will log in using the standard login. If you decide to take advantage of the Integrated Logins feature, you must create synonyms for the GIFTS tables so that these tables will be accessible to all users.

A script that renames all GIFTS database tables to include the prefix GFW_ and create synonyms for these newly renamed tables is available from MicroEdge. Please contact MicroEdge Technical Support if you wish to receive these materials.

Requiring Individual Database User Logins

By removing the login ID and password from the Connect string in the GIFTS.INI or GIFTS.SYS file, you can require users to enter database login information manually each time they log in to GIFTS.

To remove the login ID and password from the Connect string:

1. In a text editor such as Notepad, open the GIFTS.INI or GIFTS.SYS file:

2 Locate the [SQL Server] section. It should resemble the following example:

```
[SQL Server]
DatabaseName=f:\GIFTS\gifts.mdb
Connect=ODBC;UID=[LOGIN ID];PWD=Ù¥ÕCÝ,©Œ;DSN=GIFTS;DATABASE=GIFTS
PWDEncrypted=-1
```

3 Remove the login ID and password so the Connect string reads:

```
Connect=ODBC;UID=;PWD=;DSN=GIFTS;DATABASE=GIFTS
```

4 Save the file with your changes.

If you are editing the Connect string in the GIFTS.INI, file you will need to repeat steps 1–4 for each workstation that runs GIFTS.

Setting Up Windows NT Login Integration

With Windows NT Integrated Security active, GIFTS retrieves the ID that the user used to log into Windows NT and—if there is a matching Login ID in GIFTS—automatically logs the user into GIFTS. (If the user has a password in GIFTS, it is ignored.)

If the Login ID is not found in GIFTS, the user must log in to GIFTS.

Important: For this feature, you should create and maintain all GIFTS users with Login IDs that are identical to their Windows NT Login IDs.

To activate this feature, select the Use Windows NT Integrated Security check box in the General Preferences, as described in "General Preferences" on page 51.

Setting Up Windows NT Login Integration with GCS

With Windows NT Integrated Security for GCS active, users can use their Windows NT Login ID and, optionally, their password to log into MyGIFTS.

Important: For this feature, you should create and maintain all GIFTS users with Login IDs that are identical to their Windows NT Login IDs.

To activate this feature, select the Use Windows NT Integrated Security for GCS checkbox in the General Preferences, as described in "General Preferences" on page 51.

5 Setting Default Grant Requirements

This chapter explains how to apply Default Grant Requirements to your pending and approved Requests.

In This Chapter

About Default Requirements **124**
Setting Default Requirements **125**

About Default Requirements

Most grantmaking organizations have reporting guidelines that are required of their grantees. These usually follow a specific pattern, with specific kinds of reports—such as progress reports and final reports—required at specific points in time.

In addition, many grant makers also require a specific set of materials from each prospective grantee at the time that a proposal is being evaluated. In GIFTS, you can schedule Default Grant Requirements for any Request Type in your system.

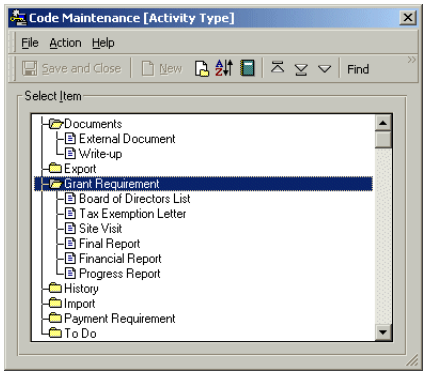
You can create lists of Requirements for both pending and approved Requests, and they will be imposed automatically when a Request is entered and/or approved, saving data entry time and guaranteeing consistency.

In the *Implementation Workbook* for the GIFTS setup training course, you should have defined your Request Types—such as Cash Grants or In-kind Giving—according to the different types of giving programs you wish to track in GIFTS. Since different types of requests normally follow different processes, you can maintain separate Default Requirement Schedules for each Request Type.

When a Pending Request is created, the default Requirements specified for a Request of that Type and Disposition are automatically entered for that Request. Users can modify and update the Requirement information just as they would if the Requirements were scheduled manually. When a Request is approved, the Requirements specified for approval are scheduled.

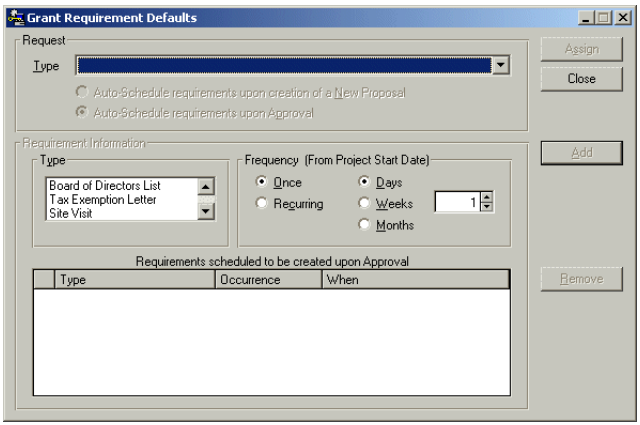
Setting Default Requirements

Before You Begin: Ensure that the Requirement Type codes that you need have been entered in the Activity Type Code Table. See "Maintaining Codes" on page 23 for more information about editing codes.



To set your Default Grant requirements:

1 From the Administrator menu, choose Setup ➤ Grant Requirements. The Grant Requirement Defaults window opens:



2 In the Type field, choose the Request Type for which you wish to define Default Requirements.

3 Click on the appropriate radio button to choose default Requirements for new proposals or for approved Requests. You can define both lists, but you must do so one at a time.

4 To schedule a Requirement, highlight the Requirement Type and specify the frequency at which this particular Requirement should be scheduled.

- Choose Once to have it scheduled only once, and then choose the appropriate interval of time. Dates are calculated from the Request Date for pending items, and from the Project Start Date for approved items.
- Choose Recurring if the same Requirement will be needed several times, and then specify the frequency of the Requirement. For example, if you require Project Reports from grantees every year until the conclusion of the project, click Recurring and specify a frequency of 12 months. The Project Report would be scheduled once a year for each year of the grant.

5 Click Add to add the Requirement to the Schedule. It is displayed in the schedule.

6 Continue adding Requirements until the schedule is complete.

- To remove a Requirement, highlight it and then click Remove.
- To edit a Requirement, highlight it and change the options as necessary.

7 When the Requirement schedule is complete, click Assign. The schedule is assigned to the Request Type you chose.

6 GIFTS Alta Extended Settings

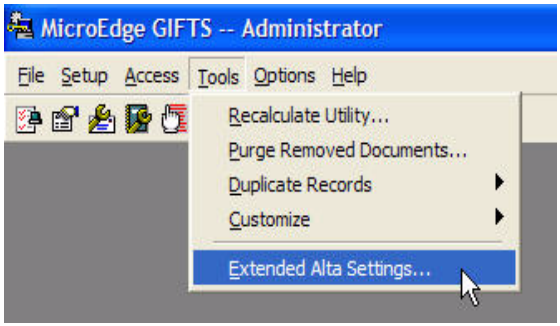
This chapter describes the options available in the new Alta Extended Settings tool available in the Tools menu.

In This Chapter

The GIFTS Alta Extended Settings Tool **128**
Setting Up Extended Functions Security..... **128**
Setting Up Batch Security..... **129**
Setting Up Requirements Security **131**
Setting Up Reminders Security **132**
Setting Up Watchlists Security..... **136**
Setting Up GIFTS Alta Link Security **139**

The GIFTS Alta Extended Settings Tool

Due to the integration of most of the GIFTS Plus Pack utilities into GIFTS Alta, the Plus Pack Configuration Tool was renamed to Alta Extended Settings and added to the GIFTS Alta Administrator's Module.



Setting Up Extended Functions Security

Using the Alta Extended Settings, User and Group Permissions can be configured for the following features:

- Batch
- Requirements
- Reminders (optional extension install required)
- Tax Status
- Watchlists
- Link (optional extension install required)

Each of these features has the ability to affect large amounts of data in a single operation. Since these changes cannot be undone, it is important to restrict the use of these utilities to qualified members of your staff.

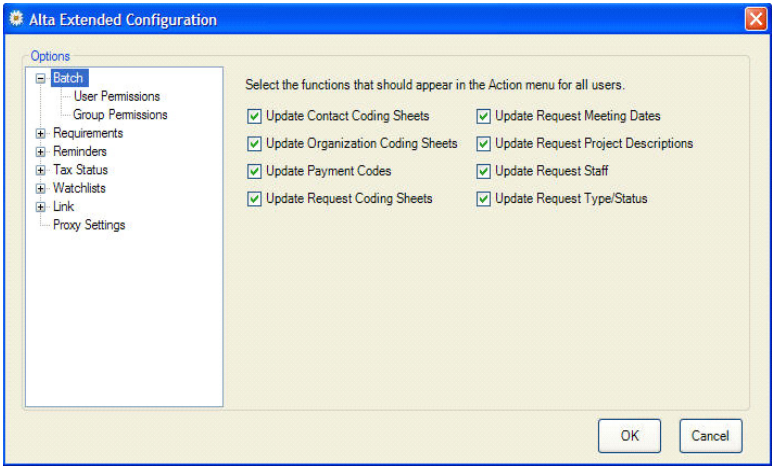
Note: For optional extension installation instructions, refer to the GIFTS Alta Installation Guide.

Setting Up Batch Security

To set up the menus and security for Batch functions:

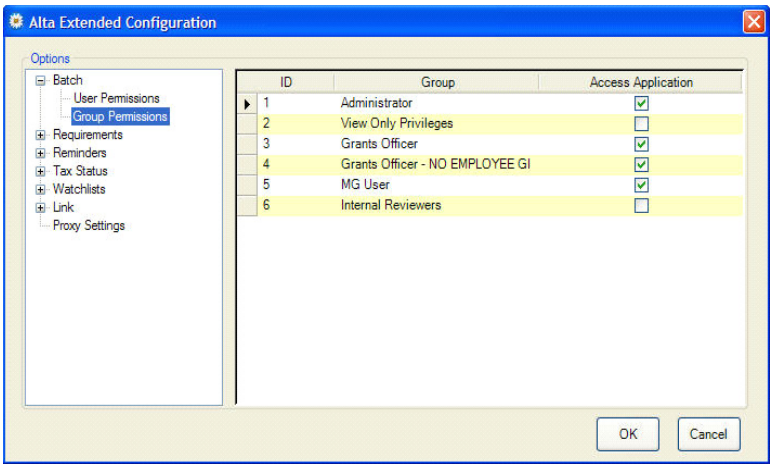
1 Open the Alta Extended Settings, as described in the preceding section. The configuration options are displayed.

2 In the Options list to the left, select **Batch**. A list of Batch functions is displayed.



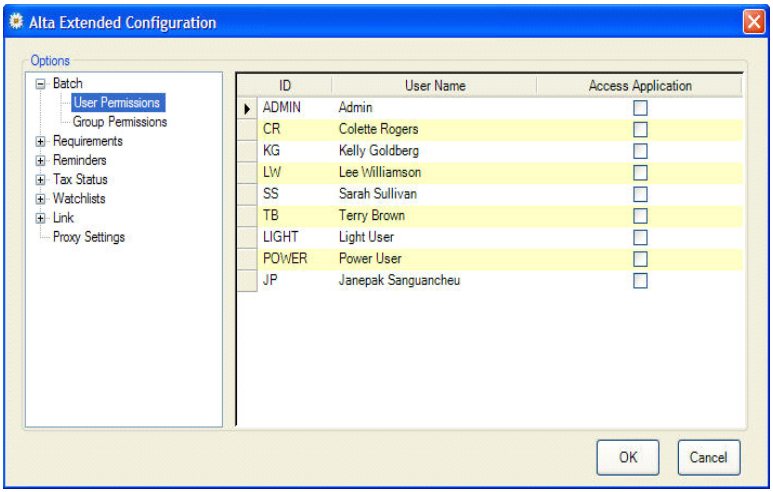
3 Choose which of the functions should be displayed to Batch users. If a function is not selected, no users will have access to it.

4 Click the **Group Permissions** option for Batch. A list of your GIFTS user groups is displayed.



5 Click the **Access Application** checkbox for user groups that should have access to Batch features. All users within the groups you select are granted permission to use Batch features.

6 If you have additional users that required Batch features, click the **User Permissions** option. A list of GIFTS users is displayed.



7 Click the Access Application checkbox for users who should have access to Batch features. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

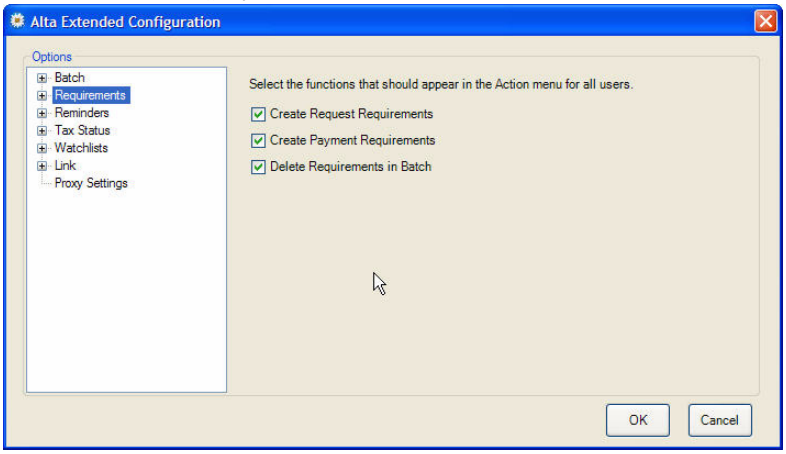
At this point, you can click OK to save your security settings or-if you want to set up security for Requirements features-go to "Setting Up Requirements Security" to continue using the configuration tool.

Setting Up Requirements Security

To set up the menus and security for Requirements features:

1 Open the Alta Extended Settings.

2 In the Options list to the left, select **Requirements**. A list of Requirements functions is displayed.



3 Choose which of the functions should be displayed to Requirements users. If a function is not selected, no users will have access to it.

4 Click the **Group Permissions** option for Requirements. A list of your GIFTS user groups is displayed.

5 Click the **Access Application** checkbox for the user groups that should have access to Requirements functions. All users within the groups you select are granted permission to use Requirements functions.

6 If there are any additional users who should have access to Requirements functions, click the **User Permissions** option. A list of GIFTS users is displayed.

7 Click the **Access Application** checkbox for users who should have access to Requirements functions. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

At this point, you can click **OK** to save your security settings or-if you want to set up security for Reminders-go to "Setting Up Reminder Security" to continue using the configuration utility.

Setting Up Reminders Security

The Reminders Engine extension is optional and must be installed manually after installing GIFTS Alta. For installation instructions, refer to Chapter 11 of the GIFTS Alta Installation Guide. To set up the menus and security for Reminders functions:

1 Open the Alta Extended Settings.

2 In the Options list to the left, expand the **Reminders** option.

3 Click the **Group Permissions** option for Reminders. A list of your GIFTS user groups is displayed.

4 Click the **Access Application** checkbox for the user groups that should have access to Reminders functions. All users within the groups you select are granted permission to use Reminders functions.

5 If there are any additional users who should have access to Reminders functions, click the **User Permissions** option. A list of GIFTS users is displayed.

6 Click the **Access Application** checkbox for users who should have access to Reminders. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

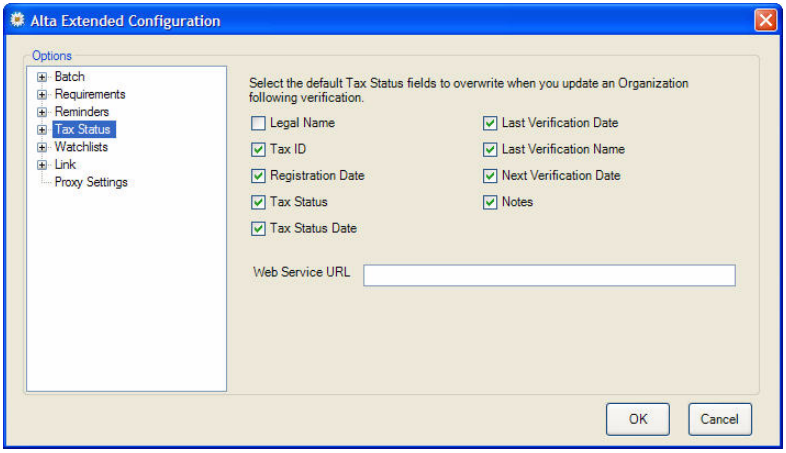
At this point, you can click OK to save your security settings or-if you want to set up security for Tax Status-go to "Setting Up Tax Status Security" to continue using the configuration utility.

Setting Up Tax Status Security

To set up the default selected tax status fields and security for Tax Status:

1 Open the Alta Extended Settings.

2 In the Options list to the left, select Tax Status. A list of default Tax Status fields are displayed.



3 Click the checkbox next to the tax status fields that will be selected by default to overwrite current organization information when a user updates an organization.

Note: The **Web Service URL** is a link to the MicroEdge web service that retrieves information from MicroEdge's Tax Exempt Organization Database. Leave this field blank if you want to use MicroEdge's default Web Service URL.

4 Click the **Group Permissions** option for Tax Status. A list of your GIFTS user groups is displayed.

5 Click the **Access Application** checkbox for the user groups that should have access to Tax Status functions. All users within the groups you select are granted permission to use Tax Status functions.

6 If there are any additional users who should have access to Tax Status, click the User Permissions option. A list of GIFTS users is displayed.

7 Click the **Access Application** checkbox for users who should have access to Tax Status. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

At this point, you can click **OK** to save your security settings or-if you want to set up security for Watchlists-go to "Setting Up Watchlists Security" to continue using the configuration utility.

Entering Proxy Server Information for Tax Status

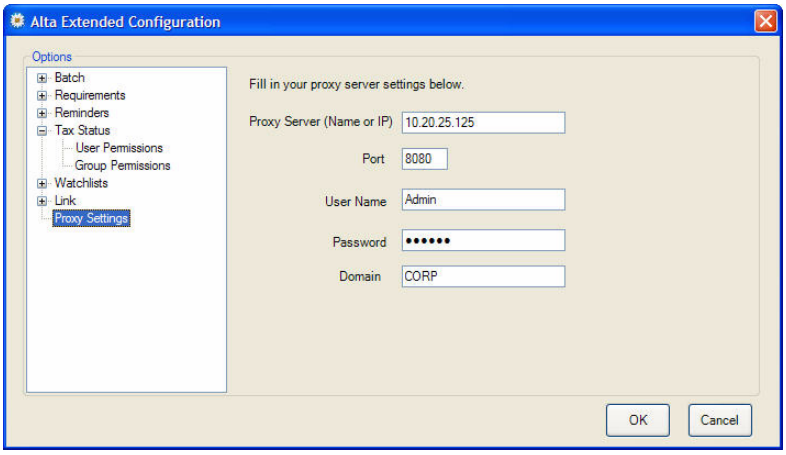
Since Tax Status uses a web service to access information from MicroEdge's Tax Exempt Organization Database, you can enter proxy server information in the Proxy Settings section of the Alta Extended Settings. This is only needed if your organization uses a proxy server. This allows Tax Status to retrieve this information using the web service.

If your organization does not use a proxy server, you do not need to complete this task.

This is the same information that is located in the Preference editor tool's GIFTSConnections section in the GIFTS Administrator module. Whatever you enter here overwrites the information entered there.

To enter proxy server information:

1 In the Options list to the left, select Proxy Settings. Your proxy settings display.



2 Enter the following information, if necessary:

- Proxy Server (Name or IP): [URL or IP address of proxy server]
- Port: [port on which proxy server is running]
- User Name: [Windows username that allows access to proxy server]
- Password: [Windows password that allows access to proxy server]
- Domain: [user domain]

The Windows password you enter in the Password field will be encrypted in the Preferences tool, unless it is the same as the current password. If you want to use the same password as the one in the Preferences tool, you must first delete it from the Preferences tool and enter it here. If you do not, the web service will not be able to successfully connect to the proxy server. For questions regarding your proxy settings, please consult with your network administrator.

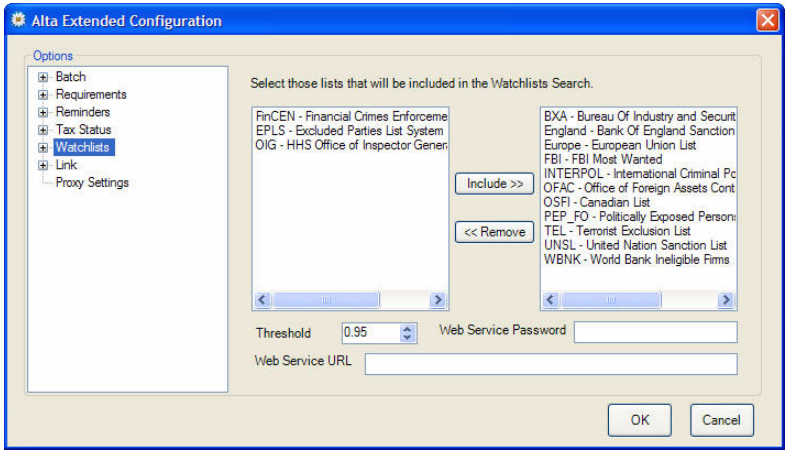
3 Click **OK**. The proxy server information is saved.

Setting Up Watchlists Security

To set up the default Watchlists, threshold, and security for Watchlists:

1 Open the Alta Extended Settings.

2 In the Options list to the left, select **Watchlists**. A list of default selected Watchlists is displayed.



Note: As of March 2012 the above options were available on the list:

3 If you do not want to include certain Watchlists when Watchlists performs a search, highlight one or more Watchlists from the right watchlist field, and click **Remove**.

To add a removed watchlist, highlight it from the left watchlist field and click Include.

4 Edit the **Threshold**, if necessary.

This field defines how close the record information from GIFTS must match the information on a watchlist in order for a "hit", or acknowledgement of a matching record, to be registered in Watchlists. You can have a threshold between .75 and 1. If you use a high threshold, such as .95 and above, information must be closely matched for a hit to occur. If you use a lower threshold, information does not have to be so

closely matched for a hit to occur. Generally, a low threshold returns more hits, and a high threshold returns fewer hits. The default threshold is .95.

The **Web Service URL** is a link to the web service that provides the Watchlists functionality. Leave this field blank to use the default hard-coded Web Service URL.

The **Web Service Password** is the password to this web service. Leave this field blank if you want to use the default hard-coded password.

5 Click the **Group Permissions** option for Watchlists. A list of your GIFTS user groups is displayed.

6 Click the **Access Application** checkbox for the user groups that should have access to Watchlists functions. All users within the groups you select are granted permission to use Watchlists functions.

In order to keep compliance records accurate, it is important to restrict the use of the utility to qualified members of your staff.

7 Click the Update Activities checkbox for the user groups that will be able to mark Watchlists Activities as false positives, or Done.

Users must have the Update/Delete System Activities permission in order to mark Watchlists Activities as false positives. For more information, please refer to the "Managing Permission Sets" section in the GIFTS Alta Administrator's Guide.

8 If there are any additional users who should have access to Watchlists, click the User Permissions option. A list of GIFTS users is displayed.

9 Click the Access Application checkbox for the users who should have access to Watchlists. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

10 Click the Update Activities checkbox for the user groups that will be able to mark Watchlists Activities as false positives, or Done.

Users must have the **Update/Delete System Activities** permission in order to mark Watchlists Activities as false positives. For more information, please refer to the "Managing Permission Sets" section in the GIFTS AltaAdministrator's Guide.

At this point, you can click **OK** to save your security settings or-if you want to set up security for Link-go to "Setting Up GIFTS Alta Link Security" to continue using the configuration utility.

Entering Proxy Server Information for Watchlists

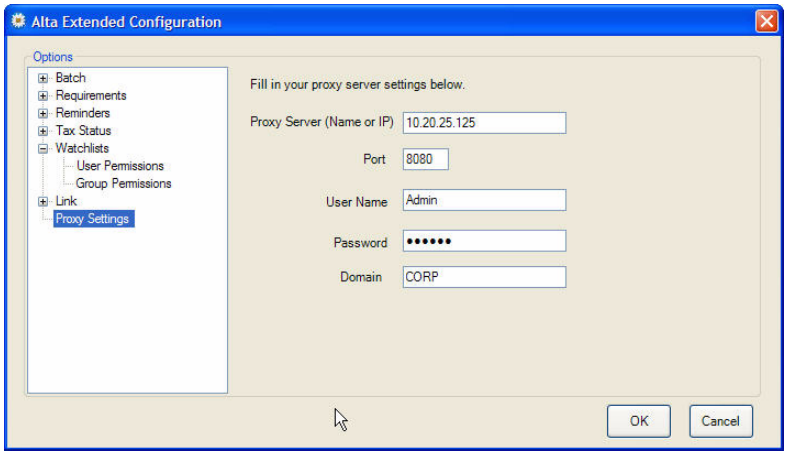
Since Watchlists uses a web service to access information, you can enter proxy server information in the Proxy Settings section of the Alta Extended Settings. This is only needed if your organization uses a proxy server. This allows GIFTS Alta to retrieve Watchlists information using this web service. You do not need to repeat this task if you have already performed it for Tax Status.

If your organization does not use a proxy server, you do not need to complete this task.

This is the same information that is located in the Preferences tool's GIFTS Connections section in the GIFTS Administrator module. Whatever you enter here overwrites the information entered there.

To enter proxy server information:

1 In the Options list to the left, highlight Proxy Settings. Your proxy settings display.



2 Enter the following information, if necessary:

- Proxy Server (Name or IP): [URL or IP address of proxy server]
- Port: [port on which proxy server is running]
- User Name: [Windows username that allows access to proxy server]
- Password: [Windows password that allows access to proxy server]
- Domain: [user domain]

The Windows password you enter in the Password field will be encrypted in the Preferences tool, unless it is the same as the current password. If you want to use the same password as the one in the Preferences tool, you must first delete it from the Preferences tool and enter it here. If you do not, the web service will not be able to successfully connect to the proxy server. For questions regarding your proxy settings, please consult with your network administrator.

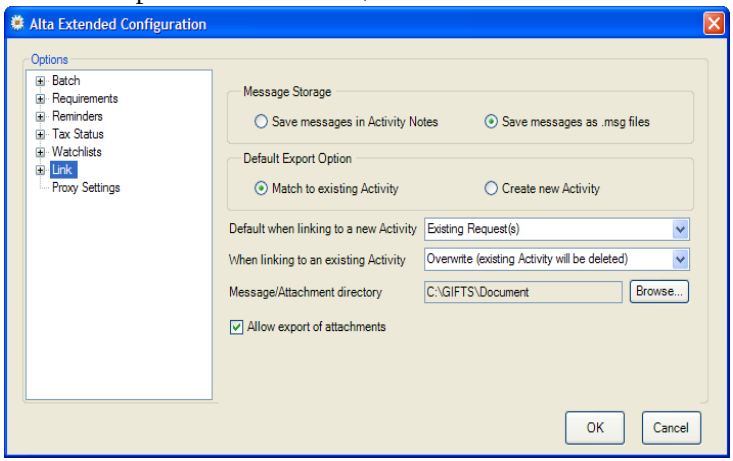
3 Click **OK**. The proxy server information is saved.

Setting Up GIFTS Alta Link Security

To set up how imported email messages are stored, how to treat existing Email Activities in GIFTS, where email messages are to be stored, whether or not to include email attachments in GIFTS, and security for Link:

1 Open the Alta Extended Settings, as described in the preceding section. The Alta Extended Configuration options are displayed.

2 In the Options list to the left, select **Link**.



3 In the Message Storage section, select one of the following options:

- **Save messages in Activity Notes:** This radio button saves the body of the Outlook email in the Long Notes section of the associated Mail Activity.
- **Save messages as .msg files:** If you have Document Manager, this radio button saves the Outlook message file (.msg) as a document which is linked to the Mail Activity.

You can set .msg files to open with Outlook by setting up Outlook as the alternate document viewer for .msg files. You must be sure to include the '/f' parameter at the end of the path. For example, for Outlook 2003, your alternate document viewer path could be:

```
"C:\Program Files\Microsoft Office\Office 11\outlook.exe" /f
```

For Outlook 2007, your alternate document viewer path could be:

```
"C:\Program Files\Microsoft Office\Office 12\outlook.exe" /f
```

For more information, refer to "*Configuring Alternate Viewers*" in the GIFTS Administrator's Module.

4 If you find yourself using the same settings each time you link an email to GIFTS, the following two settings will save you time by not having to change those settings.

- **Default Export Option**

------ Match to existing Activity

------ Create new Activity

- **Default when linking to a new Activity**

------ Existing Request(s)

------ Existing Organization(s)

------ Existing Contact(s)

------ No existing records

5 For the **When linking to an Existing Activity** drop down menu, select one of the following options. These options determine how previously created Mail Activities in GIFTS will be handled when new Outlook emails are linked to them during the linking process.

- **Overwrite (existing Activity will be deleted):** The existing Mail Activity (and associated .msg file), as well as any External Document attachments will be overwritten with the new Outlook email.
- **Create new (existing Activity will remain):** The existing Mail Activity (and associated .msg file), as well as any External Document attachments will not be overwritten with the new Outlook email.
- **Ask user (user chooses to delete existing or not):** A checkbox will allow the user to choose whether or not to delete the existing Mail Activity (and associated .msg file), as well as any External Document attachments.

6 In the Message/Attachment directory section, click the **Browse** button to change the location where email attachments and Outlook message files (.msg) are stored. This field only displays if you have the Document Manager.

7 Select the **Allow export of attachments** checkbox if you want users to have the option of creating separate External Document Activities for any email attachments when linking an Outlook email. If you deselect this checkbox, users will not have this option, and no email attachments will be imported into GIFTS when linking an Outlook email. This field only displays if you have the Document Manager.

8 Click the **Group Permissions** option for Link. A list of your GIFTS user groups is displayed.

9 Select the **Access Application** checkbox for the user groups that should have access to Link. All users within the groups you select are granted permission to use Link.

10 If there are any additional users who should have access to Link, click the **User Permissions** option. A list of GIFTS users is displayed.

11 Click the **Access Application** checkbox for users who should have access to Link. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

7 Setting Up Multi-Currency Options

This chapter explains how to set up and maintain exchange rates for other currencies.

In This Chapter

About Currencies and Exchange Rates **144**

Setting Up Your Multi-Currency Preferences **150**

Adding Currencies **164**

Updating Exchange Rates **167**

Maintaining and Using Historical Rates **174**

Deactivating a Currency **178**

Reporting Exchange Rate Information **179**

About Currencies and Exchange Rates

If you are involved in international grant-giving and want to track Request and Payment amounts in two currencies—your own, and another currency used by the grantee—you can do it using GIFTS multi-currency features.

The basic concept behind GIFTS multi-currency features is fairly simple: You enter other currencies (and their exchange rates) in the Administrator Module's Exchange Rate Table. Then, when adding or modifying a pending Request or unpaid Payment, you can specify a second currency (e.g., Euro, Japanese Yen). Enter a Request or Payment amount in one currency, and GIFTS then automatically calculates the amount in the other, based on the exchange rate in the Exchange Rate Table. The Request or Payment record is saved with both amounts specified.

After that, however, it gets a lot more complicated. You're well aware that exchange rates are not static: They fluctuate daily—even hourly!

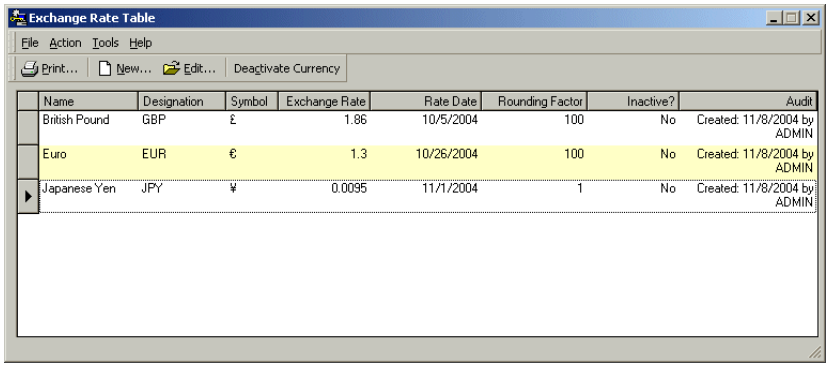
So what happens when exchange rates change? How do you update the Exchange Rate Table? Do you want two-currency Request and Payment amounts recalculated when you update exchange rates? Which amount do you want to remain constant—the amount in your currency, or in the other currency?

GIFTS's flexible multi-currency features allow you to make these decisions yourself and set rules for your GIFTS system using the Administrator Module. You can also decide whether to enforce this rules strictly, or allow users (or members of certain user groups) to change multi-currency behavior for Requests and Payments.

One consequence of this flexibility, however, is that choosing and using the multi-currency options can become rather complicated. Please read this chapter very carefully before deciding how to implement multi-currency features in your GIFTS system.

The Exchange Rate Table

In the Exchange Rate Table, you enter the local/other currencies your grantees may use, the exchange rate for each currency, and other currency details:



Name	Designation	Symbol	Exchange Rate	Rate Date	Rounding Factor	Inactive?	Audit
British Pound	GBP	£	1.86	10/5/2004	100	No	Created: 11/8/2004 by ADMIN
Euro	EUR	€	1.3	10/26/2004	100	No	Created: 11/8/2004 by ADMIN
Japanese Yen	JPY	¥	0.0095	11/1/2004	1	No	Created: 11/8/2004 by ADMIN

For information on accessing and adding currencies to the Exchange Rate Table, please see "Adding Currencies" on page 164.

You can also update a currency's exchange rate in the Exchange Rate Table. For details, please see "Updating Exchange Rates Manually" on page 168.

Key Terms: "Functional" versus "Local/Other"

The amount of a Request or Payment can be tracked in two currencies. GIFTS refers to these as the *functional currency*—the currency your organization's headquarters uses—and the *local/other currency*—the currency the grantee uses.

Your functional currency is specified in the multi-currency preferences of the GIFTS Administrator Module. By default, GIFTS uses the currency selected in your Windows Regional Settings. However, you can enter a different currency to use as your functional currency. For details on specifying your functional currency, please see "Choosing Your Functional Currency" on page 146.

A local/other currency can be selected within pending Requests or unpaid Payments by GIFTS users. This can be any currency saved in the Exchange Rate Table.

You can also specify a default local/other currency. Note that if you do, all new pending Requests and unpaid Payments will automatically save the default currency and—depending on your preferences—the resulting local/other amount.

Just as we refer to functional and local/other currencies, we also refer to functional and local/other *amounts*.

The functional amount is the amount in your currency that you are granting out of your giving budget. When you then specify a local/other currency to a Request or Payment, GIFTS multiplies the functional amount times the exchange rate specified for the currency. The product is saved in the GIFTS record as the local/other amount.

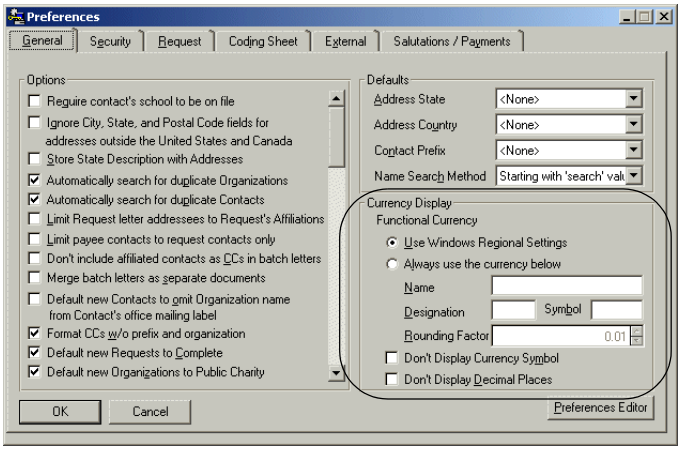
Choosing Your Functional Currency

By default, your functional currency is the currency specified in your Windows Regional Settings. This work will work well for many users.

However, certain organizations may wish to designate a different functional currency. For example, a charity based in Great Britain may have the British Pound specified in its Windows Regional Settings. However, their giving budget is specified in Euros, not Pounds. In that case, they may want to change their GIFTS functional currency to the Euro.

A different functional currency can be specified in the General Preferences of the GIFTS Administrator Module:

1 From the Administrator menu, select Setup ➤ Preferences. The Preferences window opens:



2 In the Currency Display section of the General tab, select the "Always use the currency below" radio button, then fill in the following required fields:

Field	Description
Name	Enter the name of the currency, e.g., "Euro" or "Canadian Dollar."
Designation	Enter a unique three-character designation for the currency. You may want to use the standard designations used in the currency market, such as **EUR** for the Euro or **GBP** for the British Pound.
Symbol	Enter the symbol you want to use to mark the currency. This symbol will be used to indicate the currency in Payment amounts, appearing in front of the number. GIFTS does not provide currency symbols that are unavailable on standard workstation keyboards. Use Windows Character Map to find other symbols, or paste the symbol from Microsoft Word. You can also enter a letter or letters as a symbol, such as **DM** for the German Mark (Deutschmark).

Field	Description
Rounding Factor	When GIFTS uses an exchange rate to calculate amounts, it will calculate the figure exactly. After the calculation is completed, however, GIFTS rounds the figure based on the Rounding Factor. GIFTS can, at its most exact, round to the nearest 1/100 of the currency (.01). However, you may prefer to track Requests and Payments using less detailed amounts. Large amounts may not need to be tracked to the .01 decimal place. Here you are determining how precisely you want functional amounts calculated when you they are adjusted, either by exchange rate changes or changes to the local/other amount. For instance, you decide that you want to track amounts to the nearest hundred units of the currency. Enter **100** in the Rounding Factor field. For example, imagine that you have entered **3.25** as the Exchange Rate for the Euro. You then add a Request, entering a local/other amount of 50,000 Euros. GIFTS calculates the exact functional amount as 15,384.62 of your specified functional currency. It *then* considers your Rounding Factor of 100 and rounds the number to the nearest 100. The Payment in your functional currency will be recorded in GIFTS as **15,400**.

3 The last two options are available for either kind of functional currency, whether based on Windows Regional Settings or your own functional currency:

Option	Description
Don't Display Currency Symbol	Select this check box if you don't want GIFTS currency fields to include the currency's symbol.

Option	Description
Don't Display Decimal Places	Select this check box if you don't want GIFTS currency fields to display the decimal point and any fractional amount following it. This option may not be advisable for multi-currency users, unless you have also set up your local/other currencies to round calculated local/other amounts to the nearest whole unit (in which case they wouldn't have any fractional amount to display to the right of the decimal point). NOTE: You can designate a local/other currency's rounding factor when adding or updating an exchange rate. This and other options are discussed in "Adding Currencies" on page 164.

4 Click OK in the lower left corner of the General tab to save your Preferences.

Setting Up Your Multi-Currency Preferences

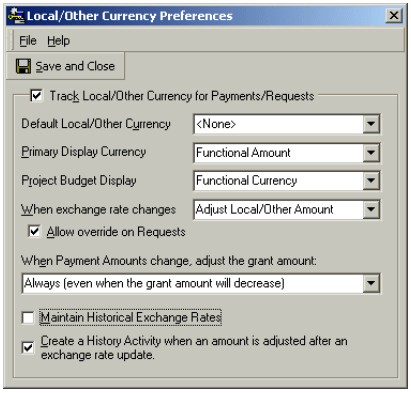
The multi-currency features in GIFTS are flexible, allowing you many different options for handling exchange rate changes and their effect on Request and Payment amounts. This flexibility requires careful attention to the multi-currency preferences you set up in the GIFTS Administrator Module.

The topics below discuss each preference in turn. Think about how your organization handles multi-currency, read this section carefully, and consider which options best suit your needs.

Accessing Multi-Currency Preferences

To access the multi-currency preferences discussed below:

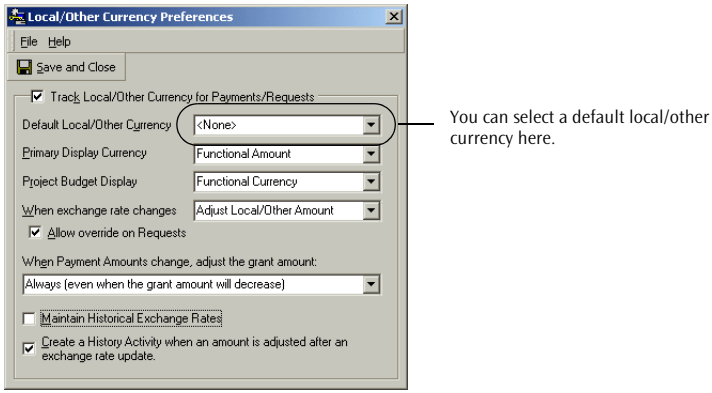
1 From the Administrator menu, select Setup ➤ Local/Other Currencies ➤ Preferences. The Local/Other Currency Preferences window opens:



2 To activate the multi-currency options in GIFTS, select the "Track Local/Other Currency for Payments/Requests" check box. The other preferences are now available.

Default Local/Other Currency

After you have added some local/other currencies to the Exchange Rate Table, you can choose one to be the default local/other currency:



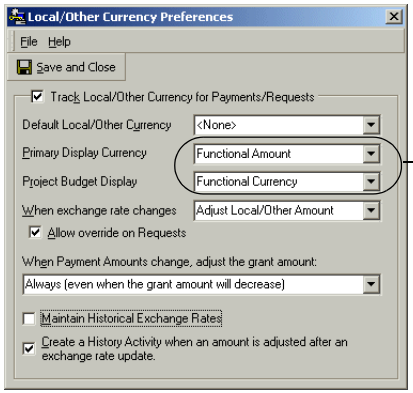
This option is useful if most of your second-currency giving is limited to one local/other currency. Select the default currency from the drop-down menu; it lists all the local/other currencies you have entered in the Exchange Rate Table.

Select <None> if you do not want to specify a default local/other currency.

Note: For information on the Exchange Rate Table and adding currencies to it, please see "Adding Currencies" on page 164.

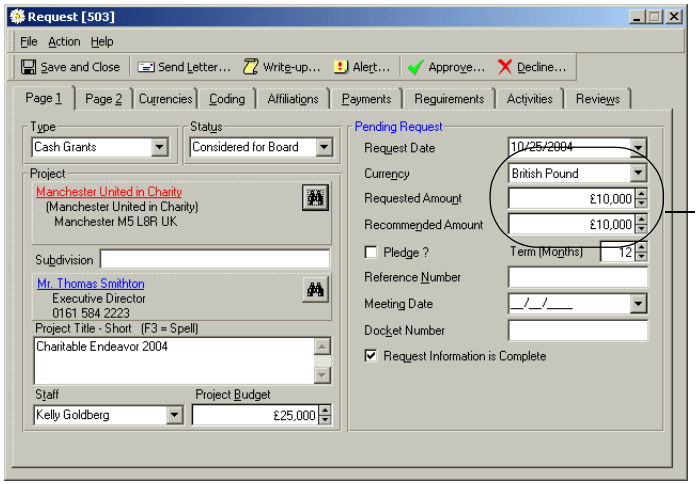
Currency Display Options

The next two options determine which currency—functional or local/other—is displayed as the primary currency in Requests and Payments where two currencies are specified:



Currency display options are selected here.

Primary Display Currency The Primary Display Currency option determines which of the two currencies is displayed on first tabs of Request and Payment records. Below is a Request in a GIFTS system where the local/other currency is the primary display currency:

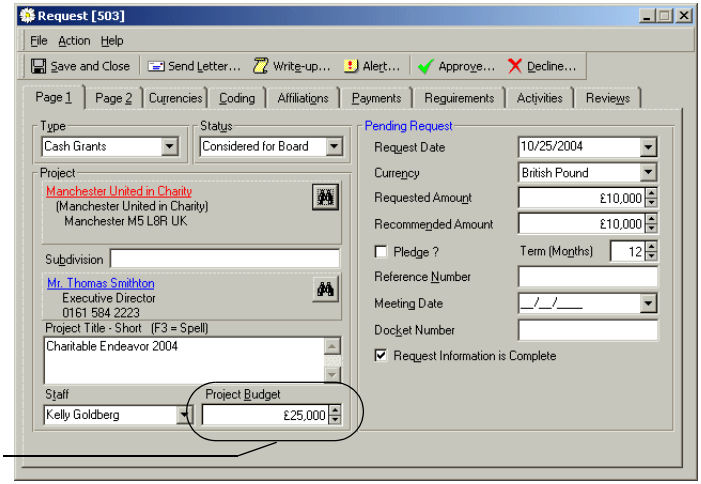


If the preference specifies that the local/other currency is the primary display currency, amounts on Page 1 of the Request shows these amounts in the currency selected.

Note that amounts in both currencies will both be saved, regardless of which is primarily displayed.

Tip: Select the currency in which your GIFTS users are more likely to think of grants and grant amounts. For example, if most of your international grant-giving commitments are made in the local/other currency—for example, you agree to give 10,000 Japanese yen in four quarterly payments, regardless how exchange rates fluctuate and affect the amount in your functional currency—it might make more sense to display primarily the local/other currency.

Project Budget Display The selection here works the same as it does in the Primary Display Currency option. In this case, however, it determines which currency the Project Budget field of Requests is shown in:



Multi-currency features do not convert the Project Budget from functional to local/other amounts, or vice versa. The currency chosen to display here will be the only currency in which the project budget amount will be saved.

Note: Since there is only one Project Budget field in a Request (even if the Request has two currencies), the display currency you choose here will be the only one saved.

When Exchange Rates Change

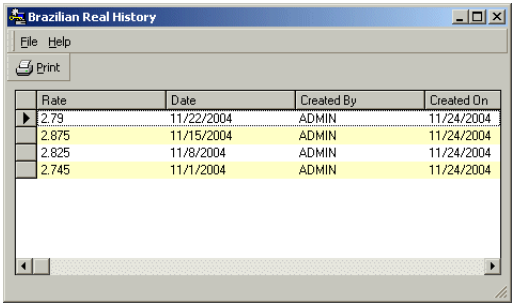
Suppose that your GIFTS system already contains a number of Requests and Payments which have been calculated in another currency. The calculations were based on the exchange rate for that currency, entered in the Exchange

Rate Table. What happens to such a Request or Payment when the exchange rate changes?

Defining "Exchange Rate Changes" First of all, you should be aware that there are a couple of ways that the exchange rate for a Request or Payment could change:

- You (the GIFTS administrator) update the exchange rates to reflect changes in the currency market. (Please see "Updating Exchange Rates" on page 167 for more information.)
- A user changes the local/other currency specified in the Request or Payment to one with a different exchange rate.
- A user changes the Rate Date specified in a pending Request or unpaid Payment, changing it to a day when a different exchange rate for the local/other currency was in effect.

  Every exchange rate has a Rate Date—the date on which the rate took effect. You have the option (discussed below in "Tracking Changes to Exchange Rates" on page 162) to track exchange rates over time. If you track historical exchange rates, GIFTS will save the old rates and the dates on which each took effect.

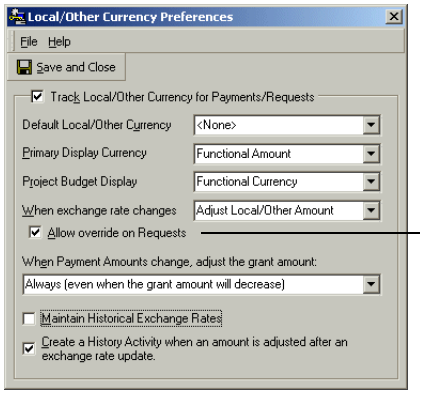


Rate	Date	Created By	Created On
2.79	11/22/2004	ADMIN	11/24/2004
2.875	11/15/2004	ADMIN	11/24/2004
2.825	11/8/2004	ADMIN	11/24/2004
2.745	11/1/2004	ADMIN	11/24/2004

  If a user changes the Rate Date in a pending Request or unpaid Payment—once a a Payment is paid or Request is approved, he or she won't be able to do that—the Rate Date might coincide with a different exchange rate than the current one. Thus, the exchange rate for that Request or Payment changes.

  Note: If you *don't* track historical exchange rates, the Rate Date field will not be editable.

What Happens when the Exchange Rate Changes? It is here in the multi-currency preferences that you decide:



In regard to pending Requests, you can set the options described in this topic as a default, or as a rule GIFTS will enforce.

Select the "Allow override on Requests" check box to allow users to change the way each particular pending Request handles exchange rate changes.

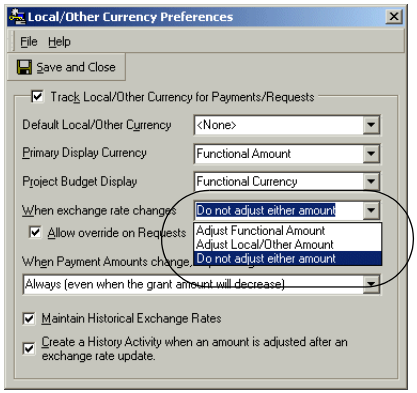
Clear the check box, and the rule you set here will be enforced for all pending Requests.

GIFTS can adjust an amount—either the functional currency amount or the local/other currency amount—based on the new exchange rate. Note that these adjustments will only apply to pending Requests and unpaid (scheduled, contingent, or hold) Payments.

(Once a Request is approved or declined, or a Payment is paid, you will want to keep track of it as was when the decision or payment was made. This is why exchange rate changes can adjust only the Requests and Payments specified above.)

Deciding Whether or Not to Make Adjustments So that's the first thing to decide: do you want GIFTS to adjust the amounts of pending Requests and unpaid Payments when you update exchange rates?

If you do not, select "Do not adjust either amount":



If you do, then have a second decision:

Deciding to Adjust Functional Amounts or Local/Other Amounts You have the option to decide which amount—functional or local/other—is recalculated when exchange rates change.

You have two options concerning recalculation of amounts. When exchange rates change, GIFTS can:

- Keep the local/other amount constant, and adjust the functional amount based on the new exchange rate.

  To do this, select "Adjust Functional Amount."

- Keep the functional amount constant, and adjust the Local/Other Amount based on the new exchange rate.

  To do this, select "Adjust Local/Other Amount."

Choosing an Option That Suits Your Needs Which option should you choose, whether on a system level or for an individual Request? It depends on the commitment you have made for grants that use the local/other currency.

When your organization approves a Request from an Organization that uses a different currency, you will most likely agree to a specified amount in one of the two currencies—your functional currency, or their currency. If Payments are to made over a period of time, fluctuations in currency exchange rates must be taken into account. How you want to deal with

these fluctuations in GIFTS depends on the currency in which you made your giving commitment.

- *Scenario 1* — You have committed to a grant amount of 10,000 US Dollars (your functional currency) to be paid to an Organization using Euros. The commitment has been made in your functional currency. Exchange rate changes will change the value of that $10,000 (in terms of the equivalent number of Euros needed to match it), but the $10,000 will remain constant.

  In this case, you will want to set your multi-currency preferences to "adjust Local/Other Amount" when exchange rates change.

- *Scenario 2* — You have committed to a grant to be paid to an Organization using a local/other amount. For example, the agreement stipulates that the commitment is for 10,000 Euros.

  In this case, you probably want to make sure that each Payment you make in US Dollars is equivalent to the promised amount in Euros. (In fact, this scenario is one where up-to-date exchange rates are most important.) Suppose the grant is being made in two Payments, each to equal 5,000 Euros.

  At the time the first Payment is made, the exchange rate for Euros is set to 2.0 (i.e., 1 dollar equals 2 Euros). You can see that the functional amount of the first Payment will be for 2,500 dollars (2,500 x 2 = 5,000 Euros).

  Six months later, the exchange rate for Euros has risen to 2.5—1 dollar now equals 2.5 Euros. You need to adjust your second Payment to the functional currency amount of 2,000 dollars (2,000 x 2.5 = 5,000 Euros). Thus, you have fulfilled your commitment to make two Payments of five thousand Euros.

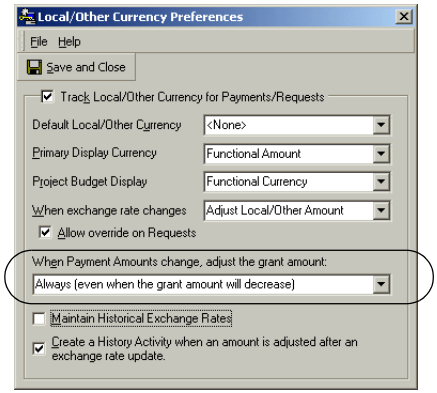
  In this scenario, you would want to select "adjust Functional Amount" when exchange rates change. This keeps the local/other currency amount (in this example, Euros) consistent, while allowing the exchange rate to determine the functional amount of your Payment in your functional currency (here, US Dollars).

  Note: If you use the optional Budget Module, be aware that Payments that have been resolved against the budget will be automatically "re-resolved" if the amount changes, so that the budget reflects the true paid amount. 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.

When Adjusting Payment Amounts

The next multi-currency preference allows you to determine how GIFTS adjusts grant amounts based on changes to Payments amounts:

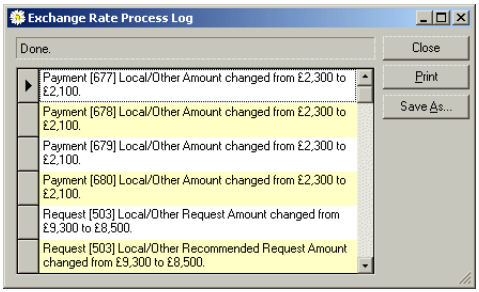


To understand these options, first consider what can happen to Payments and their Requests when exchange rates change.

How Exchange Rate Changes Affect Grant Amounts An exchange rate change may adjust a Payment's functional or local/other amount. These changes can, in turn, affect the grant amount (i.e., the amount of the approved Request associated with the Payments):

- *When the local/other amount is adjusted* — Since in this case the Payment functional amount (the "real" amount) remains the same, the change does

not affect the grant total. GIFTS will simply adjust the local/other amount of the Payment and inform you of the change in the process log:

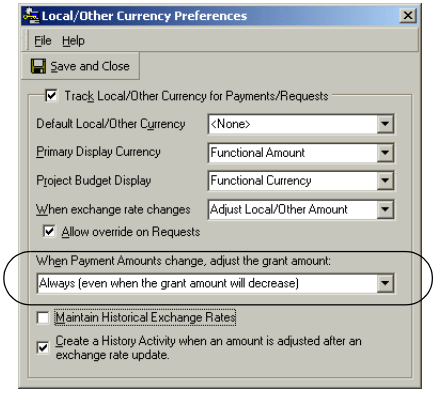


Note: In the Payment's affiliated Request, the functional amount will not change.

❖ *When the functional amount is adjusted* — More care should be taken in these cases, as a Payment's adjusted functional amount means either adjusting the grant (Request) amount or possibly adding another Payment to make up the difference (when the Payment's functional amount decreases).

Note: If you use the optional Budget Module, be aware that *unpaid* Payments that have been resolved against the budget will be automatically "re-resolved" if the functional amount changes, so that the budget will reflect the true paid amount. If the budget Line Item or Reserve Fund against which the Payment is resolved does *not* have sufficient funds to cover the increased functional amount, the Payment will *not* be changed. A message appears noting that, due to insufficient funds, the Payment or Payments have not been updated.

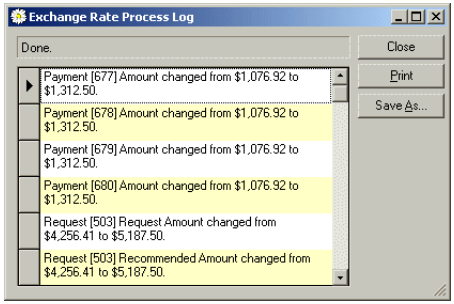
When adjusting functional Payment Amounts... This multi-currency preference will determine what happens in these cases:



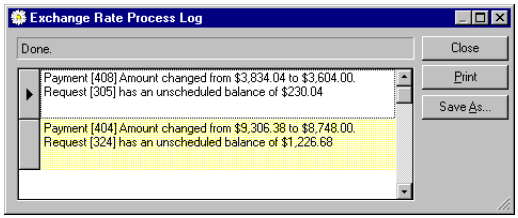
If you do not need the functional amounts of a Request and its Payments to reconcile, select "Never" in this drop-down menu. If you *do* need to reconcile those functional amounts, however, GIFTS can prompt users to create Grant Amendments to reconcile the amounts. In this multi-currency preference, you decide when users will be so prompted:

- Only when the sum of the Payments exceeds the grant amount
- Always (even when the grant amount will decrease)

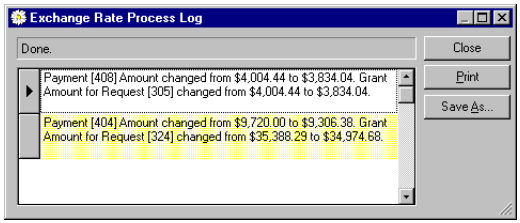
If an updated exchange rate *increases* the functional Payment amount(s), the Request Amount is automatically increased to cover the Payment totals (unless you choose "Never" for this preference). The process log tells you the amount that both the Payment and the associated Request have increased:



If the exchange rate change *decreases* the functional Payment amount(s), and you have selected "Only when the sum of the Payments exceeds the grant amount," the grant amount is not changed. The user will have to add another Payment (or increase an existing Payment) if you want to make up the difference. The process log indicates the change in the functional Payment Amount, and also notes the Request's remaining unscheduled balance:



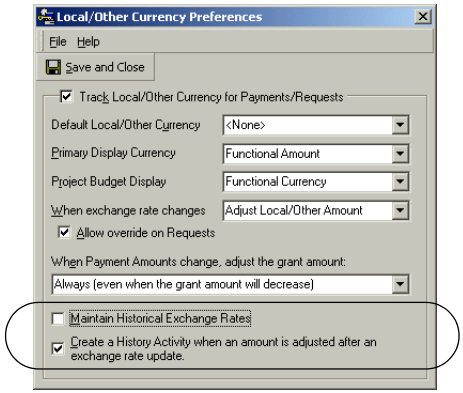
If the exchange rate change decreases the Payment Amount(s), *and* you have selected the second option, "Always (even when the grant amount will decrease)," the grant amount is decreased to the sum of the new functional Payment amounts. The process log tells you the amount that both the Payment and the associated Request have decreased:



Note: In each of the process logs shown as an example above, only one kind of amount change is shown. Be aware—if you have selected the Request override option described in "When Exchange Rates Change" on page 153, that each Request can be set to handle exchange rate changes differently. Some items in a process log may show changes to the local/other amount, while others in the same log show that the functional amount has been adjusted. Read the process log carefully every time you change an exchange rate. You can also save the log, or print it.

Tracking Changes to Exchange Rates

The last two options to select for your multi-currency preferences concern tracking changes to exchange rates:



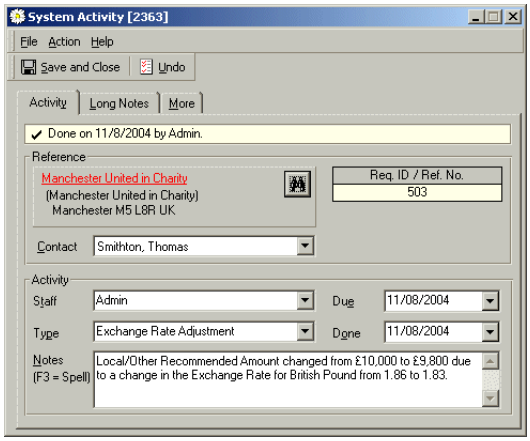
Maintaining Historical Exchange Rates Select the Maintain Historical Exchange Rates check box if you want to maintain a table of past exchange rates for each currency entered in your Exchange Rate table. When you update an exchange rate, the rate your are replacing is saved to the exchange rate history.

These historical rates can then be applied to pending Requests and unpaid Payments when users change the Rate Date to an earlier date. They can also be used when approving a Request: In the Currency Information page of the Approval Wizard, users can enter a past Rate Date, when a different rate may have been in effect.

Note: Which (if either) of the two Request amounts will be recalculated depends on your multi-currency preferences. Both user actions mentioned in the previous paragraph may result in an exchange rate change. As noted above, what happens when exchange rates change depends on several factors. These were discussed in "When Exchange Rates Change" on page 153—refer to that section for information on what happens if a changed Request or Payment date results in an exchange rate change.

Tracking Exchange Rate Changes with Historical Activities GIFTS can create a Historical Activity noting a change in either the functional or local/other

amount for each Payment and Request that is affected by an exchange rate update:



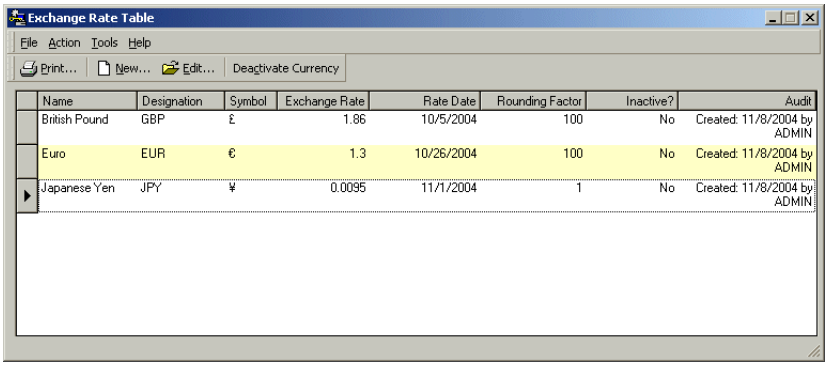
To have GIFTS create Activities to track changes to Payment and Request amounts following exchange rate updates, select the "Create a Historical Activity when an amount is adjusted after an exchange rate update" check box.

Important: If you update exchange rates on a regular basis, and you have set your multi-currency preferences to adjust amounts based on these updates, using this option could end up creating a very large number of Historical Activities. Keep this in mind when deciding whether to track changes to exchange rates in this manner.

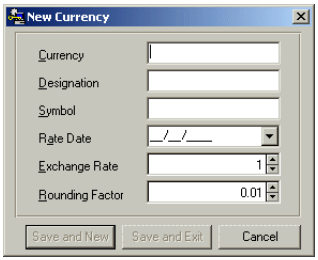
Adding Currencies

To add a new currency to your Exchange Rate Table:

1 From the Administrator menu, select Setup ➤ Local/Other Currencies ➤ Exchange Rate Table. The Exchange Rate Table opens:



2 From the Exchange Rate Table menu, select File ➤ New, or click the New button on the table toolbar. The New Currency window opens:



3 Fill in the following fields:

Field	Description
Currency	Enter the name of the currency, e.g., “Euro” or “Canadian Dollar.”
Designation	*Required.* Enter a unique three-character designation for the currency. You may want to use the standard designations used in the currency market, such as **EUR** for the Euro or **GBP** for the British Pound.

Field	Description
Symbol	*Required.* Enter the symbol you want to use to mark the currency. This symbol will be used to indicate the currency in Payment amounts, appearing in front of the number. GIFTS does not provide currency symbols that are unavailable on standard workstation keyboards. Use Windows Character Map to find other symbols, or paste the symbol from Microsoft Word. You can also enter a letter or letters as a symbol, such as **DM** for the German Mark (Deutschmark).
Rate Date	The date on which the exchange rate you are entering goes into effect. This date is important if you are planning to track rate changes over time, and want to know what different exchange rates were in effect for the currency at different times. For more information on tracking historical exchange rates, and what uses you can make of that information, please see "Maintaining and Using Historical Rates" on page 174.
Exchange Rate	Enter the exchange rate for the currency. This figure is based on your functional currency. More specifically, if 1 of your functional currency equals X of the local/other currency, then enter X here. Your functional currency is specified in the GIFTS Administrator General Preferences. For information on setting your functional currency, please see "Choosing Your Functional Currency" on page 146.

Field	Description
Rounding Factor	When GIFTS uses the exchange rate you are entering to determine the local/other amount's value in the other currency, it will calculate the figure exactly. After the calculation is completed, however, GIFTS rounds the figure based on the Rounding Factor. GIFTS can, at its most exact, round to the nearest 1/100 of the currency (.01). However, you may prefer to track Payments using less detailed amounts. Large Payments may not need to be tracked to the .01 decimal place. For instance, you decide that you want to track Payments to the nearest hundred units of the currency. Enter **100** in the Rounding Factor field. In this example, imagine that you have entered **2.348** as the Exchange Rate. You then take a Payment of 1, 000 of your functional currency and change it to this currency. GIFTS calculates the exact amount as 2,348.00 units of the other currency. It *then* considers your Rounding Factor of 100 and rounds the number to the nearest 100. The Payment in the other currency will be recorded in GIFTS as **2,300**.

4 If you want to save the currency and add another currency, click Save and New.

If you want to save the currency and exit the New Currency window, click Save and Exit. Click Cancel to cancel the new currency.

Updating Exchange Rates

Keeping your exchange rates up-to-date is certainly the most important aspect of keeping your Request and Payment local/other currency data useful.

When you update a local/other currency's exchange rate, GIFTS will update amounts of pending Requests and unpaid Payments using that currency. (Your multi-currency preferences or the a record's multi-currency settings can be set to recalculate neither if you prefer.)

When GIFTS recalculates based on exchange rate change, there are two questions about *what* to adjust:

- What kinds of record amounts do you want to recalculate? Payment Amount, Request Recommended Amount, Request Requested Amount, or any combination of these *can* be adjusted with each exchange rate change.

  You as GIFTS administrator will make this decision each time you update exchange rates. For more information on this choice, please see "Request and Payment Update Options" on page 172.

- Which amount in a given record will be changed? The functional amount, or the local/other amount?

  Whether it is the functional or local/other amount that is recalculated depends on your GIFTS settings. In your multi-currency preferences, you specify which amount you want recalculated when exchange rates change. (For details, please see "When Exchange Rates Change" on page 153.) If in those same preferences you allow user override, which amount changes depends on the setting of the pending Request that 1) GIFTS is updating or 2) is associated with unpaid Payment that GIFTS is updating.

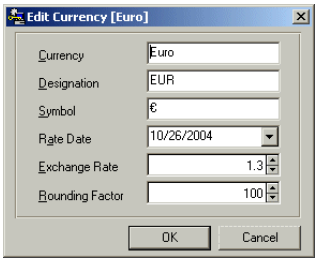
You can update one exchange rate at a time manually from within the Exchange Rate Table; for details, please see "Updating Exchange Rates Manually" on page 168.

GIFTS can also import a correctly-formatted XML file which includes new exchange rates, and update multiple local/other currency rates at once. This is discussed in "Updating Exchange Rates Automatically" on page 169.

Updating Exchange Rates Manually

You can update the exchange rate for a single currency manually. You may want to enter a new exchange rate, or move an existing rate's Rate Date to a different starting point.

1. From the Administrator menu, select Setup ➤ Local/Other Currencies ➤ Exchange Rate Table. The Exchange Rate Table opens.
2. Select the currency in the grid and click Edit in the Exchange Rate Table toolbar. The Edit Currency window opens:

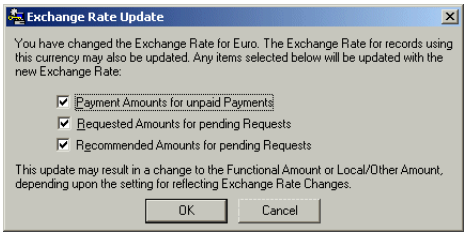


3. You can edit any of the fields in the Edit Currency window. However, since you are updating an existing exchange rate, your changes are likely to be limited to Exchange Rate and Rate Date.

Field	Description
Rate Date	The date on which you want the new exchange rate to go into effect. By default, this field contains the same date entered the last time the exchange rate was updated. Be sure to update the Rate Date if you track historical rate changes. Only one rate can be saved per date, so a rate associated with a date will be lost if a new rate with the same date is entered.
Exchange Rate	Enter the new exchange rate for the currency. As you will recall, this figure is based on your functional currency. More specifically, if 1 of your functional currency equals X of the other currency, then enter X here.

Note: For full details on these and other fields, please see "Adding Currencies" on page 164.

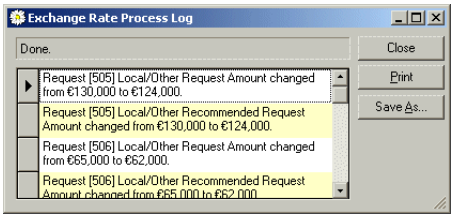
4 Change other fields in the Edit Currency window as needed, then click OK. The Exchange Rate Update window opens:



Choose which amounts of unpaid Payments and pending Requests you want to recalculate using the new exchange rate. (This applies to those records which already have the update currency specified.) For more information on these options, please see "Request and Payment Update Options" on page 172.

5 Select the options in the message above you want to use, then click OK. GIFTS performs the exchange rate update, adjusting Payment, Request Requested, and/or Request Recommended Amounts as indicated.

A process log lists the results of your update:



You can print or save your results using these process log buttons.

Click Close to close the process log.

Updating Exchange Rates Automatically

GIFTS multi-currency features include a separate application (file name FXImport.exe) that can update multiple local/other currency exchange rates automatically. The application imports an Extensible Markup Language (XML) file which can include a new Rate Date and Exchange Rate for each currency in your Exchange Rate Table.

This is useful for grant-making organizations which receive currency exchange rate data from a third-party vendor. These organizations may be

able to work with the vendor to have the data supplied in the correct format for use with GIFTS.

Formatting the XML File There are a couple specifications that the XML file must meet to be imported successfully:

- The file name should always be CurrentRates.xml. You can save the file to any location on your network and specify the network path within the application, but the file name itself must remain constant.
- The XML file itself must be formatted properly. They should be specified in the document as shown below:

```
<EXCHANGERATES>
   <EXCHANGERATE DESIGNATION="EUR" DATE="12/08/2004" RATE=".82"/>
   <EXCHANGERATE DESIGNATION="GBP" DATE="12/08/2004" RATE="1.85"/>
</EXCHANGERATES>
```

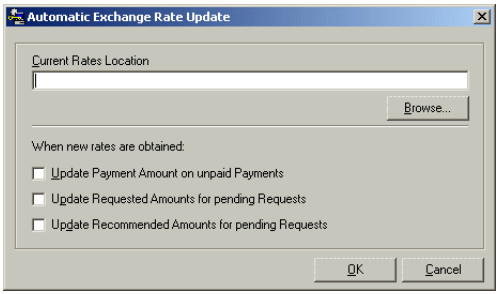
  You need only specify the currency's three-letter Designation from GIFTS, the Rate Date for the new rate, and the new exchange rate itself. Be sure to use unique Rate Dates if you track historical rate changes. Only one rate can be saved per date, so a rate associated with a date will be lost if a new rate with the same date is entered.

  Note: The XML file can list only those currencies you want to update. If a currency in your Exchange Rate Table is not found in the XML file, it will keep its current rate and rate date.

Setting Up Your Automatic Update Preferences To set preferences for the FXImport application:

1. From the Administrator menu, select Setup ➤ Local/Other Currencies ➤ Exchange Rate Table. The Exchange Rate Table opens.

2 From the Exchange Rate Table menu, select Tools ➤ Auto Update. The Automatic Exchange Rate Update window opens:



3 In the Current Rates Location field, click Browse to find the CurrentRates.xml file you want to import.

4 Under "When new rates are obtained:", select which amounts of unpaid Payments and pending Requests you want to recalculate using the new exchange rate. (This applies to those records which already have one of the updated currencies specified.) For more information on these options, please see "Request and Payment Update Options" on page 172.

Note: If your CurrentRates.xml file lists rates for multiple local/other currencies, please note that pending Requests and unpaid Payments using these currencies will be all be updated (or not) the same way, based on the options you choose here.

5 Click OK.

Running the Automatic Update Application The FXImport.exe file is installed in the same folder as the other GIFTS executables on your workstation. Open your workstation's GIFTS folder in Windows Explorer and double-click FXImport.exe to run the application.

The application can be run by a user with exchange rate update rights, or it can be scheduled to run automatically at set intervals under Windows Task Manager.

Tip: If you plan to update exchange rates on a regular, frequent basis, MicroEdge recommends running the application under Windows Task

Manager. If you use this option, be sure to save the XML currency file in the same location with the same file name each time. This will prevent the need of changing application preferences to account for file name and location changes.

Whether the application runs under Windows Task Manager, or is run manually, the following occurs:

- GIFTS updates the Exchange Rate Table with the new rates.
- If you have chosen to track historical exchange rates, the old rate you just replaced is saved. A Historical Activity record for each changed rate is also created, if you have selected that preference. (See "Tracking Changes to Exchange Rates" on page 162 for details on these preferences.)
- A log file called FXImport (mmddyyyy).log is created and placed in the FXImport subdirectory of the GIFTS directory. It details the changes in functional or local/other amount made to any Requests and/or Payments as a result of the exchange rate update.

Request and Payment Update Options

When you update an exchange rate, you may have pending Requests and unpaid Payments already calculated in that local/other currency. GIFTS offers you options on which amounts you want to change for those particular Requests and Payments.

When you update an exchange rate, you can select to have any and all of the following amounts recalculated with the new rate:

- Payment Amount
- Request Recommended Amount
- Request Requested Amount

Remember, these only apply to *unpaid* Payments and *pending* Requests that have already had the updated local/other currency specified.

Important: Note that these options, when presented to you during an exchange rate update, will not indicate whether your action will adjust the functional amount or the local/other amount. Which is adjusted is based on your multi-currency preferences. For details on the option that determines whether functional or local/other amounts are changed when exchange rates change, please see "When Exchange Rates Change" on page 153.

Maintaining and Using Historical Rates

Exchange rates change and updating rates is one of the keys to making GIFTS multi-currency data useful to your organization. GIFTS also allows you to maintain a history of past exchange rates for your local other currencies, allowing you to:

- track changes to exchange rates over the course of your gift-giving.
- recalculate Request and Payment amounts using previous (or newer) exchange rates in case a key date (for example, an unpaid Payment's Schedule Date) is changing.
- use the Functional Continuity Schedule report (found in the GIFTS Report Library) to view exchange rate-related changes to functional amounts over the life of a grant.

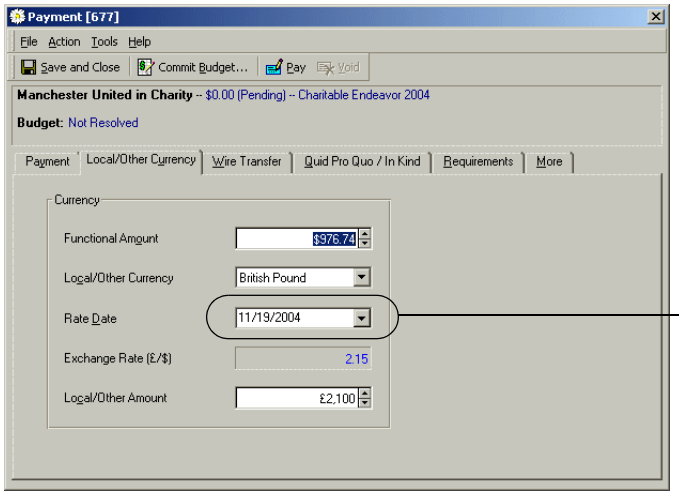
Historical exchange rate tracking is set up in your multi-currency preferences. For details, please see "Tracking Changes to Exchange Rates" on page 162.

Important: To track historical exchange rates correctly, care should be taken when updating the rates. Be sure not to use a Rate Date already in use for a given currency. For each currency, only one rate can be saved per date, so a rate associated with a date will be lost if a new rate with the same date is entered.

How Users May Use Historical Rates

If you choose the maintain a history of the exchange rates of your local/other currencies, GIFTS users can use this history to recalculate amounts of pending Requests and unpaid Payments.

In the Local/Other Currency tab of Requests and Payments, any local/other currency specified requires a Rate Date. Below is the Local/Other Currency tab of a Payment with a local/other currency of the British Pound:



If you track historical exchange rates, changing the date could change the exchange rate, and thus either the functional or local/other amount, depending on your preferences.

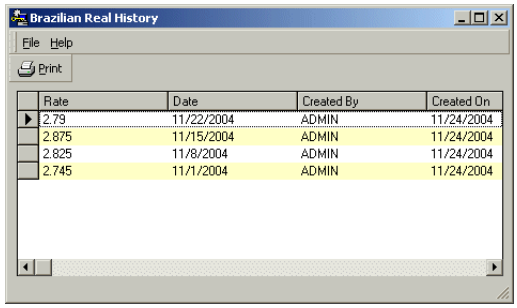
If you are tracking historical exchange rates, users can change the Rate Date of a pending Request or unpaid Payment. GIFTS will check any new Rate in the Request or Payment against the historical record for that currency. If a different exchange rate was in effect on that date, the record's amount(s) will be recalculated using that exchange rate.

Note: Whether it is the functional or local/other amount that is recalculated depends on your GIFTS settings. In your multi-currency preferences, you specify which amount you want recalculated when exchange rates change. (For details, please see "When Exchange Rates Change" on page 153.) If in those same preferences you allow user override, which amount changes depends on the setting of the pending Request that 1) the user is giving a new Rate Date or 2) is associated with unpaid Payment the user is giving a new Rate Date.

Viewing and Printing Historical Rates

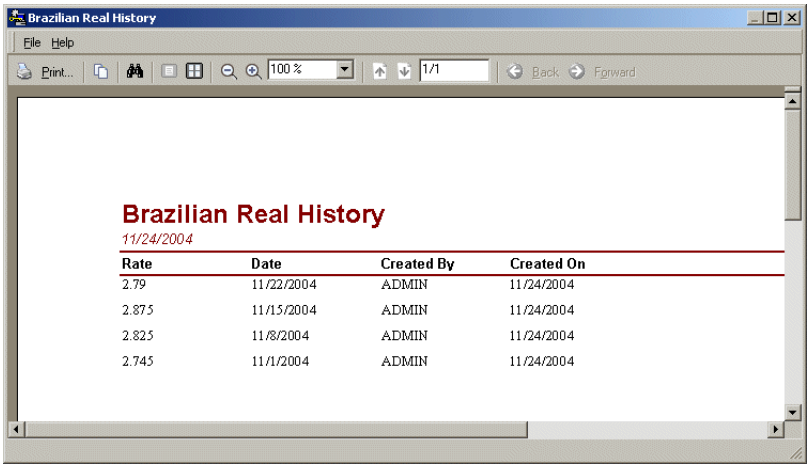
To view the exchange rate history of a currency:

1. From the Administrator menu, select Setup ➤ Local/Other Currencies ➤ Exchange Rate Table. The Exchange Rate Table opens.
2. Select a currency in the grid, then select Tools ➤ View History. The currency History window opens:



Listed is each past exchange rate for this currency, with the Rate Date each went into effect.

3 Choose File ➤ Print from the currency History menu. The Active Reports Viewer opens:



Click Print to print the report. From the Active Reports menu, you can select File ➤ Export to select a number of formats in which to export the information shown.

Deactivating a Currency

You can deactivate a currency in the Exchange Rate Table. This allows you to keep a record of currency, both in the Administrator Module and in any Requests and Payments that are already calculated in the currency.

You can edit deactivated currencies and even update their exchange rates: Payments and Requests *already calculated* in the currency will respond to these changes.

Deactivating a currency simply makes it unavailable for new calculation of Requests and Payments. Also note that if you deactivate a currency designated in your Request preferences as the default local/other currency, the preference reverts to <None> as the default.

To deactivate a currency:

1. In the Administrator, select Setup ➤ Local/Other Currencies ➤ Exchange Rate Table to open the Exchange Rate Table.
2. Highlight the currency and click the Deactivate Currency button on the toolbar. The currency is deactivated.

A currency can be reactivated at any time. Highlight a deactivated currency, and you will see that the toolbar button now reads Activate Currency. Click it to reactivate the currency.

Deleting a Currency

You can delete a currency from the Exchange Rate Table if it is not in use (i.e., if no Requests or Payments in GIFTS are calculated in the currency). Highlight the currency in the table and select File ➤ Delete from the menu. The currency is deleted.

If the currency is in use, a message opens informing you of the number of records using the currency. The message warns you that you cannot delete the currency while it is in use. The message then asks you if you would like to deactivate the currency instead. Click Yes to deactivate the currency.

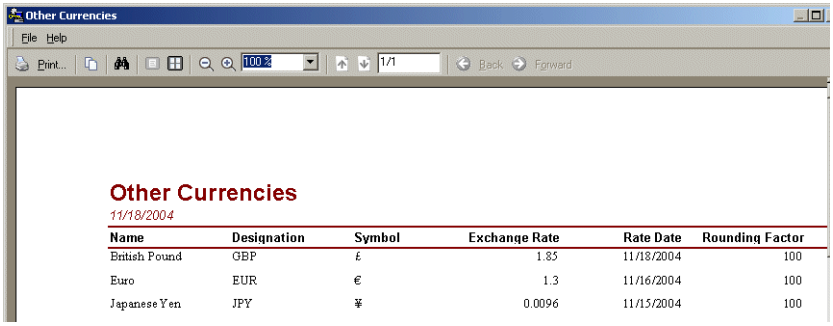
Reporting Exchange Rate Information

A simple report outlining your current exchange rates for all local/other currencies can be printed from the Exchange Rate Table. A number of standard reports found in the GIFTS Report Library also help you track changes to grants with local/other currencies specified.

Reporting Your Current Exchange Rates

You can print a report showing the details of your Exchange Rate Table:

1. In the Administrator, select Setup ➤ Local/Other Currencies ➤ Exchange Rate Table to open the Exchange Rate Table.
2. Make sure that the information in the grid is displayed as you want it to look in your report. Modify the width of the items in the grid as needed.
3. Choose File ➤ Print from the Exchange Rate Table menu. The Active Reports Viewer opens:



Name	Designation	Symbol	Exchange Rate	Rate Date	Rounding Factor
British Pound	GBP	£	1.85	11/18/2004	100
Euro	EUR	€	1.3	11/16/2004	100
Japanese Yen	JPY	¥	0.0096	11/15/2004	100

From the Active Reports Viewer, you can print the report, or export the data to a number of different file types. For more details, please see the *GIFTS User's Guide*.

Standard GIFTS Multi-Currency Reports

The GIFTS Report Library contains special reports that help track grants calculated in a local/other currency. For more information, please see *Using GIFTS Reports*.

8 Defining Correspondence Templates

As users work in GIFTS, they can generate Microsoft Word® documents or e-mail messages that merge correspondence or write-up templates with data from GIFTS. This chapter explains how to create these templates and manage them within the GIFTS Template Library.

In This Chapter

Planning Your Templates **182**
Accessing the Template Library **188**
Creating a New Template **190**
Working with E-mail Templates **196**
Working with Letter Templates **198**
Working with Letter/E-mail Templates **199**
Editing Templates **202**
Copying Templates **204**
Renaming a Template **205**
Working with Table Merge Fields **207**
Event-Specific Document Subdirectories **212**

Planning Your Templates

In the *Implementation Workbook* for the GIFTS Setup training course, you should have defined all of the correspondence and write-up templates that you need. Refer to that list as you establish your templates.

This section discusses how to choose the fields that you use for your templates and how to manage them from within GIFTS. However, the use of the mail merge fields within Microsoft Word is covered in the product documentation and is not repeated here. If you have not used Word's mail merge function, you may wish to familiarize yourself with it before continuing.

When you choose merge fields for your template, they are added to the template's *header*. The header contains the merge fields that are available for the correspondence that you generate with the template. (Since so many fields can be used, having all fields available would be cumbersome and could slow your document processing time.)

You can create new templates, edit templates, rename templates, copy templates, copy headers into new templates, and delete templates.

Attaching Printed Templates to Email Correspondence

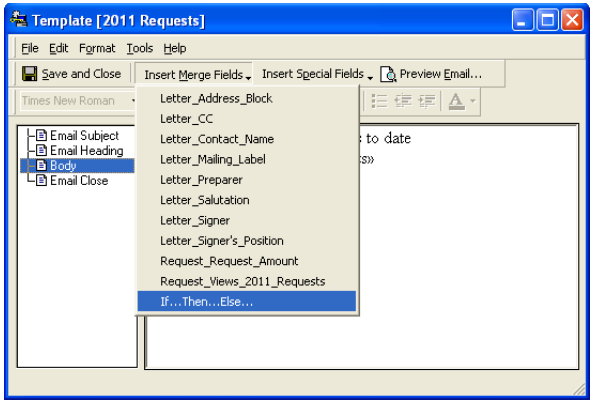
Something to keep in mind when planning your correspondence templates is that GIFTS Alta and IGAM 5 now allows you to attach secondary printed templates from the same event type to Email correspondence. An example would be sending an email acknowledgement to an applicant and then attaching a secondary form for them to fill out.

If..Then..Else Conditional Available in Templates

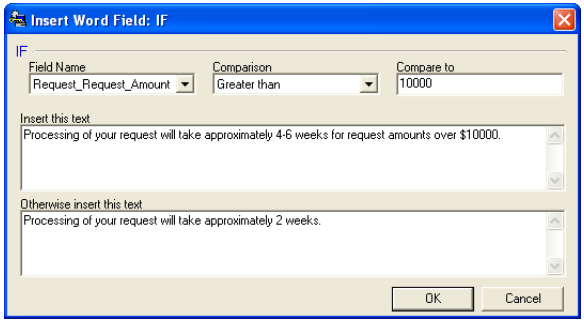
Another option available which may affect your template planning is the If..Then..Else option. This allows you to set conditional statements in your templates to be added to a correspondence based on the value of a merge field. In order to use this properly you must remember to add the merge field with the value you wish to use for comparison to the template prior to opening the IF statement window.

Example: If you normally take two weeks to process a new request up to $10000 but 4-6 weeks for any higher amount due to additional steps in processing, you could do the following:

1. Go to Setup ➤ Correspondence Templates to open the Template Library.
2. Select the Acknowledgement Letter template and click the Merge Fields button on top to open the Show Merge Fields window.
3. Select Request as the field category, Include the Request Amount field, and click OK.
4. Now click the Open Template button and go to Insert Merge Field > If...Then...Else to open the Insert IF statement window.



5. Fill in the window as shown below:



This basically says if the Request Amount is greater than $10000, add the 4-6 week statement, otherwise add the 2 week statement.

About Correspondence Events

Templates are organized by correspondence event. The event determines when the template is available to generate correspondence.

Event	Description
Activities	Activities templates merge with information about an Activity and the Contact, Organization, Request, or Payment related to it.
Affiliations	You can create Affiliations templates to merge data about Contacts' relationships with Organizations and Requests into letters and e-mail. TIP: This is especially useful when Contacts have a number of e-mail or regular addresses associated with different roles they play with different Organizations or Requests (since each Affiliation can have a different address).
Approval	For approved Requests only. Award letters, terms and conditions, grant Payment correspondence, and so forth would fall into this category. Fields pertaining to recipients and grants, such the Grant Amount and Coding Sheet information, are available.
Contacts	Contacts templates merge with information about Contacts and their Primary Organization, and are useful in conjunction with GIFTS Mailing List functions to produce mass mailings.
Declination	For declined Requests only. Rejection correspondence would fall into this category. Fields pertaining to recipients and declinations, such the Declination Reason and Coding Sheet information, are available.
Organizations	Include information regarding the Organization, its Tax Status, Coding Sheet information, and so forth. Organization templates can summarize their history as a recipient, including the total number of grants awarded and the total amount granted.
Payments	Payment templates can merge Payment information, including information about the payee, the Request for which the Payment is being made, quid pro quo, and the check or wire transfer used to make the Payment. They also can be used to make check requisition forms for manual processing.

Event	Description
Pending	For pending Requests only. Acknowledgment letters, requests for further information, and similar correspondence would fall into this category. Fields pertaining to recipients and proposals, such the Request Date and Coding Sheet information, are available.
Requirements	Requirements templates merge with information about a Requirement and the Contact, Organization, Request, or Payment related to it.
Write-up	Used to print a comprehensive summary of a single Request. Write-ups are generally used to print summaries of proposals for review at board or committee meetings. You can also create write-ups for use with grants.

If you have purchased additional GIFTS modules—such as Employee GIFTS or the Reviewers Module—additional correspondence events are available in the Template Library.

Note: By default, letters that are generated from the templates are saved in a single document directory that you specify in the External Preferences. If you want to organize your document files by event, you can save them to a document subdirectory that is specific to the event. For details, see "Event-Specific Document Subdirectories" on page 212.

About E-mail and Letter Templates

You can create three types of correspondence templates that merge information from GIFTS:

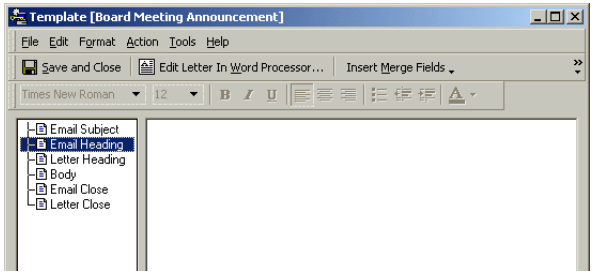
Template	Description
E-mail	Generates e-mail messages only. Use this template type if you want to correspond by e-mail only—to cut down on paper consumption, for example.
Letter	Generates printed letters only. Use this template type if you want to correspond by printed letter only. For example, your organization might want to generate all correspondence through Word.

Template	Description
Letters and E-mails	If the recipient's e-mail address is in the GIFTS database, this template generates an e-mail message; otherwise it generates a printed letter.

Note: If you are upgrading GIFTS from Version 4.0 or earlier, your templates created in those versions will generate only printed letters in GIFTS 6.2.1.

About Letter/E-mail Templates

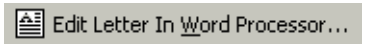
Letter/E-mail (or Automatic) templates are really two templates in one. If you use this template to generate correspondence, applicants that provide an e-mail address receive their correspondence by e-mail. Otherwise, GIFTS prints a letter.



For details on creating and editing Letter/E-mail templates, see "Working with Letter/E-mail Templates" on page 199.

About Editing and Synchronizing Letter/E-mail Templates

If you are working with a Letter/E-mail template, and you want to customize the appearance of your letters by taking advantage of Word's advanced formatting features, you can edit the "letter" portions of the template in Word:



Once you edit a Letter/E-mail template in Word, the template is split into two templates—an e-mail template and a separate letter template; the templates are no longer "synchronized."

The template still functions in the same manner—that is, it prints correspondence if the applicant does not provide an e-mail address; otherwise it generates e-mail correspondence. However, the text that you see in the Template Viewer may not accurately reflect the text of the printed letters that are generated by the template.

Example: You create Body text for a Letter/E-mail template and then edit the letter template Body in Word—to add customized fonts or paragraph formatting, for example. The e-mail text and the letter text no longer match; they are not synchronized. The texts of the e-mail and printed correspondence that you generate with the template may differ.

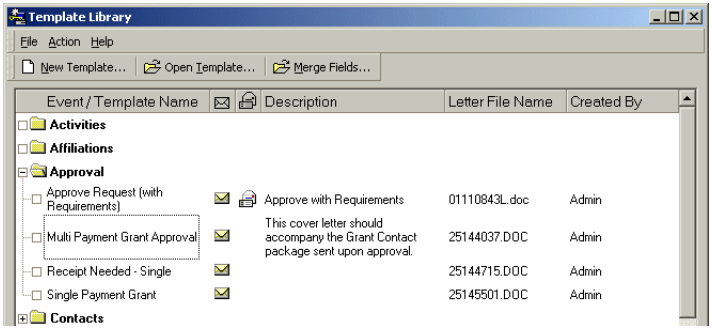
When you edit the letter template in Word, you must continue to edit the letter portions in the word processor. (You can still edit the e-mail sections as described in "Working with E-mail Templates" on page 196).

If you want to revert back to the original combination template—and edit the letter and e-mail portions in the Template Viewer—you can synchronize the letter and e-mail templates. From the Template Viewer menu, select Action ➤ Synchronize Letter Template.

Note that when you synchronize the templates, the template that you edited in Word is deleted. Changes that you made in the word processor are *not* transferred back to the Letter/E-mail template. The letter portions of the template are restored to their original state before you edited them in the word processor.

Accessing the Template Library

Correspondence templates are maintained in the Template Library. To access the Template Library, choose Setup ➤ Correspondence Templates from the Administrator menu. The Template Library opens:



The following information is displayed for the templates in the Library.

Column	Description
Event/Template Name	The Template Name and the event with which it is associated.
Letter?	If this icon is displayed, the template can be used to generate printed letters.
E-mail?	If this icon is displayed, the template can be used to generate e-mail correspondence.
Description	A short description of the template. **Example:**"Rejection E-mail for non-charitable Organizations."
Letter File	If the template is for generating printed letters, the template's document file name.
Created By	The staff member who created the template.

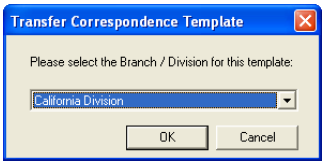
The Template Library displays templates for individual events much in the same manner that Windows Explorer™ displays the directories and files on

your computer. To view the templates for an event, expand them by clicking on the box to the left of the event.

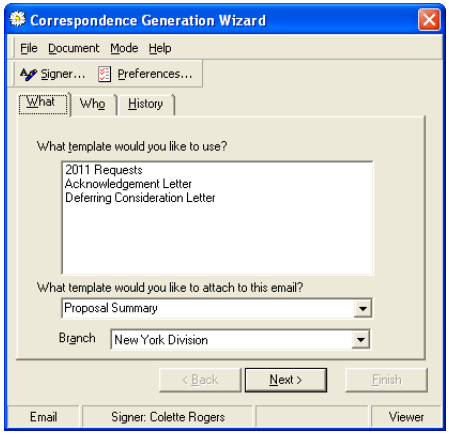
Branch/Division Assignment to Templates

If you have Branch Security enabled, when creating a new Correspondence Template, there will be a Branch/Division field that will allow you to assign the template to a specific branch/division. The default is All.

To assign a Branch/Division to an existing template, right-click on a template and select Edit Branch/Division.



When sending new correspondence, GIFTS users will be able to filter the available templates list by Branch/Division on the What tab.



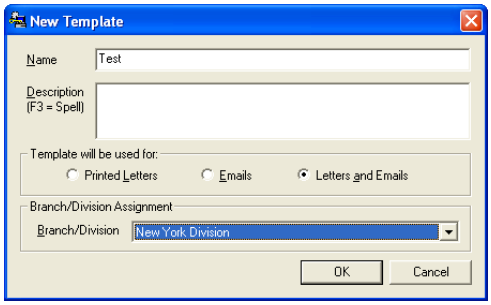
Note: This feature is purely for filtering purposes. It does not prevent the GIFTS user from changing the Branch and seeing templates they may not have access to.

Creating a New Template

1 From the Administrator menu, choose Setup ➤ Correspondence Templates. The Template Library opens.

2 Highlight the event for the template that you wish to create.

3 Click New Template. The New Template window opens:



4 Enter a Template Name and description. Keep in mind that both should be clear to other users who will use the template.

5 Select whether the template will be used to generate printed letters, e-mail messages, or Letters/E-mails (Automatic) correspondence.

Note: If you are creating this template for the Write-up event, you do not need to select a template type. Write-up templates are used to generate printed documents only.

6 If you have Branch Security enabled, select the Branch/Division to assign this new template.

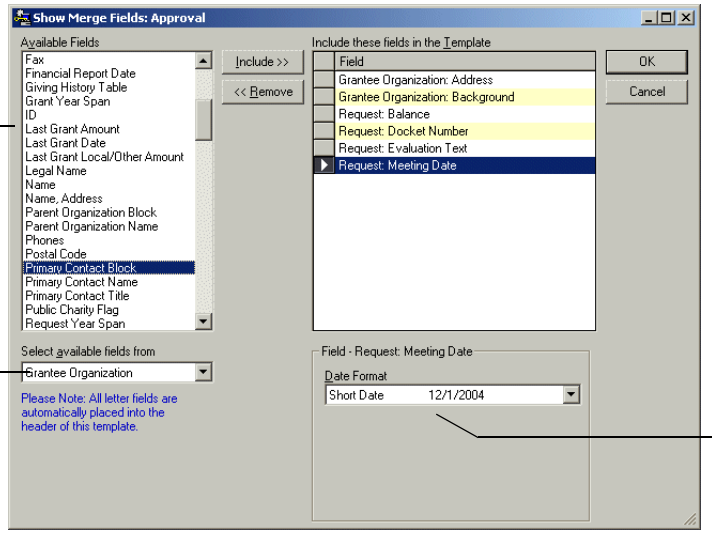
Note: This feature is purely for filtering purposes. It does not prevent the GIFTS user from changing the Branch and seeing templates they may not have access to.

7 Click OK. The Show Merge Fields window opens:

The merge fields available for the selected category (below this list) are listed here. Select the merge fields you want to include and click Include.

You can highlight a merge field in the grid on the right and click Remove to remove it.

The Category is selected here. Fields are available from related records. For example, this is an approved Request template; you can merge data from the grantee Organization, the Request Primary Contact, and other affiliated records.



Formatting options specific to the field type selected in the grid appear here. In this example, you can choose how you want the Meeting Date formatted when it is merged into the correspondence.

Important: Microsoft Word templates can accommodate no more than 63 merge fields. GIFTS makes eight standard merge fields available in every document template, allowing you to add an additional 55 fields.

8 Choose a category of information from the "Select available fields from" drop-down list. The "Available Fields" list is populated with the merge fields for the category you have selected.

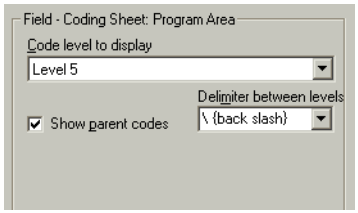
9 Highlight a merge field and click Include to add it to the template. It is added to the list of included fields on the right side of the form. Note that the field name is preceded by the name of the category. For instance, "Grantee Organization: Address Block."

10 For each merge field you add to the template, there may be display options to configure.

❖ For details on the display options available for date, currency, number, and coding sheet merge fields, please see "Merge Field Display Options" on page 192.

- For information on table merge fields and the options available for formatting the tables they generate, please see "Working with Table Merge Fields" on page 207.

  For example, if you add "Coding Sheet: Program Area" to your header, you can define the following display options:



  If you choose *three* coding levels and a *comma* as the delimiter (a delimiter is simply a character used to separate values), the Program Area of a Request might be displayed as Education, College & Universities, Scholarships. If you chose to display *two* levels and a *semicolon* as a delimiter, the same Request's Program Area would be displayed as Education;Colleges & Universities.

11 When you have included the merge fields that you want to use in the template, click OK. The new template is displayed.

- If you are creating an e-mail template, please proceed to "Working with E-mail Templates" on page 196.
- If you are creating a letter template in Microsoft Word, please proceed to "Working with Letter Templates" on page 198.
- If you are creating a letter/e-mail template, please proceed to "Working with Letter/E-mail Templates" on page 199.

Merge Field Display Options

Note: For information on table merge fields and the options available for formatting the tables they generate, please see "Working with Table Merge Fields" on page 207.

Date Field Options

Option	Description
Date Format	Indicates the format for the date value in the merge field. Select from: ❖ Short Date (e.g., 4/29/2011) ❖ Long Date (e.g., Thursday, April 29, 2011) ❖ Month, Year (e.g., April, 2011) ❖ Month Day, Year (e.g., April 29, 2011) ❖ Day Month Year (e.g., 29 April 2011)

Currency Field Options

Option	Description
Don't display currency symbol	Indicates whether or not a currency symbol should be displayed along with the value in the merge field. The currency symbol is determined by your Windows Regional Options.
Decimal places	Indicates the number of decimal places (0 – 4) to display for the value in the merge field. If set to "0" the value is rounded to the nearest whole number. There are two exceptions: ❖ If the global preference "Don't Display Decimal Places" is selected, it will override this merge field option. ❖ Merge fields based on custom calculated fields will rely on the field definitions for decimal place settings.
Show amount in words	Indicates whether the value in the merge field should be rendered in text rather than numerically.
Include grouping character	Indicates whether or not a grouping character (e.g., the comma in 1,000) should be used with the value in the merge field. The grouping character is determined by your Windows Regional Options.

Number Field Options

Option	Description
Decimal places	Indicates the number of decimal places (0 – 4) to display for the value in the merge field. If set to "0" the value is rounded to the nearest whole number. There are two exceptions: ❖ If the global preference "Don't Display Decimal Places" is selected, it will override this merge field option. ❖ Merge fields based on custom calculated fields will rely on the field definitions for decimal place settings.
Include grouping character	Indicates whether or not a grouping character (e.g., the comma in 1,000) should be used with the value in the merge field. The grouping character is determined by your Windows Regional Options.

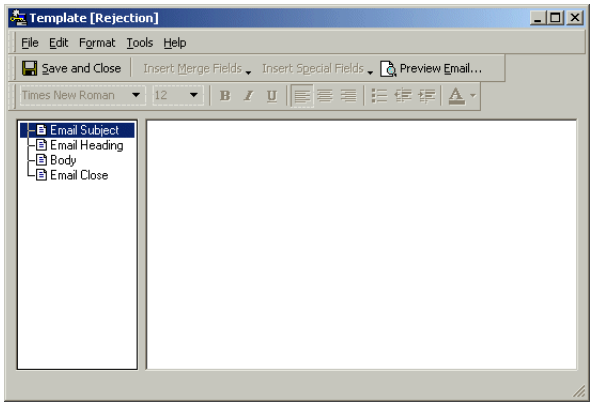
Coding Sheet Field Options

Option	Description
Code level to display	Indicates the code level to be displayed. The available choices (Level 1 – Level 5) will depend on the number of levels allowed for the Code Table.
Show parent codes	Select to display the full code hierarchy (e.g., Arts & Culture\Dance\Ballet) rather than just the code level indicated in "Code level to display" option.

Option	Description
Delimiter between levels	Indicates the delimiter to use between individual levels of a code. Enter your own character, or select from the following choices: ❖ {carriage return} ❖ {tab} ❖ {space} ❖ , ❖ / ❖ \ ❖ : ❖ ;
Primary/Secondary codes	Indicates which code is displayed. The available choices are: ❖ Primary only ❖ Secondary only ❖ Primary and Secondary
Delimiter between codes	Indicates the delimiter to use between multiple codes. *(See "Delimiter between levels" for available choices.)*

Working with E-mail Templates

If a template will be used to generate e-mail, the Template Viewer is displayed:



The e-mail template is divided into four sections:

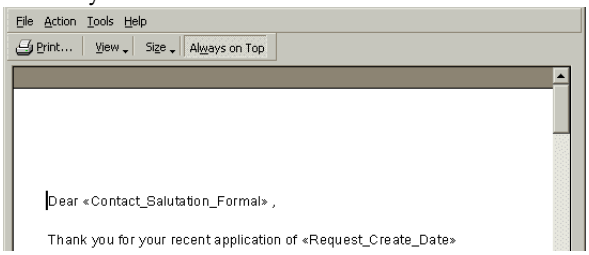
Section	Description
Subject	Appears in the Subject section of the message.
Heading	Appears at the top of the message. **Example:** The applicant's name and title.
Body	This might include a salutation and the Contact's name followed by the text of the e-mail message.
Close	Appears at the end of the e-mail message. **Example:** A closing and the signer's name, title, and e-mail address.

1 Select a section and add merge fields or text. To add merge fields, click Insert Merge Fields and select the fields from the list.

Important: To ensure that your e-mail messages are compatible with the recipient's e-mail program, they are created in the Plain Text Format

only. Text formatting options in the E-mail Template Viewer toolbar are disabled.

2 When you are finished, skip to the next step or click Preview E-mail to review your work in the Document Viewer:



In the Document Viewer, you can:

- View the e-mail template in Draft, Normal, or Preview mode.
- Control the size of the template in the Viewer.
- Specify that the Viewer is always displayed on top of other windows on your desktop.

When you are finished reviewing the template, choose File ➤ Close from the Document Viewer toolbar. You are returned to the Template Viewer.

3 From the Template Viewer, click Save and Close to save the template. (To keep a printed copy for your records, choose File ➤ Print E-mail.) You are returned to the Template Library.

The template is listed below the event with which you are working. The e-mail icon indicates the template can be used for generating e-mail correspondence.

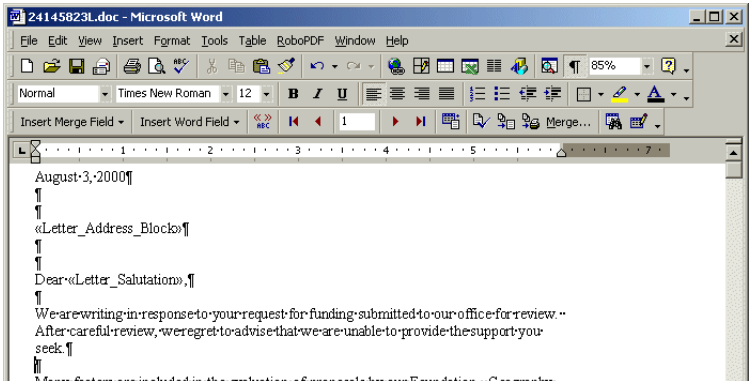
Tip: GIFTS does not automatically place carriage returns between the Subject, Heading, Body, and Close sections. If you want a blank line between these sections in the merged e-mail message, be sure that you begin or end each section with a carriage return.

Working with Letter Templates

If the template will be used to generate printed letters, GIFTS opens it in Microsoft Word.

To create a letter template:

1 Use Word's mail merge feature to add merged fields and text to the template. For instance, here is a Declination letter template in Microsoft Word:



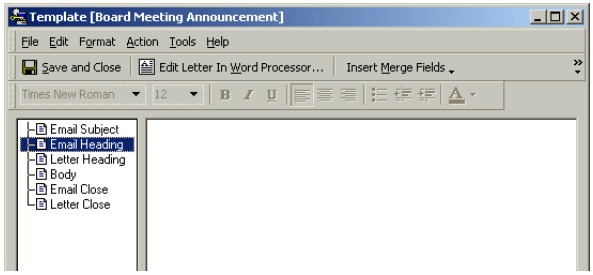
2 When you are finished defining the template, save the word processor file and close it. GIFTS uses a number as the filename of the document (such as 24145823L.DOC) and links it to the Template Name you specified earlier. (When you use or edit the template later, you can identify it by its name and won't need to know its filename.) Be sure not to change the filename of the document so that its link to GIFTS is maintained.

3 Return to the Template Viewer (you do not have to close Word). The template is displayed in the Template Library below the event with which you are working. The letter icon indicates the template can be used for generating printed correspondence.

Working with Letter/E-mail Templates

Before You Begin: Review "About Letter/E-mail Templates" on page 186 and "About Editing and Synchronizing Letter/E-mail Templates" on page 186.

If the template will be used to generate e-mail when the recipient's e-mail address is available, and printed letters when no e-mail address is available, the Template Viewer opens:



The Letter/E-mail template is divided into six sections:

Section	Description
E-mail Subject	When the template is used to generate an e-mail message, this section appears in the message's Subject field.
E-mail Heading	When the template is used to generate an e-mail message, this section appears at the top of the message. **Example:** The applicant's name.
Letter Heading	When the template is used to generate a printed letter, this section appears at the top of the letter. **Example:** The applicant's name and address block.
Body	The body of the e-mail and letter. This might include a salutation and the applicant contact's name followed by the text of the correspondence. The Body is used for both e-mail and printed correspondence.

Section	Description
E-mail Close	When the template is used to send an e-mail message, this section appears at the end of the message. **Example:** A closing and the signer's name, title, and e-mail address.
Letter Close	When the template is used to generate a printed letter, this section appears at the end of the letter. **Example:** A closing, the signer's name and title, and space for the signature.

Note: If you are working with an existing template that was previously edited in Word, the "letter" sections of the template are not displayed. You can edit the letter sections separately in Word, or you can synchronize them with the Letter/E-mail template. For details, please see "About Editing and Synchronizing Letter/E-mail Templates" on page 186.

To add merge fields or text to the combination Letter/E-mail document:

1. Select a section and add merge fields or text. To add merge fields, click Insert Merge Fields and select the fields from the list.

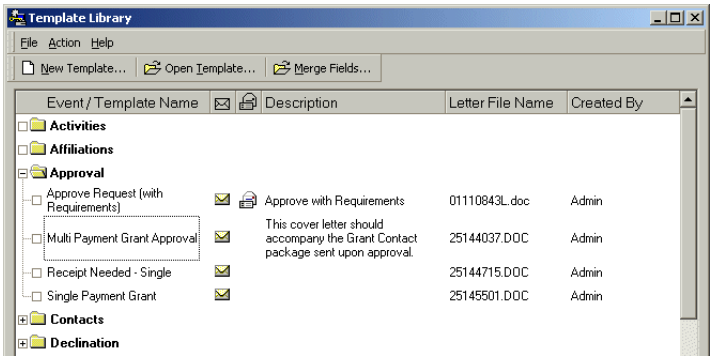
   Tip: GIFTS does not automatically place carriage returns between the Subject, Heading, Body, and Close sections. If you want a blank line between these sections in the merged e-mail message, be sure that you begin or end each section with a carriage return.

   Note that you can also add fields and text to the letter sections of the template by editing them in Microsoft Word. To do this, click Edit Letter in Word Processor and add merge fields and text as described in "Working with Letter Templates" on page 198.

2. When you are finished, click Save and Close to save the template or click Print Preview to review the e-mail template or the letter template.

   To keep a printed copy of the template for your records, choose File ➤ Print. You can print the e-mail template or the letter template.

3 When you have reviewed and saved your work, you are returned to the Template Library:



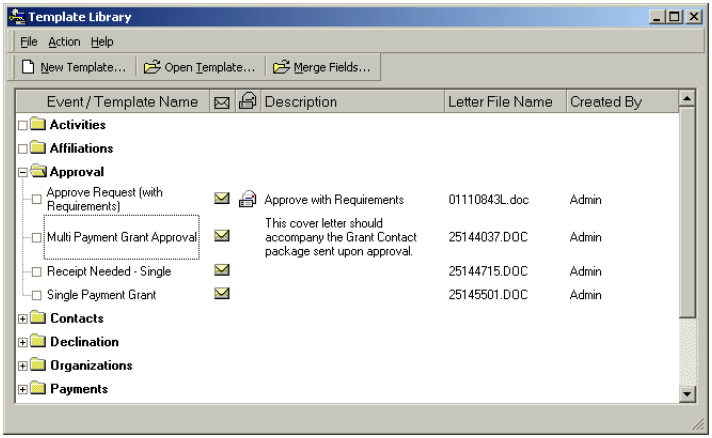
The template is listed below the event with which you are working. The e-mail and letter icons indicate the template can be used for generating both e-mail and printed correspondence.

Editing Templates

Note: You cannot edit the headers of templates that were created prior to GIFTS v3.5.

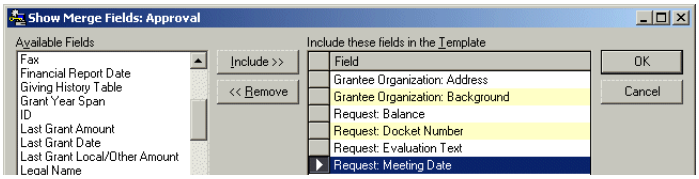
From the Template Library, you can open letter templates to edit them and, if necessary, add merge fields to the template's header.

1 From the Administrator menu, choose Setup ➤ Correspondence Templates. The Template Library opens. If the template is not displayed in the Library, expand the template's event by clicking the box to the left of the event. The templates for that event are displayed:



2 Highlight the template you wish to edit.

- If you do not need to add merge fields to the template's header, skip to step 3.
- If you need to add merge fields to the header, click Merge Fields. You are prompted to choose the merge fields that you wish to add to the template:



When you have added the fields that you need, click OK. You are returned to the Template Library.

3 Click Open Template. The template opens.

- If you are editing an E-mail template, please proceed to "Working with E-mail Templates" on page 196.
- If you are editing a letter template in Microsoft Word, please proceed to "Working with Letter Templates" on page 198.
- If you are editing a Letter/E-mail template, please proceed to "Working with Letter/E-mail Templates" on page 199.

Important: You can cut and paste text between your templates, but you should avoid pasting merge fields between letters unless you are sure that you set up the template to use the merge field that you are copying. For instance, if you copy the Project Title field to a template that does not use that field, an error results.

Copying Templates

If you want to create a template that is similar to an existing template, you can copy it. If you want to create a new template with the same merge fields as an existing template—but you want to enter new text for the template—you can copy the header from an existing template.

To copy a template and/or header:

1. From the Template Library, highlight the template you want to copy and choose File ➤ Save As from the Main menu.

   You are prompted to specify the type of new template you want, and whether you want to copy the header or both the header and the template. Note that when you copy a template, the copy must be the same template type as the original.

If the original template generates:	You can save the copy as...
E-mail	an e-mail template -or- the e-mail sections of an letter/e-mail template.
Letters	a letter template.
E-mail and Letters	a letter/e-mail template

   If you choose to copy the Header Only, the merge fields from the original template are copied to the new template. If you select Header and Text, both the merge fields and the text of the original template are copied. In either case, you can subsequently add merge fields and edit the template's text.

2. Enter a name and description for the new template.

   Note: If you do not enter a name, the new template is named "Copy of..." followed by the original template name. For example, "Rejection E-mail" would be copied as "Copy of Rejection E-mail."

3. When you are finished, click OK. The new template is listed in the Template Library.

Renaming a Template

To rename a template:

1. From the Template Library main menu, choose File ➤ Rename. You can enter a name and description for the renamed template.

   Note: If you do not enter a name, the template is renamed "Copy of..." followed by the original template name. For example, a template titled "Acknowledgement.letter" would be renamed "Copy of Acknowledgement.letter."

2. When you are finished, click OK. The template is renamed.

Deleting a Template

Once a template is deleted, it is no longer available from the Template Library. Merged letters generated from the template are not deleted when you delete the template.

1. From the Template Library, highlight the template you wish to delete and click File ➤ Delete. You are prompted to confirm that you wish to delete the template.
2. Click Yes. The template is deleted.

Working with Table Merge Fields

The term "table merge fields" refers to merge fields that create tables of GIFTS data in your correspondence. There are a number of standard table merge fields built into the system, but you may also create and save Workspace Views to use as table merge fields.

For details on adding merge fields to a correspondence template, please see step 5 in "Creating a New Template" on page 190.

Table Merge Field Options

Most standard table merge fields and all table merge fields created from saved Views have the same options for manipulating the appearance and content of the table.

Tip: Table merge fields created from saved Views will ignore the text formatting (font, size, color, etc.) of their corresponding Views, but will retain any column-specific formatting (alignment, indentation, delimiters, etc.). Formatting should be adjusted within the saved View before it is applied as a table merge field, since table merge fields are limited to the standard options listed below.

All table merge fields offer the following standard options:

Option	Description
Include Column Headings	The generated table will include column headings. The column headings are drawn from GIFTS field names.

Option	Description
Autofit Column Width to Contents	This option is available for Word templates only. If you select this option, the generated table alters the column width to fit more closely around the column entries. Each column will be as narrow as it can be while still fitting around the widest entry in the column. If you do not select this option, each column in the generated table will be the same width. This might be wider than you need for dollar amounts, for example, but not wide enough for text fields.
Use Table Borders	This option indicates whether the table will appear with a thin border line around each cell in the final merged correspondence.

Note: There are two table merge fields with additional options, which are detailed in "Matches Listing Table Merge Field" on page 209 and "Giving History Table Merge Field" on page 210.

Adding GIFTS Workspace Views

Views from GIFTS Workspace may be added to a correspondence template the same way as any standard merge field. The View categories which appear in the "Select available fields from" drop-down list will depend on the type of template you are working on and if the record type has any saved Views.

The available View categories in Pending, Approval, Declination, and Write-Up templates include:

- Request Views
- Payment Views
- Activity Views
- Requirement Views
- Affiliation Views

After choosing a "Views" category, the saved Views for the record type can be selected from the "Available Fields" list box and added to the template.

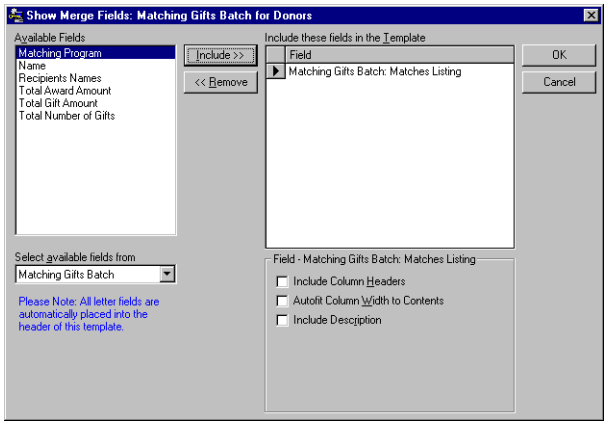
Caution: Once a View is added to a correspondence template as a table merge field, the merge field will not be affected by subsequent changes to the saved View. If changes are made to the View, you will need to remove the table merge field from the template and then add it again.

Important: Private saved Views used as merge fields in templates *do not* limit the use of the template to the user who created the saved Views. All users who have permissions to create correspondence from the template will be able to do so, whether or not they have access to the saved Views used for merge fields.

Matches Listing Table Merge Field

Note: The Matches Listing table merge field generates a table of data for Matching GIFTS and Volunteer GIFTS correspondence. It is available only to users of these optional GIFTS modules.

The Matches Listing table merge field generates a table of employee gifts matched by the employees' Organizations. When you add this merge field to correspondence, the table merge field standard option(s) are available. In addition, a third option may be chosen:

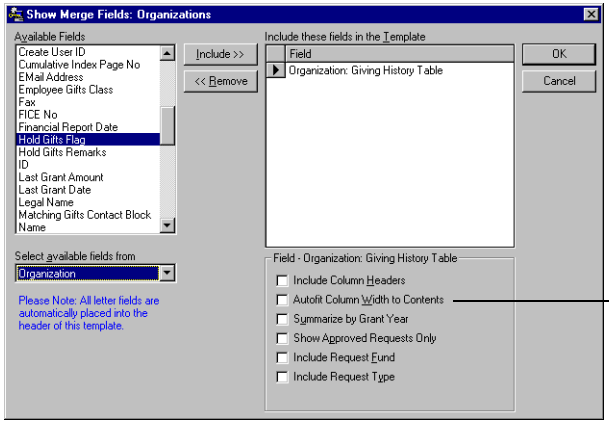


If you select the Include Description check box, another column will be added to the table. This column will contain the description of each matching gift, as it appears in the Description field of the matching gift record in GIFTS.

Giving History Table Merge Field

The Giving History Table merge field can be found under the Requests category and lists previous giving to the grantee Organization to whom you are sending correspondence.

When you add this table merge field to a correspondence template, you have several options to determine what data appears in the table. When you choose this merge field, the options appear as shown below:



As noted before, this option is only available to Word users.

If you do not specify otherwise, the giving history table will list individual Requests and grants line by line. This much detail may be unnecessary or unwieldy; you can choose a year-by-year summary instead. At the same

time, if you prefer to list Requests, other options allow you to choose which ones:

Option	Description
Include Column Headers	The two standard table merge field options (for Word users)
Autofit Column Width to Contents	
Summarize by Grant Year	Check this box if you want to limit the table to a year-by-year summary of giving history. Individual Request and grants will not be listed. For each year, the total amount of grant money awarded and the number of grants given are listed. If you check this check box, the last three options become unavailable.
Show Approved Requests Only	If you want the giving history table to list Requests line by line, these three options will help you determine which details are listed: Select the “Show Approved Requests Only” check box to limit the list to approved Requests only. Select the “Include Request Fund” check box to add a column showing the Fund from which the grant was drawn. Select the “Include Request Type” check box to add a column showing the Request type (such as ‘Cash Grant’ or ‘In-Kind’).
Include Request Fund	
Include Request Type	

Event-Specific Document Subdirectories

By default, document files for your printed letters are saved in a single Document directory that you specify in the External Preferences. For example, you can set up GIFTS to save document files to the directory G:\GIFTS\DOCUMENTS.

If you want to organize your documents by correspondence event, you can create a document subdirectory and direct GIFTS to save documents generated for the event to the subdirectory. For example, you can create the G:\GIFTS\DOCUMENTS\APPROVAL subdirectory for your Approval documents.

Before You Begin: Use Windows to create the subdirectories on your system. For example, if you currently maintain your document files in G:\GIFTS\DOCUMENTS, you might create document subdirectories like:

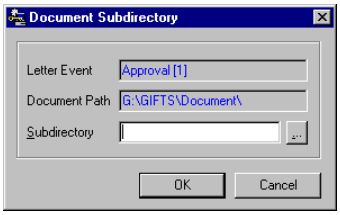
G:\GIFTS\DOCUMENTS\APPROVAL
G:\GIFTS\DOCUMENTS\DECLINATION
G:\GIFTS\DOCUMENTS\WRITEUP

Once you create your subdirectories, you can direct GIFTS to save documents for a specific event to the appropriate subdirectory. In addition, you can copy existing documents for the event to the new subdirectory.

To specify a document subdirectory for an event:

1. From the Administrator menu, choose Setup ➤ Correspondence Templates. The Template Library opens.
2. Highlight the event.

3 From the Library menu, choose File ➤ Document Subdirectory. GIFTS displays the document event and the current document file path:



Define the subdirectory to which files for the event will be saved. You can either type the name of the subdirectory or click the search button.

4 When you are finished, click OK. If there are any documents for the event in the current document directory, you are asked if you want to transfer them to the new subdirectory. Click Yes to transfer the documents, or No to leave existing documents in their current directory.

A process log list the results. To keep a copy of the log for your records, click Print or Save As.

9 Managing GIFTS Reports

This chapter describes how to manage the library of reports available to your users in the GIFTS Report Library.

In This Chapter

About the Report Library **216**
Managing the Report Library **218**
Ad Hoc Reports in the Report Library **224**
Global Report Formatting for Ad Hoc Reports **225**

About the Report Library

The GIFTS Report Library refers to the collection of reports designed to help your users extract important data into usable formats. Reports are organized into specific categories, based on the information included in the report and the search criteria applied.

Reports included fall into two groups, depending on their origins and the methods for working with them:

- **Standard Reports**—When you first install GIFTS, the Report Library contains a large number of reports that have been designed by MicroEdge to handle the data reporting needs of most grant makers. These reports are based on templates (.rpt files) created through Crystal Reports.

  Many of these reports may be run "as is," while some have additional options that may be applied at runtime. If the initial set of reports is not sufficient for your reporting needs, you may want to add new standard reports to the library. You can create a new standard report by designing a new template in Crystal Reports, or by attaching a saved search to an existing report.

- **Saved Workspace Reports**—Saved Workspace reports are unique in that they are created and added to the Report Library through the GIFTS Workspace, rather than the GIFTS Administrator. These 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.

  Note: Information on managing saved Workspace reports is included in this chapter. However, details on creating ad hoc reports and saving them are discussed in the *GIFTS User's Guide*.

Note: Before working with the Report Library, you should take some time to browse through the samples of standard reports in *Using GIFTS Reports*. You can then determine which standard reports are most useful for your organization, and what other reports you will need to create to meet your reporting needs.

Report Template Files

Standard reports in GIFTS are based on templates (.rpt files) designed in Crystal Reports. The report templates are located in the directory identified as the "report path" in the External Preferences. The report templates are usually stored in your main GIFTS directory.

Managing the Report Library

An important part of maintaining the effectiveness of your GIFTS system lies in the management of your Report Library. This section provides information on performing important administrative tasks.

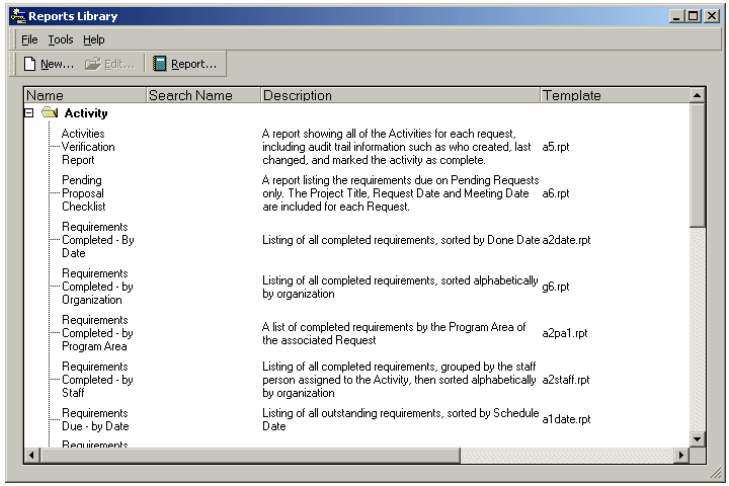
Adding a Standard Report

If your users frequently specify the same search criteria for a standard report, you can easily address this need. Simply create a new standard report by attaching a saved search to the appropriate report template. Your users can quickly run the new report with the search criteria already applied.

Example: The Report Library includes an Alpha List of Grantee Organizations report that lists all Organizations in the GIFTS database that have received funding. The template for this report is o1.rpt. You can add an Alpha List of Arts Grantees report to your Report Library by attaching a saved search for Organizations coded as "Arts & Culture" to the o1.rpt template.

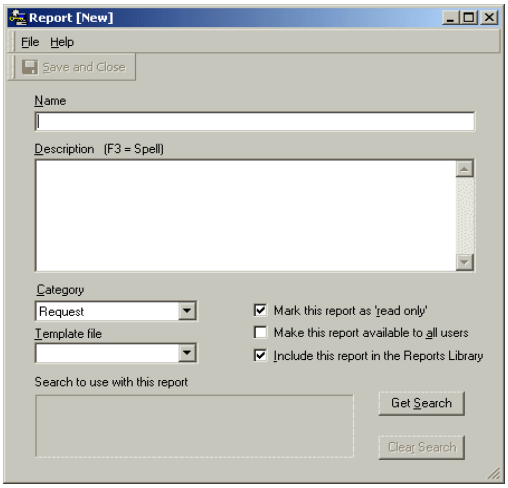
To create a new standard report for inclusion in the Report Library:

1 From the Administrator menu, choose Setup ➤ Reporting ➤ Report Library. The Report Library opens:



2 Find the report file which you intend to use as a basis for your new report. Note the title and description of this report, as well as the filename of its report template (such as o1.rpt). In the next step, you will need to know the name of the template file.

Click New. The Create/Edit Report form opens:

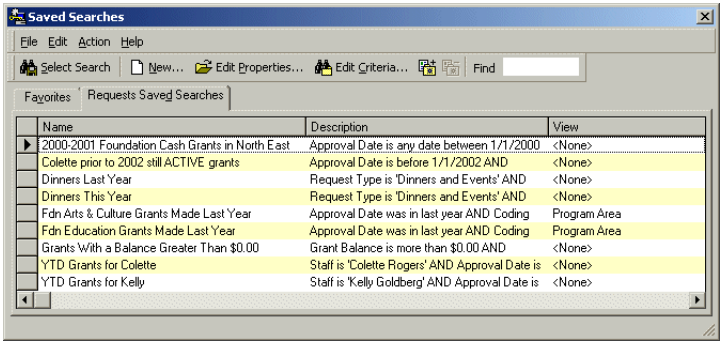


3 Configure the following options for the new report:

Option	Description
Name	The name of the report, which can be modified later, if necessary.
Description	A description of the report's usage and the information it contains. This information can be modified to make the use of the report clearer to users.
Category	Reports are designed to fit into specific categories, based on the information included in the report and the available search criteria. You should select the same category as the original report. Important: If you choose a different category than the original report, users may not have access to the Quick Find or Advanced search criteria they need, or errors may occur.
Template File	The template file for the report. Select the template file used by the original report.
Mark this report as "Read Only"	If this option is enabled, users can run the report from GIFTS, but they cannot modify its titles or the search criteria.

Option	Description
Make this report available to all users	If this option is disabled, only the user who added the report to the Report Library can access it in GIFTS. This user's name is displayed in the Created column of the Report Library listing.
Include this report in the Report Library	If this option is disabled, the report will be hidden from all users. This does not delete the report from the system or the Report Library; it simply hides the report in the Reports view. You can restore the report at any time by enabling this option. NOTE: This option is for template reports only; it is not available for saved Workspace reports.
Search to use with this report	This field displays the name of the saved search attached to the report. At run time, users can add additional criteria. To attach a saved search to a report, see step 4.

4 Click Get Search. The Saved Searches form opens:



5 Choose a saved search and click Select Search.

For more information about working with saved searches, please refer to the *GIFTS User's Guide*.

6 Click Save and Close to exit and save your new report. The new report is added to the Report Library under the category you selected.

Editing a Report's Properties

General properties of each report in your Report Library—including saved Workspace reports—may be edited through the Administrator Module. If you want to edit the contents and/or formatting of a saved Workspace

report, you must do so in GIFTS. For details on editing saved Workspace reports, refer to the reporting chapter in the *GIFTS User's Guide*.

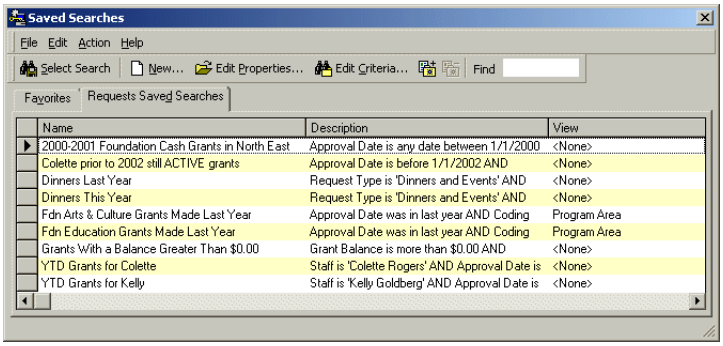
Tip: Although you can alter the properties of the standard reports that were installed with GIFTS, it may be better to leave them untouched and create new reports based on the same templates. This way, you can still run the original reports.

1. From the Administrator menu, choose Setup ➤ Reporting ➤ Report Library. The Report Library opens.
2. Highlight the report and click Edit. The Create/Edit Report form opens:
3. The following options are available for configuring the report:

Option	Description
Name	The name of the report that appears in the Reports Library.
Description	A description of the report's usage and the information it contains. This description also appears in the Reports Library.
Category	Reports are designed to fit into specific categories, based on the information included in the report and the available search criteria. Note: This option is read-only for all reports.
Template File	The template (.rpt file) that the report is based on. Note: This option is hidden for saved Workspace reports.
Type	Indicates whether the saved Workspace report is a detail report, a summary report, or a top N report. For details on each type of report, refer to the *GIFTS User's Guide*. Note: This option is hidden for standard reports and read-only for saved Workspace reports.
Mark this report as "Read Only"	If this option is enabled, users can run the report from GIFTS, but they cannot modify its title or the search criteria.
Make this report available to all users	If this option is disabled, only the user who added the report to the Report Library can access it in GIFTS. This user's name is displayed in the Created column of the Report Library listing.

Option	Description
Include this report in the Report Library	If this option is disabled, the report will be hidden from all users. This does not delete the report from the system or the Report Library; it simply hides the report in the Reports view. You can restore the report at any time by enabling this option.
Search to use with this report	This field displays information about the search attached to the report. At run time, users can add additional criteria and/or remove the criteria that you've attached. ❖ Standard reports—the name of the saved search is displayed. ❖ Saved Workspace reports—if a saved search is attached to the report, the search name is displayed, followed by the specific search criteria. To attach a saved search to a report, see step 4.

4 To remove the search that is currently attached to the report, click Clear Search in the toolbar. To attach a search to the report, or to change the attached search, click Get Search. The Saved Searches form opens:



5 Choose a saved search and click Select Search.

For more information about working with saved searches, please refer to the *GIFTS User's Guide*.

6 Click Save and Close to exit and save your changes to the report.

Removing a Report

In most cases, it is better to exclude a report from the Reports view rather than delete the report from the system. This way, you can always restore a report if a need for it arises in the future. However, if there is clearly no need for a report, or a report has been added incorrectly, you can remove it. (Certain reports cannot be deleted.)

Tip: If you remove or hide all reports from a category, the folder for that category will be hidden in the Report Library. The folder will be reinstated automatically once at least one report has been added to it.

Please be advised that this option does not remove the report template (.rpt file) from your computer or network. If you wish to delete the .rpt file itself, you must do so from Microsoft Windows.

To remove a report from the Report Library:

1. From the Administrator menu, choose Setup ➤ Reporting ➤ Report Library. The Report Library opens.
2. Highlight the report and choose File ➤ Delete from the Reports menu. You are prompted to confirm that you want to remove the report.
3. Click Yes. The report is removed from your Report Library.

Ad Hoc Reports in the Report Library

GIFTS users can now save ad hoc reports created in the GIFTS Workspace to the Report Library. (Details on creating and saving ad hoc reports can be found in the *GIFTS User's Guide*.) There are two things GIFTS administrators should be aware of when setting up GIFTS for this functionality.

The first is global report formatting, which is established in the Administrator Module and serves as the default formatting for all GIFTS ad hoc reports. (Users can customize formatting of each ad hoc report they create or modify.) It is described in the next section of this chapter.

The second is the "Public Saved Report Definition Templates" permission, which can be set for each permission set. You can grant users rights to add, modify, and delete saved ad hoc reports which have been made public (i.e., available to all users).

Note: All users can add, modify, and delete their own ad hoc reports, regardless of permissions and whether they make them public or not.

The permission is found in the Permissions window, listed under the GIFTS category. For details on modifying permissions, please see "Managing Permission Sets" on page 96.

Tip: To prevent users from modifying or deleting others' ad hoc report templates, you may want to deny those rights to all or most user groups. Even if a user is not allowed to modify public saved report templates, he or she can save a copy of the report template under another name, then modify that report as his or her own.

Global Report Formatting for Ad Hoc Reports

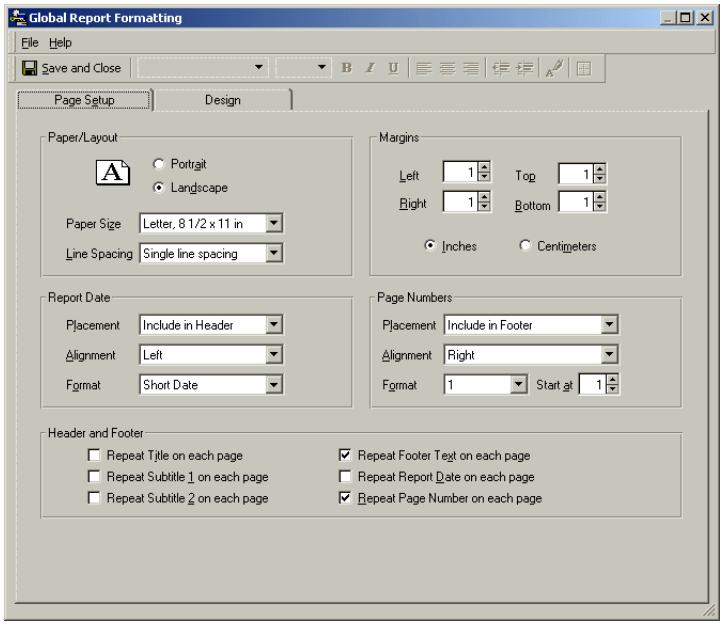
Ad hoc reporting from the GIFTS Workspace is one of the most versatile tools available to your users. Unfortunately, the same versatility that makes ad hoc reporting so powerful may also cause problems for an organization that adheres to a set of design standards for reports. In order to provide your users with guidance regarding existing design standards, you may want to set up global formatting options to be applied as default settings for all new ad hoc reports.

Note: The global report formatting settings are only applied as defaults, and individual users may override these settings when they create ad hoc reports. The setting are intended to be guidelines for your users, not restrictions on their reporting permissions.

To set up the global formatting defaults for ad hoc reports, open the Global Report Formatting window. This can be accessed one of two ways:

- From the Administrator Module main menu, select Setup ➤ Reporting ➤ Global Formatting.
- From the Report Library menu, select Tools ➤ Global Formatting.

The Global Report Formatting window opens:



Page Setup Tab

Use the options on the Page Setup tab to configure a basic report layout and the placement of standard report elements. Available options are organized into the following sections:

- **Paper/Layout**—Use the Portrait and Landscape option buttons to select the orientation for reports. The Paper Size field drop-down list allows you to select one of many standard paper sizes for your reports.
- **Margins**—Use the options in this section to indicate the blank margins around the perimeter of a report. You may choose to express margin sizes in either inches or centimeters.

- **Report Date**—You may choose to have reports indicate the date on which they are run. The options in this section are as follows:

Option	Description
Placement	Use this option to determine whether reports 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 report dates should appear left, right, or center aligned in the header/footer.
Date Format	Allows you to choose a format for report dates from a short list of standard date formats.

- **Page Numbers**—You may choose to have page number included on reports. The options in this section are as follows:

Option	Description
Placement	Use this option to determine whether reports 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:

❖ Title	❖ Footer Text
❖ Subtitle 1	❖ Report Date
❖ Subtitle 2	❖ Page Numbers

Design Tab

The Design tab allows you to set text and border formatting defaults through an integrated version of the Active Reports viewer that is used to create ad hoc reports from the Workspace. The Active Reports viewer on this form displays text elements containing sample text 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 be highlighted in the preview pane, where it may be edited. The text elements available are:

❖ Column Headings	❖ Group 4 Heading
❖ Footer Text	❖ Group 4 Subtotal Label
❖ Grand Total Label	❖ Group 4 Subtotals
❖ Grand Totals	❖ Group 5 Heading
❖ Group 1 Heading	❖ Group 5 Subtotal Label
❖ Group 1 Subtotal Label	❖ Group 5 Subtotals
❖ Group 1 Subtotals	❖ Page Numbers
❖ Group 2 Heading	❖ Report Data
❖ Group 2 Subtotal Label	❖ Report Date
❖ Group 2 Subtotals	❖ Subtitle 1
❖ Group 3 Heading	❖ Subtitle 2
❖ Group 3 Subtotal Label	❖ Title
❖ Group 3 Subtotals	

- Use the **Report Section** drop-down list to choose an entire section of the report that will share format settings. When you choose a report section to format, all text elements contained in the section will appear in the preview pane. The following table lists the report sections available, along with the text elements contained in each section:

Report Section	Text elements contained within
Column Header	Column Headings
Footer	Footer Text, Report Date*, Page Numbers* **(depends on settings from Page Setup tab)*

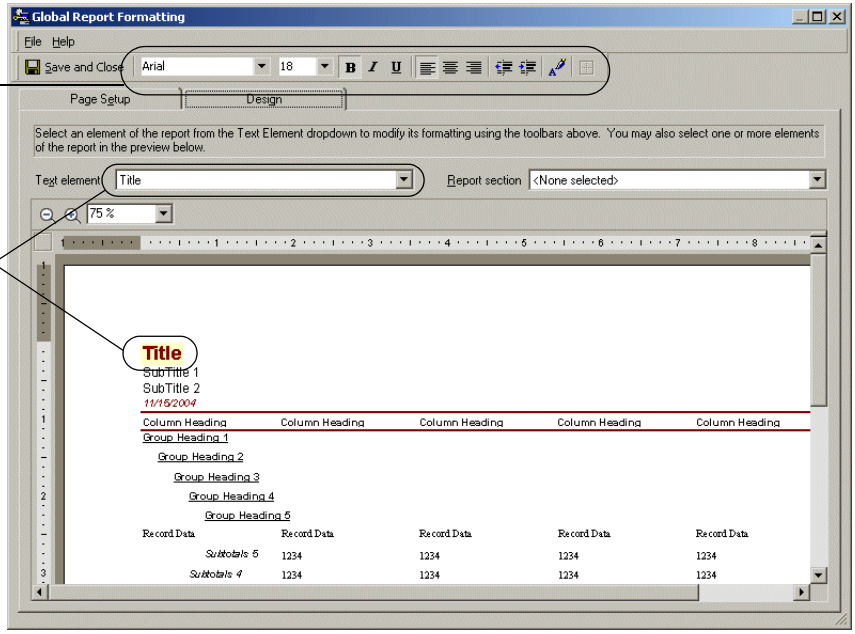
Report Section	Text elements contained within
Grand Totals	Grand Totals
Group 1 Header	Group 1 Heading
Group 2 Header	Group 2 Heading
Group 3 Header	Group 3 Heading
Group 4 Header	Group 4 Heading
Group 5 Header	Group 5 Heading
Group 5 Totals	Group 5 Subtotal Label, Group 5 Subtotals
Group 4 Totals	Group 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 selected a text element or report section in the preview pane, use the formatting buttons on the toolbar to set its formatting:

Text formatting options are found here on the Global Report Formatting tool bar.

When you select a Text Element or Report Section to modify, the text in question is highlighted in the preview pane.

(This may be difficult to see in printed manuals, as the highlight color is a light yellow.)



Note: For detailed instruction on working in the Active Reports viewer, please refer to the *GIFTS User's Guide* chapter on ad hoc reporting.

10 Maintaining Your GIFTS Data

This chapter describes how to consolidate duplicate records, recalculate GIFTS data, purge documents that have been removed from GIFTS.

In This Chapter

Consolidating Duplicate Records.....**232**

Recalculating Data.....**235**

Purging Removed Documents.....**238**

Consolidating Duplicate Records

Data entry errors can result in there being duplicate Organization or Contact records in your database. You can identify duplicate records, and consolidate the links to the Requests and Contacts associated with the duplicates into one record.

For example, assume you have two Organization records for "New University." One record is associated with three Requests, and the second is associated with another Request. After consolidation, you will have only one record for "New University," and all four Requests and their affiliated Contacts are linked to that record.

Tip: You can configure GIFTS to automatically search for duplicate records when users enter Organization or Contact records. For more information, please refer to "General Preferences" on page 51.

Searching for Duplicate Records

To find duplicate records, choose Tools ➤ Duplicate Records ➤ Reports from the Administrator menu, and then choose either Organizations or Contacts.

- The Organization report will list all Organizations that have exactly the same name as another Organization in the database.
- The Contacts report will list all Contacts that have the exact same last name as another Contact in the database. Note that the report may include people who are not in fact duplicates, such as "Mary Smith" and "Brad Smith."

  The report does not check the first names in order to ensure that it includes duplicate records where the Contact's first name was entered differently, such as "Brad Smith" and "Bradley Smith."

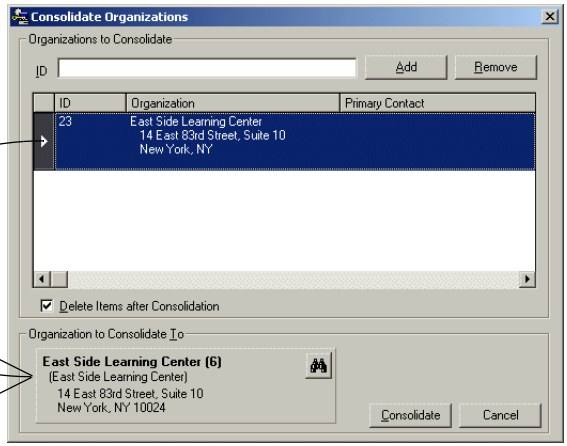
Consolidating Duplicate Records

Before You Begin: Decide which of the duplicate records you wish to maintain, and which ones you wish to remove from the system. Usually the record with the most up-to-date information is designated as the one to be maintained.

To consolidate the records:

1 From the Administrator menu, choose Tools ➤ Duplicate Records ➤ Consolidate, and then choose either Organizations or Contacts. The Consolidate Organizations/Contacts window opens:

The records you select in the list are consolidated to the record you choose below.



2 Identify the records that you want to consolidate:

- In the Organizations/Contacts to Consolidate section, either type the ID of the first record and click Add, or leave the ID field blank and click Add to search for the record by name.

  Do *not* select the record you wish to *keep* in this list. You will identify the Organization or Contact that you wish to keep later.

- If you are consolidating more than one duplicate record, add them to the list as well. To remove a record from the list, highlight it and click Remove.

3 If you wish to delete the duplicate records after the consolidation is complete, select the Delete Items after Consolidation check box.

4 In the Organization/Contact to Consolidate To section, click the Find button to search for the record you wish to maintain.

5 Click Consolidate to begin the process. A message details the consolidation that is about to take place, and prompts you to confirm that you wish to continue.

6 Click Yes to continue. A process log displays the status of the consolidation as it proceeds. When the consolidation is complete, you can click Print or Save As to keep the log for your records.

Recalculating Data

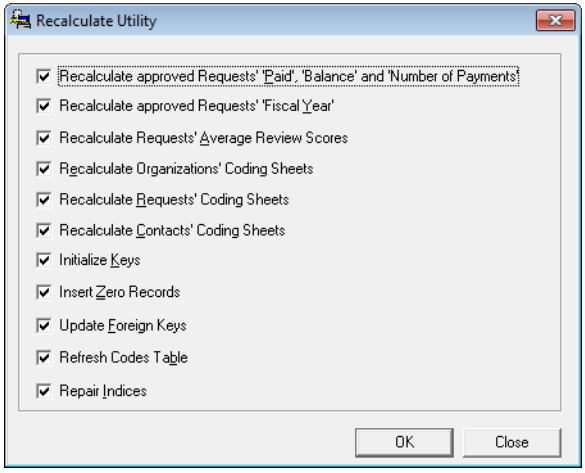
GIFTS maintains summary data—such as the balance of a grant or the total number of payments for a grant—to maximize the speed of queries and reports. Occasionally, as users work in GIFTS, this data is not properly synchronized. This can happen for a variety of reasons, including network communication errors and hardware problems.

If you suspect that the calculations of summary data and totals in GIFTS are not synchronized, you can use the Recalculate Utility to synchronize your data.

Caution: While the use of this utility is documented here, you should use this utility only with the guidance of MicroEdge Technical Support. Before recalculating your data, ensure that you have a valid backup of your database and that no one else is logged in to GIFTS.

To recalculate your data:

1. From the Administrator menu, choose Tools ➤ Recalculate Utility. The Recalculate Utility window opens:



2. Choose the recalculation options you want to run.

Recalculate approved Requests' 'Paid', 'Balance', and 'Number of Payments' The information in these fields is based on the Payment Schedule for each Request. This option checks the Payment Schedule for all approved Requests and refreshes this information.

Recalculate approved Requests' Fiscal Year This option calculates each Request's Fiscal Year based on their Approved Dates and your Fiscal Year setup. If you change your Fiscal Year setup, you can run this process to correct the Fiscal Year of your existing grants.

Recalculate Requests Average Review Scores This option should only display if Reviewers Module/ReviewerCONNECT is part your configuration. Selecting it will recalculate the Request Average Numeric Score by adding up all the Numeric Grade fields of the Reviews for the particular Request and updating this field in the Request table.

When recalculating this field it should compare the new calculation with the existing amount and only update it if it has changed. This will in turn only update the Audit trail on the records that were changed by the recalc.

Recalculate Coding Sheets If your coding information is not synchronized, there may be inconsistencies between the coding information displayed in GIFTS Alta and the coding information in your reports. These options ensure that the coding information used throughout the system is synchronized with the information displayed when you view your Coding Sheets. Coding sheet options include Organization, Request, Contact, and Donors. Donors options will only be available if Employee GIFTS is installed.

Initialize Keys Each record in the GIFTS database has a unique *key* field, or ID. When users enter data, each new database record is assigned to the next available key. If the key counters are not correct, users may encounter errors when entering data. This option ensures that the keys for each database table are set appropriately.

Insert Zero Records This option helps to maintain the integrity of the GIFTS database, and to make sure that queries return the desired results. It ensures that each table has a special "zero record," which is used to join tables when a relationship does not exist - for instance, when an Organization does not have a Primary Contact.

Update Foreign Keys Like the preceding option, this recalculation will help to keep records in your GIFTS database in the proper relationship with one another. This option makes sure that in every case where a relationship does not exist between records, the database is "pointing" to the special zero record.

Refresh Codes Table This option helps you maintain the integrity of the Coding Sheet information in your database. This is particularly important in that it ensures that records that have not been coded in a certain category still appear on reports and queries that group by that category.

Repair Indices This option recreates any standard indices that are not currently set correctly in the database, and removes any that are not standard GIFTS indices.

3 Click **OK** to run the recalculation.

Purging Removed Documents

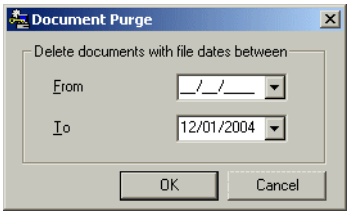
When users create merged correspondence, they can choose to save their word processor documents for later reference. If users no longer need to access these documents in GIFTS, they can remove them.

Removed documents are not deleted; they are archived to the /GIFTS/DOCUMENT/TEMP directory. You can manage this archive by periodically purging removed documents from the /GIFTS/DOCUMENT/TEMP directory.

Caution: Purged documents are deleted and cannot be recovered.

To purge documents from the /TEMP directory:

1. From the Administrator menu, choose Tools ➤ Purge Removed Documents. The Document Purge window opens:



   Specify a date range for the documents you want to purge. If you do not specify a date range, GIFTS purges all documents up to the current date.

   Note: Since removed documents are no longer associated with Document Activity records, GIFTS uses the document date—the date that the document was last modified.

2. Click OK. You are prompted with the number of documents that will be purged and asked to confirm you want to purge them.

3. Click Yes. The documents are purged from the /GIFTS/DOCUMENT/TEMP directory.

11 Customizer Planning

This and the following chapter provide information to clients using the optional GIFTS Customizer Module. The Customizer Module allows you to create custom forms for GIFTS records, in which you can record data specific to your needs.

Note: If you have the GIFTS Alta Blueprint module installed, menu options in the Administrator module for Customizer will not be available. Please refer to the GIFTS Alta Blueprint User Guide.

Before you create custom forms, it is a good idea to plan your needs for data fields and other elements on paper first. This chapter describes how to plan the customizing of your GIFTS system.

In This Chapter

About Customizer Planning.....**240**

Planning Data Fields.....**242**

Planning Calculated Fields **246**

Field Planning Worksheet.....**247**

Creating Database Fields.....**249**

About Customizer Planning

In order to create your custom forms, you must first determine which types of records you wish to expand, and then determine what specific data you wish to collect. Custom forms can be established for Requests, Organizations, Payments, Activities, Contacts, Requirements, Affiliations, and/or Reviews. These forms may contain one or more custom elements, including: custom data fields; read-only calculations based on current data in the record; and even live Web content. The "Field Planning Worksheet" on page 247 has been designed to assist you in planning your custom data fields, calculated fields, and Web clippings.

Once you have defined your data needs using the Field Planning Worksheet, you can create the custom data fields. At this point, you will establish the name of each field and the type of data that is to be captured in the field.

Note: GIFTS stores custom data in database tables called extension tables. For example, when you use the GIFTS Customizer to add fields to the Contact record, GIFTS adds a table to the database called Contacts_Ext; the custom fields you create become columns of data in that table. Contacts_Ext is linked to the standard Contacts table (containing standard GIFTS Contact fields), so that when a Contact record is opened in GIFTS, any custom data for that Contact can also be displayed.

The final step is the layout and building of the data entry form(s), which is covered in detail in the next chapter. The Form Design Worksheet on page 257 will help you lay out the custom elements you established on the Field Planning Worksheet. Once you have built your custom forms, users can immediately begin entering data.

Important: It is important to set up your custom forms as accurately as possible before rolling the changes out to your users. Although it is possible to add, remove, and change fields later, this process can take a long time for the system to complete, particularly if a large amount of data entry has occurred in the custom fields.

Custom Fields in GIFTS Connections

Custom data fields and calculated fields are available in MyGIFTS. Data fields can be displayed, edited, hidden, or made read-only, just like other GIFTS fields. Calculated fields (which are read-only in MyGIFTS as well as GIFTS) can also be displayed or hidden using MyGIFTS field-level permissions.

If you use ReviewerCONNECT, note that custom data fields and calculated fields added to your Review, Request, and Contact records can be displayed to your online reviewers. These custom Review fields appear on both edit and detail pages, but can also be hidden or made read-only using ReviewerCONNECT field-level permissions.

Planning Data Fields

First, decide which type of record you wish to customize: Requests, Organizations, Payments, Activities, Contacts, Requirements, Affiliations, or Reviews. In doing so, think about how the information you wish to capture is related to the information already captured by GIFTS.

For instance, you may wish to record the number of books purchased as a result of each Request. In this case, information about individual grants (project title, amount awarded, etc.) is part of the Request record. Since the number of books purchased is specific to each grant, you would want to add this field to the Request information.

However, if you wish to track specific information about the librarians involved in the project, you would add fields to the Contact records, since information regarding specific individuals is maintained in their Contact records.

Request Type-Specific Data Entry Forms

If your organization tracks Requests for different giving programs, you can capture information that is specific to each Request type.

For example, if your organization has both a Cash Grants program that purchases computer equipment and an In-kind computer donation program, you can track different information for each program. You might track "# of Computers Purchased" and "Average Purchase Price" for your Cash Grants Requests and "# of Computers Donated" and "Retail Value" for your In-kind Requests.

Stage-Specific Data Entry Forms for Reviews

If you use the optional Reviewers Module, you can capture information specific to each Review Stage.

Review Stages allow you to choose specific types of feedback you want from different reviewers (internal or external) for different kinds of Requests. When you add a Review you choose a Stage, and that Stage's settings are

reflected in the new Review. Each Review Stage can be further customized using the GIFTS Customizer Module.

Listing Data Fields

Once you have chosen the appropriate record type for your data, you can use the Field Planning Worksheet to list the individual fields you wish to include.

As you list your fields, be sure to separate information into distinct fields. For instance, you may wish to track the number of books bought and the amount of money spent. The "Number of Books" should be tracked in one field and the "Amount Spent" in another. You should also make sure that each field name accurately represents the field's intended use.

Tip: For client/server GIFTS systems, the number of data fields that you may include on a custom form is essentially unlimited; file server and standalone systems are limited to 255 custom elements. (Calculated fields and Web clippings don't count toward these limits.) Regardless, it's important to note that the amount of "real estate" on each form *is* limited. Any more than 20 data fields, depending on their size, will probably create difficulties during the layout stage. Other elements, like Web clippings, can take up a considerable amount of space by themselves. If you have too many data fields and other elements to fit neatly on one form, consider dividing your custom elements between two or more forms.

If you are creating Request type-specific fields, list all your Request data fields on the same worksheet. Although these fields will be displayed in different data entry forms, the data is stored in the same database extension table. You can assign the fields to a specific Request type when you design the layout of your Request data entry forms.

Choosing Data Field Types

Once you have established the data fields you need, you must decide on the type of data that is to be captured in each field. For instance, if you have a

field called "Number of Books," do you want to capture numbers that can be calculated in your reports? Or, would you rather save the information as text so users can enter ranges like "over 1000" or "100–500"? Or, would you like to define a list of values from which users can choose?

The following field types are available:

Field Type	Description
Text	Holds any text information up to a limit of 255 characters. If you want, you can make the character limit smaller.
Long text	Holds any text information up to a very high limit. (The precise limit varies among different client/server and file server systems, but in every case it is many tens of thousands of characters.) If you want, you can designate a specific character limit.
Small number, no decimal	Permits integers between zero and 255.
Medium number, no decimal	Permits integers between -32,768 and 32,767. *This data type is not available on client/server systems.*
Large number, no decimal	Permits integers between -2,147,483,647 and 2,147,483,647.
Currency	Permits numbers with two decimal places and a currency symbol.
Number, with decimal	Permits numbers with as many as four decimal places.
Date	Permits dates in the format specified by the Windows Regional Settings. (For example, the United States date format is mm/dd/yyyy).
Values	Holds a value from a list that you define. During data entry, users can choose from the values you enter, much in the same way that users choose from lists of classifications in coded fields like Request Status and Request Type. If you choose this field type, you must also enter the available values.
True/False	Permits a "Yes/No" or "True/False" response. On the data entry screen, it appears as a check box. A selected check box indicates "True"; a cleared check box "False."

You can use the Field Planning Worksheet on page 247 to help plan the implementation of your custom fields.

Important: The names of all currency fields should end with "_Amount" (like "Ave_Unit_Amount"), and all date fields should end with "_Date". The names of fields of other types should *not* end with "Amount" or "Date."

Planning Calculated Fields

Custom calculated fields can dynamically display the results of simple calculations based on current values in your data fields. For example, if you are tracking the number of children's books purchased by a grant, as well as the total number of books purchased, you can use a calculated field to display the percentage of books purchased that are for children. You could also use the total amount of the grant to calculate the percentage of the grant amount that is being spent on children's books.

GIFTS handles calculated fields differently than data fields and, as such, does not require you to create them through the Table Customizer. Instead, you will create and format calculated fields when you actually build your custom data entry forms. For now, you should simply determine what calculated values you wish to display on your forms, and the appropriate formula needed to calculate each value. For details on adding calculated fields to your forms, see "Adding and Configuring Calculated Fields" on page 275.

Field Planning Worksheet

Completed by: _____

On (date): _____

For customizing (circle one):	Activities	Organizations	Payments	Contacts
	Requests	Requirements	Reviews	Affiliations
	Request Type: _____		Review Stage: _____	

Use the following table to list the custom elements you need to capture your grant making information. Please note that the names of currency fields should end with "_Amount" and date fields with "_Date". Other fields should *not* end with the word "Amount" or "Date".

Element Name	Type	URL/Calculation

Data Field Types:	
Text (255-character limit)	Currency ($1,000,000.00)
Long text (64,000-character limit)	Number, with decimal (1.1234)
Small number, no decimal (0-255)	Date (01/01/2000)
Medium number, no decimal (-32,768 to 32,767) *not available on client/server systems*	Values (user-defined list)
Large number, no decimal (-2,147,483,647 to 2,147,483,647)	True/False (check box)
Other Element Types:	
Calculated Field	Web Clipping

Field Planning Worksheet

Completed by: _____

On (date): _____

For customizing (circle one):	Activities	Organizations	Payments	Contacts
	Requests	Requirements	Reviews	Affiliations
	Request Type: _____		Review Stage: _____	

Use the following table to list the custom elements you need to capture your grant making information. Please note that the names of currency fields should end with "_Amount" and date fields with "_Date". Other fields should *not* end with the word "Amount" or "Date".

Element Name	Type	URL/Calculation
Number_of_Books	Medium Number Field	
Books_for_Adults	Medium Number Field	
Books_for_Children	Medium Number Field	
Book_Vendor	Text Field	
Discount_Flag	True/False Field	
Discount	Text Field	
Avg_Unit_Amount	Currency Field	
Institution_Type	Values Field	
Adult_Books_Pct	Calculated Field	100(Books_for_Adults/Number_of_Books)
Children_Books_Pct	Calculated Field	100(Books_for_Children/Number_of_Books)
Book_Store_Web	Web Clipping	www.bookstore.com

Field Types:	
Text (255-character limit)	Currency ($1,000,000.00)
Long text (64,000-character limit)	Number, with decimal (1.1234)
Small number, no decimal (0-255)	Date (01/01/2000)
Medium number, no decimal (-32,768 to 32,767) *not available on client/server systems*	Values (user-defined list)
Large number, no decimal (-2,147,483,647 to 2,147,483,647)	True/False (check box)

Other Element Types:	
Calculated Field	Web Clipping

Creating Database Fields

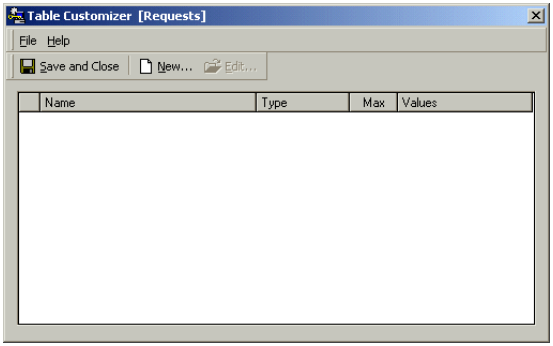
When you enter the Table Customizer for Requests, Organizations, Payments, Activities, Contacts, Requirements, or Reviews, the system automatically creates the Extension Table(s) needed to contain your new fields. At this point, you should have completed the planning worksheets on page 247 and page 257.

Caution: Before you modify the GIFTS database, be sure to make a backup of your GIFTS database and ensure that no other users are logged into GIFTS.

Accessing the Table Customizer

To create and work with custom fields:

1. Log in to the GIFTS Administrator Module.
2. From the Administrator menu, choose Tools ➤ Customize ➤ Tables.
3. Choose the type of record—Request, Organization, Payment, Activity, Contact, Requirement, or Review—for which you wish to add custom fields. The contents of the Extension Table are displayed. For instance, if you choose Requests, the contents (if any) of the Requests_Ext table are displayed:

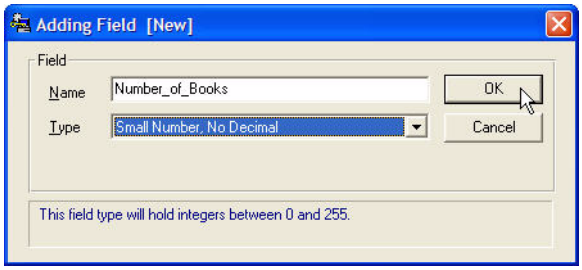


Adding a New Field

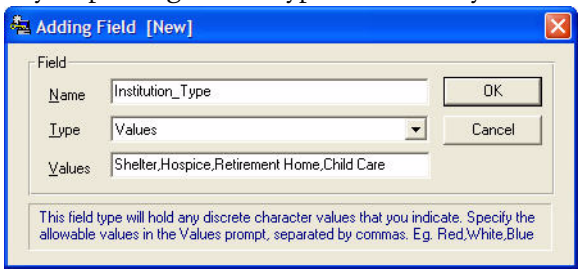
Note: Before adding or modifying fields, you should make sure all GIFTS users are logged off the system. It is also advisable to back up your GIFTS database before proceeding.

Each field in the table must have a Name and Type. The Type defines the type of data that can be stored in the field and how the data is formatted. To add a new field:

1 In the Table Customizer window, click **New**. The Adding Field window opens:



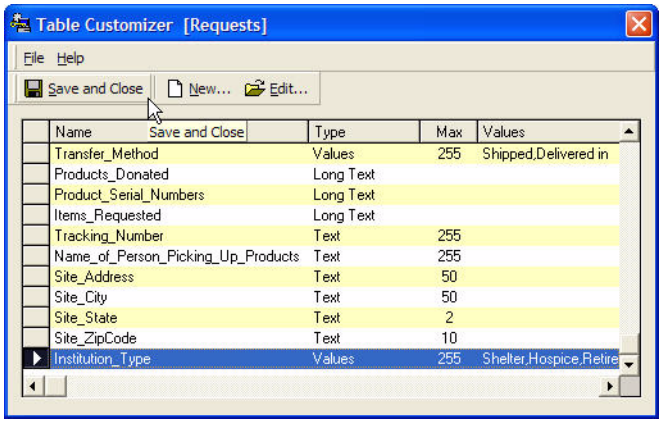
2 Enter a **Name** for the field, then the **Type**. Note that the available options vary, depending on the Type of field that you are adding.



Field	Usage
Name	The name of the field in the GIFTS database. Field names cannot contain spaces: if you enter a space, GIFTS automatically inserts an underscore (_) in its place. Do not use special characters such as "?," "!," "#," "*," and so forth. These characters sometimes have special meanings to the system. By default, this name is used as the *label* that identifies the field on the data entry form. You may change the label displayed for your users without changing the field's database name. **Important:** The names of all currency fields should end with "_Amount" (for example, "Ave_Unit_Amount") and all date fields should end with "_Date". If the name you specify for a currency or date field does not end as specified, GIFTS automatically adds it to the end of the field name. The names of all other field types should *not* end with the word "Amount" or "Date".
Type	Choose the appropriate type for the data you wish to enter in this field. See the Data Types table on page 244 for a description of each type.
Max. Length	This field is displayed if you have chosen "Text" as the field type. Text fields have a limit of 255 characters. If you wish to limit the number of characters that can be stored in the field to a smaller number, enter that number here.
Values	This field is displayed if you have chosen "values" as the field type. This is where you provide the list of values available to users during data entry. Enter the values in the field, separating each value by a comma. (Make sure that you do not use commas within the values—and don't put a space after a comma.)

3 When you are finished defining a field, click **OK**. The field is saved in the Table Customizer grid. The Adding Field window clears, and you can enter another field, click **OK** after each one you add.

4 When you have finished adding fields, click **Cancel** to exit the field-creation process. The fields you have created are displayed in the Table Customizer window:



5 Click **Save and Close** to exit the Table Customizer window and save your changes. A message appears, informing you that this operation required exclusive access to the GIFTS database. Make sure all other GIFTS users are logged off before clicking Yes to proceed.

If you click **Yes**, another message appears advising you to back up your GIFTS database before proceeding. If you want to proceed, click **Yes**. GIFTS updates the database with your new fields.

Modifying an Existing Field

Note: Before adding or modifying fields, you should make sure all GIFTS users are logged off the system. It is also advisable to back up your GIFTS database before proceeding.

You can modify the field information at any time, even after data entry has taken place. Depending on the amount of data entered, the system may require some time to update the database when you save the new field information.

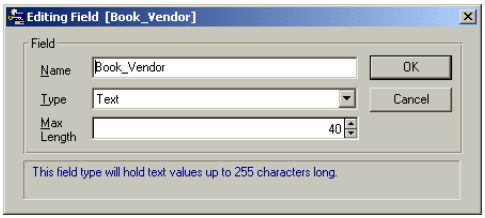
Important: If you modify the Type of a field after users have entered data, any data currently residing in the field that is incompatible with the new Type is deleted. For instance, if you change a text field to a numeric field,

text values such as "a lot" are erased, whereas values that can be represented numerically—such as "15"—are converted to the new Type.

To edit a field:

1 From the Administrator menu, select Tools ➤ Customize ➤ Table ➤ [desired record type]. The Table Customizer window opens.

2 In the gird, highlight the field you want to modify and click Edit. The Editing Field window opens:



3 Modify the field as needed, then click OK to save your changes.

4 Click Save and Close to exit the Table Customizer window and save your changes. A message appears, informing you that this operation required exclusive access to the GIFTS database. Make sure all other GIFTS users are logged off before clicking Yes to proceed.

If you click Yes, another message appears advising you to back up your GIFTS database before proceeding. If you want to proceed, click Yes. GIFTS updates the database with your new fields.

Deleting a Field From the Database

Important: If you delete a field, *all data that has been entered into the system for that field is deleted*. The field is removed from any custom data entry forms on which it appears. Just as when adding or modifying fields, you should make sure all GIFTS users are logged off before proceeding. It is also advisable to back up your GIFTS database before making these changes.

1 From the Administrator menu, select Tools ➤ Customize ➤ Table ➤ [desired record type]. The Table Customizer window opens.

2 In the grid, highlight the field and select File ➤ Delete. You are prompted to confirm that you want to delete the field.

3 Click Yes to continue.

4 Click Save and Close to exit the Table Customizer window and complete the deletion. A message appears, informing you that this operation required exclusive access to the GIFTS database. Make sure all other GIFTS users are logged off before clicking Yes to proceed.

   If you click Yes, another message appears advising you to back up your GIFTS database before proceeding. If you want to proceed, click Yes. GIFTS updates the database with your new fields.

The field, and all of the database information that has been entered into it, is removed from the system.

If you delete or change the name of a custom database field used in an IGAM form without updating the IGAM form, the field will become invalid and IGAM users will receive an error when trying to consider applications that contain invalid fields.

Updating IGAM Forms

To update an IGAM form after you have changed a custom data field used in that form:

1 Log in to the IGAM and open the Forms Manager.

2 Open the form that uses the field that has been modified. The IGAM performs an automatic synchronization of the form with the Code Tables and custom fields in your database, and—if the form uses any fields that no longer exist—a message is displayed and the invalid fields are removed from the form.

3 If you wish to replace any of the fields that had been removed, go to the Fields tab of the Form Design Wizard and add the new or updated field to the appropriate section of your form.

4 Save and close the form.

12 Building Custom Forms

This chapter describes how to design the data entry forms used to enter your custom data.

Note: If you have the GIFTS Alta Blueprint module installed, menu options in the Administrator module for Customizer will not be available. Please refer to the GIFTS Alta Blueprint User Guide.

In This Chapter

Planning the Form Layout **256**

Form Design Worksheet **257**

Adding Custom Forms **259**

Working in the Form Customizer Environment **264**

Adding and Arranging Data Fields **270**

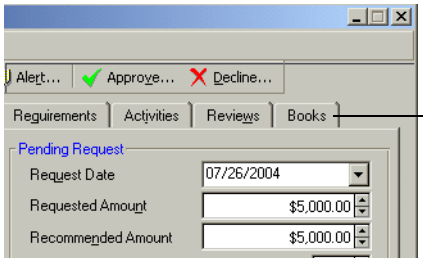
Adding and Configuring Calculated Fields **275**

Adding and Configuring Web Clippings **279**

Planning the Form Layout

Once you have chosen the elements that you wish to include, you may wish to experiment with the layout of the form on paper before building it in the system.

Using the "Form Design Worksheet" on page 257, draw the layout—using the element labels from the Field Planning Worksheet(s) you completed in the last chapter—in the positions that you think will make the most sense to your users during data entry. You can also choose a name (or Tab Caption) for the tab that users select to view the data entry form.



A user-define tab name, as it appears in GIFTS.

Note: If you are creating Request data entry forms for more than one Request Type, you should complete a Form Design Worksheet for each Request Type. The same is also true of Reviews; if you use the optional Reviewers Module, create a worksheet for each Review Stage.

Form Design Worksheet

Completed by: _____

On (date): _____

For customizing (circle one):	Activities	Organizations	Payments
	Contacts	Requirements	Affiliations
	Requests Request Type: _____		Reviews Review Stage: _____

Tab Caption: _____

In the following box, design the on-screen layout of your custom elements. For assistance, please fax this form to MicroEdge Technical Support at (877) 704-3343.

Form Design Worksheet

SAMPLE

Completed by: Mary Brown

On (date): April 15, 2003

For customizing (circle one):	Activities	Organizations	Payments
	Contacts	Requirements	Affiliations
	Requests Request Type: Book Purchase		Reviews Review Stage: _____

Tab Caption: Books

In the following box, design the on-screen layout of your custom elements. For assistance, please fax this form to MicroEdge Technical Support at (877) 704-3343.

Number of Books Purchased	
Books for Adults	
Children's Books	
Institution Type	
Book Vendor	
Discount Received	
Discount	
Average Unit Price	
Percent Adults' Books	
Percent Children's Books	
Book Store Web Site	

Adding Custom Forms

Once you have planned the layout of your custom GIFTS forms, you can begin to build those forms in your system. At this point, you should have completed the "Form Design Worksheet" on page 257, where you defined the form layout.

This section of the chapter describes how to add, rename, and delete custom form (or tabs). Information on adding, arranging, modifying, and deleting elements of these tabs is found in:

- "Adding and Arranging Data Fields" on page 270.
- "Adding and Configuring Calculated Fields" on page 275.
- "Adding and Configuring Web Clippings" on page 279.

Opening a New Custom Form

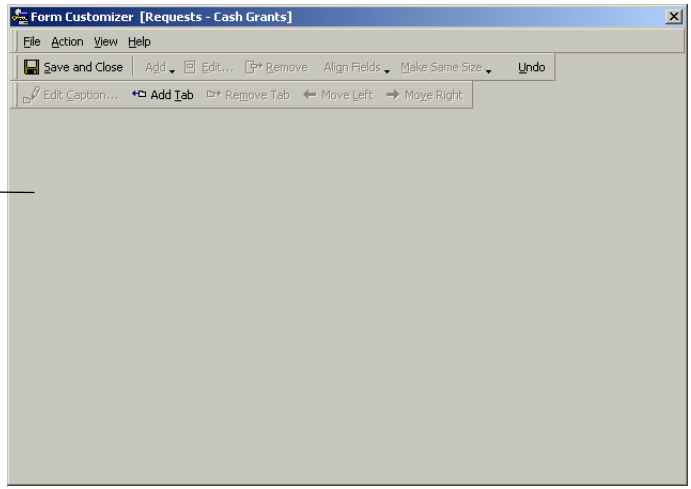
To open the Form Customizer and start a new custom form:

1. From the Administrator menu, choose Tools ➤ Customize ➤ Forms.
2. In the Forms sub-menu, select the type of record for which you wish to design a form. You may select Organizations, Payments, Activities, Contacts, Requirements, Affiliations, Reviews, or Requests.

   Note: If you select Reviews or Requests, you then select (respectively) the Review Stage or the Request Type to which you are adding a form.

For both Reviews and Requests, you can choose "Default," which adds the form to all Review or Request records.

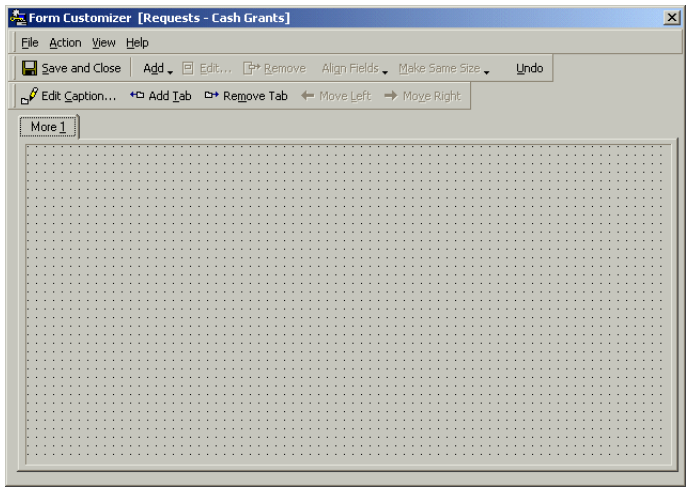
The Form Customizer opens:



If you have previously added forms to the record type indicated, they would be displayed here.

In this case, we have not yet created any custom tabs for Cash Grant Requests.

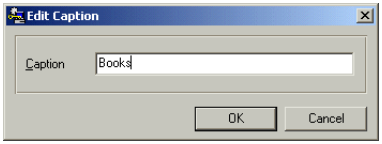
3 To open a new custom form, click Add Tab. The form design environment opens within the new tab:



Changing the Tab Name

"More[#]" is the default title for a new tab when added. To change the tab name to something more descriptive and helpful to GIFTS users:

1 Click Edit Caption. The Edit Caption window opens:



2 Enter your tab name in the Caption field and click OK. The Form Customizer now shows your custom form with the new caption.

Creating Additional Data Entry Forms

When you have too many fields to fit onto one custom form, or if you want to divide your custom data fields and elements under separate tab captions for easier location, you can simply create additional forms.

To add a custom form to a GIFTS record type:

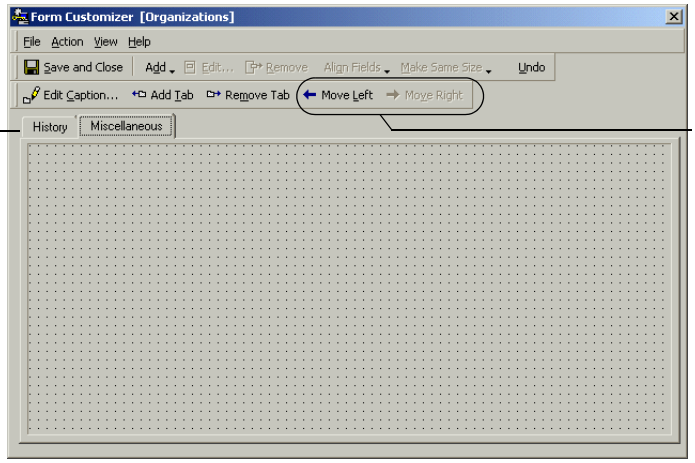
1 From the Administrator menu, choose Tools ➤ Customize ➤ Forms.

2 In the Forms sub-menu, select the type of record for which you wish to design a form. You may select Organizations, Payments, Activities, Contacts, Requirements, Affiliations, Reviews, or Requests.

Note: If you select Reviews or Requests, you then select (respectively) the Review Stage or the Request Type to which you are adding a form.

For both Reviews and Requests, you can choose "Default," which adds the form to all Review or Request records.

The Form Customizer opens:



In this example, a second custom tab, "Miscellaneous," has already been added to Organization records.

Use the Move Left and Move Right buttons to place the custom forms in the desired order. Note that custom tabs will always appear to the right of the record type's standard tabs.

3 When the Form Customizer opens, click Add Tab.

4 Click Edit Caption to enter a name for the new tab.

5 Complete the form by adding and arranging your data entry fields and other elements, as described in later sections of this chapter.

Deleting a Data Entry Form

If you have created an additional data entry form that you no longer wish to use, you can delete it from your GIFTS system so it will not be available as a tab in the GIFTS record.

To delete a data entry form:

1 From the Administrator menu, choose Tools ➤ Customize ➤ Forms.

2 In the Forms sub-menu, select the type of record for which you wish to design a form. You may select Organizations, Payments, Activities, Contacts, Requirements, Affiliations, Reviews, or Requests.

Note: If you select Reviews or Requests, you then select (respectively) the Review Stage or the Request Type to which you are adding a form. For both Reviews and Requests, you can choose "Default," which adds the form to all Review or Request records.

3. When the Form Customizer opens, select the form you wish to delete by clicking on its tab.
4. Click Remove Tab to delete the form.

Important: If you delete a form, the database will still retain any custom data fields that were on the form, as well as any data that has been entered in those fields. If you wish to delete a field from the database, please refer to "Deleting a Field From the Database" on page 253.

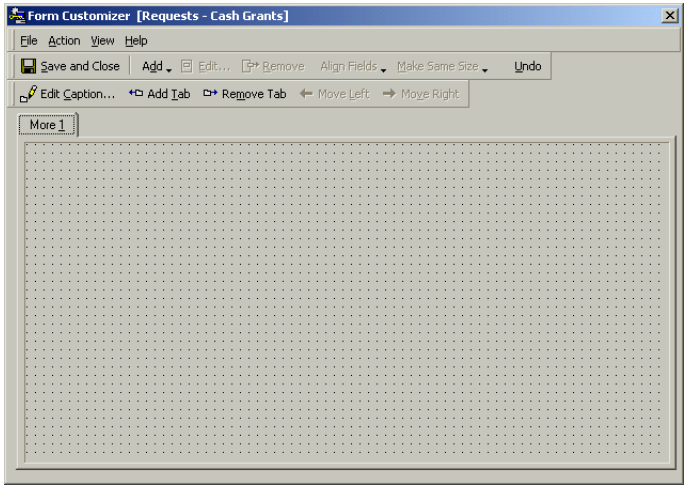
Working in the Form Customizer Environment

Specific information about working with Data fields, Calculated fields, and Web clippings follows this section. First we will look at some general features of the Form Customizer environment.

The Custom Form Grid

The custom form grid is designed to help you arrange elements (like data fields) in straight lines. This makes it easier to arrange custom forms with a pleasingly symmetrical appearance.

The grid appears as a matrix of dots in the tabs in the Form Customizer:



Move your labels and your data fields, calculated fields, and Web clippings in line with the dots for a cleaner, more regular layout.

Changing Grid Size The grid can be resized to allow more or less precise of placement of form elements. The distance between the dots can be modified to 30, 60, 90, 120, or 150 twips. (A twip is equal to one-twentieth of a printer's point, or 1/1440th of an inch.) The defaults is 120 twips.

To change this setting, select View ➤ Grid Size ➤ [30, 60, etc.].

Toggling the Grid Off If you prefer not to use the grid, you can turn off the option by selecting View ➤ Show Grid. To toggle back to grid view, select View ➤ Show Grid again.

"Snapping" to the Grid—Keeping Elements in Line

When you toggle the grid view on, a second Form Customizer option called "Snap to Grid" is also toggled on. This feature automatically places elements and labels in line with grid when you move or resize them. When you move or adjust them, they automatically "snap" to the nearest grid lines.

Toggling Snap to Grid Off If you prefer not to use the feature, you can turn off the option by selecting View ➤ Snap to Grid. To toggle in back on, select View ➤ Snap to Grid again.

Selecting Items in a Custom Form

After you have added fields and/or Web clippings to a custom form, you can move, resize, align, or remove them. Before taking those actions, however, you have to select the field or fields you want to work with. There's more to this than meets the eye.

Selecting a label or an element (field or Web clipping) is like selecting other items on your workstation: Place your mouse over the item and left click. You can select a group of items by holding down the left mouse button, scrolling diagonally until you create a sort of "box" around the items, then releasing the left mouse button. Nothing unusual there.

However, when you are trying to arrange a nicely laid-out custom form, you may want to move elements and their labels together—or separately. Or you might want to select multiple items that have other items in between, when the "box" selection method described above won't work.

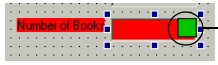
The table below describes the less obvious ways to select items in a custom form:

Desired Selection	Selection Method
Both an element and its label.	Left click on the element

Desired Selection	Selection Method
An element, but not its label.	CTRL+left click on the element.
A label, but not its element.	Left click on the label.
A variety of elements, each with its label.	SHIFT+left click on each desired element.
A variety of elements and/or labels.	CTRL+left click on each desired item.
Deselect an item among a group of selected items.	CTRL+left click on the item you want to deselect.

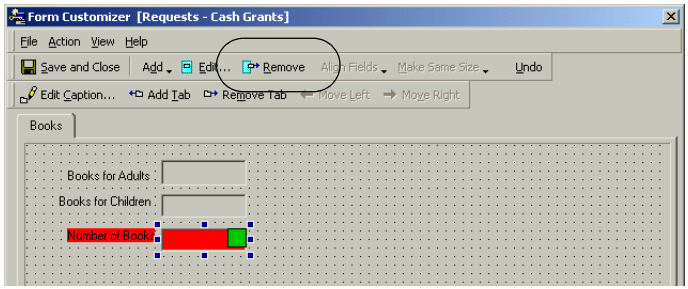
Moving Items in the Form Customizer

Elements and labels in the Form Customizer can be moved using the mouse and its standard drag-and-drop method. However, like selecting items, moving items also has a few tricks:

Item(s) to Move	Method
An element with its label.	Place mouse pointer over the middle of the element and drag it to its new location.
An element, but not its label.	When you click on an element, you will see a green square in the top right corner of the element. To move an element independently of its label, place your mouse pointer over that square, then drag it to its new location.  Hold the left mouse down with the pointer on this square to move the element independently of its label.
A label, but not its element.	Place mouse pointer over the label and drag it to its new location.
A group of items.	Select the multiple items you want to move together, then drag them to their new location.

Removing Elements and Labels

To remove an element from the Form Customizer, select it and click Remove.



A message reminds you that the element's label will also be removed; click Yes to remove them.

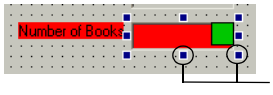
You can select multiple items and remove them at once by clicking Remove.

You can remove a label without also removing its field or Web clipping. Select the label and click Remove. To get the label back, highlight the element, click Edit, select the Label Visible check box, then click OK.

Resizing Fields and Web Clippings

The sizes of custom form elements—Data fields, Calculated fields, and Web clippings—can be modified to suit your new custom tab. There are a few different ways to change elements' sizes.

And individual element can be resized using the mouse. When you select a field or Web clipping, "handles" appear on each corner and each side of the element:



Hold down the left mouse button over one of these handles to "grab" it—then move the mouse to expand or contract the element in that direction.

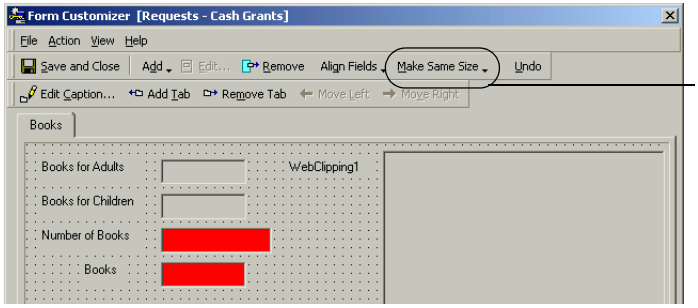
Make Fields the Same Size You can select multiple elements and make them all the same size as the first selected one.

Note: "First selected" in this case means the one that is the top or furthest left one. Change the size of that element, then select it with other items you want to be the same size.

Select the elements, then select one of the following from the Form Customizer menu:

- Action ➤ Make Same Size ➤ Widths
- Action ➤ Make Same Size ➤ Heights

To make the selected fields the same in both dimensions, select one option right after the other.



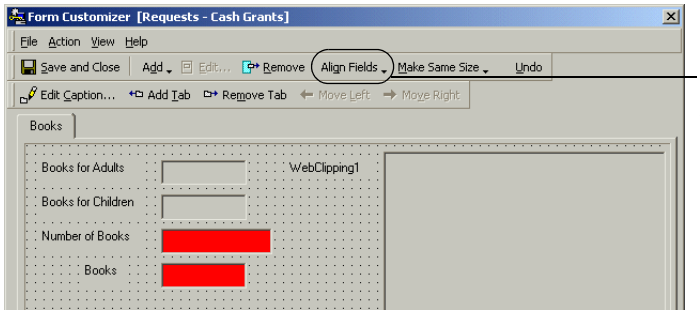
The options to make selected items the same size can also be found here.

Fine-Tuning Element Size If you like, you can specify element size right down to the twip. Since the options for specifying element dimensions and location look different for data fields, calculated fields, and Web clippings, these options are discussed in the next sections.

Aligning Elements and Labels

You can select multiple labels and/or elements and align either vertically or horizontally.

Select the items you want align. From the Form Customizer menu, select Action ➤ Align Field ➤ Tops (for elements next to each other) or Action ➤ Align Field ➤ Lefts (for elements in a list).



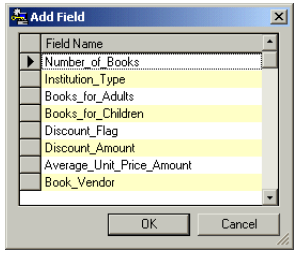
Options for aligning items can also be found here.

Adding and Arranging Data Fields

Important: If you have more than one data entry form for a record type, make sure the correct form is displayed when you are adding or editing custom data fields.

To add one of your custom data fields to a data entry form:

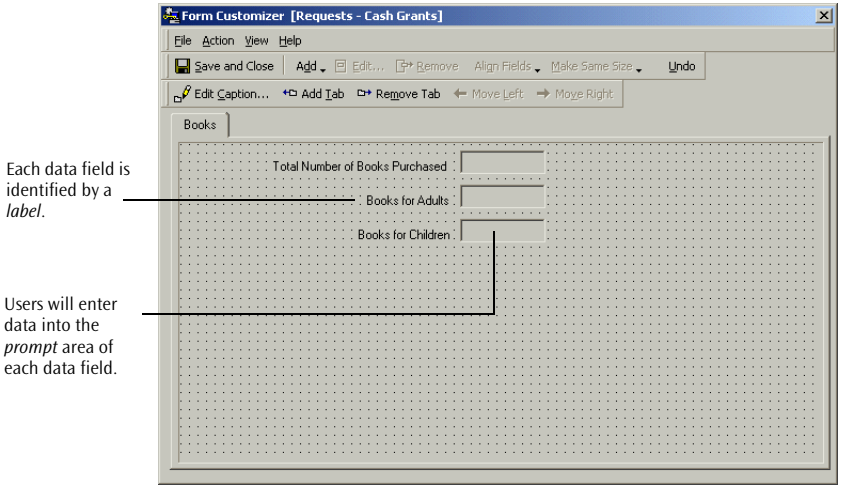
1 Click Add, and then select Field from the drop-down list. The Add Field form presents a list of the data fields you created in the database:



If you have already begun building the data entry form, this list does not include data fields that have already been added to the form. (If no data fields are displayed in the list, you have not created any custom fields in the database. Refer to "Creating Database Fields" on page 249 for information about creating custom data fields.)

2 Highlight the data fields you would like to add and click OK.

The data fields are displayed in the upper left corner of the form. Note that each data field on a form is comprised of two parts: the *label* that identifies the data field, and the *prompt* area into which users will enter data.



Tip: Although you can add many data fields to a form at once, it is easier to insert and place a few data fields at a time. When you add data fields to the form, be sure you move labels and prompts from the upper left corner before inserting more data fields.

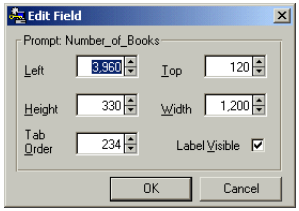
3 To move a prompt or label on the data entry form, click on it and drag it to the appropriate location.

For information about sizing and renaming the labels and/or prompts, please refer to "Changing Prompt and Label Properties" on page 271.

Changing Prompt and Label Properties

By editing the field properties, you can determine the size and location of most prompts and labels. You can also change label names.

To change the dimensions or options for a label or prompt, highlight it and click Edit. The properties are displayed:



You can modify the following properties for both prompts and labels:

Property	Description
Left	The distance of the data field from the left border of this custom tab, in twips.
Top	The distance of the data field from the top border of this custom tab, in twips.
Height	The height of the field in twips.
Width	The width of the field in twips.

Note: You cannot modify the height of a Values field, and you cannot modify the dimensions of True/False fields.

You can modify the following properties for prompts only:

Property	Description
Tab Order	In data entry screens, each prompt (field) is assigned a tab order number; when the user presses TAB, the cursor moves to the next prompt, as determined by its tab order number. Once you have established the layout of the fields on the screen, you may wish to set the tab order so that the user can move logically among prompts using the TAB key. Note that the tab order number of the first prompt is zero, not one.
Label Visible	You may choose to hide the label tied to this particular prompt. Select this check box to show the label, or clear the check box to hide the label.

You can modify the following property for text field prompts only:

Property	Description
Multi-Line	For text fields (but not long text fields), you can choose whether you want the text to "wrap" during data entry. If you select this check box, the text the user is entering will wrap to the next line when it exceeds the width of the field. If this option is not on, the text will scroll to the right as it is entered. If you select this check box, you should increase the height of the field so that more than one line of text can be displayed. The default height is 300 pixels, or one line of text; for each additional line of text you want to display, add 300 pixels to the height of the prompt.

You can modify the following property for labels only:

Property	Description
Label Text	To change the label displayed on the form, just edit the text in this field. Please note that changes to the label text *do not* affect the field's database name. This may create confusion for users when this field is used for searching and reporting if your label differs significantly from the field name. If the purpose of the field has changed, you should edit the field name as described in "Modifying an Existing Field" on page 252.

When you are finished editing the properties, click OK to save your changes. The layout of the custom form reflects the changes you've made. When all of the fields on all the forms have been laid out to your satisfaction, click Save and Close or create more data entry forms, as discussed in the next section.

Removing a Data Field from a Form

You can remove data fields from a form at any time. Removing a data field from the form does not remove it from the database, nor does it delete the information currently entered in the field. You may re-add the data field to a form at any time. If you wish to remove the field from the database, and to

delete any information that has been entered in the field, please refer to "Deleting a Field From the Database" on page 253.

Important: When you remove a calculated field or Web clipping from a form, the element's configuration options are deleted permanently. If you wish to re-add any of these elements to a form, you will need to configure them from scratch. Before removing one of these elements, it is a good idea to make a record of the existing calculation Formula, Launch command line, or URL.

To remove a data field from a form:

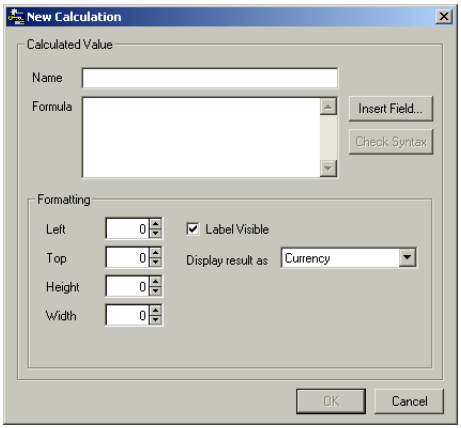
1. Highlight the data field prompt and click Remove. A message opens, asking you to confirm your intentions.
2. Click Yes to remove the data field and its label.

Adding and Configuring Calculated Fields

Important: If you have more than one data entry form for a record type, make sure the correct form is displayed when you are adding or editing calculated fields.

To add a calculated field to a data entry form:

1 Click Add, and then select Calculation from the drop-down list. The New/Edit Calculation form opens:



2 Configure the following settings on the New/Edit Calculation form:

Option	Description
Name	The name of the calculated field. This name will be used as the label for a new field, but the label may be changed later.
Formula	The formula used to calculate the value to be displayed in the calculated field. For details on building formulas for calculated fields, please see “Formulas for Calculated Fields” on page 277.
Left	The distance of the calculated field from the left border of this custom tab, in twips.
Top	The distance of the calculated field from the top border of this custom tab, in twips.
Height	The height of the calculated field, in twips.

Option	Description
Width	The width of the calculated field, in twips.
Label Visible	Indicates whether or not the label for the calculated field should be visible on the data entry form. Default is on (selected).
Display Result As	Indicates whether the result of the calculation should be displayed as a currency amount or a number. Note: If Currency is selected, formatting of negative values on data entry forms is determined by Windows regional settings. If the calculated field is added to the Workspace as a column, the user may specify negative number formatting in GIFTS.
The following options are available if you select to display result as a number.	
Decimal Places	Indicates the number of decimal places to display (0 – 4).
Display Percent Symbol	Indicates whether the calculated value should display with a percent symbol preceding it. Note: Selecting this option *does not* convert a calculated value to a percentage. If you want to calculate a value as a percentage, you must set up the Formula to do the appropriate calculation.
The following options may be available if you select to display result as currency. (They will not appear if your Administrator Module system-preferences specify not to display currency symbols.)	
Don't Display Currency Symbol	Indicates whether the currency symbol should be displayed.
Currency Symbol	Indicates the appropriate currency symbol to display.

3 Click OK to add the calculated field to the data entry form.

4 To move the calculated field on the data entry form, click on it and drag it to the appropriate location.

Formulas for Calculated Fields

Formulas for calculated fields are built using static numeric values, dynamic numeric values from GIFTS data fields, and basic arithmetic operations. You can use both standard GIFTS data fields and your custom data fields for building formulas.

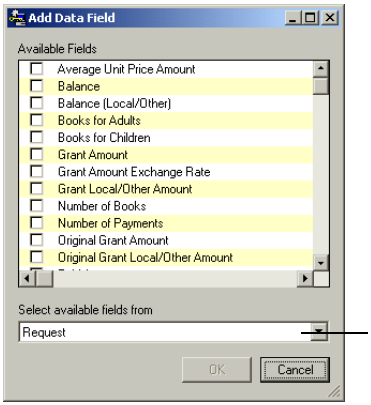
When you save a calculated field, GIFTS validates the formula you entered and alerts you if it was not set up properly. You can also have GIFTS check your formula within the Add/Edit Calculation window by clicking the Check Syntax button.

Merge fields should be entered into formulas using the following format:

{Category.Field Name}

You may either enter data fields directly into the Formula area of the New/Edit Calculation form, or use the Field Insert tool to select one or more fields from any available category. To use the Field Insert tool:

1. Click the Insert Field Reference button located next to the Formula field on the New/Edit Calculation form. The Add Data Field form opens:



You can select the GIFTS category (database table) that contains the field(s) you want to insert here.

2. Use the "Select available fields from" drop-down list to select the GIFTS category (table) that contains the field(s) you want to insert.

3. Scroll through the Available Fields list and select the check box(es) next to the field(s) you want to insert, and then click OK.

You may use any combination of the following operations to build formulas in calculated fields:

Operation	Symbol
Addition	+
Subtraction	-
Multiplication	* OR ( )
Division	/
The sum of a set of values.	SUM (Field 1, Field 2, Field 3)
The average of a set of values.	AVERAGE (Field 1, Field 2, Field 3)

Example: If you are tracking the number of children's books purchased by a grant, as well as the total number of books purchased, you can use a calculated field to display the percentage of books purchased that are for children. The formula for this calculated field may be written as:

100*({Requests_Ext.Books for Children} / {Requests_Ext.Number of Books})

Removing a Calculated Field From a Form

You can remove calculated fields from a form at any time. When you remove a calculated field from a form, the element's configuration options are deleted permanently. If you wish to re-add a deleted calculated field, you will need to configure it from scratch. Before removing a calculated field, it is a good idea to make a record of its calculation Formula.

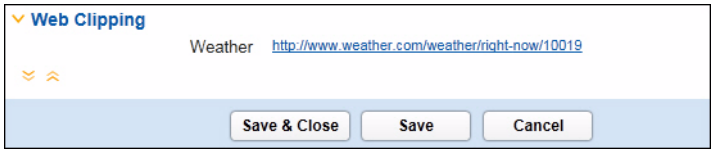
To remove a calculated field from a form:

1. Highlight the calculated field and click Remove. You are prompted to confirm your intentions.
2. Click Yes to remove the calculated field.

Adding and Configuring Web Clippings

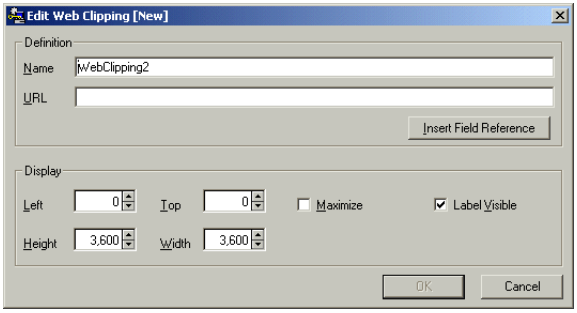
Important: If you have more than one data entry form for a record type, make sure the correct form is displayed when you are adding or editing Web clippings.

Note: Custom Web Clippings in GIFTS Alta edit forms do not show the contents of the URL page. Instead, only the Label Name and URL link is displayed.



To add a Web clipping to a data entry form:

1 Click **Add**, and then select **Web Clipping** from the drop-down list. The Edit Web Clipping form opens:



2 Configure the following settings on the Edit Web Clipping form:

Option	Description
Name	The name of the Web clipping. This name will be used as the label for a new Web clipping, but the label may be changed later.
URL	The address of the Web page that should load on the data entry form. For information on adding context-sensitive parameters to a URL, refer to “URL Parameters” on page 280.

Option	Description
Left	The distance of the Web clipping from the left border of this custom tab, in twips.
Top	The distance of the Web clipping from the top border of this custom tab, in twips.
Height	The height of the Web clipping, in twips.
Width	The width of the Web clipping, in twips.
Maximize	Selecting this option will resize the Web clipping automatically to occupy the entire data entry form. Note: If this option is selected, any other elements on the data entry form will be blocked by the Web clipping.
Label Visible	Indicates whether or not the label for the Web clipping should be visible on the data entry form. Default is on (selected).
Scrollbars	Indicates whether scrollbars should be available for scrolling through the page in the Web clipping. You may choose to include a horizontal or vertical scrollbar, both, or none.

3 Click OK to add the Web clipping to the data entry form.

4 To move the Web clipping on the data entry form, click on it and drag it to the appropriate location.

URL Parameters

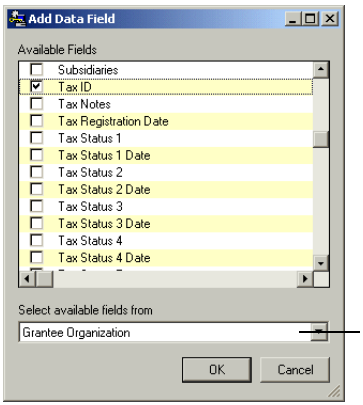
To include context-sensitive parameters in a URL, you will need to add GIFTS data fields, either manually or through a Field Insert tool. Both standard and custom GIFTS data fields may be used as merge fields in a Web clipping URL.

Data fields should be entered using the following format:

{Category.Field Name}

To use the Field Insert tool for selecting one or more merge fields:

1 Click the Insert Field Reference button located below the URL field on the Edit Web Clipping form. The Add Data Field form opens:



You can select the GIFTS category (database table) that contains the field(s) you want to insert here.

2 Use the "Select available fields from" drop-down list to select the GIFTS category (table) that contains the field(s) you want to insert.

Note: In addition to GIFTS categories, this list contains an "Authentication" option that allows you to add *user data* from the Available Fields list in the next step.

3 Scroll through the Available Fields list and select the field(s) you want to insert, and then click OK.

Removing a Web Clipping From a Form

You can remove Web clipping from a form at any time. When you remove a Web clipping from a form, its configuration options are deleted permanently. If you wish to re-add a deleted Web clipping, you will need to configure it from scratch. Before removing a Web clipping, it is a good idea to make a record of its URL.

To remove a Web clipping from a form:

1 Highlight the Web clipping and click Remove. You are prompted to confirm your intentions.

2 Click Yes to remove the Web clipping.

13 Importing Matching GIFTS Summary Data

This chapter describes how to import summary data about a matching gifts program into GIFTS.

In This Chapter

About the Matching GIFTS Summary Import.....**284**

About the GIFTS Import Module **285**

Considerations for Summary Imports **287**

Avoiding the Creation of Duplicate Records **290**

Running the Import.....**296**

Matching GIFTS Summary Import File Layout **304**

About the Matching GIFTS Summary Import

The standard GIFTS product includes a Matching GIFTS Summary import that you can use to populate your database with a summary of matching gifts data tracked elsewhere, such as in an out-sourced matching gifts program. It is suitable for files created by matching gift "outsourcing" agencies.

You can import data from any system provided that you can export it to ASCII data files that conform to the import file format requirements of GIFTS.

During the import, GIFTS creates grants that represent the total giving for each recipient Organization within each imported period. The Payment Amount of each grant is the sum total of the matches for a recipient Organization within a single giving period. No information about individual matches or donors is imported.

Only one Payment can be associated with each imported Request. You can resolve the imported Payments against a single Line Item in your Budget, or to create a separate Line Item for each Payment.

Additional imports are supported by the optional GIFTS Import Module, as described in "About the GIFTS Import Module" on page 285.

How the Import Works

You can use the Import facility of the Administrator Module to verify the formatting of your ASCII import files and run the import. The import process creates GIFTS database records for your data, and produces a report listing all of the records imported. In addition, GIFTS maintains a history of all imports, allowing you to re-run reports for individual imports as often as necessary.

In addition, you can "re-do" an import in order to correct errors in the imported data; re-doing an import deletes all imported records for that batch and then imports the new data. Be sure to read "Canceling and Re-doing Imports" on page 303 for important information about this feature.

About the GIFTS Import Module

In addition to the Matching GIFTS Summary import included with the standard GIFTS product, clients who purchase the optional GIFTS Import Module can run the imports described in this section.

Note: MicroEdge provides conversion utilities for many grants management products, including MicroEdge's DOS-based products, Riverside Grants, Riverside Matching GIFTS, Grants Manager, and Award. For information about these utilities, please contact MicroEdge Technical Support.

Import Type	Description
Detailed Request Import	This comprehensive import includes detailed information about Approved, Pending, and Declined Requests. This import can include multiple Payments and/or Grant Requirements for each imported Request, and either background information concerning Organizations or long descriptions of Requests. *This import cannot be used to update records.*
Grant Summary Import	This import can be used to import summary information about Requests, including information about the grantee Organization and a single Payment. This import may also be used to convert data from other systems if you only need summary information for historical purposes. *This import cannot be used to update records.*
Detailed Matching GIFTS Import	This import is used to populate your database, most often with data from a legacy system. It includes individual gift records, including the Donor and recipient Organization information. In addition, this type of import groups Approved gifts into batches and creates the appropriate grant and payment information. *This import cannot be used to update records.*
Organization Import	This import can be used to import detailed information about grantee Organizations. Each imported record can include the Organization's Vendor Number, name, address, Primary Contact, Tax ID, telephone number and extension, fax number, e-mail address, and Web site address.
Contact Import	This import is used to import detailed information about Contacts, and can import multiple Affiliations between a Contact and grant requests and organizations.

Import Type	Description
User Import	This import is used to import detailed information about users. Each imported record can include the user's name, group, email address, and title.

Considerations for Summary Imports

For each recipient Organization within each imported period, the import creates an Approved Request with a single Payment that represents the total giving to the Organization within the period.

During the import, you specify the Request Type (such as 'Matching GIFTS') and Status (such as 'Closed') of the imported grants. The Request Type and Status are applied to every grant in the import file.

The following topics apply to the Requests and Payments that are created as a result of your import.

- Default Coding Sheet classifications
- Default Grant Requirements
- Budget resolution
- Setting up your Fiscal Year

Default Coding Sheet Classifications

In the Coding Sheet Preferences of the GIFTS Administrator Module, you can supply default Coding Sheet codes prior to importing records. Each Request that does not contain a classification is given the default classification, if any, that you specified.

Note: The Coding Sheet defaults do not overwrite the classifications in the import file; defaults are only used to populate blank fields.

If any of the categories on your Request Coding Sheets *require* a classification (as described in "Requiring a Category" on page 76), you can supply a default to ensure that every imported Request has a classification entered for the required categories.

You can set these defaults during the import, as described in "Step 3: Specifying Coding Sheet Defaults" on page 301.

Default Grant Requirements

If your Administrator has established Default Grant Requirements for the Request Type of the imported grants, you can determine whether these Requirements are attached to imported Requests. Since you are importing matches that have already been processed, most grantmakers choose not to apply Requirements to their summary imports.

This option is displayed during the import, as described in "Step 2: Setting the Import Options" on page 299.

Budget Resolution

If you are using the GIFTS Budget Module, you can resolve the total amount of the imported Payments from a single Reserve Fund in your Budget. To complete the import, you must have a Reserve Fund with a sufficient available balance, or have a Budget that allows Reserve Funds to carry a negative balance.

During the import, you can choose to create a Line Item for each imported Payment, or to create a single Line Item for the entire import.

To resolve your imported Payments, enter "MG" as the Import Type in field 2 of the import file's header record (described on page 305). To exclude Budget resolution from the import process, enter "MG_NO_BUDGET" as the Import Type.

Setting up Your Fiscal Year

To ensure that your financial data is imported properly, be sure to set up your Fiscal Year in the GIFTS Preferences before you import data. For more information, see "Fiscal Year" on page 69.

Organization Type Classifications

This import cannot be used to update existing records. If a record in the import file matches a record in GIFTS, the record in the import file is not imported.

However, please note the following exception: if the Organization Type classifications for an existing Organization are blank and a matching Organization is found in the import file, the Organization Type 1 and Organization Type 2 fields in the GIFTS Organization record are updated with the Type information from the import file.

Avoiding the Creation of Duplicate Records

When you import data, it is important to avoid the duplication of records so that your reports and queries are accurate. For example, you wouldn't want a report that divides an Organization's grants between two "duplicate" Organization records that in fact represent the same Organization.

During imports, GIFTS searches your database for matching records before importing new data. If a duplicate record is found, the new data is not imported in order to avoid the creation of duplicate records.

The process that the system uses to search for duplicate records is known as *matching logic*.

Organization Matching Logic

The import feature allows you to determine how aggressive you wish the system to be when searching for duplicate records. The logic used by each of the two available methods, and considerations for choosing a method, are detailed in this section.

The option that you choose may affect how you create your import file and the nature of the information that you include within it. We recommend that you take the time to understand this process before you create your import files.

There are two available matching logic options:

- Match on Vendor Number only
- Match on Vendor Number, Tax ID, Name, State and Postal Code

Match on Vendor Number Only

With this approach, the system searches for matches between the Vendor Numbers in your database and the Vendor Numbers specified in the import file. (In GIFTS, Vendor Numbers are displayed on the Background tab of each Organization record.)

If no exact match is found for a Vendor Number in the import file, a new Organization record is created and populated with the Organization information from the import file. If an exact match is found, no record is created and—if you are importing a Request—the Request is associated with the existing Organization.

Considerations If your Organization Vendor Numbers were not entered consistently, duplicate Organizations record may be created where no exact match is found between the import file and your database.

Solution After the import, use the Administrator Module to merge duplicate Organizations. Note that this can be time consuming if many duplicates were created by the import.

Match on Vendor No., Tax ID, Name, State, and Postal Code

With this approach, GIFTS makes several attempts to match the Organization in the import file with an Organization your GIFTS database. Note that the State field may also be known as County or Province, as determined by the Regional Settings control panel of Microsoft® Windows®.

The matching logic is as follows:

1. Does the Vendor Number in the import file match a Vendor Number in GIFTS?
   - If the answer is no, proceed to Question #2.
   - If the Vendor Number matches a single Organization record in GIFTS, there is a match and the Organization information is not imported.
   - If the Vendor Number matches more than one Organization in GIFTS, GIFTS checks the Tax ID, if available, and name/state/postal codes to ensure that the correct match is made. A match is made only if the Vendor Number, Tax ID (if available), *and* the name/state/postal code match. Otherwise, proceed to Question #2.
2. Does the Tax ID in the import file match a Tax ID in the database?

- If the answer is no, proceed to Question #3.
- If the answer is yes and the Organization in GIFTS does not have a Vendor Number, proceed to Question #3.
- If the answer is yes and the Organization in GIFTS has a Vendor Number (that did not match in question #1) there is no match and the Organization data is imported into a new Organization record.

3 Do the name, state, and postal code for the Organization match the name, state, and postal code of an existing Organization? (Note that all three fields must match).

- If the answer is no, there is no match and the Organization data is imported into a new Organization record.
- If the answer is yes and the Organization in GIFTS has a Vendor Number (that did not match in question #1) there is no match and the Organization data is imported into a new Organization record.
- If the answer is yes and the Organization in GIFTS *does not* have a Vendor Number, there is a match and the Organization information is not imported.

Considerations If an incorrect match is found, imported Requests can be associated with the wrong Organization and the correct Organization record would not be created.

Solution Manually enter the Organizations that were not imported. Then, identify each Request that was associated with the wrong Organization and transfer them to the correct Organization.

Contact Matching Logic

The following logic is used to match Contacts included in Matching GIFTS Summary imports. The summary import can include a Primary Contact with each imported Request.

If an imported Organization matches an existing GIFTS Organization And both records contain a Primary Contact, GIFTS attempts to match the Contact information based on the last name, first name, and middle name of the Contact.

- If there is an exact match, the Contact is not imported and the Request is assigned to the Primary Contact from the existing Organization.
- If there is not an exact match, a new Contact record is created for the Contact from the import file. A Request Primary Contact Affiliation identified this person as the Primary Contact for the Request (the Primary Contact for the existing Organization is not altered).

  Important: Multiple records for the same Contact may be created by this process, since GIFTS does not attempt to match the Primary Contact of a Request with the Primary Contact of another Request for that same Organization.

If the imported Organization *does not* match an existing Organization Its Primary Contact is imported as both the Organization Primary Contact and the Request Primary Contact; there is no attempt to search for an existing Contact.

Code Matching Logic

Throughout GIFTS, there are *coded* fields that restrict data entry to a pre-defined list of codes. For example, the Request Coding Sheet includes a 'Program Area' category that can have classifications like 'Arts & Culture' or 'Education.'

These codes are stored in *Code Tables*. For example, the Program Area codes are stored in the Program Area Code Table.

When you import data from an external source, GIFTS attempts to match the imported codes with your codes in GIFTS. However, the coding structure in the system used to create the data may not be the same as the coding structure you have established in GIFTS.

If this is the case, your import may create 'duplicate' codes that have the same meaning. Duplicate codes can make it extremely difficult to obtain accurate reports and queries from your database.

Note: If duplicate codes are created by an import, you can use the Code Replace feature described in "Replacing Codes" on page 37 to replace the duplicates with the correct code.

During any import that includes codes, GIFTS attempts to match the imported codes with the codes in your GIFTS database to prevent the creation of duplicates. The import attempts to match first by the Code value, and then by the Description. These searches are not case-sensitive, so "arts" would be recognized as being equal to "ARTS."

Important: If a GIFTS Code Table contains duplicate Descriptions, the Description in the import file is matched against the first matching Description found in the table. Therefore, Descriptions may be mapped incorrectly more than one codes in a table has the same Description.

If no exact match is found, a new code is created in GIFTS. A match is made when an imported Description and/or Code value matches an existing code in GIFTS that:

- Is in the same Code Table
- If the code is in a multi-level table, is at the same level and has the same parent code.

The following examples illustrate how this matching logic works. (Note that no changes are ever made to the existing classifications in GIFTS.)

	Import Code	GIFTS Code	Match?	GIFTS Code After Import
1	Code:HOSP Desc: Hospitals	Code:HOSP Desc: Hospitals	✔	Code:HOSP Desc: Hospitals
2	Code:HOS Desc: Hospital	Code:HOSP Desc: Hospitals	✔	Both codes reside in GIFTS as "duplicates"
3	Code:[blank] Desc: Hospital	Code:[blank] Desc: Hospitals		Both codes reside in GIFTS as "duplicates"
4	Code:HOSP Desc: Hospitals	Code:HOS Desc: Hospitals	✔	Code:HOS Desc: Hospitals
5	Code:CIV Desc: Civic	Code:CIV Desc: Civil Liberties	✔	Code:CIV Desc: Civil Liberties
6	Code:[blank] Desc: Hospitals	Code:HOSP Desc: Hospitals	✔	Code:HOSP Desc: Hospitals
7	Code:HOSP Desc: Hospitals	Code:[blank] Desc: Hospitals	✔	Code:[blank] Desc: Hospitals

Important: The fifth match is improper, since the Descriptions 'Civic' and 'Civil Liberties' are intended to represent different information. If you are importing Code values, be sure that they are unique.

Running the Import

Before You Begin: Make sure that your import file conforms to the layout described in "Matching GIFTS Summary Import File Layout" on page 304. Set up your Fiscal Year in GIFTS to ensure that your financial data is imported properly.

Important: If you use Branch Security, records imported into the database *are automatically stamped with the Branch ID of the user currently logged into the system*. Make sure that a user with the appropriate branch is logged in before importing records from a specific branch.

Import processing involves the following steps:

1. Verifying the Import File
2. Setting the Import Options
3. Specifying Coding Sheet Defaults
4. Running the Import

Caution: Before you verify or import data, ensure that you have a valid backup of your database. In case of problems, it may become necessary to restore the backup in order to continue working.

Step 1: Verifying the Import File

The verification phase of the import is used to identify the import type and to ensure that there are no errors in the import file.

When you verify an import file, the system obtains the import type from its header record, confirms that each record contains the appropriate number of fields, and confirms that the summary information specified in the header reflects the actual contents of the records in the file's data area.

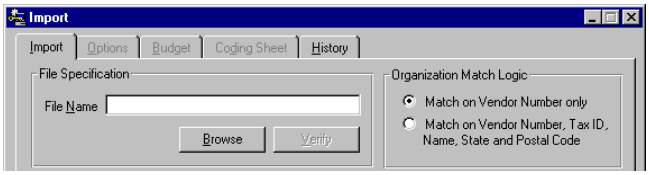
Important: If you are importing a large amount of data, the verification process can take some time. Be aware that if you exit the Import utility before you have completed the import, you will have to re-verify the import

file when you re-enter the Import utility. Ensure that you have a valid backup of your existing database before you verify your import data.

To verify an import file:

1 Start the GIFTS Administrator Module.

2 From the Administrator menu, choose File ➤ Import. The import facility is displayed.

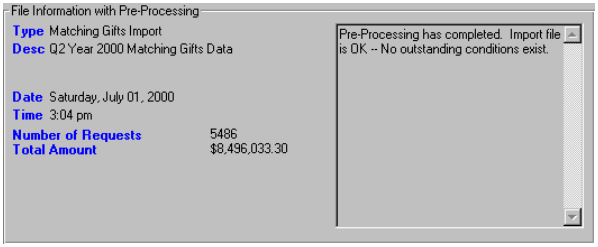


3 Enter the path to your import file. You can click Browse to search for it, if necessary.

4 Click the appropriate Organization Match Logic option. (For a description of these options, please refer to "Organization Matching Logic" on page 290.)

5 Click Verify to scan the import file. A log of any errors or anomalies that are encountered in the file is displayed.

❖ If the verification is successful, the log closes and a summary of the import data is displayed.



❖ If there are informational messages or verification process is not successful, a detailed description of the errors found is displayed in the log. Click Print or Save As to keep the log for your records, and

refer to "Verification Messages and Errors" on page 298 for more information.

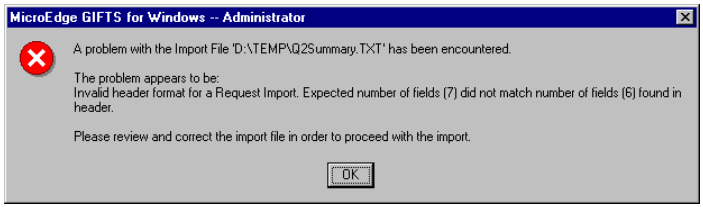
Note that the Import button, Options tab, and Coding Sheet tab are not available until the verification process has been run successfully.

Verification Messages and Errors

The importing of data is a complex process that can result in permanent changes to your system, so the verification process notifies you not only of errors within your import file, but also of any notable changes that your import will cause.

For instance, some imports can affect the Codes and Descriptions in your Code Tables, as described in "Code Matching Logic" on page 293. The Process Log details such changes so that you can ensure that the effect of your import reflects your intentions.

If the system encounters an error in the number of fields or other formatting errors in the file, a message similar to the following is displayed.



Other errors related to the import as a whole are displayed in the lower right portion of the Import window. For example:

[#] Request record(s) were expected, but [#] were found The total number of records specified in the header of the import file does not match the total number of records present in the file.

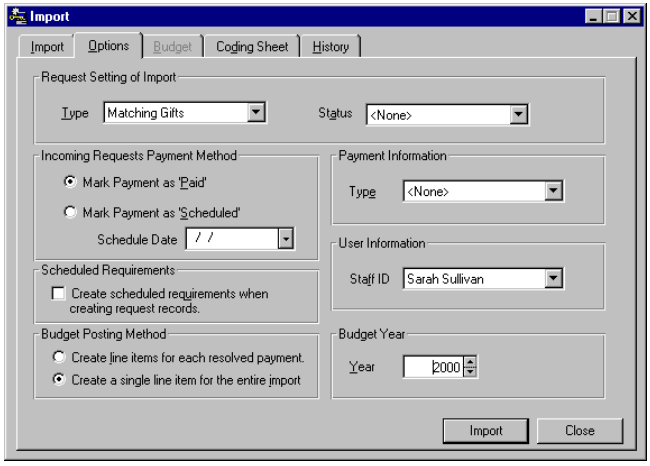
Total grant amount of [$] was expected, but a total of [$] was found The total grant amount specified in the header of the import file does match the sum total grant amount of the records present in the file.

If you encounter an error message, you must correct the error before you can proceed with the import. Messages in the Process Log, on the other hand, can be either informational or in regard to an error. If you require

assistance in identifying and/or resolving problems related to your import, please contact MicroEdge Technical Support.

Step 2: Setting the Import Options

To access the options for enhancing your imported data, click the Options tab . These options apply to your imported Requests and their Payments.



Option	Description
Request Setting of Import	Choose the Type and Status that you want to apply to the imported Requests. Note that since all records are imported with a Disposition of Approved, only the Status codes for Approved Requests are available.
Incoming Requests Payment Method	For each grant imported, GIFTS creates a single Payment for the *full grant amount*. If you choose the Mark Payment as 'Paid' option, the system marks this Payment as Paid with the Payment Date as same day as the grant date. If you choose Mark Payment as 'Scheduled', GIFTS marks each Payment as Scheduled on the data you provide in the Schedule Date field. (You can change the Schedule Date later by editing the Payment records.) Please note that you must provide a Payment Schedule Date if you choose this option.

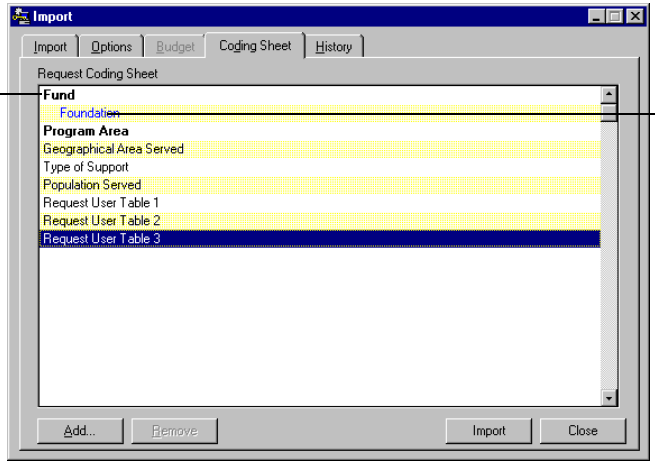
Option	Description
Scheduled Requirements	If you select this option, the Default Grant Requirements for your system are created for each of the imported Requests. For more information about Default Grant Requirements, please refer to "Default Grant Requirements" on page 288.
Budget Posting Method	If you are using the optional Budget Module, you can choose to create a single Line Item within the Budget for the entire import or a separate Line Item for each imported Payment that requires resolution. As you run the import, you will be prompted to choose a Reserve Fund from which to resolve your Line Item(s). *This option is not displayed for Matching GIFTS Summary imports that do not include Budget information (as specified by field 2 of the import file's header).*
Payment Information	You may choose a Payment Type for each Payment created by the import. Note that the code provided here does not override data in the import file where this information has been provided. Only records where the Payment Type has been left blank are supplied with this code.
User Information	The staff person chosen here is assigned as the Staff person responsible for each Request created by the import.
Budget Year	If you use the optional Budget Module and have chosen a Request Type that is included in your Budget, the Budget Year specified here is the Budget Year from which funds must be allocated in order to complete the import. **Example:** If the import contains a total of $500,000 in grants, you is asked to resolve $500,000 against a Reserve Fund in the Budget Year specified here. *This option is not displayed for Matching GIFTS Summary imports that do not include Budget information (as specified by field 2 of the import file's header).*

When the options on this tab are complete, you can continue to step 3 to define a default Coding Sheet for the imported Requests.

Step 3: Specifying Coding Sheet Defaults

You can supply default codes for the imported Request records. Each Request that does not contain a classification (such as 'Arts & Culture') in a given category (such as 'Program Area') is given the default classification, if any, that you specified for that category.

Categories that have been marked as *required* in the Coding Sheet Preferences are displayed in bold type.



The defaults you enter (displayed in blue) are applied only to Requests that have not been classified. The defaults *never* overwrite the imported data.

Note: The classifications specified here never override the data supplied by the import file; they are used only to populate categories that are blank.

Note that the following considerations may apply to your import:

- Your Administrator may have set up default classifications that are applied when a user enters a new Request into the system. They do not affect imported records.
- Your Administrator may have marked categories as being 'required,' meaning that users who enter Requests must enter a classification into the required categories before the Request can be Approved.
- If any of your imported grants do not have a classification in a required category, a message is generated. (Note, however, that you are still permitted to import the Request.)

  You may wish to enter defaults to ensure that your imported Requests are not missing required classifications; as an alternative, you can search for missing classifications after the import.

To enter a default classification, highlight a category and click Add. To remove a default, highlight it and click Remove.

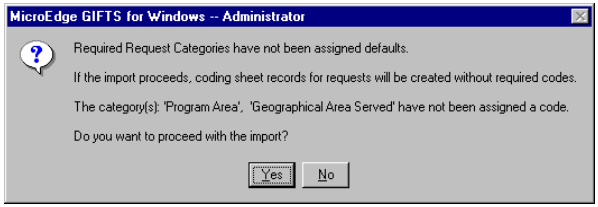
Step 4: Running the Import

Once you have chosen import Options and the (optional) default Coding Sheet classifications, you are ready to proceed with your import.

Caution: Before you verify or import data, ensure that you have a valid backup of your database. In case of problems, it may become necessary to restore the backup in order to continue working.

To run the import:

1. Click the Import button. A message reminds you to ensure that you have a valid backup of your database.
2. If your backup is available, click Yes to proceed. A message describes the Organization Matching Logic option you chose, and asks you to confirm that it reflects your intentions.
3. Click Yes to proceed.
   - If there are required fields on your system's Request Coding Sheets and you did not supply a default value in the import's default Coding Sheet, a message informs you of this fact. You can click Yes to proceed.



   - If you need to resolve the imported Payments against your Budget, you are prompted to confirm that you wish to proceed with the Budget resolution. Click Yes to resolve the Payments. For information

about resolving Payments against the Budget, please refer to the *Budget Module User's Guide*.

4 After you respond to the necessary prompts and start the import, a log is displayed to track the progress of the import. If any errors are listed, you can click Print or Save As when the import is complete to keep the contents of the log for reference.

5 When the import is complete, an import report is displayed in the Crystal Reports viewer. From the viewer, you can print or export the report.

Canceling and Re-doing Imports

While an import is in progress, you can cancel it by clicking the Cancel button. Be aware that the cancel button does not delete any of the records that were imported before you clicked Cancel; it simply stops the import.

After canceling an import, you can run the import later or make changes to the import file and then re-do the import. The Import utility automatically determines that you are re-doing the import only if the time-and-date stamp in the header record of the master file matches the stamp from your earlier attempt.

Caution: An import is considered a redo only if the system can detect that you are importing the same data again. If you re-import your data, be sure that the time-and-date stamp in the header of the master file has not changed. If this information is different, GIFTS cannot recognize that you are re-importing the same data and may create duplicate data.

When you re-do an import, the system deletes any Requests, Payments, or Requirements that were imported the first time the import was run. Note that the system does not delete the Organizations, Contacts, or classifications that were created. Then, the data in the import file is imported in the same manner as a first-time import.

Matching GIFTS Summary Import File Layout

The import file must contain a header record followed by one data record for each Request that is to be created by the import. This import allows only one payment per Request, and all Requests are imported with a Disposition of Approved.

Note: If the Organization contained in the import file is found to exist in the GIFTS database, and Organization Type 1/Type 2 classifications have been supplied in the import file but are blank in GIFTS, the import process updates the existing Organization with the classifications contained in the import file.

General File Requirements

GIFTS import files are flat ASCII text files that consist of lines, or rows, of text that are delimited into *fields* by tab characters. Each line ends with a carriage return and represents an individual *record*.

The first record in the Matching GIFTS Summary import file is the *header*, which contains summary information about the import. The header record is followed by one or more *body* records, which contain the data you are importing.

Example: Each grant you import has its own line in the Matching GIFTS Summary import file. Within a line, each data element—such as the recipient Organization name, the Grant Amount, and so forth—is contained in a *field*.

GIFTS import files must conform to the following specifications:

- The fields within each record (row) are tab delimited (ASCII character 9). No other tab characters may appear anywhere in the data that are not field delimiters (including description fields).
- A carriage return (ASCII character 13) and a line-feed (ASCII character 10) terminate each record.
- There is one record per line.
- All blank fields are treated as null entries.

- All times in 24-hour format. (example 20:00)
- Numeric fields (with the exception of currency fields) contain:
  - no decimal point (for example, 1234)
  - no commas
  - leading negative signs, when appropriate

The imports are sensitive to the Regional Settings Control Panel of Microsoft® Windows®. The format of the currency and date fields in your import files must comply to the format specified by your workstation's Regional Settings.

The following requirements, and the sample values shown in this publication, are for the "English (United States)" setting only. If you are using a different Regional Setting, these requirements may be different.

- Currency fields contain:
  - a decimal point (for example, 30000.00)
  - no commas
  - leading negative signs, when appropriate
- All dates in mm/dd/yyyy format.

Header Record Layout

	Field Name	Description	GIFTS Format / Example	Req
1	File Type	Indicates to GIFTS that this is a valid import file.	Fixed characters (literal) GFW_IMPORT_FILE	✔
2	Import Type	Indicates the type of import file to GIFTS. Without this information, GIFTS cannot determine what type of import to run.	Fixed characters (literal) For Matching Gift Summary imports: MG For Matching Gift Summary imports with no Budget resolution: MG_NO_BUDGET	✔

	Field Name	Description	GIFTS Format / Example	Req
3	Import Description	A description of the import. This field is the default Project Title applied to imported Requests that do not have a Project Title.	Limited to 255 characters.	✔
4	Import Date	The date that this import was created.	Date format: Example: 08/25/2000	✔
5	Import Time	The time that this import was created	Time format. Example: 20:00	✔
6	Total Batch Amount	Total grant amount to be imported.	Limited to 12 digits, including decimal. Example: 300000.00	✔
7	Total Number of Requests	Total number of grants to be imported.	Limited to 5 digits. Example: 1290	✔

Data Area Layout

Each line of the data area should include the import data for a single grant, which consists of the following fields.

	Field Name	Description	GIFTS Format / Example	Req
1	Vendor Number	The unique ID of the Organization from the source database used to populate the Vendor Number field in GIFTS; it is matched against existing Organizations as described in "Organization Matching Logic" on page 290.	Limited to 20 characters. Example: UWNY This field should be unique to the Organization.	✔
2	Organization Name	The Name of the Organization	Limited to 255 characters. Example: United Way of New York	✔
3	Organization A.K.A.	An alternate name that may be used to refer to this Organization.	If not supplied, Organization A.K.A. name is the same as Organization name. Limited to 255 characters.	

	Field Name	Description	GIFTS Format / Example	Req
4	Organization Address 1	The first line of the address of the Organization.	Limited to 100 characters.	
5	Organization Address 2	The second line of the address of the Organization.	Limited to 100 characters.	
6	Organization City	The city where the Organization is located.	Limited to 50 characters.	
7	Organization State	The state, province, or county where the Organization is located.	Limited to 20 characters.	
8	Organization Postal Code	The postal (or Zip) code where the Organization is located.	Limited to 20 characters.	
9	Organization Country	The country where the Organization is located.	Limited to 50 characters.	
10	Contact Last Name	The last name of the Organization's Primary Contact. (Contact information is optional.)	Limited to 50 characters. The last name of Contact is required if any of the other Contact Name fields are populated.	(✔)
11	Contact First Name	The Contact's First Name.	Limited to 50 characters.	
12	Contact Middle Name	The middle name of the Contact.	Limited to 50 characters.	
13	Organization Contact Title	The title of the Contact at their Primary Organization.	Limited to 100 characters.	
14	Contact Salutation	The salutation of the Contact.	Limited to 100 characters. Example: Dear Sir	
15	Organization Type 1	Description for the Organization Type (Level 1) classification. If this Description is not found in GIFTS, it is created during the import.	Limited to 75 characters. Example: Government Required if Organization Type 2 is defined	(✔)
16	Organization Type 2	Description for the Organization Type (Level 2) classification. If this Description is not found in GIFTS, it is created during the import.	Limited to 75 characters. Example: Social Services	

	Field Name	Description	GIFTS Format / Example	Req
17	Organization Matching GIFTS Classification	Description of the Organization Matching GIFTS classification. If this Description is not found in GIFTS, it is created during the import.	For users of the optional Matching GIFTS Module only. Otherwise, leave this field empty. Limited to 75 characters. Example: Education	
18	Tax ID	The Tax ID number of the Organization. This field is matched against existing Organizations as described in "Organization Matching Logic" on page 290.	Limited to 20 characters.	
19	Grant or Match Date	The award date or match date of the grant.	Date format: Example: 08/25/2000	✔
20	Grant or Match Amount	The *total* Grant Amount of the grant.	Limited to 12 digits including decimal. Example: 300.00	✔
21	Payment Date	The actual date the grant was paid. If this date is not supplied, the Grant Date is used as the payment date.	Date format: Example: 08/25/2000	
22	Hold GIFTS	Whether to allow matches for the Organization.	For users of the optional Matching GIFTS Module only. Otherwise, leave this field empty. Yes or No (default is No). Example: No	
23	Hold GIFTS Remarks	Reason the Organization cannot receive gifts.	For users of the optional Matching GIFTS Module only. Otherwise, leave this field empty. Limited to 255 characters. Example: Tax status not verified	

	Field Name	Description	GIFTS Format / Example	Req
24	Project Title	The Project Title for the grant. *If this field is blank, the text in the Import Description field of the header record is used as the Project Title.*	Limited to 255 characters. Example: Library Restoration Project	
25	Filler	For future use.	Leave this field blank.	
26	Program Area	Description for the Program Area (Level 1) classification. If this Description is not found in GIFTS, it is created during the import. The data you enter here overrides the default Coding Sheet, if any, that you created for the import process.	Limited to 75 characters. Example: Education	
27	Fund Donor	Description for the Fund Donor classification. If this Description is not found in GIFTS, it is created during the import. The data you enter here overrides the default Coding Sheet, if any, that you created for the import process.	Limited to 75 characters. Example: Corporation	
28	Payment Type	Description for the Payment Type classification for the imported Request's Payment. If this Description is not found in GIFTS, it is created during the import. The data you enter here overrides the default Payment Type, if any, that you created for the import process.	Limited to 75 characters. Example: Charitable	

14 Setting Up Branch Security

This chapter describes how to use Branch Security to control access to your grant making data among your branch offices.

In This Chapter

About Branch Security **312**

Activating Branch Security **316**

Managing Branch Codes **317**

Assigning Groups to Branches **319**

Branch/Division Correspondence Templates **322**

Branch-Specific G/L Account Codes **323**

About Branch Security

Branch Security allows grant makers with multiple sites or branches and separate giving programs to capture all of their information in a centralized database, while preventing users from different branches from editing (or viewing, if desired) each other's data.

Users cannot edit or view data from other branches unless they are granted permission to do so. In addition, reports and searches generated by users only include data for the branches for which they have "view" rights.

To accomplish this, you can enter a code for each of your branches into the system. Each Request and its associated Activities, Payments, and Requirements are then stamped with a primary branch. Each group's access can then be restricted to records based on the branch stamp.

Note: Access to Organization and Contact information is not limited to specific branches. This ensures that you maintain an accurate giving history for Organizations that are funded by more than one branch. In addition, users of Employee GIFTS can use the "Donors are branch specific" option in the GIFTS Security Preferences to determine whether Donor information is shared between branches.

When you set up Branch Security for your system, you must choose one of two ways Requests (and thus their associated Activities, Payments, and Requirements) can be stamped with a primary branch:

- A Request can be automatically stamped with the primary branch of the user creating it.
- The Request form can include a branch field, allowing a user to enter a specific branch him- or herself.

The option you should choose depends upon which of two different data entry models you use. Descriptions of each model follow. You should be able to recognize the model your organization already follows and choose the correct Branch Security option.

Note: This Branch Security option is set up in your Security Preferences. For details on setting this option, please see "Activating Branch Security" on page 316.

Decentralized Data Entry Model

This data entry model is appropriate if members of your various branches or divisions are receiving, entering, approving, and declining grant requests more or less independently of one another. Your GIFTS data is all stored centrally; however, each branch or division works almost exclusively with Requests and grants that they have entered themselves. For most foundations and corporations with branches or divisions, this is the model they follow.

In this case, you would want Requests to be automatically stamped with the primary branch of the user creating it. This allows members of each branch to enter Requests (and other associated GIFTS records) that can only be viewed or edited by other members of the same branch.

In addition, you can:

- Create a "Headquarters" division that has access to all data. (Regardless of the Branch Security settings, the Admin user group has unrestricted access to all data.)
- Transfer Requests and Budget items from one branch to another.

Centralized Data Entry Model

The centralized data entry model is most likely to be used by organizations that manage several different, wholly separate funds. In this case, a single user group is accepting, entering, approving, and declining grant requests for many various funds. However, you also want representatives of the individual funds to be able to view the data for their fund (and their fund only).

In this case, you want your users to enter the branch for each Request manually. This allows a single user to enter Requests for several different branches.

For example, you could create a "Headquarters" branch that has access to all data; these users would be employees of your central organization. Then you can create a branch for each fund you represent, adding the fund's representatives to the appropriate branch.

Note: If you use the Branch Security option recommended for this model, you can create user groups with *no* branch identification. You may want the user group performing data entry for different funds to have no branch ID. For details, see "Assigning Groups to Branches" on page 319.

Your users will then assign a branch to each Request they enter, depending on the specific fund being appealed to. Representatives for each fund (or "branch") will then be able to access data concerning their fund only.

When following this model, the branch must be entered in each new Request manually. You will not be allowed to save a new Request without entering a branch. The branch field appears in the Request form only if you choose this Branch Security option.

The branch field may also appear on the following forms when using this Branch Security option:

- *Activity forms* — If you are creating a new Activity not associated with a Request, the branch field will appear.

  If you create and Activity associated with a Request, the Activity is automatically stamped with the Request's branch, and the branch field is unavailable.

- *Quick Entry forms* — Quick Entry forms for historical grants, immediate declinations, and pending Requests all require an entry for branch. You will not be allowed to save a Request entered using Quick Entry without adding a branch.

- *Budget item form* — In the optional Budget Module, the branch field will appear on new budget items, if those items are for first-level categories.

  In this case, the branch field will be filled in with the branch of the user entering the budget item. (The user can change the branch at any point.) If the user has no branch assigned, the field in the budget item defaults to <None>. Please note, however, that no budget item can be saved without being assigned to a branch. The user will have to choose a branch in this case.

- *Employee GIFTS forms* — If you use the optional Employee GIFTS Module, and choose this Branch Security option, you will also see the branch field on new Volunteer and Matching Gift forms. You will not be allowed to save a new Gift without adding a branch.

If you chose in your GIFTS Security Preferences to make Donors branch-specific, the branch field will also be seen on the Donor form for new Donors you are adding. You will not be able to save a new Donor if you do not enter a branch.

Note: In all the forms listed above, the Branch field defaults to the branch of the user adding the record. (The user can change the branch at any point.) If the user is assigned to no branch at all, <None> will first appear in the field. You must enter a valid branch before you can save these records.

Activating Branch Security

To activate Branch Security, go into your Security Preferences and set up your Branch Security options. Please see "Security Preferences" on page 62.

Note: Currently, the ability to use Branch Security, and the number of branches you can code, is determined by your GIFTS configuration file, and is priced separately. If you wish to take advantage of this feature, please contact MicroEdge.

If your organization has been using GIFTS without Branch Security and you wish to begin using this feature, you must assign your existing records to their appropriate branches. Records that are not assigned to a branch are available only to users in the Admin group.

If you wish to implement Branch Security in the middle of a Budget Year and have your budget information accurately reflect your branch structure, you can do one of the following:

- Use the "Ignore Branch Security in the Budget Module" option described in "Security Preferences" on page 62 for the remainder of the Fiscal Year. At the beginning of your next Budget Year, turn this option off and create your new Budget Year with Branch Security on.
- Use the Transfer Branch option to transfer all your budget items to the appropriate branches. For details, please see the *Budget Module User's Guide*.
- Wait until the beginning of the next Budget Year before activating Branch Security.

For more information about using the Budget Module with Branch Security, please refer to the *Budget Module User's Guide*.

Tip: When Branch Security is active, the primary branch of the user logged in is displayed at the bottom right corner of the screen. Note that if the user belongs to the Admin group, no branch name is displayed.

Managing Branch Codes

The first step in using Branch Security is to create codes for each branch in your organization. These codes are used to assign your user groups to their appropriate branches.

To create a new branch code:

1. Select Setup ➤ Code Tables from the Administrator menu. The Table Maintenance window opens.
2. Click the System tab. The System Code Tables are displayed.
3. Highlight the Branch/Division table and click Edit Codes. The Code Maintenance window opens.
4. Add your branch codes to the table. (For more information about adding codes, please refer to "Adding Codes" on page 24.)

Deactivating Branch Codes

If you are no longer using a branch code, you may wish to deactivate the code so that no new data may be associated with it. A deactivated branch may not be assigned as the primary branch for any group. It may, however, be assigned as the secondary branch for a group with view-only permission.

Caution: If there are any user groups assigned to a branch with "view only" permissions (a secondary branch assignment), the branch's code may be deactivated but the branch will still be recognized by the system as an active branch for configuration purposes.

To deactivate a branch code:

1. Select Setup ➤ Code Tables from the Administrator menu. The Table Maintenance window opens.
2. Click the System tab. The System Code Tables are displayed.

3 Highlight the Branch/Division table and click Edit Codes. The Code Maintenance window opens.

4 Highlight the branch you want to deactivate, and then select Action ➤ Deactivate.

Assigning Groups to Branches

GIFTS determines the branch of the user logged in to the system by the group to which they belong. Each group is assigned a primary branch—users assigned to that group have full access (according to that group's permissions) to records assigned to that branch.

Each user group can also access records assigned to other branches, or secondary branches, based on the following permissions:

Permission	Description
None	Users in this group cannot view or modify Requests, Activities, Payments, and Requirements for this secondary branch. This is the default permission.
View Only	Users in this group can view—but *not modify*—Requests, Activities, Payments, and Requirements for this secondary branch.
Use Group's	Users in this group can view and modify information for this secondary branch just as they do for their primary branch.

Important: Each Request and its associated Activities, Payments, and Requirements are stamped with a primary branch. If you have users who are responsible for data entry for more than one branch, you must do one of the following:

- If you are using the Branch Security option for the *decentralized* data entry model (where a Request is automatically stamped with the branch of the user who entered it), these users should have a separate login at each branch.
- If *all* your data entry is being performed by one user group (although for many branches), you should consider using the Branch Security option for the *centralized* data entry model (where users manually enter the branch for new records).

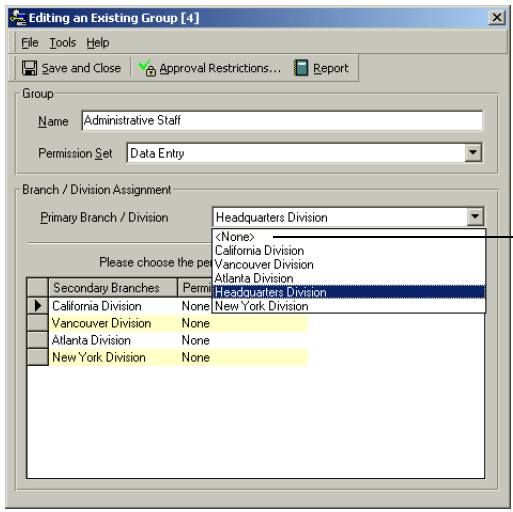
  When using this Branch Security option, you can have user groups with no assigned branch. Users in a user group with no branch ID can access data from all branches (according to that group's permissions). This

would only be recommended for your central group, not for representatives of the various funds you manage.

To assign an existing group to a branch or branches:

1 From the Administrator menu, choose Access ➤ Groups. The Groups window opens.

2 Highlight the group you want to work with, and click Edit. The Editing an Existing Group window opens:



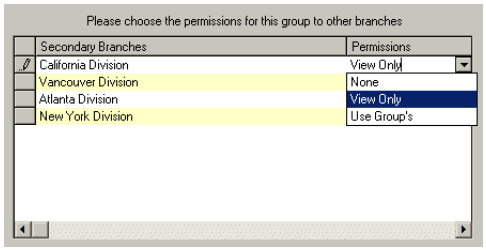
'<None>' is an available option *only* if you are using the Branch Security option for centralized data entry (where users manually enter the branch for new records).

If you are using the other Branch Security option, all user groups must have an assigned branch. (The Admin group, although it too must have a branch assigned, can access data from any branch.)

3 In the Branch/Division Assignment section of this window, select the Primary Branch/Division for the group.

Note: You cannot assign a user group to an inactive branch. If a branch code is inactive, it will not be listed in the Primary Branch/Division drop-down menu.

4 Indicate the group's permissions for each secondary branch (the default is None).

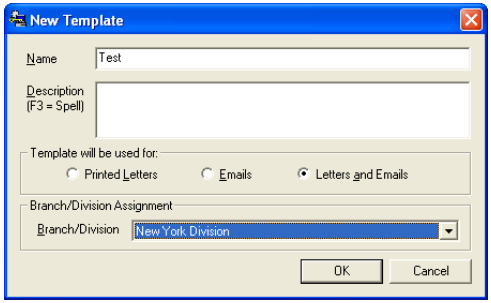


Note: The Use Group's permission option is not listed for inactive branches.

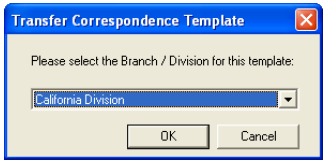
5 Click Save and Close.

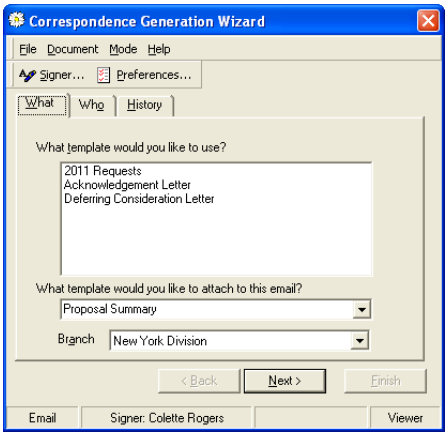
Branch/Division Correspondence Templates

If you have Branch Security enabled, when creating a new Correspondence Template, there will be a Branch/Division field that will allow you to assign the template to a specific branch/division. The default is All.



To assign a Branch/Division to an existing template, in the Administrator module go to Setup ➤ Correspondence to open the Template Library window. Right-click on a template listed and select Edit Branch/Division.





When sending new correspondence, GIFTS users will be able to filter the available templates list by Branch/Division on the What tab.

Note: This feature is purely for filtering purposes. It does not prevent the GIFTS user from changing the Branch and seeing templates they may not have access to.

Branch-Specific G/L Account Codes

For corporations with multiple divisions, each branch typically has a set of account numbers that are valid for that branch only. In order to streamline data entry, you can stamp G/L Account codes with a particular branch name; during data entry, users from each branch see only the G/L Account codes designated for their branch.

Activating Branch-Specific G/L Account Codes

1. From the Administrator menu, choose Setup ➤ Preferences. The Preferences window opens.
2. In the Security section of the Preferences tab, select the "Make G/L Account Codes Branch Sensitive" checkbox.
3. Click OK to save your changes.

Note: Existing G/L Account codes are not assigned to a branch when this feature is activated. If existing codes require a branch assignment, you can enter a new code with the appropriate branch stamp and then replace the old code with the new, branch-specific code. For more information about replacing codes, please refer to "Replacing Codes" on page 37.

Adding, Modifying, and Deleting G/L Account Codes

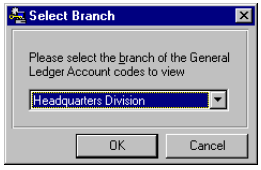
When the system is set up to use branch-specific G/L Account codes, each new G/L Account code should be assigned to a branch. G/L Account codes are automatically stamped with the primary branch of the user that entered the code; users belonging to the Admin group can enter G/L Account codes for any branch.

To create a branch-specific G/L Account code:

1. From the Administrator menu, select Setup ➤ Code Tables. The Table Maintenance Window opens.
2. Click the System tab. The system Code Tables are displayed.

3 Highlight the General Ledger Account table and click Edit Codes.

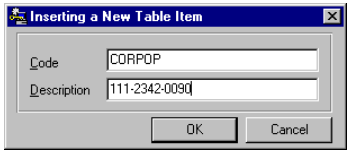
- If you are logged in as a member of the Admin group, you are prompted to choose the branch for which you are editing Account Codes.



  Choose a branch and click OK. GIFTS displays the G/L Account codes associated with that branch. Any new codes you enter are automatically associated with that branch.

- If you are not logged in as a member of the Admin group, GIFTS displays the G/L Account codes associated with your primary branch. Any new codes you enter are automatically associated with that branch.

4 To add a G/L Account code, click New. The Inserting a New Table Item window opens:



5 Enter the Code and Description information as necessary.

6 Click OK. The account number is added.

7 Use the Code Maintenance options to add, modify, and delete codes as necessary. When your changes are complete, click OK to save your changes.

15 Creating IGAM Review Rules

This chapter describes how to create review rules for application forms in IGAM.

In This Chapter

About Review Rules **326**

Creating Review Rules **327**

About Review Rules

This feature allows administrators to create a set of rules that, when triggered, automatically assigns reviewers to Requests (or proposals) after applications have gone through the consideration process in IGAM. A Request will have a Review created for it when the content of the Request matches the criteria specified in the rule. This can include a particular Disposition, Request Type, and Status, but might also contain a Recommended Amount (over or under a certain amount), and Coding, such as Program Area, Fund, or Geographic Region. This Review is assigned to the Request in GIFTS.

Important: This feature only applies to clients who have the Reviewers module and IGAM.

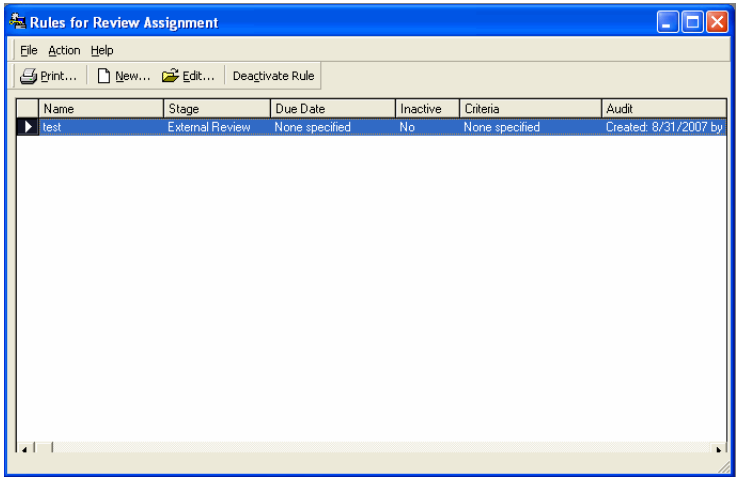
For information about assigning rules to IGAM forms, see "Assigning Review Rules to Forms" in the *Reviewers Module and ReviewerCONNECT User's Guide* for your version of ReviewerCONNECT(GCS 3.6).

Creating Review Rules

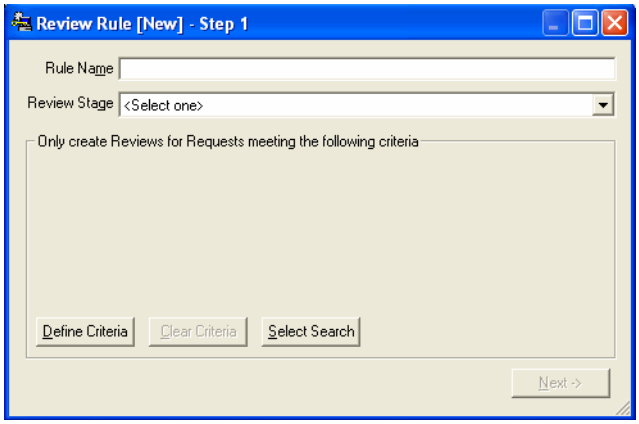
You can create one or more review rules that automatically assign reviewers to Requests when the content of a Request matches the criteria specified in the rule. After creating rules, you can assign them to specific IGAM forms.

To create review rules:

1 From the Administrator module, go to Setup ➤ Reviewers ➤ Review Assignment Rules. The Rules for Review Assignment window displays.



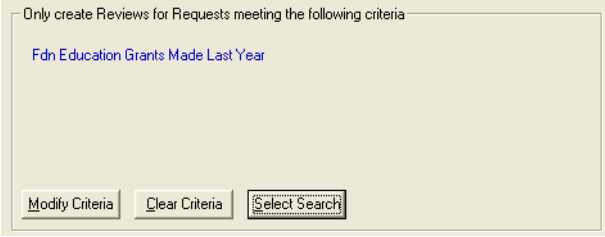
2 Click New to create a new rule, or highlight a previously created rule and click Edit. The Review Rule window displays.



3 Enter the Rule Name and select the Review Stage.

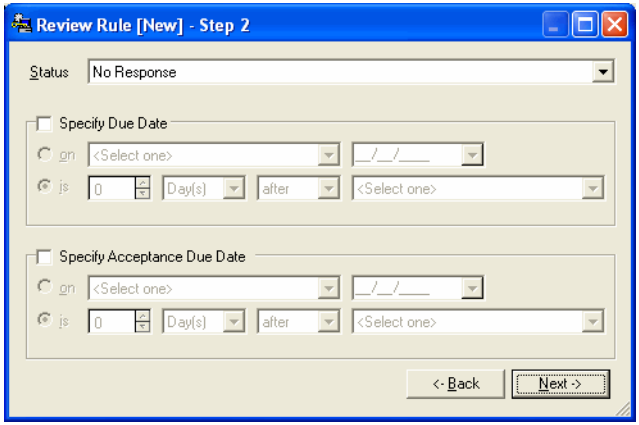
Note: A Review Stage is a set of preferences defining the properties of Review records created under it. External reviewers are generally consultants or field experts outside your organization. Internal reviewers are individuals with GIFTS user accounts; these are generally members of your staff. For more information, please see "About Review Stages" in the *GIFTSConnections Reviewers Module and ReviewerCONNECT User's Guide.*

4 Click Define Criteria to bring up the Requests Quick Find and specify the criteria which a request must meet for the rule to be applied to it. The Select Search button allows you to select a Saved Search. The selected criteria displays in the window.



Tip: Click Clear Criteria to clear the selected criteria.

5 Click Next. The content in the screen below depends on the Review Stage picked in the previous screen (internal or external reviewers).



You can choose the following:

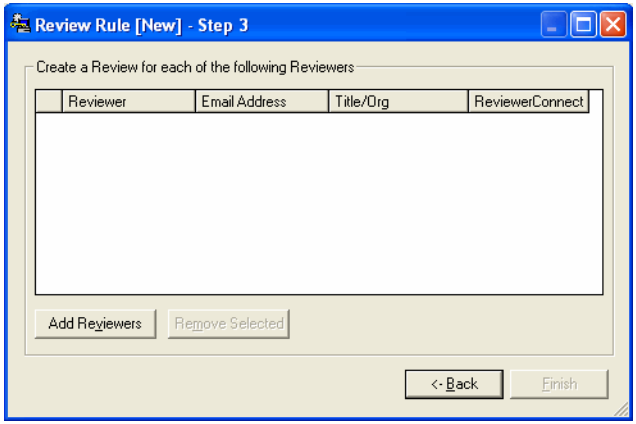
❖ Status contains all available external statuses for an external stage. For internal stages, this field only displays Pending.

Note: Review Status codes are managed in the Administrator module. For more information, please see "Editing Reviewers Module Code" in the *GIFTSConnections Reviewers Module and ReviewerCONNECT User's Guide*.

❖The Specify Due Date and Specify Acceptance Due Date sections allow you to set the due date of the review and the date the reviewer must respond by (for external reviews only), respectively.

6 Click Next. One of three screens appear, depending on whether you are creating an internal or external reviewer rule:

❖ External Review Stage



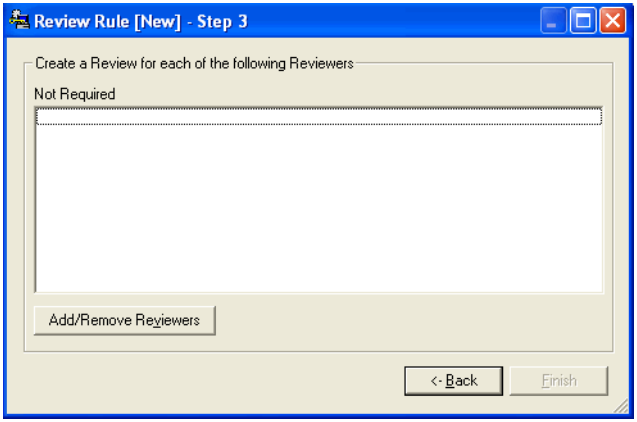
To add reviewers to an External Review Stage:

i. Click Add Reviewers. The Contact Search form displays. After searching for and locating one or more reviewers, highlight them and click Select.

ii. Click Finish.

Note: To remove a reviewer, highlight the reviewer and either click Remove Selected or press the [DELETE] key, and then Yes. You can select multiple reviewers using the [CTRL] or [SHIFT] keys.

❖ Internal Review Stage ('Notify in sequence' not applied)



Note: 'Notify in sequence' is designated when the review stage is created, and when not applied, indicates that proposals are sent to all reviewers immediately when a new Review is created and assigned to them. For more information, see "Designating Review Types and Stages" in the *ReviewersCONNECT User's Guide*.

To add reviewers to an Internal Review Stage ('Notify in Sequence' not applied):

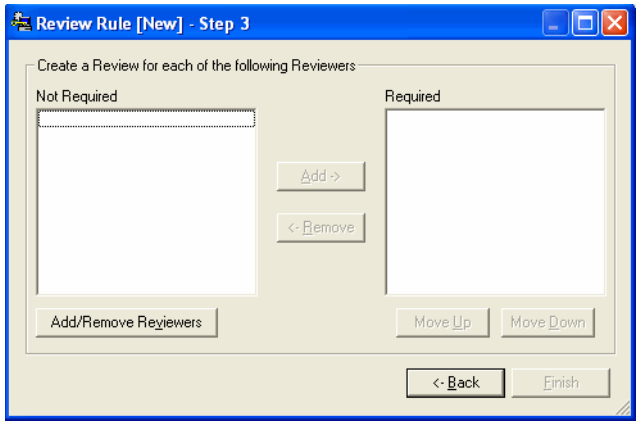
i. Click **Add/Remove Reviewers**. The User Select form displays.

ii. Click the checkbox next to one or more reviewers, and then click **OK**. You can also use the Name contains field to filter by name. To use this field, enter the text string you wish to filter by, and then click **Apply Filter**. When a reviewer is added, he or she is displayed at the bottom of the Required section.

iii. Click **Finish.**

Note: To remove a reviewer, click **Add/Remove Reviewers**, uncheck the reviewer(s) you do not want, and then click **OK**.

❖ Internal Review Stage ('Notify in sequence' applied)



Note: 'Notify in sequence' is designated when the review stage is created, and indicates that proposals are sent to reviewers one at a time in a pre-set order.

To add reviewers to an Internal Review Stage ('Notify in Sequence' applied):

i. Click Add/Remove Reviewers. The User Select form displays.

ii. Click the checkbox next to one or more reviewers, and then click OK. You can also use the Name contains field to filter by name. To use this field, enter the text string you wish to filter by, and then click Apply Filter. When a reviewer is added, he or she displays at the bottom of the Required section.

Note: If you do not want the reviewer to be on the required list, you can highlight the reviewer, and click Remove. The reviewer moves to the Not Required list. Likewise, you can add a reviewer from the Not Required list by highlighting the reviewer and clicking Add. Since the reviewers in the Required list review in sequence from top to bottom, you can rearrange the order of this list by highlighting a reviewer and clicking Move Up or Move Down.

iii. Click Finish.

Note: To remove a reviewer, click Add/Remove Reviewers, uncheck the reviewer(s) you do not want, and then click OK.

Index

A

activating codes 26
alternate viewers
    setup 88
Approval Restrictions
    description 106
    setting 106
automatically
    mark first Payment as Paid 68
    search for duplicate Contacts 53
    search for duplicate Organizations 53

B

batch letters, saving options 53
branch security
    about 312
    activating 316
    G/L account codes 323
    implementing 316
    managing branch codes 317
    preferences 63
    viewing Donors 64
    view-only privileges 319

C

categories, See Code Tables 14
CC list for letters 53
classifications
    activating and deactivating 26
    adding 24
    deleting 27
    editing 25
    printing a list of 47
clear a user's password 114
client/server
    global login options 116
    login integration 119
    security issues 119
Code Tables
    adding 19
    default 17
    deleting 21
    modifying 19
    number of levels 20
    number of selections 20
    system 16
codes
    adding 24
    branch 317
    deleting 27
    editing 25
    marking as inactive 26
    printing a list of 47
    reactivating 26
    replacing 33
    report 47
    sorting 40
    transferring 28
Coding Sheets
    adding categories to 74
    arranging categories 75
    default codes 77
    definition 14
    preferences 74
    removing a category from 75
    report 78
    requiring a category 76
    setting up 74
consolidating duplicate records 233

Contacts
default prefix 61
search for duplicates 53
copying correspondence templates 204
correspondence events 184
correspondence templates
Automatic 186
copying 204
creating 190
deleting 206
e-mail 185
letter 185
letter/e-mail 186
renaming 205
synchronizing 186
Crystal Reports 87
currencies
about 144
adding 164
choosing functional 146
deactivating 178
default local/other 151
deleting 178
display options 152
effects of rate changes 153
functional vs. local/other 145
preferences 150
reporting rates 179
tracking exchange rates 162
tracking rate changes 174
updating rates automatically 169
updating rates manually 168
currency format 61
Customizer Module 239–281
adding fields 250
custom forms
about 259
deleting 262
opening 259
deleting fields 253
editing form layout 259
environment
aligning items 268
custom form grid 264
moving items 266
removing items 267
selecting items 265
forms
adding calculated fields 275
adding fields 270
adding Web clipping 279
changing labels 271
removing calculated fields 278
removing fields 273
removing Web clipping 281
resizing items 267
modifying fields 252
planning
currency fields 243
date fields 243
designing form layout 256
Form Design Worksheet 257
forms specific to Request Type 242
forms specific to Review Stage 242
large number fields 243
medium number fields 243
number fields 243
small number fields 243
value fields 243

D

data recalculation 235
deactivating codes 26

default
codes 77, 82
Contact prefix 61
country 61
currency format 61
Grant Requirements 124
name search method 61
Request Type 68
salutation 79
state 61
wire transfer 81
deleting
Code Tables 21
codes 27
user accounts 112
deleting fields 253
delimiter 192
Disposition
defined 8
document path 86
document sub-directories, event-specific 212
documentation
conventions ix-x
on CD ??-xvii
using the documentation set xiii-xiv
dump transaction log 54
duplicate records
consolidating 233
during data imports 290
enabling automatic search for 53
searching for 232

E

editing
classifications 25
codes 25
e-mail
setup 87
templates 185
text formatting 196
event-specific document sub-directories 212
Excel 86
exchange rates
about 144
adding 164
effects of rate changes 153
reporting 179
setting 165, 168
tracking changes 174
updating 167
updating automatically 169
updating manually 168
external preferences
system-wide and local 84

F

fields
planning worksheet 247, 248
fiscal year
recalculation 235
setup 69
foreign addresses 52
FXImport.exe 169

G

G/L account codes
activating 323
adding 323
deleting 323
modifying 323
GIFTS Customizer Module 239-281
GIFTS Customizer Module. See also Customizer Module
grant reference number 67

grant term 61
GuideStar® 59

H

header
of templates 182
hiding labels 272

I

IGAM
Transfer Requests or Requirements 99
IGAM Review Rules 325
import
errors 298
matching logic 290
messages 298
individuals, proposals from 55
in-kind
setup 81

K

key initialization 235

L

label
arranging 271
defined 271
hiding 272
showing 272
text 273
letters
Contacts available as CCs 53
local preferences 84
logging in 11
login integration
client/server 119
Windows NT 65, 66, 121, 122

M

MAPI mail protocol 87
matching logic, import
for classification codes 293, 294
for Contacts 292
for Organizations 290
merging coded fields 192
money format 61
multi-currency features 143
preferences 150
multi-line text fields 273

O

OCS 4
online Help xv
Open Classification System (OCS) 14
Organizations
import 285
name search preference 55

P

password
clearing for users 114
extended password security 64
resetting for users 114
setting for users 113, 114
Payments
receipts 68
Payments preferences 79

permission sets
creating 96
defined 94
deleting 102
editing 96
reporting 102
permissions
staff override 99
POP mail protocol 87
Portable Document Format (PDF) xvii
postal code lookup list 56
pre-defined tables, list of 28
preferences
about 50
Coding Sheet 74
external 84
refreshing 50
Request 67
salutation/Payments 79
security 62
Preferences Editor 89
primary branch
assigning 319
prompt area
arranging 271
defined 271
purging removed documents 238

Q

quid pro quo
setup 80

R

recalculating data 235
receipts for Payments 68
reference number, grant 67
refreshing preferences 50
regional settings 51
removed documents, purging 238
replacing codes 33
Report Designer
setup 87
reports
adding to library 218
hiding 220, 222
making available to other users 220, 221
removing from library 223
setting path to 86
showing 220, 222
Request ID 68
Request preferences 67
Requests
default Type 68
Disposition 8
Status 8
Type 8
Requests from Individuals 55
Requirement Type codes, creating 125
requiring a category 76
research settings 59
reset a user's password 114
Revenue Canada 59
Review Rules, IGAM 325

S

salutation preferences 79
school 52
searching
for duplicate records 53, 232
name search method 61
secondary branch
assigning 319
security
detailed 93
extended password security 64
of client/server logins 119
password 109

security preferences 62
showing labels 272
SMTP mail protocol 87
spreadsheet setup 86
SQL transaction log 54
staff override permission 99
subtitles, of reports 54
synchronizing correspondence templates 186
system
  Code Tables 16
  preferences 49
system-wide preferences 84

T

tab order 272
telephone numbers, formatting 58
Template Library 188
template path 86
templates
  Automatic 186
  copying 204
  creating 190
  deleting 206
  e-mail 185
  letter 185
  letter/e-mail 186
  renaming 205
  write-up 185
templates, reports 215
transaction log, SQL 54
transferring codes 28

U

user accounts
  adding 110
  deactivating 111
  deleting 112
  modifying 110
  re-activating 111
  replacing 111
user groups
  adding 104
  definition 94
  deleting 104
  editing 104
  primary branch 319
  secondary branch 319
user import 286

V

viewers, configuring 88
view-only privileges 319

W

Windows NT login integration 65, 66, 121, 122
wire transfer
  setup 81
Word for Windows 86
word processor setup 86
worksheet
  field planning 247, 248
  form design 257, 258
write-up templates 185