

GIFTS Online

October 2016 Release Notes

This document contains a brief summary of the features of GIFTS Online. For more in-depth information on any of the features discussed, please refer to the GIFTS Online Help page.

CLIENT PRODUCTION SITES WILL BE UPGRADED

- October 7, 2016 UK – Downtime Window – 2:00 pm – 8:00 pm US, EST
- October 8, 2016 US – Downtime Window – 6:00 am – 8:00 pm US, EST

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Login Page and Password Updates

The following updates were made to the GIFTS Online login page and password reset process:

1. If the *Forgot Password* link is used on login screen:
 - the user will be required to enter their user ID
 - an email is then sent to the user with a reset link
 - the user must answer their security questions correctly
 - the user then enters the new password twice
2. If user logs in and the password has expired or no longer meets requirements, they will be prompted to change the password immediately. Once done, they will be taken to the Login page to log in with the new password.
3. If user is logged in to GIFTS Online and uses the *Change Password* user menu option, a new password will be requested and then the user will be taken to Login page to log in with the new password.

Current standard password requirements:

- Minimum of 8 characters
- Minimum of 1 number
- Minimum of 1 uppercase letter
- Minimum of 1 lowercase letter
- Minimum of 1 special character (examples: !, @, #, \$)

Note:

- Maximum log-in attempts is 3
- Password maximum age is 90 days
- Password History is set to 10

Document Template Manager Updates

Correspondence Templates

Application Considered, *Application Rejected*, and *Stage 2* correspondence templates can now be modified through the Document Template Manager. This previously had to be done through MicroEdge Services.

Online Applications

Grantees on their MyAccount (grantrequest.com) sites who access the Change Email/Password page will now be required to enter their current password as well before clicking **Update**.

Blueprint Updates

Forms Library Update

When editing a *Review Form*, clients can now select a field to override its default setting.

The screenshot shows the 'Reviews Form - System Default Form (12, Active)' interface. On the left, there is a list of fields including 'Acceptance Due Date', 'Age Group', 'Budget Area', 'Long Term Sustainability', 'Due Date', 'Ethnicity', 'Fund', 'Gender', 'Geographical Area Served', 'Internal Program', 'Letter Grade', 'Mission Alignment', 'Mission Alignment Notes', 'Numeric Grade', 'Sustainability Explanation', 'Population Served', 'Program Area', 'Received Date', 'Response Code', 'Response Notes', 'Review Long Notes', and 'Sent Date'. The central table lists fields with their settings, including 'Sequential?', 'Acceptance Due Date', 'Due Date', 'Status', 'Status Date', 'Sent Date', 'Received Date', 'Visible From', and 'Visible To'. The right-hand panel shows the 'Selected Field' as 'Due Date' and the 'Required Setting' dropdown menu. The dropdown menu is highlighted with a yellow box, and a red box highlights the 'Required', 'Optional', 'Required on Submit', and 'Optional' options.

Simply select a field you wish to make a change to and on the right hand panel under **Required Setting** select **Override** and then choose an option from the drop down menu:

- Required = Field is required and must be filled in by the Reviewer
- Optional = Field is optional
- Required on Submit = Field must be filled in by the Reviewer before submitting a Review

Maximum Custom Fields Increased

The number of custom fields allowed per record type has been increased from 500 to 1000.

Blackbaud Outcomes

Outcomes in GIFTS Online

The following changes have been made to the Outcomes features in GIFTS Online:

Support for Stage 2 Application Forms

Outcomes can be enabled on Stage 2 application forms.

When creating two-stage application forms, users with Online Applications and Outcomes will now be able to enable Outcomes on their 2nd stage application forms.

NOTE: *Stage 1 of 2* forms will not have the ability to add Outcomes as they are intended as a simple universal pre-screen. Stage 1 forms will not have the Outcomes option in the Settings ribbon menu.

In the Form Designer:

While editing *Stage 2 of 2* forms, the user will be able to select **Settings > Outcomes** in the ribbon menu and check the **Enable Outcomes** button.

In Forms Manager:

If an existing form has Outcomes enabled, the user may change it to a *Single Stage* or *Stage 2 of 2* form. It cannot be changed to a *Stage 1 of 2* form.

For the applicant:

Stage 1 of 2 forms will never require a Blackbaud login or ask to fill in an Outcomes section.

Single-stage and *Stage 2 of 2* forms with Outcomes enabled will require a Blackbaud login.

Outcomes Portal Updates

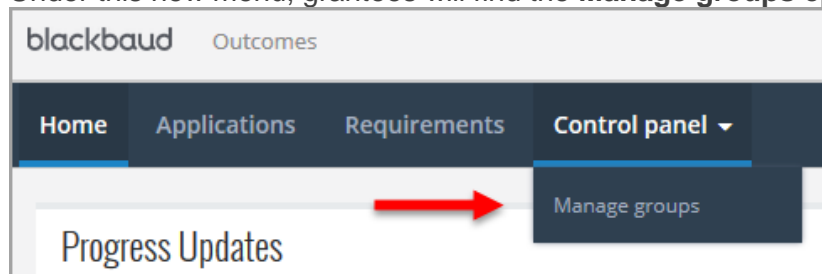
The following changes have been made to the Outcomes Portal:

Support for Stage 2 Application Forms

In the Outcomes Portal, Stage 2 application forms are now supported on the Applications page for potential grantees. They will first appear on the In Progress list and noted in the Type column as *Stage 2*. Once completed and submitted, they will be moved to the Completed list.

Updates for User Groups

In order to expand the features for user groups, the Groups menu has been replaced by a Control Panel menu. Under this new menu, grantees will find the **Manage groups** option.



Manage Groups page

Control Panel menu > **Manage groups** option

The Manage Groups page lists the following:

- All groups user belongs to
- Number of members
- Number of shared applications
- Number of shared requirements
- Number of shared grants

The screenshot shows the Blackbaud Outcomes portal 'Manage Groups' page. The page has a navigation bar with 'Home', 'Applications', 'Requirements', and 'Control panel'. The 'Control panel' dropdown menu is open, showing 'Manage groups'. Below the navigation bar, there is a 'Manage Groups' section with a search bar, 'Add group' button, 'Find in this list' text, 'Choose columns' button, and 'Filters' button. The main content is a table with the following data:

	Name	Members	Progress Updates	Applications	Requirements
...	Wavey	4	3	6	2
...	Test	1	0	1	0
...	Test 2	1	0	4	1

Columns can be sorted by ascending or descending order by clicking on their header.

The **Add group** button opens the Create group form. When you're done, the group is added the grid. If you're not a member of any group, the Add group button is displayed with text that says "You're not a member of any groups yet."

The **Find in this list** field lets you narrow down the displayed groups by the keyword you enter. The Choose Columns button lets you decide which columns to make visible or hide.

Group details page

When the user clicks a group name from the Manage groups page, they will be taken to the Group details page where all current members are listed.

If the user is an administrator, clicking the icon to the left of a name will open an actions menu.

Home Applications Requirements Control Panel ▾

West 54th Street NPO Group

Invite new members

Members 4

Find in this list 🔍 Filters

	Name	Role	Status
⋮	Nora Jones	Administrator	Active
⋮	Nancy Drew	Member	Active
⋮	Anthony Tomaino	Member	Active
⋮	Adam Funderburk	Member	Invited

Roles in user groups

Group members are now assigned to specific roles of Administrator or Member.

Members can open, edit, and submit shared grant forms and progress updates.

Any user who creates a user group automatically becomes an administrator for the group.

Administrators have the following rights:

- Delete shared in-progress applications
- Invite new members to an existing group

Resolved Issues

The following issues are resolved in this release. We have provided the case numbers for internal referencing along with a description of the issue and resolution.

Title	Salesforce ID
User was unable to submit review without the review long notes field on form + response notes enabled.	317715
Carriage Return(CR) and Line Feed(LF) were counted as two separate lines in the application when considering.	339644
Budget export was randomly rearranging categories/ adjustments on report.	342509
Requests from Individuals Organization option should be exposed in GIFTS Online.	343676
Views in Document Templates did not respect table border setting.	344171
IGAM Quiz header did not obey formatting rules.	346917
AngelPoints 360 reporting - including Activity/Shift repeated for all participants, even if they did not participate in the shift.	349225
Budget – user was unable to assign/ appropriate budget when "No users are authorized for unassigned items" is checked.	349946
Payment requirements - when there were multiple requirements with at least one contingent, all were treated as contingent; payment may be paid regardless of contingency.	350734
Calculated fields did not appear on HTML version of application form	350849
Error occurred when saving copy of forms on Outcomes enabled sites.	351260
Use of & in the Email template reply-to address caused email send to fail.	351610
Requirement is Overdue search filter on Standard Reports had incorrect syntax.	351862
Duplicate contacts were being created from stage 2 applications.	351845
Intermittent error when generating correspondence, online applications.	351843
'Deleted (Archived) Stage 2 form' should not be available on Generate Stage 2 in Retrieve and Consider process.	351859
Error logging into GIFTS Online - does not write to central log,	351910
Warning was incorrect when transferring Document branch	352377
User timeout message was non-responsive when the user clicked OK to continue.	352397
Requests with scheduled Payments prior to approval had incorrect prompt on Approve.	352481
The View associated with a Saved Search was not displayed when search is applied.	352657
Submitted reviews did not open if sequential and response codes not on stage.	352874
Consolidate duplicates process failed if organization to delete has all-alpha ID value.	354023
Scheduled Report - edit report filter did not have scroll bar to access all available application forms.	354257
Reviews - 'Send to PDF' was not displaying Response Notes specific question fields.	354642
Reviewer Portal - Unable to save with percentage coding allocation change.	354666
Duplicate request search results with "org name include parents" search filter.	354890
Review - Response Notes (Long) Override Label did not work.	355506
View Merge Fields - advanced saved searches attached did not work correctly.	354506
Account page lost custom HTML if changes made to preferences.	355885
Validation on consider application for Organization Name is 250 chars when max should be 255.	356063
Merge to PDF action with Create Activity selected did not work with UK regional settings.	356110
Related Reviews do not appear when navigating from View Request page in Reviewer Portal	356082
Review Merge Fields were not populating.	356347
Newly created Application forms were giving deactivated message early when date was today.	356627
Intermittent Xceed license error.	356749
Error on login - Error occurred while hashing, related to illegal operation attempted on a registry key error.	356924
Requirement form with Payee_Organization with Read-Only and Populate from GO attributes cannot be published.	357857
On Requirement forms, Payment currency values were displaying with 4 decimal places.	357911
Payee contact merge field/view column was not displaying correctly.	358137
Reset grantee password leaves account unrecoverable.	358656
A/P import failed with more than 1 import.	358633
Reviewer Portal - Locked out users did not appear in Admin->Locked Out Users if locked for incorrect security answers.	358721
A/P export - incorrect error message, unable to export.	359355

Support

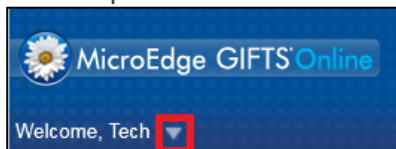
Support Hours: M-F, 8:00 am – 8:00 pm ET

Phone: 877.704.3343

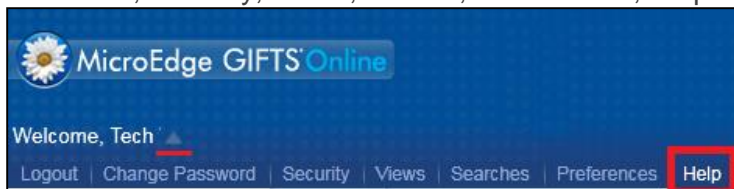
Email: helpdesk@microedge.com

Online: www.microedge.com

- For information on troubleshooting common issues, see the **Technical Support** section in the online help.
 - In the top menu bar of **GIFTS Online**® under your name, is the *User Menu*.



- Select the triangle next to your name to view the User Menu options: Logout, Change Password, Security, Views, Search, Preferences, Help



- Select **Help** and the online web help opens in a new window:

The MicroEdge Community Resources Site

To keep up with all the latest news on MicroEdge products, access our knowledgebase, or join in relevant discussions on our forums, go to - <https://community.blackbaud.com/products/microedge>.

The GIFTS Online How-To Documents Page

For the most current information or a copy of previous release notes, visit the GIFTS Online How-To page: <https://www.blackbaud.com/howto/giftsonline>