MicroEdge

GIFTS®

IGAM

Internet Grant Application Module

Version 5.5

User's Guide

NOTICE

The software described in this document is furnished under a license agreement. The software may be used or copied only in accordance with the terms of the agreement. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose without the express written permission of MicroEdge, LLC. Information in this document may be revised from time to time without notice.

U.S. Government Users: *Use, duplication, or disclosure is subject to the restrictions as set forth in the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 subparagraph (c)(1)(ii), or the Commercial Computer Software -- Restricted Rights at CFR 52.227-19, subparagraphs (c)(1) and (2), as applicable. Manufacturer is MicroEdge, LLC. 619 W. 54th Street, New York, NY 10019.*

Copyright © 2013 by MicroEdge, LLC. All rights reserved.

Part number: IGAM55-UG

Publication date: October 2013

GIFTS, GIFTS Alta, Essential GIFTS, GIFTS Connections, MyGIFTS, and ReviewerCONNECT are registered trademarks of MicroEdge, LLC. Other brands, or products, are the trademarks or registered trademarks of their respective holders, and should be treated as such.

Contents

Welcome to the Internet Grant Application Module viii
Using This Manual ix
Conventions Used in This Manual xi
Using Online Help xii
Using the Documentation xiii
IGAM 5.5 Support from MicroEdge xiii

1 Working with IGAM 1
About Online Grant Applications 2
About the Application Review Process 3
About Requirement Forms 4
IGAM Workflow 5
About the Grant Application Manager Display 7
Avoiding Duplicate Records 11
Managing IGAM Permissions 12

2 IGAM Accounts and Workflows 15
Single-Stage and First-Stage Application Workflow 16
Second-Stage Application Workflow 23
Requirement Workflow 26
Accessing an In-Progress Application or Online Requirement 29
About Applicant/Grantee Accounts 30

Sharing Requests and Requirements 37

3 IGAM Quick Start Guide 47

Step 1: Setting your IGAM Preferences 48
Step 2: Set Up Applicant/Grantee Options 53
Step 3: Creating Application and Requirement Forms 56
Step 4: Defining Correspondence Templates 57

4 Setting the IGAM Preferences 59

IGAM Preferences 60
System-Wide Options 60
Application Handling 63
External 64
Updating GIFTS 66
Match Options 69
IRS Tax Data 70
External Reviews 74
Review Rules 74
Proxy Server 75
Firewall 77
User View Options 79
Applicant/Grantee View Options 80
Site Design Wizard 82
Setting the Research Preference 110
Defining Default Complete/Incomplete Status 111
Resetting a Password 112

5 Designing Your Online Forms 113

Verifying System Requirements 114
Planning Your Form 115
The Form Design Wizard 118
Properties Tab 120
Quiz Tab 128
Fields Tab 133
Codes Tab 148
Attachments Tab 153
Links Tab 156
Design Tab 162
Graphics Tab 162
Activate Tab 162
The Forms Manager 166

6 Sending Online Requirements from GIFTS 173

Sending an Online Requirement to a Grantee 174
Removing an Online Requirement from the Web 176
Creating an IGAM Account for a Grantee 177

7 Customizing Display Language 181

About the Custom Display Language 182
Creating a New Display Language 183
Editing Other IGAM Text 185

8 Retrieving and Handling Pending Applications and Online Requirements 193

Retrieving Applications, Requirements, and Attachments 194
Viewing Pending Applications 200
Viewing Attachments 207
Checking Pending Applications for Errors 207
Researching Applicants 211
Transferring Applications to Another Branch 212
Deleting Pending Applications 214

9 Processing Application Decisions 215

Processing Single-Stage Applications 216
Processing Two-Stage Applications 217
About Linking Applications with GIFTS 221
Linking Applications with GIFTS 227
Considering Applications 236
Rejecting Applications 239
Working in the History Folder 242

10 Working with Correspondence 249

About Correspondence Templates 250
Creating New Templates 254
Editing Templates 262
Generating Correspondence 266
Automated Email Messages 273

11 Reporting from IGAM 275

Standard IGAM Form Reports 276

Ad Hoc Reporting from IGAM Folders 284

12 Managing Multiple Sites 285

Overview of Multiple Sites 286

Configuring Multiple Sites 287

Assigning Sites to Forms 288

Retrieving IGAM Forms 289

Site ID Column 291

Running Reports for Different Sites 292

Welcome to the Internet Grant Application Module

With the GIFTS Internet Grant Application Module (IGAM), grant applicants can submit proposals to you electronically by completing an online application form. Applications that meet your preliminary requirements can be transferred directly to GIFTS as Pending Requests—without further data entry by your staff. In addition, grantees can submit requirement information electronically using an online form that can be transferred directly to GIFTS.

The Grant Application Manager (GAM) is a user interface that includes all the tools you need to create and manage your online application and requirement forms, and to retrieve your applications and online requirements:

- **Organizer Grid**—This is similar to the Organizer grid in GIFTS, and is the first thing you see when you log in to the GAM. The Organizer grid is where you view your submitted applications which are organized into two folders, Pending and History.
- **Form Design Wizard**—From the Organizer you can access a Form Design Wizard that will walk you through the process of creating and activating your online application and requirements forms.
- **Forms Manager**—The Forms Manager, also accessed from the Organizer, is where you manage your online application and requirement forms. Your application and requirement form folders each contain two sub-folders, Active Forms (applications / online requirements currently posted to the web) and Inactive Forms.

This manual covers the entire online grant application and requirement form creation process, from designing your forms to retrieving online applications and online requirements, and reviewing applications.

Using This Manual

In this manual, you will learn how to:

- Design and activate your online applications and online requirements.
- Set up IGAM.
- Retrieve and review applications.
- Retrieve online requirements and automatically transfer this information to GIFTS.
- Compare applications with existing Requests in GIFTS to identify duplicate funding requests.
- Link applications with existing Organizations and Contacts in your GIFTS database.
- Reject applications that don't meet your funding requirements, and create declined Request records for them in GIFTS.
- Consider applications and transfer them to GIFTS as Pending Requests.
- Generate email and printed correspondence.

The following chapters contain the information you need to set up the IGAM and use it to review and process online grant applications and process online requirements.

Chapter	Summary
"Working with IGAM" on page 1	Introduces the online grant application management, submission, and review processes and the online requirement management and retrieval process.
"IGAM Accounts and Workflows" on page 15	Describes the IGAM experience for applicants/grantees submitting online applications and online requirements.

Chapter	Summary
“IGAM Quick Start Guide” on page 47	Provides the most essential information for getting IGAM set up for your online application and online requirement process.
“Setting the IGAM Preferences” on page 59	Contains important setup tasks your System Administrator must perform before you can begin processing grant applications and online requirements.
“Designing Your Online Forms” on page 113	Walks you through the process of creating your online application or online requirement, then making it available via the web.
“Sending Online Requirements from GIFTS” on page 173	Describes how you can send online requirements to grantee via Requirements in GIFTS. This chapter also describes how you can create IGAM accounts for grantees, if necessary.
“Customizing Display Language” on page 181	Describes how to customize the display language for application and requirement forms in IGAM.
“Retrieving and Handling Pending Applications and Online Requirements” on page 193	Describes how to retrieve applications and online requirements from the MicroEdge server and how to manage pending applications.
“Processing Application Decisions” on page 215	Provides detailed information on what to do with Pending applications once they have gone through an initial review. You will learn how to consider and reject applications, and how to work with applications once they move to the History folder.
“Working with Correspondence” on page 249	Helps you set up email and letter templates that you will need at different stages of the online application process, and then generate correspondence from those templates.
“Reporting from IGAM” on page 275	Describes how to report on the number of online applications you are receiving, how to print information displayed in IGAM folders, and how to get up-to-date information on your organization’s IGAM transaction charges.

Conventions Used in This Manual

Before you proceed with the *Internet Grant Application Module User's Guide*, it is helpful to familiarize yourself with the conventions used throughout this manual. Doing so will enhance the usefulness of the documentation.

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 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.

Different Types of Notes

When appropriate, notes provide additional information or warnings that may apply to you. This manual 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 single-user 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.

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.

Using Online Help

While you work with IGAM, you can find answers to your questions by reading the documentation or by using IGAM 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	MicroEdge Homepage. (*http://www.microedge.com*)
	MicroEdge Knowledgebase GIFTS Compatibility Fact Sheet These links now take you to the MicroEdge Support Services webpage. For access to the current knowledgebase and online documents please login to GIFTS PowerME.

Choose	To
Technical Support	Display information about contacting MicroEdge Technical Support.
About GIFTS	Display copyright and release information for GIFTS.

Using the Documentation

MicroEdge provides you with the GIFTS documentation inPortable Document Format (PDF). To view these files, you will need to install the Adobe® 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.

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

IGAM 5.5 Support from MicroEdge

The Internet Grant Application Module has been designed to be easy to use, and thorough documentation is included. An electronic version of the user guide is included with the software.

MicroEdge's Technical Support can provide answers to your basic how-to questions. (For details and contact information, please see "Maintenance and Support Program" on page xv.) If your needs go beyond simple how-to questions, MicroEdge's Educational Services department would be happy to work with you to arrange an appropriate training engagement.

If Your Applicants/Grantees Have Problems

MicroEdge's Technical Support staff will work with you to resolve any problems that your applicants/grantees encounter when using your online application form(s). In order to prevent any possible breach of confidentiality, MicroEdge will not work directly with applicants/grantees without your participation.

It is possible that an applicant/grantee may encounter a problem that is the result of his or her setup, and not a problem with your application form. It may be helpful to include information about compatible browsers on your website or in other communications to your applicants.

For a list of compatible browsers, please refer to the "GIFTS Compatibility Fact Sheet" in GIFTS PowerME.

The applicant/grantee should make sure that his or her connection to the Internet is valid. A good way to do this is to ask him or her to open a browser and access a particular page on the Internet other than the application form or online requirement.

If an applicant/grantee reports a problem to you, here are some tips to get the most out of MicroEdge's Technical Support service:

- Ask the applicant/grantee to provide specific information about the browser type and version he or she uses, what he or she was doing when they encountered the problem, and the exact text of any error messages he or she encountered.
- If possible, ask the applicant/grantee to send this information in an email message or fax to you, so that if you need MicroEdge's assistance in resolving the problem, you can easily pass this information along.

Please note that at this time, MicroEdge Technical Support will not accept any calls from applicants/grantees directly. If an applicant/grantee does contact MicroEdge, he or she will be instructed to bring their problem to your attention. Then, we can all work together to resolve the issue.

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, software updates, and prompt furnishing of any available problem solutions relating to the currently supported versions of GIFTS.

Our Technical Support staff are 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
Email	*helpdesk@microedge.com*
Internet	From the GIFTS menu, choose Help ➤ Technical Support

Members may also search our library of documentation and technical bulletins in the MicroEdge Solutions Knowledgebase. To access the knowledgebase go to www.microedge.com and login to the PowerME portal.

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 call 1-800-899-0890 and ask for the Maintenance and Support department. We will be happy to assist you.

1 Working with IGAM

This chapter introduces you to the online grant application management and review process and the online requirement management and retrieval process. It provides you with background on how online grant applications and online requirements are generated and how to use the Grant Application Manager (GAM) to process them.

In This Chapter:

About Online Grant Applications 2

About the Application Review Process 3

About Requirement Forms 4

IGAM Workflow 5

About the Grant Application Manager Display 7

Avoiding Duplicate Records 11

Managing IGAM Permissions 12

About Online Grant Applications

Think about the resources your organization expends in the following grant-processing activities:

- Data entry
- Research
- Correspondence

Now imagine reducing the time that your staff spends on these activities. IGAM can help!

When you process printed applications, your staff enters the Request information manually, generates printed correspondence, and mails it to the applicant.

Let's look at how the GIFTS IGAM can streamline the grant application and review process and help you and your grantees save:

- Time
- Paper
- Postage

With the IGAM, prescreened applicants can submit proposals to you by completing an online application form that you design to fit your organization's needs. Your staff can manage and review submitted applications from within the GAM—independent from your GIFTS data.

Applications that clearly do not meet your funding requirements can be Rejected and removed from your workflow. Proposals that your organization might be interested in funding can be transferred directly to GIFTS as Pending Requests—with little or no additional data entry by your staff.

At key points in the review process, you can notify grant applicants by email to inform them of the status of their applications. If you wish, you can generate printed correspondence as well.

Single- and Two-Stage Online Applications

IGAM 5 allows you to create application forms to use either as single-stage applications, or as parts of two-stage application processes.

Single-stage applications are designed to collect all the information needed to complete a full grant proposal in one online form. This application, if considered, can be transferred to GIFTS as a Pending Request.

Two-stage applications utilize two forms: the first to collect enough information for a preliminary decision on your organization's interest in the project, and the second to collect any remaining data needed to complete a grant proposal.

When the first of a two-stage application is considered, you select the appropriate second-stage form and generate correspondence directing the applicant to the URL where the second form can be filled out. The completed second-stage application, if considered in the GAM, then *updates* the Pending Request created for the first stage. This allows you to track a two-stage application with a single Request record.

About the Application Review Process

IGAM serves as a link between applicants and your GIFTS database. Applications are maintained separately from your GIFTS data while you review them. During the review process, you can:

- Eliminate duplicates from your workflow
- Make sure that information is complete
- Correct spelling errors
- Research the organization (for applicants)
- Generate correspondence

The IGAM review process ensures that only those applications that you want to *consider* further are transferred to GIFTS as Pending Requests.

Applications that you consider and transfer to GIFTS are treated like any other new Requests in GIFTS. Defaults that your Administrator set for new Requests—such as Default Requirements and Request Types—are added to Requests that you create when you consider applications.

Note: If you want to track rejected applications in GIFTS, there is an option in the IGAM preferences to create declined Requests in GIFTS for rejected applications. This is important if you need to produce reports on all of the applications rejected or declined within a certain period—and you don't want to have to generate separate reports from GIFTS and from the GAM.

About Requirement Forms

Likewise, IGAM helps you to save time by allowing grantees to directly enter requirement data using an online form.

You can create an online version of a Requirement that uses a form you create in IGAM as a template. First, you create a requirement form in IGAM specifying certain fields for which you want the grantee to provide information. Then, you send it to a grantee via the Requirement in GIFTS for which you want to gather information. The grantee can then enter information using the online requirement.

Note: This grantee is either the person who originally submitted an IGAM application that became the Request in GIFTS that the Requirement is attached to, or another grantee that you specify. The grantee must have an IGAM account to access the online requirement. For more information about sending requirement forms to grantees, see "Sending Online Requirements from GIFTS" on page 173.

After the grantee submits this requirement information using the online requirement form, you retrieve this information in IGAM. When you retrieve online requirement information, it is automatically entered into GIFTS. No further input from you is required.

IGAM Workflow

1 Retrieve forms from the server.

Incoming applications and online requirements are collected in a private database on a MicroEdge-hosted server. To begin reviewing the forms, you must first retrieve them from the server. For online requirements, this is the only step; information from these forms is automatically entered into the appropriate GIFTS records.

When you retrieve applications, you can generate acknowledgement correspondence as either an email message or as a printed letter.

2 Review the application forms.

Application forms that you retrieve are maintained in the Pending folder while you review them. You can check forms for spelling errors and research the applicant organization. If an application doesn't meet your funding requirements, you can reject it and remove it from your workflow. You can notify the applicant by email and/or letter. If you want to track rejected applications in GIFTS, you can enable an option to create declined Requests for all rejected applications.

3 Link applications with your GIFTS data.

Before you transfer applications to GIFTS, you'll need to *link* their associated Organizations and Contacts with existing records in GIFTS. You may also link Requests to search for similar Requests from the same Organization. Linking helps you avoid creating duplicate records in your GIFTS database.

4 Consider the application forms.

Applications that meet your preliminary review requirements can be Considered and transferred to GIFTS as Pending Requests. You can inform the applicant by email or generate printed correspondence.

When you consider a first-stage application, you'll also need to generate a second-stage application. In this case, your correspondence should include the account login URL, and it should inform the applicant that the second-stage application is waiting in their account.

The following diagram summarizes the online grant application review process.

About the Grant Application Manager Display

The GAM is similar in function and appearance to the GIFTS Organizer.

You can:

- Customize the GAM display
- Search the contents of the GAM folders
- Print ad hoc reports
- View summary information

Tip: The GAM is designed so that the form information you need is displayed in the grid columns. If the form information you want is not displayed, you can add most fields as columns in the display.

Customizing the Grid Columns

You can customize the columns that are included in the GAM display in the same way that you customize the columns in the GIFTS Organizer. From the GAM menu, choose View ➤ Show Columns.

You can define the way that information is displayed in the GAM display.

For certain fields (such as dates or currency) you can specify formatting options to define how they are displayed.

For additional information on adding, removing, or combining columns, please refer to the *GIFTS User's Guide*.

Changing the Sort Order

You can also change the order in which the GAM sorts the applications that are displayed in the folder. To change the sort order, choose View ➤ Sort from the GAM menu.

For additional information on changing the sort order, please refer to the *GIFTS User's Guide*.

Searching for Forms

If you want to work with a specific group of submitted applications, you can populate the GAM with the results of a search. You can search for submitted applications using the same search methods that are available in GIFTS.

Example: You may wish to create a public saved search for applications in each of your program areas. That way, your program officers can apply the appropriate search to populate their GAM with only the applications they need.

In addition, a user can specify a saved search in his or her View Options and have the GAM perform this search automatically each time they log in. The data resulting from this search becomes, in effect, the user's default view. For more details, please see "User View Options" on page 79.

For details on searching folders to display the information you need, please see "Searching for Pending Applications" on page 203 and "Searching in the History Folder" on page 244.

Viewing Summary Information

You can generate summary data for pending and archived (historical) applications by choosing Action ➤ Folder Summary from the GAM menu. The type of information generated is dependent on the folder that you are in.

For instance, here is the summary data for the Pending folder:

In contrast, the History folder displays the following summary information:

Avoiding Duplicate Records

To ensure the integrity of your data, it is important to avoid creating duplicate records in your database. At key points in the online application review process you can identify and remove duplicates from your workflow.

There are two types of duplicate records that you might encounter as you review and process applications:

- Multiple Submissions
- Duplicate Requests

Multiple Submissions

If an applicant submits the same application a number of times, each copy is assigned a different Application ID. These are called *multiple submissions.* Multiple submissions are not filtered out during the retrieval process. After you retrieve applications, you can search the Pending folder for multiple submissions and reject them. For details, see "Searching for Multiple Submissions" on page 210.

Duplicate Requests

When you *consider* an application, it is transferred to your GIFTS database as a Pending Request. *Duplicate Requests* can result when you consider an application that is already in your GIFTS database.

Question: How could the proposal from a Pending application already be in my GIFTS database?

Answer: Perhaps the applicant submitted the same application last month and your staff considered it. Or the applicant also submitted a printed application and the proposal was entered into GIFTS manually.

To avoid generating duplicate Requests when you consider an application, you should attempt to *link* your Pending applications with existing Requests in GIFTS before you consider them. For more information on linking, please see "About Linking Applications with GIFTS" on page 221.

Managing IGAM Permissions

IGAM allows administrators to manage IGAM permissions for permission sets.

The following table describes each IGAM permission:

Permission	Description
Login	Access IGAM.
Forms	Manage application and requirements.
Activate a Form	Activate applications and requirements.
Deactivate a Form	Deactivate applications and requirements.
Preferences	Manage IGAM preferences.
Delete Applications	Delete applications.
Purge Applications	Purge applications from the History folder.
Online Requirements	'Add' permission allows users to publish requirements to the web. 'Update' permission allows users to upload requirement due dates to the web. 'Delete' permission allows users to delete published requirements.
Upload Status	Allows the status of requests to appear on users' My Account page. For more information, see "Request / Payment Status" on page 108.
Generate Stage-2 Applications	Ability to generate Stage-2 applications.
Transfer Requests	Transfer an existing Request to a new owner.
Transfer Requirements	Transfer one or more existing Requirements to another IGAM user.

You can manage these permissions by doing the following:

1 From the Administrator Module, go to **Access ➤ Permissions**.

2 Highlight the permission set you want to edit and click Edit (or click New to create a new permission set), and scroll down to the Grant Application Manager section.

3 Edit the permissions for the permission set as necessary, and then click Save and Close.

Tip: The term 'Form' refers to both applications and requirements.

For more information about permissions, refer to the *GIFTS Administrator's Guide*.

2 IGAM Accounts and Workflows

This chapter provides an overview of an applicant's or grantee's workflow as he or she completes your online applications and online requirements. A potential applicant accesses an online application form by clicking a link on your web page, and a grantee accesses an online requirement by clicking a link on his or her My Account page. Processes differ somewhat for applications, depending on the stage of the application; different flows are provided for each stage.

Also included in this chapter are details concerning account pages, log-in procedures, and account maintenance.

In This Chapter:

Single-Stage and First-Stage Application Workflow **16**

Second-Stage Application Workflow **23**

Requirement Workflow **26**

Accessing an In-Progress Application or Online Requirement **29**

About Applicant/Grantee Accounts **30**

Sharing Requests and Requirements..... **37**

Single-Stage and First-Stage Application Workflow

The following is an outline of the workflow an applicant would take through a Single-Stage application or the First-Stage of a Two-Stage application.

1

The applicant clicks on a link

The applicant begins the application process by clicking a link to your online application form. This link will in most cases be found somewhere on your organization's web page. It could also be included in an email to prospective applicants.

Tip: To learn the URL of an active application form, highlight the form in the Forms Manager and click the **View URL** button.

2

The applicant logs in *(optional)*

You can require applicants to create a new account before starting an application. To make the creation of a new account required for a single-stage application, see "Creating an Applicant Account" on page 34.

3 The applicant provides the form password *(optional)*

Requiring your applicant to provide a password to the selected form is optional. If you have chosen this option, however, the applicant must provide the correct password for the form before proceeding.

- If you have required a password for access, and the applicant provides an incorrect password, he or she cannot access the form.
- If the applicant provides the correct password, or you have not required a password for this form, the applicant moves on to step three.

4 The applicant provides a U.S. Tax ID *(optional)*

Requiring your applicant to provide his or her organization's U.S. or Canadian Tax ID is optional. If you have chosen this option, however, the applicant must provide the U.S. or Canadian Tax ID before proceeding.

The U.S. or Canadian Tax ID the applicant provides will be checked against the IRS and Canada Revenue Agency databases for validity. In cases when the U.S. or Canadian Tax ID provided is not found in the IRS or Canada Revenue Agency databases, you have the further option of allowing an applicant to proceed with the application anyway.

- If you have required the applicant to provide a U.S. or Canadian Tax ID that checks out successfully against the IRS and Canada Revenue Agency databases, and the applicant fails to do so, he or she cannot access the form.
- If the applicant provides a valid U.S. or Canadian Tax ID; if you have not required the U.S. or Canadian Tax ID to be found in the IRS or Canada Revenue Agency databases; or if you have not required a U.S. or Canadian Tax ID to be entered at all, the applicant moves on to step four.

Note: For information on requiring an application password and/or U.S. or Canadian Tax ID to access a form, please see "Properties Tab" on page 120.

5 The applicant takes the eligibility quiz *(optional)*

Before being allowed to access the form, the applicant may also need to take an eligibility quiz. This quiz asks questions designed to limit applicants to those who meet the most basic eligibility requirements.

Administering an eligibility quiz is optional. IGAM users can create an eligibility quiz for each form they create in the Form Design Wizard, but a quiz is not required. Users can also make passing an eligibility quiz required or optional for accessing the application. Users can also customize the eligibility quiz title.

- If passing the eligibility quiz is required and the applicant fails, they are not granted access to the application.
- If you have chosen not to include an eligibility quiz for this form, or if passing the eligibility quiz is *not* required, the applicant (regardless of quiz performance) moves on to step five.

Note: Details for adding eligibility quizzes to forms is found in "Properties Tab" on page 120.

6 The applicant fills out the application

The applicant is taken to the first page of the selected application and begins entering data. At the bottom of any page of the application, the applicant can click **Save & Finish Later** to save the data entered so far and return later to complete the application.

Please note the following about in-progress applications:

- Applicants must be logged in to save their work for completion later. If the applicant clicks **Save & Finish Later** before logging in, he or she will be prompted to log in first.

  Applicants without an account must create one before saving their work. New accounts can be created from the login prompt page, as described in "Logging in to an Applicant/Grantee Account" on page 33.

- As noted above, saved applications can be completed later. For information on applicants returning to complete unfinished applications, please see "Accessing an In-Progress Application or Online Requirement" on page 29.

For this workflow, we'll have the applicant continue until he or she has completed the entire single-stage application process.

7

The applicant attaches files to the application *(optional)*

Allowing applicants to attach files is optional. You can design forms to allow, disallow, and/or require attached files.

If the form the applicant is filling out does not allow attachments, the page won't appear during the application process. For more information about making attachments required, see "Attachments Tab" on page 153.

If enabled, the Attachments page of an application will allow the user to attach multiple files to the application and upload them to the MicroEdge IGAM server. Likely files might include Microsoft Word document files (such as cover letters) or PDF files (perhaps a financial report).

In the example above:

- Two files have already been attached to this application. They can be removed by selecting the Remove? check box, then clicking Remove. Also, users can click the file name to view the file.
- To attach files, applicants enter a Title, then specify the file they would like to upload. Clicking Browse lets them search for the file on their hard drive or network. Clicking Upload uploads the file.

8 The applicant reviews the form before submission

Before submitting the application, the applicant is given a chance to review all entries on a single page. On the Review My Application page, fields from all pages of the application are listed on a single web page. The applicant may change data in any field.

Note: If the applicant has added one or more attachments, he or she can click the attachment name to view or download it. Attachments cannot be uploaded from this page, they can only be viewed and/or downloaded. The applicant can also click Printer Friendly Version if he or she wants to view a printer-friendly version of the application.

9 The applicant submits the application

When the applicant is finished, he or she clicks the Submit button at the bottom of the application review page. (If any required fields have been left blank, the applicant is instructed to complete them, then re-submit.)

- If they are not already logged in, applicants are offered the opportunity to create a new account or log in to their existing account and then receive an email confirmation of the receipt of the application.

Note: For information on setting up this email message, please see "Automated Emails" on page 103.

Applicants who choose Yes above and click Continue must log in if they have not already (or create an account if they don't have one yet). Applicants who choose No are not required to log in.

- Applicants who are already logged in when they submit an application will receive the confirmation email automatically.

Once login and account creation (if needed) are complete, applicants are presented with a printer-friendly version of their submitted application.

You or another IGAM user can now retrieve this completed application from the MicroEdge IGAM server.

Second-Stage Application Workflow

The following is an outline of the workflow for an applicant seeking to access and complete the second stage of a two-stage application.

1 The applicant is invited to complete the second stage

Second-stage applications are released only to applicants whose first-stage applications you have considered in the Grant Application Manager (GAM). Upon consideration of the first stage, you will select and publish a second-stage application that can only be accessed by the applicant after logging in.

During the consideration process of a first-stage application, you can generate correspondence to alert the applicant that a second-stage application is waiting in their applicant account. (For details on the consideration process, please see "Considering Applications" on page 236.) The correspondence can instruct the user to log in to their account home page and click the link to the second-stage application.

Tip: Include the "Account Login URL" merge field in your second-stage correspondence template.

2 The applicant logs in to the site

Second-stage applications are only published for specific applicants whose first-stage applications have been considered by you or your staff in the GAM. Therefore, the applicant must log in to access the form.

After clicking continue to complete log in, the applicant is taken to their applicant account home page.

3 The applicant accesses the second-stage application

The applicant may access the second-stage application by clicking the appropriate link in the New section of their account home page.

The applicant clicks this link to access the second-stage application.

For full details about the applicant account home page, please see "The My Account Home Page" on page 31.

4 The applicant fills out the application

The applicant is taken to the first page of the selected application and begins entering data. At the bottom of any page of the application, the applicant can click **Save & Finish Later** to save the data entered so far in the application and return later to complete it.

Saved applications, as the button label implies, can be completed later. For information on applicants returning to complete unfinished applications, please see "Accessing an In-Progress Application or Online Requirement" on page 29.

For this workflow, we'll have the applicant continue until he or she has completed the entire second-stage application.

5 The applicant attaches files to the application *(optional)*

The last page of an application allows the user to attach files to the application and upload them to the MicroEdge IGAM server. Likely files might include Microsoft Word document files (such as cover letters) or PDF files (perhaps a financial report).

Allowing applicants to attach files is optional. You can design forms to allow, disallow, and/or require attached files. If the form the applicant is filling out does not allow attachments, the page above won't appear during the application process.

- If the form allows files to be attached, the applicant uploads them here before proceeding to application review.
- If the form doesn't allow files to be attached, the applicant would have seen the Review & Submit button on the previous (i.e., last) page of this application.

Note: Details for allowing files to be attached to forms are found in "Properties Tab" on page 120.

6 The applicant reviews the form before submission

Before submitting the application, the applicant is given a chance to review all his or her entries. On the Review My Application page, fields from all pages of the application are listed on a single Web page. The applicant may change data in any field.

Note: If the applicant has added one or more attachments, he or she can click the attachment name to view or download it. Attachments cannot be uploaded from this page, they can only be viewed and/or downloaded. The applicant can also click Printer Friendly Version if he or she wants to view a printer-friendly version of the application.

The applicant submits the application

7

When the applicant is finished, he or she clicks the Submit button at the bottom of the application review page. (If any required fields have been left blank, the applicant is instructed to complete them, then re-submit.) An automated email confirming submission is sent to the applicant.

Note: For information on setting up this email message, please see "Automated Emails" on page 103.

After clicking Submit, applicants are taken to their applicant account home pages, which are described in "The My Account Home Page" on page 31. Among other tasks, applicants may open a printer-friendly version of their submitted application from the Submitted section of their applicant account home page:

You or another IGAM user can now retrieve this completed second-stage application from the MicroEdge IGAM server.

Requirement Workflow

The following is an outline of the workflow for a grantee who wants to fill out an online requirement.

The grantee accesses his or her My Account Page

1

The grantee begins the online requirement process by accessing his or her My Account page to log in.

All online requirements require grantees to log in before they can fill out the requirement form.

2 The grantee accesses the online requirement

The grantee clicks this link to access the online requirement

The grantee clicks the Requirements tab and then selects either New Requirements or In-Progress Requirements from the Show menu. This will list any Requirements with that status in the table below.

The grantee may then access the online requirement by clicking the appropriate link in the Requirements tab of his or her My Account home page.

For full details about the applicant account home page, please see "The My Account Home Page" on page 31.

3 The grantee fills out the online requirement

The grantee is taken to the selected online requirement and begins entering data. At the bottom of any page, the grantee can click Save & Finish Later to save the data entered so far in the online requirement and return later to complete it.

Saved online requirements, as the button label implies, can be completed later. For information on grantees returning to complete unfinished online requirements, please see "Accessing an In-Progress Application or Online Requirement" on page 29.

For this workflow, we'll have the grantee continue until he or she has completed the entire online requirement.

4 The grantee attaches files to the online requirement *(optional)*

The last page of an online requirement allows the grantee to attach files to the online requirement and upload them to the MicroEdge IGAM server. Likely files might include Microsoft Word document files (such as progress reports) or PDF files (perhaps a financial report).

Allowing grantees to attach files is optional. You can design online requirements to allow, disallow, and/or require attached files. If the online requirement the grantee is filling out does not allow attachments, the page above won't appear during the requirement process.

- If the online requirement allows files to be attached, the grantee uploads them here before proceeding to requirement review.
- If the online requirement does not allow files to be attached, the grantee would have seen the Review & Submit button on the previous (i.e., last) page.

Note: Details for allowing files to be attached to online requirements are found in "Properties Tab" on page 120.

5 The grantee reviews the online requirement before submission

Before submitting the online requirement, the grantee is given a chance to review all his or her entries. On the Review My Requirement page, fields from all pages of the online requirement are listed on a single web page. The grantee may change data in any field.

6 The grantee submits the online requirement

When the grantee is finished, he or she clicks the Submit button at the bottom of the online requirement review page. (If any required fields have been left blank, the grantee is instructed to complete them, then re-submit.) An automated email confirming submission is sent to the grantee.

Note: For information on setting up this email message, please see "Automated Emails" on page 103.

After clicking Submit, the grantee is taken to his or her account home page, which is described in "The My Account Home Page" on page 31.

You or another IGAM user can now retrieve this online requirement from the MicroEdge IGAM server.

Accessing an In-Progress Application or Online Requirement

An application of any stage or any online requirement may be saved by clicking the Save & Finish Later button found at the bottom of each form page. If an applicant is not logged in, or has not yet created an account, he or she is prompted to do so at this time.

Applicants/grantees can log back in to the site later and resume their work. After logging in, the applicant/grantee will see saved applications and online requirements listed under the Open heading on his or her account home page.

Applicants/grantees can click the form title to resume the form process, or click the trash can icon to delete the partially-completed application.

Note: An overview of the applicant/grantee account home page can be found in "The My Account Home Page" on page 31.

About Applicant/Grantee Accounts

When applicants first fill out and submit an online form, they will be asked to create an log-in account. (For first-time users submitting a single-stage application, the account can be either optional or required, depending on the application. Those who want to fill out the first of a two-stage application are required to create an account. Grantees must already have an account in order to access requirement forms.) This account allows your applicants/grantees to do the following:

- Save unfinished applications and online requirements and return to complete them later.

  After applicants/grantees begin filling out an application or online requirement, they may click the Save & Finish Later button to save the information they have entered. Logging back in using their account ID will allow them to finish the form.

- Track a history of their submitted applications and online requirements.

  Applicants/grantees can return to your site, log back in, and view a list of submitted applications and online requirements.

- Gain access to second-stage applications.

  Applicant accounts help you control access to your two-stage applications, particularly the second-stage applications. Applicants must log in before accessing and submitting the first stage. If you later agree to consider their application, it is then that you grant the applicant access to the second-stage application. The second-stage form is published to a Web page that can only be accessed from the applicant's account home page after he or she logs in.

Linking to Your Account Login Page

In addition to links to forms, you will probably want to provide a link on your website to the account login page. You can get the URL of your login page in the IGAM preferences. Select **Tools ➤ Preferences** from the Main menu; in the Preferences window, select the Applicant/Grantee View Options category.

The My Account Home Page

From his or her account home page, an applicant or grantee can access second-stage applications, resume work on in-progress applications saved in an earlier session, access online requirements, and view applications previously submitted:

Home Page Section	Description
Language drop-down menu	You can choose to apply an optional language for the text displayed on this page, if available. For more information, contact MicroEdge's Technical Support. Note: This drop-down list only appears if you have created one or more forms in a language other than English. The list selections contain all the languages other than English in which you have created application forms. This functionality does not change the language of any form, only the information on this page. For more information, refer to "About the Custom Display Language" on page 182.
Applications | Requirements | Payments	These three tabs allow the grantee/applicant to view his or her applications, online requirements, and payments, respectively. They can click Applications to view all their application forms, Requirements to view all their online requirements, or Payments to view all scheduled payments.

Home Page Section	Description
New	After an IGAM user considers a first-stage application and publishes the second stage, a link to the second-stage application is listed here.
New Requirements	Only available on the Requirements tab in the Show menu. This menu option will display any new Requirements the applicant has received and has not work on yet.
In-Progress	This option on the Show menu links to in-progress applications or online requirements, saved by the applicant/grantee in previous sessions, are listed by default. Applicants may also delete an incomplete application by clicking the trash icon, or email a copy of the application or online requirement by clicking the email icon. For more information about emailing an application or online requirement, see "Emailing an Application or Online Requirement" on page 36.
Submitted	By selecting Submitted from the Show drop down menu, a list of submitted applications or online requirements can be displayed. This provides a history of the applicant/grantee's previous requests for funds and a history of previous online requirements they have completed. Clicking the link to a form opens a printer-friendly version of the form. At the bottom of the page, the Attachments section contains any form attachments. Click the name of any attachment to open and/or download the attachment.

Last Known Login

With IGAM 5.5, the last known login information for the applicant will now appear on the following pages directly below the account e-mail address:

- My Account
- Change E-mail/Password

Deleting an In-Progress Application

In-Progress applications listed on the My Accounts page can be deleted using the trash can icon on the Actions column.

When an applicant clicks the icon, the following prompt will be displayed to confirm the deletion.

Once the applicant clicks Yes, the application is permanently removed from the In-Progress list.

Logging in to an Applicant/Grantee Account

If a visitor to your website clicks the My Account link, or receives a prompt due to any of the circumstances described in the application and online requirement workflows, he or she will be taken to the Account Login page.

The applicant/grantee enters his or her email address, which is used as the applicant/grantee's account ID. If the applicant/grantee has an account already, he or she will enter his or her password and click Login. If the information is correct, the applicant/grantee is taken to his or her account home page.

Site visitors who enter an email address and select the "New Applicant" link are taken to the Account Creation page, as described in "Creating an Applicant Account" on page 34.

Note: The IGAM server checks data for inconsistencies before proceeding, and alerts applicants/grantees to errors. For example, if a user enters an email address for which an account exists, but selects "New Applicant," he or she receives an error message informing them that an account exists. The message also offers to email the applicant/grantee the password.

Creating an Applicant Account

New applicants who click the **New Applicant** link are taken to the Account Creation page:

The applicant then types his or her email address and selected password twice (for confirmation purposes) and clicks Continue. If the passwords match, the account is created, and a confirmation email including the password is automatically sent to the email address. The email also includes a direct link to the account home page, allowing the user to log in and begin the application process.

Data Used to Create Applicant Accounts

Applicant accounts consist of the applicant's email address and a password; visitors to your site need not enter any other data to create an IGAM applicant account. (Basic application information such as name,

organization, address, and telephone number must be gathered by the forms your applicants fill out.)

Note: IGAM automated emails are sent to the email address used to establish the applicant account. (Automated emails are set up in your IGAM preferences; for details, please see "Automated Emails" on page 103.) Passwords are defined by the applicant, and may be five to 25 characters long.

Data for all your applicant accounts are saved on the MicroEdge IGAM server.

Transferring an Account

In the event that an applicant/grantee loses access to his or her account (e.g., if the email address used to open the account is closed), he or she will not be able to view submitted applications or complete pending applications. To correct this situation, you may transfer an account to a new email address with a new password.

To transfer an account:

1. Highlight an application in either the Pending or History folder of the GAM. Select **Tools ➤ Transfer Account** from the Main menu. The Transfer Account form displays.

   Note: For grantees, you can simply select any application, and then overwrite the Old Email Address with the grantee's email address.

2. The **Old Email Address** field is automatically populated with the email address associated with the selected application. Change the **Old Email Address** if necessary, and then enter a **New Email Address** and click **OK**. An automated transfer account message is sent to the applicant/grantee

that contains a temporary password. The applicant/grantee will be asked to change it when they login.

Emailing an Application or Online Requirement

Applicants can email a printer-friendly version of any open application or online requirement to up to ten recipients. Recipients can save and view the application or online requirement, as well as download any attachments.

Note: For this feature to be enabled, you must have the Email Drafts and Submissions box checked in the Tools ➤ Preferences ➤ Site Edit ➤ Email tab.

1 From your My Account page, click the Email icon in the Action column for any open application or online requirement.

Note: Click the **Project Title** to display a view-only, printer-friendly version of the application/requirement.

2 Enter email information in the page that appears.

Tip: Fields with an asterisk next to them are required. If you do not enter any information in the Subject and/or Message field(s), the default values will display. For more information about these default values, see "Automated Emails" on page 103.

3 Click **Submit**. The email is sent to the recipient(s) indicated.

Sharing Requests and Requirements

A new feature in IGAM 5.5 is the ability to allow grantees to share thier Requests or Requirements with others and collaborate on the grant application process through feaures on the My Account page.

Enabling Sharing of Applications and Requirements

Enabling sharing of Applications and Requirements is a two part process.

1. Two permissions (Transfer Requests & Transfer Requirements) in the IGAM Group Permissions must be enabled through the Administrator module.

2. All three options on the top of the **Emails** tab in the Site Preferences must be checked.

- Allow applicants and grantees to email drafts and submissions
- Allow applicants and grantees to manage viewers
- Allow applicants and grantees to transfer drafts and submissions

Transfer Options/Actions

Once the transfer features have been enabled, applicants will notice the following changes to their My Account pages.

Feature	Description
Hide Viewer Only Applications	Checking this box will immediately hide all applications for which the current user is a Viewer.
My Role	This column will be added to the Applications & Requirements pages. ❖ If the current user is the owner of the Application/ Requirement, it will display 'Owner'. ❖ If the current user is a Viewer of the Application/ Requirement, it will say 'Viewer'.

Feature	Description
Actions NOTE: Some actions may not be visible depending on the status of the user (owner or viewer) and the status of the request or requirement (submitted or in-progress).	The following options will be available under the Actions column: -Transfer to new owner - Enabled only if the current user is the Owner. Tooltip will state 'Transfer to new owner'. Clicking this icon will open the Transfer Ownership form. -Manage Viewers - Enabled only if the current user is the Owner. Tooltip will state 'Manage Viewers. Clicking this icon will open the Manage Viewers form. -Email a Copy - Tooltip will state 'Click to email a copy of this application.' Clicking this icon opens a new email form. Viewers will have an option to Send to Owner and additional email recipients if desired as well as attach a copy of the application to the email. Owners will have an option to Send to Viewers instead. - Deleting Applications - Clicking the trashcan icon will cause the system to prompt the user for a confirmation. Once the user clicks Yes, the application is deleted and will no longer be visible to assigned Viewers. Current viewers will be notified of the application deletion by email. - Decline All Transfers -If the Decline All Transfers or Decline Transfer icon is selected, a prompt will appear to confirm the choice. If the user clicks Decline, the system will email the current owner(s) that the application transfer has been declined.

New Grantee Concepts

Grantee functionality changes will center around two new concepts: "owners" and "viewers."

OWNER: The owner has exclusive rights to edit, save, or submit an application or grantee report.

- The current owner will be allowed to transfer each application or requirement to a different owner. The new owner must accept the transfer.
- The owner can grant View-only rights to any number of other grantees; a read-only version of the application or report will be listed on the others' My Account pages.

- The owner can see a list of all "viewers" and take view rights away from any of them.

VIEWER: "Viewers" will see applications and requirements owned by others listed in their My Account pages, and can view read-only copies until view rights are taken away by the owner.

All grantees can select a filter on his or her My Account page to show or hide items that s/he does not own via the Hide Viewer Only Applications/ Requirements checkbox.

New Grant Maker Features

In addition, IGAM 5.5 will grant the following capabilities to IGAM users:

- The grant maker can transfer an application or grantee report to a different owner.
- When publishing a Requirement, the grant maker may choose to whom to publish it:
  - the current application owner
  - the Requirement contact
  - or any Contact affiliated with the Request

Transferring Ownership

The current owner of an Application or Requirement can transfer ownership to another by clicking the **Transfer to new owner** icon in the Actions column on their My Account page.

You can enter an email address and then click the Check Email button to see if the account already exists or not. Click Transfer to immediately send the transfer request to the new owner.

Note: For New Requirements/Stage 2 applications, since access to these applications are shown in link form, this transfer process does not apply until they are opened and become "in progress".

- If the account exists, a notification of ownership transfer will be sent to the new owner.
- If the account does not exist, a new IGAM account will be created and notification will be sent to the new owner using the current Create

Account email type. In addition, the notification of ownership transfer email will be sent separately.

- The current owner retains ownership when s/he clicks Transfer until the new owner accepts the transfer. On the My Account page, under the column My Role, the application is updated to 'Owner (Pending Transfer)' and on mouse-over of the text 'Pending Transfer' with the new email address is displayed as a tooltip.
- When there is a Pending Transfer, the email that the ownership is being transferred to will be displayed to the right of the title 'Transfer Owner', in the form of 'To xxx@email.com'. If there is no pending transfer, there will be no email displayed to the right of the title.
- If the current owner clicks Transfer while the status is still on Owner (Pending Transfer), the new transfer will overwrite the previous transfer. The application is removed from that owner's my account page and the process continues with the newer owner.
- The Save and Finish Later, Next/Previous page, and Submit buttons will validate if the current user is still an owner or viewer of the application. If not, an error will need to be displayed to this user. This will prevent problems in the situation where an application is opened and either an ownership transfer is accepted or the owner removes view access for a user.
- The new owner of the application will see the application/requirement listed next time they log in to their My Account page with a Check icon (Accept) or X icon (Reject). During the time before accepting, the new owner is made a Viewer of the application.

- If accepted by the new owner, no confirmation is displayed. The old owner becomes a Viewer of the Application or Requirement.

Cancel and Cancel Current Transfer If the **Cancel** button is clicked, the Transfer to new owner page will close and will revert back to the My Account page. If the **Cancel Current Transfer** button is clicked, the current pending transfer to the new potential owner will be canceled and will no longer be pending transfer. The Transfer to new owner page will close and will revert back to the My Account page.

Manage Viewers

Using the Manage Viewers interface, the owner of an Application or Requirement can:

- Add new Viewers
- See the current Viewers List
- Remove people from the Viewers List
- Modify the email notice sent to new viewers

The Manage Viewers interface opens by clicking the Manage Viewers icon in the Actions column.

Once a user has a view rights, s/he enjoys them until the current owner removes that access. If one owner makes someone a viewer, then transfers ownership, that viewer can still view.

Note: Viewing rights do not carry over from Stage-1 applications to

Stage-2 applications when they are generated.

Adding Viewers Current owners can add one or more Viewers by entering valid email address(es) and clicking Add Viewer(s). Multiple email addresses must be separated by commas. The new Viewer(s) will be added to the Viewers List at the top with '(New)' to the right of the email.

Note: If an added viewer does not have an account, an error is returned instead stating that the account does not exist.

Important: The applicant must click the Update button to save their changes and send out the notification to the new viewer(s).

Removing Viewers To remove one or more Viewers from an Application or Requirement, the owner can check one or more check boxes to the right of the viewer(s) and click the Remove button.

Note: There is no notification sent to a Viewer when View access is removed. The Application or Requirement will simply no longer appear on their My Account pages.

3 IGAM Quick Start Guide

Now that you have a better idea of what the Internet Grant Application Module is all about, you're ready to get started. This chapter provides IGAM administrators with an overview of the basic steps of setting IGAM preferences, creating forms for online applications and online requirements, and defining correspondence templates. Completing these tasks will allow you to begin receiving online applications and online requirements.

In This Chapter:

Step 1: Setting your IGAM Preferences..... **48**

Step 2: Set Up Applicant/Grantee Options..... **53**

Step 3: Creating Application and Requirement Forms..... **56**

Step 4: Defining Correspondence Templates **57**

Step 1: Setting your IGAM Preferences

Before creating forms and publishing them, you will want to set the preferences that control how your IGAM system works. For full details on IGAM preferences, please see "Setting the IGAM Preferences" on page 59.

To access the IGAM preferences, open the Grant Application Manager (GAM) and select Tools ➤ Preferences from the Main menu.

The Preferences window appears:

There are several categories of preferences that are listed in the Category field on the left side of the window. Click on each category to see its available options on the right side of the Preferences window.

A summary of the preferences listed for each category follows.

System Wide

Options

The preferences in the Options category define basic IGAM system settings. They are organized under the following sub-categories:

Application Proofing You can set up your IGAM system to display a message urging users to perform a spell check when they consider an application for which one has not yet been performed. (In IGAM, *considering* an application is a particular task; for details, please see "Processing Application Decisions" on page 215.)

You can also require IGAM users to try to find existing GIFTS Requests representing an application before transferring the application to GIFTS as a new Request. If a Request does already exist for an application, the user should then link the application to the Request. This helps avoid duplicate Requests in GIFTS. (For more information on linking, please see "About Linking Applications with GIFTS" on page 221.)

Maintenance The History folder in the GAM contains applications for which processing is completed. The Maintenance option allows you to have IGAM automatically delete processed applications older than an age you specify. The number of days is unlimited.

If you would like to have your IGAM system create Declined Requests in GIFTS for *rejected* applications, you can also set that option here. (This option is not selected by default.)

Correspondence Settings Here you can choose to have IGAM generate batch correspondence in a single word processor file, or in separate files for each item in the batch. You can also set your IGAM system to prompt your users to generate correspondence for applicants after retrieving their applications for the IGAM server. (By default, this option is selected.)

For complete information on this preference category, please see "System-Wide Options" on page 60.

Application Handling

These options allow IGAM to retrieve new applications and online requirements from the MicroEdge IGAM server automatically.

The Default option checks your original site for new applications and online requirements automatically each time you log in to the GAM.

The other option can be set to check for new applications at regular intervals while you're logged in.

If Multi-Site IDs is enabled, you will have the option to select All Sites or one of your current sites as the default site to retrieve applications from when you log in. The default setting is All Sites.

.

When All Sites is selected, IGAM begins by checking your original Default SiteID and prompts you to retrieve them on the New Submissions window. Once applications have been retrieved and correspondence has been sent out, IGAM checks the next site ID on the list and so on.

For complete information on this preference category, please see "Application Handling" on page 63.

External

In the External category of your system-wide IGAM preferences, you determine where you would like to store your IGAM application/online requirements and attachments data.

The IGAM Path field should contain the path to the network location where you want to store data from retrieved applications and online requirements. The default location is a sub-directory of your \GIFTS folder.

Caution: Changing the entry in the IGAM Path field will cause the entire IGAM directory to be moved to the new location indicated. If you move the IGAM directory to a local hard drive, only users with access to that hard drive will be able to access IGAM forms. It is therefore recommended that you do not move the IGAM directory. If it does become necessary to relocate the IGAM directory, make sure all users are logged out of IGAM and disable the automatic form retrieval feature before proceeding.

Options in the Attachments section concern downloading and saving files attached to applications and online requirements. Enter the network path to the default location where you want to save attached files, and choose whether or not IGAM should automatically delete attached files when an application is rejected.

For complete information on this preference category, please see "External" on page 64.

Updating GIFTS

Your online application and requirement forms may contain fields equivalent to certain "long text" fields in GIFTS. (Long text fields are text fields with a 64,000-character limit to an entry.) Second-stage applications may also repeat these fields from the first stage, creating another situation in which applicants' entries may differ.

This preference lists certain long text fields and allows you to determine how you want IGAM to handle conflicting entries. For each field (including each custom long text field in use by Customizer Module users), you may choose to have IGAM:

- replace the old text with the application/requirement's new text;
- amend the field, entering the new text after the unchanged old text; or
- ignore the new text, leaving the old text unchanged and unamended.

For complete information on this preference category, please see "Updating GIFTS" on page 66.

IRS Tax Data

This preference category determines how tax ID data submitted by applicants is used to update records in GIFTS.

When an application is considered, the U.S. or Canadian tax ID will be checked against the database of non-profit organizations available on the IRS and Canada Revenue Agency websites. If the organization is found, data from the IRS or Canada Revenue Agency database can be used to pre-populate certain fields on the online application.

For complete information on this preference category, please see "IRS Tax Data" on page 70.

External Reviews

If you have both IGAM and the Reviewers Module, you can set up IGAM to create external Reviews automatically. For more information, see the "Integration with IGAM" section in the *Reviewers Module and ReviewerCONNECT User's Guide*.

GIFTS Preferences Affecting IGAM

Other preferences that affect your IGAM system are set in the GIFTS Administrator:

- In the GIFTS Administrator General Preferences, you specify the URL for the website you wish to use to research the applicant organization. Linking to the specified research website is available directly from IGAM.
- Another General Preference in the GIFTS Administrator determines whether new Requests will be automatically flagged Complete or Incomplete. When you use IGAM, this option is applied to new applications when you retrieve them.

For details on these preferences, please see the *GIFTS Administrator's Guide*.

Step 2: Set Up Applicant/Grantee Options

Applicant view options allow you to define the look of the web pages that display your account log-in, applicant/grantee account home page, application and requirement forms, and other pages. Here you will also write the automated emails used to inform applicants and grantees about account issues, and set design standards for all your application and online requirements.

Applicant/grantee view options may be accessed by selecting Tools ➤ Preferences from the GAM main menu, then selecting Applicant/Grantee View ➤ Options in the Category section of the Preferences window:

Note: If you have multiple Site IDs, make sure to click on the one you wish to work on.

Click the Edit button to open the applicant/grantee view options. The Site Global Design Preferences window appears:

Note: These options can also be set at the application/requirement form level for individual application forms and override the options set here. For more information, see "Links Tab" on page 156.

Web Page Links and Messages In the Links tab of the Global Form Preferences window, you can enter appropriate information for links that appear on your applicant account web pages. Buttons can be changed to Links or vice-versa for most of the ones listed. Their labels can also be modified.

In the Messages section, you can edit the content of several automated messages applicants/grantees may receive as they navigate the application/online requirement.

Idle and Timeout settings can be accessed using the Timeout Settings button.

Account Home Page Design and Graphics The Design tab allows you to define the default layout, colors, and text properties of your applicant/grantee account pages. You can also add your logo, background, or other custom HTML design elements in the Graphics tab.

The preferences you set here will be the default settings for the pages that contain the forms you will design in Step 3 below.

Note: The page design for each form can be defined differently in the Form Design Wizard.

The applicant/grantee account page now allows users to click a read-only, printer-friendly version of applications and requirements. Also, users can now view attachments by clicking them. If you want the description of sub-status Foundation Codes for 509(a)(3) charities to display on this page, you can add the codes to your Tax Status code table in the Administrator module. For more information on adding codes to your Tax Status code tables, see "IRS Tax Data" on page 52.

For details on working with these Global Form Preferences settings, please see "Applicant/Grantee View Options" on page 80.

Automated Emails

In order for IGAM to send automated email messages to your applicants and grantees, you must provide an email address for applicants/grantees to reply to in the "'Reply To' Address" field. You also need to provide a display name that will appear exactly as you have entered it in the "From:" field of the email message. Your display name should be either your organization's name, or the name of the person who will be handling all email inquiries.

Important: You must enter a valid email address and a display name before you will be able to activate any forms. If you close the Preferences window without entering this information, you will receive a message to remind you that these fields must be completed.

For more information about this section, see "Automated Emails" on page 103.

Note: Automated emails should not be confused with correspondence templates, which are used to communicate information concerning specific applications and decisions reached on them. Correspondence templates are described in "Working with Correspondence" on page 249.

Step 3: Creating Application and Requirement Forms

Once you have the Internet Grant Application Module set up the way you like, you can create forms for applicants and grantees to fill out. Use the Form Design Wizard to create and edit your forms, as described in "Designing Your Online Forms" on page 113.

You have many options when creating forms for online applications and requirements; a quick overview of the process here would by necessity omit many important details. Instead, some tips on planning and performing form creation follow in this section.

Single- and Two-Stage Applications

Single-stage applications are designed to collect all the information needed to complete a full grant proposal in one online form. This application, if considered, can be transferred to GIFTS as a Pending Request.

Two-stage applications utilize two forms: the first to collect enough information for a preliminary decision on your organization's interest in the project, and the second to collect remaining data needed to complete a grant proposal.

When the first of a two-stage application is considered, you select the appropriate second-stage form and generate correspondence directing the applicant to the URL where the second form can be filled out. The completed second-stage application, if considered in the GAM, then *updates* the Pending Request created for the first stage. This allows you to track a two-stage application with a single Request record.

Tip: A first-stage application can be linked to multiple second-stage applications. If you use first-stage applications to collect basic data, you may find that a single first-stage form can be used for a number of two-stage application processes.

Pre-Built Forms

Note that two pre-built forms are included with the installation of IGAM 5. These forms are designed to mirror the content of the Common Grant Applications (CGAs) for the NY/NJ Regional Association of Grantmakers (NY/NJ RAG) and the National Network of Grantmakers (NNG).

Important: Should you choose to activate the NY/NJ CGA as is, it is recommended that you contact the NY/NJ RAG in order to be added to their list of form "acceptors." If you choose to make changes to one of these forms, your new form should not be represented as the official CGA of either organization.

Creating Multiple Forms Efficiently

If you serve a number of different kinds of grant-seekers, you may want to create forms tailored to different applicants. Nevertheless, because much common data will be sought from all applicants, these forms are likely to contain many common fields.

To speed the creation of multiple forms, you can create one form and save copies of it under different titles (select File ➤ Save As from the Form Design Wizard menu). Modifying the copy may prove more efficient than creating a new form from scratch.

Step 4: Defining Correspondence Templates

The automated emails you set up in your IGAM preferences notify your applicants/grantees about changes to their website accounts and confirm the receipt of their applications and online requirements. Correspondence templates, however, are used to communicate decisions on applications, to request additional information, or (in the case of two-stage applications) to direct applicants to web pages where they complete second-stage applications.

Instructions for defining and modifying correspondence templates can be found in "Working with Correspondence" on page 249. The suggested correspondence templates in the following list should cover the basic needs of communicating with online applicants:

Recommended Template	Description
Receipt of Application	An automated email is sent to applicants when you retrieve their applications from the MicroEdge IGAM server. However, when retrieving applications from the server, you are given an opportunity to generate letter or email correspondence as well. If you feel that the automated email message is adequate, you will not need this template.
Application Rejection	When you reject an application in the GAM, you have the opportunity to generate correspondence to the applicant. A template for letters or emails informing applicants of your decision is recommended.
Application being Considered (First-stage application)	When you consider an application that is the first of a two-stage application, you must inform the applicant that a second application must be filled out. *Tip:* A merge field called "Applicant Account URL" will allow your email or letter to include the URL for the applicant account login page. It is recommended that you include this merge field in this correspondence template. You may also want to remind the applicant that he or she will be asked to log in to the Web site before they can access the form.
Application being Considered (Single-stage *and* second-stage applications)	You can also generate correspondence when you consider an application in the GAM. This template should inform the user that their application is being considered, but that a decision to provide funds has not yet been made.

Once applications have been considered, Pending Requests are created in GIFTS and further decisions processed there. At that point, you can use your existing GIFTS correspondence templates to communicate your funding decisions.

4 Setting the IGAM Preferences

This chapter describes how to set the IGAM preferences, and is mostly intended to be read by the GIFTS Administrator. There is, however, a section toward the end of the chapter on user-specific view options.

In This Chapter:

IGAM Preferences 60
System-Wide Options 60
Application Handling 63
Updating GIFTS 66
Match Options 69
IRS Tax Data 70
External Reviews 74
Proxy Server 75
Firewall 77
User View Options 79
Applicant/Grantee View Options 80
Site Design Wizard 82
Automated Emails 103
Request / Payment Status 108
Setting the Research Preference 110
Defining Default Complete/Incomplete Status 111
Resetting a Password 112

IGAM Preferences

You can use the IGAM preferences to customize the way in which applications and online requirements are processed. To access the preferences, choose **Tools ➤ Preferences** from the GAM menu.

Note: Most of the IGAM preferences detailed in this chapter are applied system-wide, with the exception of the user-specific view options. If you are not the Administrator of your GIFTS system, you should skip ahead to the user-specific **View Options** section.

System-Wide Options

The preferences available in this category are general system settings.

Application Proofing

Display warning message if the spell check has not been performed prior to 'Considering' an application Since data entry is performed by the applicant, his or her spelling mistakes or typographical errors may be

reflected in your reports and correspondence if they are not identified and corrected. Select this option to alert users when an application that they are about to consider has not been spell-checked.

Require 'Request Duplicate Search' prior to considering an application To prevent duplicate Organizations and Contacts in your GIFTS database, users are required to attempt to link a Pending application with existing Organizations and Contacts before they can transfer the application to GIFTS. Select this option to also require that users apply a search for duplicate Requests in GIFTS before considering an application. Applications for proposals that are already in GIFTS can be automatically rejected and removed from your workflow.

Maintenance

Delete Historical applications older than "x" days When users reject or consider an application, it is archived to the History folder. You can limit the size of the History folder by selecting this option and specifying the number of days that applications are maintained in the History folder before they are purged from your system. There are no limits to this field.

If the application's Submitted Date falls within the range you specify here, the application will be purged.

When users log off, they are prompted with the number of applications to be purged. They can choose to purge the applications or to log off without purging them.

Applications in the Pending folder, and records in your GIFTS database, are unaffected when you purge the History folder.

Users can also purge the History folder manually. For details, please see "Purging the History Folder" on page 248.

Caution: Purged applications cannot be recovered.

Create Declined Requests in GIFTS for Rejected applications Check this option if you would like to create declined Request records in GIFTS for rejected applications. To avoid duplicate records, when this option is turned on you will need to perform Organization and Contact linking before rejecting applications.

Correspondence Settings

Users can process applications individually or in batches. When users generate printed correspondence—such as acknowledgement letters, or rejection email—for a batch of applications, the documents for the batch are saved in one file by default. Use this option to create a separate file for each merged letter.

Note: You can also set this option in GIFTS General Preferences. For details, refer to the *GIFTS Administrator's Guide*.

Prompt user to generate correspondence when applications are retrieved The default setting for this feature is on. If you typically send acknowledgement correspondence to applicants when you have received their application, you should leave this option on. Keep in mind that IGAM will automatically generate a confirmation message to applicants when their application is submitted. If you feel that the confirmation message is sufficient, you may wish to turn this option off.

Application Handling

The easiest way to keep track of your online applications is to let IGAM do it for you. With the options in this section of the Preferences window, you can customize the way IGAM communicates with the MicroEdge server to transfer your application data.

Retrieval Options

Automatically check for new submissions upon login If this option is selected, IGAM will automatically check for new applications and online requirements every time you log in, and if there are, displays a message asking if you want to retrieve them.

When Multi-Site IDs is enabled, the menu defaults to All Sites. IGAM will check each of your sites beginning with your original 'Default' site and ask if you wish to retrieve any new applications. Once done retrieving and sending out correspondence, IGAM will display the New Submissions window for the next Site ID on the list and repeat until all sites have been checked.

Automatically retrieve applications every This option allows you to designate a regular time interval at which IGAM will automatically check for newly submitted applications and online requirements. Check this option to activate it, and then select the time interval from the drop-down menu.

Note: When you have IGAM configured to automatically retrieve applications and online requirements at regular intervals, your applications and online requirements will only be retrieved while you are logged in to the Grant Application Manager (GAM). IGAM does not continue to attempt application and online requirement retrieval once you have logged out.

External

In this section of the IGAM preferences, you need to indicate where you would like to store your IGAM application, online requirement, and attachments data.

External

The IGAM Path field should contain the path to the network location where the IGAM directory resides. The IGAM directory is where your forms (both active and inactive) and retrieved applications (in both the Pending and History folders of the GAM) and online requirements are stored. The default IGAM path is a sub-directory of your GIFTS directory, which was created during the IGAM installation.

Caution: Changing the entry in the IGAM Path field will cause the entire IGAM directory to be moved to the new location indicated. If you move the IGAM directory to a local hard drive, only users with access to that hard drive will be able to access IGAM forms, online requirements, and applications. It is therefore recommended that you do not move the IGAM directory. If it does become necessary to relocate the IGAM directory, make sure all users are logged out of IGAM and disable the automatic form retrieval feature before proceeding.

Attachments

This section of the Preferences window contains options for handling attachments required by your application and online requirement process.

Default Path In order to download attachments, you must designate the path on your network or local hard drive to which the attachments should download. During downloads, GIFTS uses each application or online requirement ID to create and name a separate sub-directory of the path you specify. That way, each application or online requirement's attachments are kept together, and file name conflicts are avoided.

Caution: The default value for this field is a sub-directory of your GIFTS directory, named "Attachments." If you choose to use a default directory on a C:\ or other local drive, only users with access to your hard drive will be able to view these attachments. If you are working in a network environment, you should specify a default path on a server that is accessible to all users.

Purge attachments for Rejected applications With this option turned on, GIFTS will delete all attachments for applications that you reject.

Caution: Since attachments are deleted from the MicroEdge server when you retrieve them to the GAM, there will be no way to re-retrieve attachments that you purge from your system. Make sure you will have no need to reference these attachments in the future.

Tip: If you have turned on the Create Declined Requests in GIFTS for Rejected Applications option in the Options section of the Preferences window, you may not wish to purge attachments during application rejection.

Internet

Internet Connection Your Internet Connection setting is used by IGAM to determine approximate download times when you are retrieving applications, online requirements, and/or attachments. Use the drop-down menu to select the setting that most closely matches your Internet connection.

Timeout after "x" seconds You can set the amount of time in which the Internet connection will timeout if a connection with the IGAM server cannot be established when retrieving applications, online requirements, and/or attachments.

Updating GIFTS

You may wish to use the application/online requirement information to fill in blank fields in the GIFTS record. You may also find it advantageous to automatically update any long text fields that have likely changed since the original GIFTS record was created.

One or more of the following long text fields in GIFTS may be updated automatically:

- Organization Background
- Project Description
- Evaluation
- Customizer long text fields

Example: You receive an application from an organization that applied for a similar grant last year, so there is already an Organization record in your GIFTS system. The text provided in the Organization Background field on the application form is different than it is in the existing GIFTS record. In such a case, you need to specify whether you would like to keep the Organization Background field unchanged in the GIFTS record, or update the field with the new text supplied on the application form.

Update Preferences

Long Text Field You may apply different update preferences to each of the long text fields in GIFTS. Select a field from the Long Text Field drop-down menu, and then choose an update preference from the radio buttons below.

Important: All Requirement information on requirement forms will automatically replace existing Requirement information. Request and Organization information on requirement forms will follow the preferences selected below.

Your update choices are:

- **Replace existing text with new text**—The text in the selected field of your existing GIFTS record will be overwritten by the text on the application form / online requirement. *This option will completely delete the text in your existing GIFTS record.*
- **Add new text to existing text**—The text from the selected field on the application form / online requirement will be pasted to the end of the text in the existing GIFTS record. *This option will not delete the text in your existing GIFTS record.*
- **Ignore new text** (**keep existing text**)—The selected field will remain unchanged in your existing GIFTS record.

Important: If you have the Customizer Module, there will be a "Customizer long text fields" choice available in the Long Text Field drop-down menu. Your update selection will, therefore, be applied to all of your custom long text fields.

Updating Blank Fields in GIFTS

The next option in this section of the IGAM preferences allows you to automatically update blank fields in GIFTS with information from your retrieved applications. To enable this feature, check the "Always update blank fields" option.

Note: This only applies to applications, not requirement forms. Requirement forms always update blank fields in GIFTS.

You should note that there are two types of fields that will not be automatically updated even if you enable this option. They are:

Coding Sheets Since coding sheets are not traditional fields, they will not be affected by turning on the option to update blank fields.

"True/False" Fields These are fields that are marked as either true or false with a check box (e.g., the United Way field on the Background tab of Organization records). Due to the fact that these fields always contain a value (checked=true; unchecked=false), they will not be recognized by GIFTS as blank fields to be updated.

Organization and Contact Fields to Update

With IGAM 5.5, you have the option to specify which Organization and Contact fields can be updated during the linking process between IGAM and GIFTS or GIFTS Alta.

Available updatable fields will be shown with a checkbox next to each field. By default, all fields are checked. A checked box indicates the default selected options when the Update Details form is open, and the fields to overwrite when Update GIFTS is checked.

Simply uncheck any fields you do not want updated in your database.

You also have the option to set the Update flag for Organizations or Contacts to always be checked when linking.

Match Options

Another new feature in IGAM 5.5, the Match Options section can be used to fine tune your searches.

The more fields that are checked, the more restrictive your searches will be.

Available match option fields will be shown with a checkbox next to each field. By default, all fields are checked. A checked box indicates whether to use that field in match options.

The new preferences allow you to basically expand the search results by excluding criteria.

For example, the default criteria for Organizations may be too restrictive. You can uncheck City, State and Postal Code and you'd get hits with Name matches.

The same holds for Contacts, which require a combination of field values to match; by unchecking, for example, First Name, you would get more search results.

Finally, the **Move Up/Down** buttons determine the sort order of results.

For example, if you want Organization results to sort first by State, then Name, move State above name.

IRS Tax Data

IGAM forms can be designed to require applicants to submit a valid Tax ID number that will be checked against a database of non-profit organizations maintained on the IRS and Canada Revenue Agency websites. The information from the IRS and Canada Revenue Agency databases will then be used to pre-populate certain fields on your application form, if you have chosen to include them.

For fields that are not on your application form, the information from the IRS or Canada Revenue Agency databases will be attached to the form, and imported into GIFTS along with the form. This section of the IGAM

preferences allows you to decide how the IRS and Canada Revenue Agency data will be handled in GIFTS.

Note: The Tax ID preferences shown above refer to both IRS and Canada Revenue Agency Tax IDs.

Important: Keep in mind that your preferences in this section will only be applied to fields that are read-only. (You have the option to make fields read-only when you create a form.) Fields that may be edited by the applicant will be updated in GIFTS using the data from the application form, which may be different from the IRS or Canada Revenue Agency databases. For details on adding fields to forms and choosing field settings, please see "Fields Tab" on page 133.

IRS and Canada Revenue Agency Data

In this section, you will select the way that GIFTS should update IRS and Canada Revenue Agency data for Organizations that already have records in GIFTS. Your choices are:

- **Replace Name, Legal Name, and tax information**—This setting will overwrite the existing data with data from the IRS and Canada Revenue Agency database.
- **Update only blank fields**—This setting will retain existing data, except in those fields with no value.
- **Ignore new Name, Legal Name, and tax information**—This setting will retain the existing data.

Subsection Code

In this section, you should choose the way you want GIFTS to handle data in the Subsection Code field of the IRS and Canada Revenue Agency databases. You may elect to either store this data in the Tax Notes field in GIFTS, or else to automatically create a value for the Primary Tax Status field.

If you choose to create a value in the Primary Tax Status field, the value created will be written as 501(c)(Subsection Code).

Foundation Code

With this setting, you will determine how GIFTS handles the Foundation Code data from the IRS or Canada Revenue Agency databases. You can choose to either store the Foundation Code data in the Tax Notes field or, if the Subsection Code is 3, to create a secondary Tax Status code.

The possible Tax Status codes are as follows:

- 10 through 17=Public Charity
- 02 or 03=Private Operating Foundation
- 04=Private Nonoperating Foundation

If you want the description of sub-status Foundation Codes for 509(a)(3) charities to display, add the following codes to your Tax Status code table in

the Administrator module. Default description values are also provided, although you can modify these.

Code	Default Description
F10-15	509(a)(1)
F16	509(a)(2) under 170(b)(1)(A)(vii)
F17	509(a)(3) under 170(b)(1)(A)(viii)
F18	509(a)(4)

You can add any description to the codes, although if you do not add a description, the default description will display. For more information about adding codes, see the *GIFTS Administrator's Guide*.

External Reviews

If you have both IGAM and the Reviewers Module, you can set up IGAM to create external Reviews automatically.

For more information, see "Integration with IGAM" in the *Reviewers Module and ReviewerCONNECT 3.6 User's Guide*.

Review Rules

Important: This option only appears if you have the Reviewers module and at least one review rule has been defined.

Review rules allow 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.

Note: For more information about Reviews and the review process, refer to the *Reviewers Module and ReviewerCONNECT 3.6 User's Guide*.

Important: For information about setting up review rules, see the *GIFTS Administrator's Guide*.

After you have set up review rules, you can assign a review rule to an IGAM form:

1. From the Review Rules preference, select the Form to which you want to apply the rule, and select the **Apply Rule** checkbox next to one or more rules.
2. Click **OK**. The rule is applied to the form. When this rule is met for an application created with this form, the reviewers indicated in the rule will automatically be assigned to the Request in GIFTS after the application goes through the consideration process in IGAM.

Proxy Server

If your organization connects to the Internet through a proxy web server, you will need to provide IGAM with information about your configuration to ensure communication with the MicroEdge IGAM server. To set up your IGAM system for use with a proxy server, check the "Use a Proxy Server for IGAM Communication" option at the top of the Proxy Server preferences form.

This will activate the form so that you may indicate your proxy server configuration.

Server Enter the name or IP address of your proxy server. All IGAM HTTP requests will be sent to this proxy instead of the server specified in the URL of the request.

Note: If the Server field indicates a domain name, a DNS request is initiated and upon successful termination of the request, the proxy server is set to the corresponding address.

Port Indicate the TCP port for the proxy server.

SSL Use the drop-down menu to select an option for encrypting communication through the Proxy server:

- Automatic (Default setting. The connection to the proxy server is SSL-enabled for 'https' URLs, and non SSL-enabled for other URLs.)
- Always SSL Enabled
- Never SSL Enabled
- Tunneling Proxy

Authorization Use this field to identify any custom/additional headers to be sent to the proxy server (e.g. headers for custom authentication schemes).

User Indicate a user name if basic authentication is to be used for the proxy.

Password Indicate a password if basic authentication is to be used for the proxy.

Important: You need to specify a name or IP address in the Server field of the form before you indicate a User or Password. When the Server is set, the User and Password fields are immediately cleared for security purposes.

Firewall

If your organization connects to the Internet through a firewall, you will need to provide IGAM with information about your configuration to ensure communication with the MicroEdge IGAM server. To set up your IGAM for use with a firewall, check the "Use a Firewall for IGAM Communication" option at the top of the Firewall preferences form. This will activate the form so that you may indicate your firewall configuration.

Host Indicate the name or IP address of your firewall. Requested connections between your IGAM system and the MicroEdge IGAM server will be authenticated through the specified firewall when connecting.

Type Select the type of firewall your system will be connecting through from the drop-down menu choices:

- No firewall.
- Connect through a tunneling proxy. Firewall Port is set to 80.
- Connect through a SOCKS4 Proxy. Firewall Port is set to 1080.
- Connect through a SOCKS5 Proxy. Firewall Port is set to 1080.

Port This field indicates the TCP port for the firewall Host. This field will be populated automatically when you set the firewall Type, but you may override the default.

User If authentication is to be used when connecting through your firewall, you should enter a user name in this field. This user name, along with the password below, will be used by IGAM for authentication with the given firewall.

Password If authentication is to be used when connecting through your firewall, you should enter a password corresponding to the user name entered in the field above. This password, along with the user name, will be used by IGAM for authentication with the given firewall.

Data When your firewall is a tunneling proxy, use this field to identify any custom/additional headers to be sent to the firewall (e.g. headers for custom authentication schemes).

User View Options

In this section of the preferences window, each user is able to designate the types of applications shown in the **GAM Pending** and **History folders**. Since this setting is user-specific, each user on your IGAM system may select a different configuration.

Use the radio buttons to select a filter for each folder, both Pending and History:

Empty If you select this option, the folder will not be populated by any applications when you view the GAM.

View all applications Selecting this option will automatically populate the folder with every application that currently resides in the GAM.

View only "x" applications Use this option to populate the folder with only one of the three types of applications: single-stage, first-stage, or second-stage. After clicking the radio button, select an application type from the drop-down menu.

View only those applications submitted using this Form Select this option if you only wish to populate the Pending or History folder with

applications originating from a particular form. After clicking the radio button, select a form from the drop-down menu.

Use a saved search If you would like to use a saved search to populate the folder, click this option. Click on the search button to open the Saved Searches window and select the saved search to apply to the folder.

Example: You may wish to create a public saved search for each program area, so that each of your program officers can apply the search for their particular program. That way, whenever they log in to the GAM, they will see only relevant applications.

Applicant/Grantee View Options

When your applicants or grantees log in to their IGAM accounts, they are taken to a My Accounts web page where they may review their submitted applications, online requirements, and scheduled payments. They may also access any incomplete or pending applications and online requirements.

The URL for the My Account login page is displayed in this section of the IGAM preferences. You should create a link to this URL on your website, so applicants can easily access their accounts.

If you have Multi SID enabled, click on each of the site IDs listed to see the unique URL for each one.

Editing Site Design Preferences From the Applicant/Grantee View Options select a site and click the Edit button to access the Site Design Wizard, which will help you design your My Account page to match the colors, fonts, and graphics of your website. Plus, you can customize web and email links, as well as on-screen messages, that will provide applicants/grantees with helpful information and contacts.

The options you set in the Site Design Wizard will be applied as the default settings when you create your application and requirement forms.

If you wish to change any settings for an individual form, you may do so in the Form Design Wizard. For information on designing your online forms, please see "The Form Design Wizard" on page 118.

Allow HTML in Forms Select this checkbox if you want to allow HTML code to be used in online forms. If this option is selected, HTML text will display as active links on forms. If the option is cleared, any HTML text on a form will display as regular text.

Note: If this option is turned on *after* forms have already been created, the new preference will not be applied to existing forms until they are opened and saved again.

Site Design Wizard

To begin formatting your My Accounts page and on-screen messages, click **Edit** in the Applicant View Options section of the Preferences window. The Site Design Wizard that opens is very similar to the Form Design Wizard you use to create new forms.

Links Tab

The Links tab of the Design Wizard allows you to change the Site name, configure timeout settings, provide applicants with links, modify important on-screen messages and set security preferences. Many of these elements will help your applicants/grantees find all the information they need to submit complete grant proposals or online requirements in a timely ans secure manner.

Site Name

The default name for your first Site ID is 'Default'. If you are managing multiple Site IDs, you may want to give each of them a more helpful name.

Timeout Settings

Clicking the **Timeout Settings** button, located on the Links tab, gives you access to the global timeout settings for the selected Site ID.

Simply check the **Enabled** box to turn on the feature and then filled in the following fields:

Idle Minutes: This is the amount time that must elapse without the applicant posting data to the server before the Idle Warning Text is displayed.

Idle Warning Text: This is the text displayed to the applicant along with the option to Continue or Exit.

Timeout Minutes: This is the amount of time that must elapse without the applicant posting data to the server or clicking Continue on the Idle Warning prompt before the system logs out of the account and displays the Timeout Text.

Timeout Text: This is the text displayed to the applicant after the session has been terminated.

How It Works:

The Idle Minutes is required to be less than the Timeout Minutes. Default times respectively are 15 & 20 minutes. These fields cannot be set to zero.

Example: Idle Time = 15 minutes, Timeout Time = 20 minutes

This allows the applicant 5 minutes to see the Idle Warning and take action before the session is terminated.

When the Idle Minutes time is reached, a prompt is displayed containing the Idle Warning Text and the option to **Continue** or **Exit**.

- If **Continue** is selected, the timeout counter will be reset to zero and begin counting up again.
- If **Exit** is selected, the session will be disconnected and the applicant will be taken to the login screen.
- If no action is taken by the applicant, the system will continue to count up until it reaches the Timeout Minutes set and then display the Timeout Warning. Clicking **OK** will take the applicant to the account login page.

Typing inside fields on the application does not reset the idle timer. In order to reset the idle timer, an action must be taken that saves data to the server.

Actions that cause current data to be saved to the IGAM server include:

- Going to a different page of the application using **Next/Continue** links, **Page Number or Page Title** links/tabs, or **Chevron Progress Bar** links.
- Clicking **Save & Finish Later**
- Uploading Attachments

Security Settings

With the upgrade to IGAM 5.5, all passwords will now be case sensitive and a more stringent password policy will be enforced when applicants create passwords (either on first login, or after a password reset).

Note: As part of the IGAM server upgrade in September 2013, all existing account passwords were changed to lowercase. Once an applicant logs in to their My Account page, they can change it as desired.

The **Security Settings** button next to the Timeout Settings button allows you to enable the new higher security features available in IGAM 5.5.

Require security questions - If checked, applicants will be required to answer three questions that will validate the account holder identity prior to sending a temporary password, either upon account creation or when a password is forgotten (which will also unlock the account). Upon account creation, applicants will be required to select questions and provide answers so that they may unlock their account if it becomes locked due to unsuccessful attempts.

Unsuccessful attempts - This will determine the number of password attempts available to an IGAM account holder until the account is locked out.

Minimum length - This will determine the minimum password length. This number must be between 5 and 25.

Reuse after - This will determine how many times the password must be changed before it can be reused.

Maximum age (**days**) - This is the number of days before a password will expire.

New Security Messages in the Links Tab

To support these new security settings, the Messages table on the Links tab will contain three additional entries:

"Initial Account Lockout. The default entry will be 'Your account is not accessible at this time. Please click the Forgot Password link to reset your password.' This will be configurable and will use the Error Message design element in the Design tab of the GAM account preferences for text size, color, font and style.

"Final Account Lockout. The default entry will be 'Your account is not accessible at this time. Please contact us for further assistance.' This will be configurable and will use the Error Message design element in the Design tab of the GAM account preferences for text size, color, font and style.

"Security Question Page Instructions. The default entry will be 'Please provide answers to the questions below.' This will be configurable and will use the Error Message design element in the Design tab of the GAM account preferences for text size, color, font and style.

Password Setup for Existing Accounts

Once the option to require Security Questions has been enabled in the global preferences, existing IGAM accounts will be forced to enter answers to security questions at their next login.

When an applicant attempts to login for the first time after the security settings have been changed the following will occur:

"The applicant will be brought to the Change Password page and must enter a new password. The new password requirements will be applied.

"If no security question responses have been previously provided, the applicant will be brought to the Security Questions page.

"Once provided, the applicant will be directed to the page that required login.

File Upload Validation

IGAM 5 allowed the GAM user to set restrictions on allowed file types. In addition, .exe, .com, .bat, and .vbs files were automatically added to the exclusion list.

However, there was potential for an applicant to rename a malicious file to an accepted file type (.exe to .doc) and IGAM would allow the upload.

With the IGAM 5.5, in addition to file extension, IGAM will now also validate the Content Type of the MIME header. If the Content Type is found to be a restricted file type, the same error message that occurs for invalid file extension will be displayed.

Security Questions Setup

Upon account creation or initial login after turning on the security questions feature, the applicant will be directed to a page with the default title of Security Questions.

There are six sets of questions and answers that must be answered by the applicant.

In the case of a forgotten password, the applicant will need to answer three of these questions to get their password reset.

Account Lockout

This enhancement tracks the number of unsuccessful attempts and prevents access to the account after the specified number of unsuccessful attempts.

Once locked, the account may only be unlocked by resetting the password via the IGAM module or if the applicant answers three security questions correctly.

"If an applicant answers the three security questions correctly, the applicant will be sent a temporary password.

"If the applicant cannot answer security questions correctly, the applicant may contact the IGAM user so that the user may reset the password for the applicant's account email.

This can be done in IGAM by selecting **Tools->Reset Password**. An application does not need to be selected in order to reset the password. The only requirement is that the applicant email entered in the reset form matches an applicant email address for the selected SID (in the event that multiple sites are configured).

Links

The Links window displays a list of all the links used by IGAM on it's webpages. Many are configurable to be a button or a link. Some can be used to route your applicants to other helpful webpages. Others also have the option to change position on the webpage between standard, left, or right.

Important Facts about Links

- **Type** cannot be changed but does not appear on the screen.
- **Labels** can all be changed to suit your needs.
- **Styles** can all be changed from Link to Button or vice-versa with the exception of the Review Application and Review Requirement links.
- The **Email/Contact Us** link should only be used with valid email addresses.
- The **Help URL** and **Document URL** links can be repurposed to take your applicant to any desired webpage URL address.
- The **Exit URL** should be used only for applicants to exit from the application site or My Account site. Once clicked, the user cannot use the **Back** button to return to the previous page. They will be asked to login again.
- The position of the N**ext, Save & Finish Later, Review & Submit, Update,** and **Submit** buttons can be modified from Standard to Left or Right.

Duplicating Links on Top and Bottom of Pages A **Duplicate to Top** option is now available for the following links/buttons so they will appear on the top of the page as well as the bottom.

"Next

"Save & Finish Later

"Review & Submit

"Update

"Submit

"Continue

Customizing a Link To modify a link, simply double-click on it. A Link window will open with the available options. Make your changes as desired and click **OK**.

Adding Useful URLs to Links If you wish to provide links to helpful resources, such as your organization's website, you can use the Help URL, Documents URL, or Exit URL links. These links do not appear on any forms or IGAM pages until a URL link is added to the Link To field.

To activate one of these links simply double click it, enter a web/email address for the link, and change the label of the link to whatever is appropriate. Once configured they will appear at the top of your application or online requirement form.

Customizing Links into Buttons or Vice-Versa You can change most of the links to buttons or vice-versa. The only exceptions are Review My Application and Review My Requirements.

Below the difference between a link and button is illustrated.

Changing Link/Button Position Some of the links/buttons listed also allow you to change their position from Standard to Left or Right side of the webpage. These include: Next, Save & Finish Later, Review & Submit, Update, and Submit.

Note: If you choose to use buttons instead of links, it's important to know you can now modify button color and font on the Design Tab. For more details, refer to the Design tab section.

Messages

During the application process, certain conditions may occur which warrant that information and/or an error message to be returned to the applicant or grantee. There is default text associated with these messages, but you may choose to customize the messages in order to provide your applicants/grantees with more detailed information.

The default text for each of the messages is as follows:

Message Type	Conditions	Default Text
Invalid Password	Displayed when the form password entered by the applicant does not match the value supplied by the form designer.	You have entered an invalid password. Please try again.
Invalid Tax ID	Displayed when the "Require applicants to enter a U.S. Tax ID" flag is on, but the "Require Tax ID to be on file in the IRS database" flag is off and the Tax ID entered is not found.	The Tax ID you entered was not found in the IRS database. Please check your entry. If it is correct, click OK to begin filling out your application form.
Valid Tax ID Required	Displayed when the "Require applicants to enter a U.S. Tax ID" flag is on, and the "Require Tax ID to be on file in the IRS database" flag is on, and the Tax ID entered is not found.	The Tax ID that you entered was not found in the IRS database. We cannot accept applications from organizations whose tax information is not on file. Note: You may want to change the first sentence above to "The Tax ID that you entered was not found in the IRS and Canada Revenue Agency databases." This reflects that GIFTS searches both the IRS and Canada Revenue Agency databases.
Tax ID Field Label	"Please enter your Tax ID:"	
Tax ID Instructions	Instructional text displayed on application's Tax ID page.	

Message Type	Conditions	Default Text
Incomplete Quiz	Displayed when the applicant clicks Continue on the Eligibility Quiz without supplying answers for each question.	Please answer all of the quiz questions so that we may accurately assess your eligibility.
Submission Acknowledgement	Displayed when the applicant submits the application.	Thank you! Your application has been submitted. You should receive an email confirmation shortly.
Save and Finish Later	Displayed when the Save and Finish Later button is used.	Thank You! Your application has been saved. You should receive an e-mail confirmation shortly.
Requirement Submission	Displayed when a grantee submits an online requirement.	Thank you! Your report has been submitted. You should receive an email confirmation shortly.
Recommender Instructions	This text will appear on the site accessed by recommenders.	
Account Login Instructions	Displayed on the Account login page.	
My Applications Page Instructions	Displayed on the My Applications page.	
My Requirements Page Instructions	Displayed on the My Requirements page.	
Email Instructions	Displayed when a user emails an application from his or her My Account page.	
Initial Account Lockout		Your account is not accesible at this time. Please click the Forgot Password link to reset your password.

Message Type	Conditions	Default Text
Final Account Lockout		Your account is not accesible at this time. Please ccontact us for further assistance.
Security Question Page Instructions		Please select and answer the six questions below.
Submission Transfer Confirmation		The application has been transferred. The new owner will need to login and accept the transfer before it is completed.
Cancel Transfer Confirmaiton		The pending transfer has been cancelled successfully.
Viewers Update Confirmation		The applicaiton's viewer list has been updated successfully.

To edit the contents of your on-screen messages:

1. Double click the message you want to edit from the Messages grid.
2. Edit the contents of the message to reflect the appropriate information.
3. Click **OK** to save your changes and return to the Links tab.

Tip: Press F3 while you have the Message window open to spell-check the new message text.

Design Tab

The Design tab of the Design Wizard allows you to manipulate the layout, colors, and text properties of your My Accounts and Application pages. These settings will also become the default settings for all new application and requirement forms created in the Form Design Wizard.

Layout This section controls several very important layout options. Each one is described in the table below.

Option	Description
Horizontal Accent	This default layout option consists of a colored header, a differently colored body area, and a menu bar separating the two.
Graphical Background	This layout option retains the menu bar, but the header and body areas are populated by a graphic of your choosing. In the center of the body area is a white area where your application/online requirement form prompts will appear. Uploading graphic files is discussed in the Graphics Tab section.
Vertical Accent	This layout option will create an application/online requirement with a solid background color and an accent bar along the left-hand side.

Option	Description
Navigation Style	This dropdown menu lets you choose between Classic or Chevron navigation styles on application forms. Classic - Displays numbered tabs by default for each page of an application form. The tabs can be configured to show page titles instead using the Use Page Title for Navigation setting (see below). Chevron - Instead of tabs, this option displays a numbered progress bar on top of forms with each step representing a page. This option can only be used for forms with six pages or less.
Button Style	This dropdown menu lets you choose between Classic or Custom button style. Classic button style is the normal light grey format. Selecting Custom will open a new Button Color field in the Colors area which will allow you to change the color of all buttons to a new color. It will also give you the option to modify the text format of all your buttons in the Text > Display Elements menu.
Include Content Frame	Checking this box creates a frame around your entire form page. Note: In IE 9.0 and Firefox 4.0, this frame has a shadow effect.
Use Page Title for Navigation	Check this box if you want IGAM to display the page titles instead of page numbers on the navigation bar of forms.
Page Span	This dropdown menu controls how your IGAM pages make use of onscreen space. Entire Page - forms will take up all the space available in the current window. Left, fixed width - forms will align to the left of the screen and be limited to the Page Width setting. Center, fixed width - forms will center on the current window and be limited to the Page Width setting.
Page Width	This setting is only available if Page Span is set to Left or Center. The minimum setting is 1000 pixels. Entries less than 1000 will default back to 1000 pixels.

Colors In this section, you can override the system default settings for the colors on the application/online requirement. To make setup easier, you may choose from three predefined color schemes by clicking the **Scheme** radio button and selecting from the drop-down menu. If you select a color scheme, the colors will not be editable.

You may also choose to assign custom colors to each part of your IGAM webpages by clicking the **Custom Colors** radio button.

Caution: After setting Custom Colors, be careful not to select a Scheme. This will cause all your custom color settings to be reset. If this happens, do not use the **Save and Close** button. Instead click the window **Close** button and answer **No** to the Save message.

The following color settings can be modified:

- Header Background
- Accent Bar
- Body Background
- Search Prompt Background
- Active tab
- Inactive tabs
- Button Color (only available if Button Style is set to Custom)

You may choose from any of the 216 standard browser-safe colors. To choose a new color for a part, you may either enter the color's hex value (e.g., "000000" for black) or click the paint bucket icon to the right of the color sample.

Select a color from the palette in the Colors window and click **OK**.

Caution: You must to consider that changes made in the Tools > Preferences Site Design and Graphics tabs will take immediate effect on the My Account and Account Login pages when you Save and Close. Care must be taken to avoid making your webpages less than ideal.

Some considerations regarding colors:

- The column header color on the My Account page is controlled by the Accent Bar color.
- If you have selected the Graphical Background layout option, the Header Background and Body Background fields will be disabled since the entire background (header and body) will consist of an imported graphic.
- If you have chosen the Vertical Accent layout option, the Header Background color will be unavailable because the layout does not include a header.

Text In this section you may select the font formatting options for your application and online requirements. Choose an element to edit from the Display Element drop-down menu at the top. You may change the Font, Alignment, Size (relative or fixed), Style, and Color.

Note: Changes made to the **Form Title** will only be displayed in the Printer Friendly Version of the form.

You can also manually enter one or more fonts in the Font field if the one you would like to use is not available in the drop-down menu. If entering multiple fonts, separate them with commas (no spaces between the comma and font name). If the first font is not available on the applicant/grantee's browser, the second will be used. If the second one is not available, the third will be used, and so on.

If you would like to make the selected element bold or italicized, select the appropriate checkbox. The last setting allows you to select the color of the font for the selected element in the same way you selected the colors of the application parts.

Required Field Icon Select an icon to display next to all required fields on your application/online requirement using the dropdown menu. You may also choose the color of the icon in the same way you selected the colors of the application/online requirement parts.

View Your Changes To view how your changes to the My Account page, click the **Save and Close** button and then click on the **URL** link displayed on the Preferences window for the Site ID selected. Once logged in, you can open an In Progress application to see how the form has changed.

To view how the color changes affect all your application forms, close the Preferences window and open the Forms Manager. For active forms, use the **View URL** button. For inactive forms, use the **Preview** form button.

Graphics Tab

The Graphics tab of the Design Wizard allows you to add and remove a Logo, Background, or custom HTML elements to your IGAM webpages.

Graphics for Logo and Background must be either .gif or .jpg files residing in a directory that is accessible at the time you click the Add button.

Logo Path and File Name This option allows you to add your organization's logo to the top of your application/online requirement. Enter the path to your logo's graphic file or use the Browse feature to search for the file, and then click Add.

Rollover Text You may choose to enter rollover text that will appear on-screen when the applicant or grantee rolls their mouse pointer over the logo.

Tip: Your logo will *not* function as a web link on your application/online requirement. Your rollover text should not, therefore, tell the applicant or grantee to click the logo to return to your home page.

Logo Alignment Your logo will always appear at the top of the application/online requirement, but you may change its horizontal position by selecting from the Logo Alignment drop-down menu.

Background Path and File Name If you have selected the Graphical Background layout on the Design tab, the background graphic option will be enabled. Enter the path to your background graphic file, or use the Browse feature to search for the file. Your background graphic will populate both the header and body areas of your application/online requirement.

Change or Remove Logo/Background If you would like to change either the logo or the background graphic, simply type the new path and file name over the existing one and click **Add**. If you would like to clear either graphic, click **Remove**.

Custom HTML

IGAM 5 allows the use of HTML files to add custom header, footer, and side panels to your webpages and forms. This allows integration of your website elements into the IGAM webpages and forms to produce a seamless transition for your applicants.

Caution: You must to consider that changes made in the Tools > Preferences Site Design and Graphics tabs will take immediate effect on the My Account and Account Login pages when you Save and Close. Care must be taken to avoid publishing HTML files that do not render correctly.

If you do not have a test environment with a test SID, there are two options:

- Remove any external facing links to My Account/Account Login, or links to published Applications that require account login/creation (disable forms), so that applicants do not see these pages while being edited.
- Acquire a test configuration/test SID that will allow previewing and testing of all IGAM elements prior to publishing and making visible to applicants.

Note: Existing forms will not display custom headers, footers or side panels unless edited, regardless of global settings.

Any custom HTML header, footer and side panels defined in the global IGAM Preferences (Tools->Preferences->Applicant View->Options, Design Wizard) will become the default header, footer and side panel for My Account and Account Login pages as well as new Forms unless different files are specified in the Form Design Wizard.

Since the custom header will replace the logo displayed in the IGAM, the presence of a custom HTML header file will disable the Logo, Logo Alignment and Logo Rollover Text fields.

Here is a sample of a My Accounts page with custom HTML header and left side panel.

Adding Custom HTML Files To begin working on custom HTML, click the HTML button on the bottom of the Graphics tab to open the Form Design Wizard for HTML.

The .html files and images (.gif or .jpg) must be contained in a .zip file for uploading. Each element (header, footer, left side panel, right side panel) must have it's own .zip file.

Note: The zip file must contain only the actual files; not a folder containing the files.

Browsing for and Selecting a File Once a .zip file is selected, or if the path and file are manually entered, the path and file will appear below the text entry field and the Add button will become enabled.

You must click the Add button for the file to be saved to the IGAM server.

IGAM will validate the contents of each zip file to make sure there is a .html file.

Image Guidelines Images must be in .gif or .jpg format. There are no guidelines regarding the size of the images as this will depend on your page width setting and personal website design preferences.

HTML Files Guidelines The .html file for each element must be formatted in a specific way in order for IGAM to properly apply it to your webpages and forms.

IMG tag src attributes in a panel html must look like this:

The SID_value is your Site ID number or account (if multi-SID) and image.gif represents the filename of your image.

The IFID must always be 0.

Sample Header HTML Zip File Here is a simple zip file for a header. It contains only the required .html and image file.

The html file contains just the path to the image file as defined above.

The above HTML path is for Site ID 1208 and is pointing to the image filename USEF-Header1.jpg.

Tip: Simple HTML files can be created very quickly in Windows Notepad by copying the example above and substituting your own Site ID and image filename. Then save the file with a .html extension.

Cascading Style Sheet (CSS) Guidelines CSS included in a panel html should be formatted as follows:

<link href="/SID_0001/Default.asp?SA=PI&CSS=Header\styles.css&IFID=0" type="text/css" rel="stylesheet" />

Instead of an IMAGE parameter, you must specify a CSS parameter. Remember to use an IFID parameter of 0.

All the image references in the css file should then look like this:

background: transparent url('/SID_0001/Default.asp?SA=PI&IMAGE=Header/image.gif&IFID=0') center left repeat-y;

Here too you must remember to use an IFID parameter of 0.

Tip: For Footer, Right or Left panel content, substitute 'Header' with Right, Left or Footer in the above path examples.

Automated Emails

IGAM will automatically generate many different types of acknowledgement and/or informational email messages. In this section of the Preferences form, you are able to customize the contents of these messages. You will also need to specify an email address to be used by IGAM as a return address for your automated email messages.

Share Drafts and Submissions Select these checkboxes if you want to allow applicants and grantees to email draft applications and submissions.2.

All three options on the top of the Emails tab in the Site Preferences must be checked.

"Allow applicants and grantees to email drafts and submissions

"Allow applicants and grantees to manage viewers

"Allow applicants and grantees to transfer drafts and submissions

Email Sent 'From' In order for IGAM to send automated email messages to your applicants and grantees, you must provide an email address for applicants/grantees to reply to. You also need to provide a display name that will appear exactly as you have entered it in the "From:" field of the email message. Your display name should be either your organization's name, or the name of the person who will be handling all email inquiries.

Important: You must enter a valid email address and a display name before you will be able to activate any forms. If you close the Preferences window without entering this information, you will receive a message to remind you that these fields must be completed.

Email Contents The automated emails listed in this area are created and sent to applicants/grantees for the following reasons:

- An applicant/grantee saves an In Progress application.
- An applicant/grantee opens an account.
- An account is created for a grantee.
- An applicant/grantee forgets their password.
- An applicant/grantee changes their password.
- The grantmaker resets the applicant's/grantee's password.
- The grantmaker transfers the applicant's account to a new email address.
- An applicant/grantee submits an application/online requirement.
- An applicant/grantee is required to send emails for letters of recommendation.

The default text for the automated email messages is as follows:

Email	Subject	Body
Submission Confirmation	Your Application Submission	Thank you for your submission. Your application has been submitted successfully, and the tracking number is {Application ID}. You will be receiving more information on the status of your application shortly. For your records, here is a copy of the contents of your application. {Application}
Save and Finish Later Confirmation	Your Application	Your application has been saved successfully, and the tracking number is «Application_ID». For your records, here is a copy of the contents of your application: «Application»
New Account	Welcome Grantseeker!	Dear Grantseeker, Your account has been created! You can log in to Your Account, {Account Login URL}, at any time. Your password is {Password}. Please make a note of it.
Password Reminder	Your Information Request	Dear Grantseeker, Your password is: {Password}*. Log in to Your Account, {Account Login URL}, at any time to access your form(s).
Password Update	Account Update	Per your request: Your account password has been changed to {Password}*. Log in to Your Account at {Account Login URL} to access your forms. Thanks for visiting!

Email	Subject	Body
Requirement Submission Confirmation	Your Report Submission	Thank you for your submission. Your report has been submitted successfully, and the tracking number is «Requirement_ID». For your records, here is a copy of the contents of your report. «Requirement»
Create Account (GIFTS)	Welcome!	Dear Grantee, Your account has been created! You can login to your account, «Account_Login_URL», at any time. Your password is «Password». For security reasons you will be asked to change it when you first log in.
Copy of Submission	Copy of «Form_Type»	I would like to share the attached «Draft_Submitted» «Form_Type» with you.
Reset Password	Account Update	Your account password has been changed to «Password». For security reasons you will be asked to change it when you first log in. Log in to your account at «Account_Login_URL» to access your forms.
Recommender's Notification	blank	blank
Transfer Applications	Application Ownership Transfer	Dear Grantee, This message is to notify you that ownership of Application «Application_ID» has been transferred to you. You must accept transfer of ownership in order to complete this process. Please login to complete the application. You can login to your account, «Account_Login_URL», at any time. NOTE: If you are a new user, a separate email will be sent to you with the login web page and your initial password. For security reasons you will be asked to change the password when you first log in.

Email	Subject	Body
Transfer Requirements	«Form_Type» Ownership Transfer	Dear Grantee, This message is to notify you that ownership of «Form_Type» «Requirement_ID» has been transferred to you. You must accept transfer of ownership in order to complete this process. Please login to complete the «Form_Type». You can login to your account, «Account_Login_URL» at any time. NOTE: If you are a new user, a separate email will be sent to you with the login web page and your initial password. For security reasons you will be asked to change the password when you first log in.
Add Viewers	«Form_Type» Viewer Access	Dear Grantee, This message is to notify you that you have been granted Viewer access for «Form_Type» «Application_ID». Please login to view the «Form_Type». You can login to your account, «Account_Login_URL» at any time.
Requirements Retrieval Notification	Requirement Received	This message is to notify you that the «Requirement_Type» Requirement, ID # «Requirement_ID» has been retrieved. A copy of the report is displayed below. «Requirement»

The **Submission Confirmation** automated email above can also be set at the application or requirement form level, and override the information entered here. For more information, see "Links Tab" on page 156.

The **Recommender's Notification** is used during the application process by applicants/grantees to send a recommendation request to an external source (professional reference, teacher, college professor, etc.). The Subject and Body of the Recommender's Notification are left blank so that the applicant can personalize the email to the recipients during the application process. However, it is possible to enter a generic message here if desired.

The **Requirement Retrieval Notification** is sent automatically to the staff owner of the Requirement when it is retrieved. By default this notification is

disabled. It can be enabled by unchecking the **Do not send notifications** box at the bottom.

The parentheses in the table above indicate merge fields. A "*" indicates a required merge field. Merge fields can be added and removed when you are editing the contents of a message, but only certain merge fields are available for each message.

To edit the contents of an automated email message:

1. Select a message from the Email Type drop-down list.
2. Click in the Subject and/or Body fields and make the appropriate changes to the text.

   Note: Use the Insert Field button below the Body field to add one of the predefined merge fields to the email message.

Request / Payment Status

In this section of the Site Preferences window, you can customize the descriptions for any Request or Payment status that appears on a user's My Account page. This description will appear in parentheses next to the status.

Note: This does not apply to the Requirements section of the My Accounts page.

Show Request Status on My Account page To display the status of Requests on a user's My Account page, select this checkbox.

To customize the description of any Request status:

1 From the Request Status section, double-click on the Request status for which you want to edit the description.

2 Enter the Description.

3 Click OK.

Show Payment Status on My Account Page To display the status of Payments on a user's My Account page, check this box.

To customize the description of any Payment status:

1 From the Payment Status section, double-click on the Payment status for which you want to edit the description.

2 Enter the Description.

3 Click OK.

Uploading Updated Request / Payment Statuses from GIFTS

If you have enabled the Request/Payment statuses to appear on an applicant's My Account page, you can upload updated statuses of any Requests/Payments from GIFTS to the IGAM server. This allows an

applicant to have the most up-to-date information about the status of their applications.

Upload Request Statuses:

1 Go to the Requests folder in GIFTS.

   Note: If you want to only upload statuses for specific Requests, select one or more from the list displayed.

2 From the Action menu, select Upload Status to IGAM.

3 Select whether you want the status updated for selected Requests only, or since the last upload.

4 Click OK.

Important: If you upload the status of a Stage 1 Request that has an associated Stage 2 Request that has not been submitted yet, you will receive an error message stating that the Stage 1 Request's status has been uploaded, but the associated Stage 2 Request's status has not. If you upload the status of the Stage 1 Request after the Stage 2 Request has been submitted, both the Stage 1 Request's status and the Stage 2 Request's status will be uploaded.

Upload Payment Statuses:

1 Go to the Payments folder in GIFTS.

   Note: If you want to only upload statuses for specific Payments, select one or more from the list displayed.

2 Go to Action > Upload Status to IGAM.

3 Select whether you want the status updated for selected Payments only, or since the last upload.

4 Click OK.

Setting the Research Preference

As users review applications, they can research the applicant organization's non-profit status and other relevant information without leaving the GAM.

You can specify the online information service they can use in the GIFTS General Preferences, as described in the *GIFTS Administrator's Guide*.

Defining Default Complete/Incomplete Status

In the GIFTS Administrator, you can set an option that automatically flags Requests as Complete or Incomplete when they are created. When using IGAM, this option is applied to online grant applications when you *retrieve* them.

If you consider an application and transfer it to GIFTS as a Pending Request, the application's Complete/Incomplete status is transferred with it. The preference, applied to the application when you retrieved it from the MicroEdge server, is not reapplied here.

Example: You set up GIFTS to mark new Requests as Complete—newly retrieved applications are thus marked Complete in the GAM Pending folder. If a user changes an application to Incomplete, considers it, and transfers it to GIFTS, the resulting Pending Request is flagged as Incomplete.

Note: When you consider the first stage of a two-stage application, it will *always* create an Incomplete Request in GIFTS, no matter what preferences you have set.

To set the default Complete/Incomplete status option:

1. Log in to the GIFTS Administrator Module.
2. From the Administrator menu, choose Setup ➤ Preferences.
3. In the General Preferences, select or clear the 'Default New Requests to Complete' check box.
4. Click OK to save your changes.

Resetting a Password

If an applicant or grantee forgets his or her password, he or she can click the **Forgot your password** link on the Account Login screen. If Security Questions are enabled, the applicant will need to answer three of their questions correctly in order to complete the process.

If this does not work, or if you want to simply reset an applicant/grantee's password, you can use the Reset Password functionality in IGAM.

To reset an applicant or grantee's password:

1. From the IGAM menu, select **Tools ➤ Reset Password**. The Reset Password window displays.

2. Enter the **Email Address** of the applicant/grantee.
3. Click **OK**. The applicant/grantee's password is reset and an automated password update message is sent to the applicant/grantee that contains a temporary password. The applicant/grantee must change it when they login.

5 Designing Your Online Forms

This chapter walks you through the design and activation of your online application and online requirements with the Form Design Wizard. It will provide you with a logical workflow and will help to insure that you don't skip any important steps.

In This Chapter:

Verifying System Requirements.....114
Planning Your Form.....115
The Form Design Wizard.....118
Properties Tab.....120
Quiz Tab.....128
Fields Tab.....133
Codes Tab.....148
Attachments Tab.....153
Links Tab.....156
Design Tab.....162
Graphics Tab.....162
Activate Tab.....162
The Forms Manager.....166

Verifying System Requirements

Before you get started you'll want to make certain that you meet the system requirements for designing and receiving online applications and online requirements.

To design, preview, and retrieve applications and online requirements you'll need:

- Monitor resolution setting of 1280 x 720 pixels or higher.
- Internet Explorer v8 or higher **or** FireFox v3.6.1 or higher. (The browser must allow cookies.)
- Internet access.

IGAM connects to the server through the World Wide Web. Workstations need to be connected to the Internet whenever the users wish to access the MicroEdge IGAM server.

Note: For a full list of compatible browsers, platforms, and software please refer to the *IGAM 5 Compatibility Fact Sheet* in your PowerME > Contents site.

Required Network Firewall Settings

If your workstations are connecting to the Internet via your site's network, then the following information should be provided to your IT staff so that the firewall(s) can be configured correctly to allow IGAM data to pass through it.

- The preferred configuration is to allow outgoing HTTPS traffic over Port 443 because this allows IGAM to apply SSL encryption to transmitted data. When retrieving application data from the MicroEdge server, IGAM will also attempt to use HTTPS with SSL encryption over Port 443. This is a standard configuration for most firewalls on networks that allow web access.

- If Port 443 is not available, IGAM will default to using HTTP over Port 80. The minimum requirement for your firewall, therefore, is that it allows outgoing HTTP traffic over Port 80. Keep in mind that this configuration will not take advantage of the SSL encryption feature of IGAM.

Planning Your Form

With the Form Design Wizard, setting up your application or requirement form is simple. But before you start, there are some key decisions you will need to make about how your application process should work.

Limiting Access to Your Online Application Forms

Most grant makers want to limit the number of ineligible applications they receive. The Form Design Wizard gives you options for handling this task:

- You can require applicants to enter a valid Tax ID (EIN) before they can access the application form itself. The Tax ID they enter will be validated automatically against the IRS and Revenue Canada databases. You can prevent the applicant from continuing if their Tax ID is not found.

  Tip: If you require applicants to provide a Tax ID, the data received from the IRS database will prepopulate the Name, Legal Name, AKA, Tax Notes, and Tax Status fields on the application form, if you have chosen to include them. For more information on adding fields to your form and setting field preferences, please see "Fields Tab" on page 133.

- You can protect your application form with a global password. Only applicants you specifically invite to apply will have access to the application form.

- You can create an eligibility quiz to determine whether the applicant's proposal will likely fall within your funding guidelines. You may choose to simply inform "failing" quiz-takers of their ineligibility, or you can bar them from accessing the application form altogether.

Tip: If none of the security options included in the Form Design Wizard suit your needs, you can also choose not to make the application available from your website. Instead, you can provide the Internet address of your application (a "link") directly to your applicants. One way to do this is to include the link in an email message. Applicants can click on the link, and have their browser open right to the application form.

Choosing a Single-Stage or a Two-Stage Application Form

The Form Design Wizard allows for the creation of either a single-stage or a two-stage application process. A single-stage application process is designed to collect all the information needed for a full grant proposal through one online form.

A two-stage application process uses a first-stage form as a means of collecting enough information for a preliminary decision on your interest in the applicant's proposal. You may then invite applicants to complete the second-stage form, which constitutes a full grant proposal.

Note: You can automatically limit access to either a single-stage or a first-stage application form through one or more of the methods mentioned in the previous section, depending on your needs. Access to second-stage application forms is always controlled manually because you must activate them on an individual applicant basis.

Deciding Which Fields to Include on Your Form

The Form Design Wizard makes a subset of GIFTS fields available to include on your application or requirement form.

All fields are optional, so you can decide which information you need in order to process the form. For each field that you include on the form, you can also decide whether the user filling out the form is required to enter a value in that field, or if they will be allowed to skip it.

Some fields correspond to your Code Tables in GIFTS, such as Program Area and Geographical Area Served. These fields will require the user filling out the form to choose from a list of values that is determined by you in the Form Design Wizard. In many cases, this will be a subset of the codes in GIFTS. For instance, if you are designing an application form specifically for your Education program, you would only include the Program Area codes that are relevant for education.

Important: For requirement forms, you can include any Request, Payment, or Organization fields that you choose. However, many of these fields can only be added to the requirement form as read-only fields. In most cases, you will

probably only want the grantee to update Notes, Long Notes, and Customizer fields for the associated Requirement in GIFTS. But if you choose, you can add some Organization and Request fields to your requirement form that are editable. If the grantee adds values to these fields, these values will update the associated records in GIFTS during the retrieval process.

Attachments

Some things to consider when planning whether to use attachments in your IGAM 5 forms include:

- Will you use Attachment fields on your forms via the Fields tab?
- Will you include the Attachments page via the Attachments tab?
- Require specific attachments? (Project Budget, List of Trustees, etc.)
- What file types and total maximum size will be allowed?

For more information, see "Attachments Tab" on page 153.

Creating a New Form vs. Editing an Existing Form

When designing an online form, you should consider copying an existing form as a starting point for your new form. This may save you a considerable amount of time if the form you wish to create is very similar in content and layout to one of your existing forms. You can then open the new form in the Form Design Wizard and edit it in the same way you would work with a completely original form.

Tip: The best way to start designing a second-stage form is by copying the associated first-stage form. Not only will all the fields be relevant, but they will already be mapped to those on the first-stage form for prepopulating. For information on how to copy forms, please see "Copying Forms" on page 170.

To help you get started with application forms, IGAM installs with two prebuilt application forms that can be used either as complete application

forms, or as templates for creating original forms. These forms are designed to mirror the content of the Common Grant Applications (CGAs) for the NY/NJ Regional Association of Grantmakers (NY/NJ RAG) and the National Network of Grantmakers (NNG).

Important: Should you choose to activate the NY/NJ CGA as is, it is recommend that you contact the NY/NJ RAG in order to be added to their list of form "acceptors." If you choose to make changes to one of these forms, your new form should not be represented as the official CGA of either organization.

For information on customizing forms, refer to the following section on the Form Design Wizard.

The Form Design Wizard

Once you have reviewed the needs of your organization's form process, and have made the key decisions about your form, you are ready to design it with the Form Design Wizard.

Copy and Modify an Existing Form

To use an existing form as a basis for your custom form:

1. Open the Grant Application Manager (GAM) and choose Forms ➤ Forms Manager from the Main menu.
2. Locate the application or requirement form you wish to copy in either the Active Forms or Inactive Forms sub-folder and highlight it.
3. Choose File ➤ Save As ➤ Same Stage from the Main menu.

   Note: If you are using a requirement form, there is no 'Same Stage' option.
4. Enter a Form Title for your new form and click **OK**.
5. Locate your new form in the Inactive Forms sub-folder and highlight it.
6. Choose **File ➤ Open** from the Main menu to open your new form in the Form Design Wizard, where it can be edited.

Start a Brand New Form

To start designing a new form based on the global defaults established by your preference settings:

1. Open the GAM and choose **Forms ➤ New Form ➤ Application/ Requirement** from the Main menu.

   Note: Choose Application if you want to create a new application, or Requirement if you want to create a new requirement form.

2. You will now be in the Form Design Wizard, where you will select all of the fields and preferences for your new form.

Tip: You can save your form at any time, regardless of how complete or incomplete it is. Click the **Save and Close** button in the lower left corner of any tab in the Form Design Wizard to add your current form to the Inactive Forms sub-folder of the Forms Manager.

Properties Tab

The Properties tab of the Form Design Wizard includes general settings and information on your form.

The **Quiz** tab is only visible when the **Include Eligibility Quiz** checkbox is selected in the Options section of the **Properties** tab.

Every application form will have a Primary Contact field. You can add as many additional Contact fields as you wish.

Click **Add**, select a Contact role from the Role dropdown list, and click **OK**.

Note: The image above displays the Properties tab for an application form, not a requirement form.

General Properties

Form Title To accommodate the new branding options available in IGAM 5 such as custom HTML headers, the form title no longer displays on application/requirement forms.

The form title now appears in the browser's tab at the top of the online form and on the Printer Friendly Version of the form.

Description You may choose to write a basic description for the form, which will not be visible to applicants/grantees but will be used to identify the form in the Forms Manager.

Site If you have Multi-SIDs enabled for your IGAM installation, this dropdown will provide you with a list of the Site IDs available to be assigned to this application form.

Caution: Once you Activate a form, the Site ID cannot be changed. If you need an activated form assigned to another Site ID, you must use the **File > Save As > Same Stage** menu option. This will create a deactivated copy of the form and allow you to assign it to another Site ID.

Stage Here you must indicate whether this is a single-stage form, a first-stage form, or a second-stage form. This field does not display for requirement forms.

Associated Stage 1 If you are creating a second-stage form, you must indicate which first-stage form it should be associated with. This field does not display for requirement forms.

Tip: You may associate more than one second-stage application with any first-stage application. Once you have reviewed the first-stage application, you may choose which of the associated second-stage forms you will ask the applicant to complete. For details on considering applications, please see "Considering Applications" on page 236.

Branch This option is visible if you have the optional Branch Security feature. The branch that you select will be assigned to applications that are submitted using this form. In IGAM, users will only be allowed to access forms for which they have at least view-only permissions.

When a GIFTS Request is created from an application, the branch to which the Request is assigned depends on the branch security model you are using. The two models, decentralized data entry and centralized data entry, are described in of the *GIFTS Administrator's Guide*.

- If you are using decentralized branch security, the Request is assigned to the branch of the user who considers (or rejects, if Requests are created for rejected applications) the application.
- If you are using centralized branch security, the Request is assigned to the branch that you have specified here.

Note: This field does not display for requirement forms.

Options

Note: This section is not available on requirement forms.

Include Eligibility Quiz Select this option if you would like to create an eligibility quiz for screening potential applicants. The Quiz tab will only be available if this option is checked.

Suppress Organization fields from application form If you are designing an application to be used by individuals rather than organizations,

you should select this option. You have two options for handling applications from individuals:

- Use Contact Name to create Organization Record—If you select this option, GIFTS will create a new Organization record for each applicant, and use the applicant's name (Last, First Middle) as the Organization name.

  Note: Each Organization created will have the same address as the Primary Contact.

- Attach applications to "Individuals" Organization—This option will automatically associate all applications with a dummy Organization that you have set up in the GIFTS Administrator preferences. For details on setting up an "individuals" Organization, please see the *GIFTS Administrator's Guide*.

Tip: If your application will include an eligibility quiz, the quiz will always be the first page displayed to applicants. If you will be accepting attachments, the attachments upload page will always be the last page displayed to applicants. However, these pages will not appear in the list of page titles.

Recommenders

This section allows you to set the number of Required or Not Required recommendation attachments necessary before the application can be submitted.

Enable Recommenders To enable this feature, the following steps must be taken:

1. The Require Account Login box under Authentication must be checked.

2 The Include Attachments Page box on the Attachment tab must be checked.

3 The Define Attachments box on the Attachment tab must be checked.

4 In Define Attachments, Add an Attachment type called 'Blind Letter' (or similar) and check the boxes for Required and Blind.

Once configured, application forms will allow the applicant to enter multiple names and email addresses to send requests to external sources for additional documentation prior to submitting the application. Applicants will then be able to see when all the required documentation has been uploaded to their application via the My Account page.

This can be used, for example, in cases where an applicant is applying for a scholarship and letters of recommendation are required from several professors.

Note that while the applicants can see if recommenders have submitted files, they cannot open and read these recommendations.

Caution: Applicants can still submit applications when there are required recommenders but no required blind attachments. In order to prevent an applicant from submitting when recommenders are assigned, you must assign a Required and Blind attachment type.

Hide the 'Send copy to me' Option This option hides the 'Send copy to me' checkbox on the request email form during the application process. Check the box to prevent applicants from sending themselves a copy of the request email sent to recommenders.

Pages

One of the most important customization features of IGAM is the ability to create forms with multiple pages. In this section of the Form Design Wizard, you can designate separate pages for each category of information (i.e., general, financial, historical).

To add a new page, type a name for the page in the **Title** field and click **Add**. To edit or remove an existing title, highlight it in the list and click Edit or Remove.

The order of the page titles indicates the order in which they will appear to the applicant/grantee. If you would like to change this order, highlight a title in the list and click **Move Up** or **Move Down**.

Important: To activate a form, you must define at least one page for it, and that page must contain at least one field.

Tip: When applicants access an application form, the system defaults to numbered tabs for page to page navigation. However there is an option on the Design tab to have IGAM display the page titles on each tab instead. If you decide to use this option, be sure to keep page titles short or your forms may not look ideal.

Additional Contacts

Note: Users of Essential GIFTS without the Contacts option will not have access to this feature. Also, this section does not display for requirement forms.

While every application must have one Primary Contact associated with it, you may also choose to provide fields for additional contacts.

To create a field for an additional contact:

1 Click **Add** in the Additional Contacts section of the Properties tab. The Additional Contact window appears.

2 Select a **Role** for the contact.

3 If you want the contact to be affiliated with the Organization or Request when the application is brought into GIFTS, select the relevant option in the Affiliate with field.

4 Select the **Contact is required** checkbox if required contact data must be included in the application.

5 Click **OK**.

Example: If you want applicants to submit the names of three board members, click **Add**, select "Board Member/Trustee" from the Role drop-down menu, and then click **OK**. Repeat this three times. A separate field will appear for each board member (i.e., Board Member/Trustee 1, Board Member/Trustee 2, Board Member/Trustee 3).

To edit a contact field, highlight it in the list and click **Edit**. To remove a contact field, highlight it and click Remove.

Authentication

This section allows you to require an applicant to enter a password, login to their account, or submit a valid Tax ID before accessing an application.

Note: This section does not display for requirement forms.

Require password to access application form To require applicants to enter a password, check this option and enter a password in the Password field below. The password must be 5-25 characters, in any combination of alphanumeric characters, with no spaces.

Require Account Login In IGAM 5 applicants are required by default to sign in or create a user account before completing a single-stage application form. If you don't want to require this of your applicants, uncheck this box.

Populate Organization and Contact data from last submission

Check this option to populate a returning applicant's application with Organization and Contact data from his or her last submission. You must first select Require Account Login to activate this field.

Require applicants to enter a U.S. Tax ID If your application should be available only to applicants who can provide a Tax ID, check this option. IGAM can also check the Tax ID entered by potential applicants against the databases of qualified non-profit organizations maintained by the IRS and Canada Revenue Agency.

Require Tax ID to be on file in the IRS database If you will only accept applications from applicants whose Tax ID appears in the IRS or Canada Revenue Agency database, check this option.

Note: If you require applicants to provide a Tax ID, the data received from the IRS database will prepopulate the Name, Legal Name, AKA, Tax Notes, and Tax Status fields on the application form, if you have chosen to include them.

For more information on adding fields to your form and setting field preferences, please see "Fields Tab" on page 133.

Tip: You can always save the form and return to it later at any time. You will find your unfinished forms in the Inactive Forms folder of the Forms Manager. For more information on working with the Forms Manager, see "The Forms Manager" on page 166.

Account

If you are using the multiple sites functionality, the Account menu allows you to choose which site (or account) you want to assign to your application or requirement form.

For more information about multiple sites, see "Managing Multiple Sites" on page 285.

Quiz Tab

Note: The Quiz tab does not display for requirement forms.

If you have chosen to include an eligibility quiz with your application form (see "Properties Tab" on page 120), the Quiz tab of the Form Design Wizard will be activated. The fields on this tab will allow you to specify the content

of the quiz, as well as any explanatory text that will display to potential applicants who do not meet the required qualifications.

The table below describes what each of the buttons on the Quiz tab does.

Button	Description
Add Question	Click this button to create a new question for the eligibility quiz.
Edit Question	To edit a question or its answer set, highlight the question and click this button.
Remove Question	To delete a question from the eligibility quiz, highlight the question and click this button.
Move Question Up	Click on an existing question to highlight it and then click this button to move it up one spot on the questions list.
Move Question Down	Click on an existing question to highlight it and then click this button to move it down one spot on the questions list.

Page Title This field allows you to enter a title that appears at the top of the eligibility quiz. You can enter up to 255 characters. If you do not enter anything in this field, 'Eligibility Quiz' appears at the top of the quiz.

Questions And Answers This field lists all of the questions you have added to the quiz. The questions are listed in the same order in which they

will appear on the actual quiz. To move a question within the quiz, highlight it in the Questions And Answers field and click either Move Question Up or Move Question Down.

Ineligibility In this section of the Quiz tab, you can write explanatory text that will display to potential applicants who fail the quiz. By default, anyone who fails the eligibility quiz will receive the explanatory text and will not be able to access the rest of the application form. You may, however, choose to allow those who fail the quiz to still submit an application. In this case, you should check the "Allow quiz takers who fail to access the application" option below the explanatory text field.

Display Only One Question Per Page When this box is not checked the eligibility quiz questions will all display on one page. There is no limit to the number of questions you may include on it. You may also provide any number of answer choices for each question, as long as each question has at least two answers and at least one will allow the applicant to proceed.

Adding a Question

To create a new question and answer set for the eligibility quiz, click the Add Question button to the right of the Questions And Answers field. The Quiz Question form will open.

Question Text This field is where you will type a new question for the quiz. The text you enter in this field is the actual text that will be visible to potential applicants when they take the quiz.

Question Answers This grid displays the answer choices you have entered for the question currently displayed in the Question Text field. It also indicates whether each answer is correct, incorrect, or leads to a specific active application form. Keep in mind that the answer choices will display on the actual quiz in the exact same order that they appear in this grid.

To add a new answer choice, click in the **Answer Choice** column. Type the new answer choice as you want it to appear on the actual quiz, and then use the drop-down menu to indicate whether the answer is correct, incorrect, or leads to a specific application form.

If you would like to move an answer choice within the grid, highlight the answer choice and click **Move Up** or **Move Down**.

Click **Sort** to sort the answers alphabetically.

You can also add codes to your answer choices by selecting the code category from the Table drop-down list, selecting the number of code levels you want to include from the Level drop-down list (if the code is multi-level), and then clicking **Populate**.

When you are done entering a question and answer set, click **OK** to add them to the eligibility quiz. The new question and answer set will appear in the Questions And Answers field on the Quiz tab of the Form Design Wizard.

Tip: To run a spell check of both the Question Text and the Question Answers, click **F3**.

Branching Quizzes

IGAM 5 allows you to route the applicant to multiple application forms based on an applicant's response to a question.

Some important points:

- The Display Only One Question Per Page box must be checked.
- Be sure to Activate any forms you want your quiz answers to point to before working on the quiz.
- Inactive forms will not appear on the Results list.
- Forms must belong to the same SID to appear on the list.

.

Tip: Plan in advance with a workflow chart and try to limit the number of forms to be used so that the quiz branching structure is easy to manage.

Fields Tab

On the Fields tab, you will enter the fields that potential applicants/grantees will need to complete on the application or online requirement. To allow you to gather sufficient information, most data entry fields in GIFTS for Requests, Organizations, and Contacts is available for inclusion on your form.

Requirement Forms Notes: For requirement forms, you can include Request, Payment, Organization, or Requirement fields that you choose. However, many of these fields can only be added to the requirement form as read-only fields. In most cases, you will probably only want the grantee to update Notes, Long Notes, and Customizer fields for the associated Requirement in GIFTS. But if you choose, you can add some Organization and Request fields to your requirement form that are editable. If the grantee adds values to these fields, these values will update the associated records in GIFTS during the retrieval process.

The following fields can only be added to requirement forms as read-only fields:

- All Payments fields
- Requests: Balance, Disposition, Disposition Date, Grant Amount, Grant Other Amount, ID, Other balance, Other Paid Amount, Paid Amount, Request Type/Status, Staff Email Address
- Requirements: Contact, Contingency Flag, Due Date, Staff, Staff Email Address, Staff Name, Type

Essential GIFTS Notes: Users of Essential GIFTS will not be able to add Organization or Contact code table fields to forms. A limited number of Request code table fields will be available, including: Fund, Program Area, Support Type, Population Served, Geographic Area Served, and Internal Program.

Users of Essential GIFTS without the Contacts option will have access to a limited number of Contact fields, including: First Name, Last Name, Middle Name, Prefix, Suffix, Type, Email, Title, and Notes.

Selecting Pages and Fields

Select Page This field indicates the page of your form that you are currently editing. To work with a different page, choose another page title from the drop-down menu.

Select Fields from This drop-down menu contains the available tables from which you will choose the fields to include on your form. The record types for application forms that will always be included on this menu are Text, Request, Organization, and Organization/Request Primary Contact. The record types for requirement fields that will always be included on this menu are Text, Requirement, Request, Payment, and Organization.

Note: If you have chosen to include additional Contact fields on your application form, each additional Contact will be listed individually in this drop-down menu.

Note: If you want to include an editable long text field that displays the GIFTS value, first add this field as a read-only field with GIFTS Value selected in the Populate with drop-down menu. Then add this field a second time as an editable field with No Value selected in the Populate with drop-down menu.

Available Fields The GIFTS data fields associated with the record type selected in the **Select Fields from** drop-down menu will be listed in the area below the menu. To add one of these fields to your form, highlight the field name and click the **Add** button to the right of the list. The field name will appear in the Page Layout Grid to the right.

Important: The Organization Name field must be included on every application form, no matter what stage it is. You will not be able to proceed in the Form Design Wizard if this field is not included on at least one page of your form.

Tip: There are a limited number of long text fields available in GIFTS, but your form may require many questions involving long text answers. In order to allow you the flexibility to ask as many questions as you need, the same memo field may be added to your form more than once. The Field Label and answer from each instance of the memo field will be recorded in the order in which they appear on the application form.

Important: The Text table provides a way of including text messages in any place on your application or requirement form. The fields available for the Text table are Header and Note. Add a Header to indicate the beginning of a new segment of the application or requirement form. Use Notes as paragraphs of informational or explanatory text for the applicant/grantee.

Attachment Field

IGAM 5 now gives you the option of using an Attachment field anywhere on your application or requirement forms instead of being limited to the Attachments Page.

Some notes about the Attachment field:

- For Application forms, it is available under the Request category.
- For Requirement forms, it is available under the Requirement category.
- It will only allow one attachment per use.
- It can be placed multiple times on the same form.

File Upload Validation and Progress Bar

For Attachment fields, file type and size are now validated prior to upload. An upload progress bar is also displayed onscreen to keep the applicant informed.

Affiliation Fields

When any Contact field category is selected in the Select Fields from list (Request Primary, Organization Primary, Alternate, etc.), Affiliation fields will appear in the listed fields window. The field names will have the prefix

of "Affiliation" to distinguish them from the Contact record fields with the same names.

Prior to IGAM 5, this information had to be entered manually into GIFTS. Now applicants can enter the data directly into applications and have the information automatically carry over when you move it to GIFTS or GIFTS Online.

Add and Remove Fields

To move a field from the Available Fields list to the Page Layout Grid highlight the field and click Add. To remove a field from the form, highlight it in the grid and click Remove.

Page Layout Grid

The grid on the right side of the Fields tab contains information about the actual data fields that applicants/grantees will see on the form.

Page	Name	Label	Req	Group
Organization	Organization:	Name of organization to which grant	Yes	Organization_Informatior
Organization	Organization: Tax	Tax ID	Yes	Organization_Informatior
Organization	Organization:	Address	No	Organization_Informatior
Organization	Organization: City	City:	No	Organization_Informatior
Organization	Organization:	State:	No	Organization_Informatior
Organization	Organization:	Zip code:	No	Organization_Informatior
Organization	Request Primary	First name:	Yes	Primary_Contact_Name
Organization	Request Primary	Last name:	Yes	Primary_Contact_Name
Organization	Request Primary	E-mail	No	Primary_Contact_Name
Organization	Contact - General	First Name	No	Alternate_Contact
Organization	Contact - General	Last Name	Yes	Alternate_Contact
Organization	Contact - General	E-mail	Yes	Alternate_Contact

Show all pages Changes the Page Layout Grid to display all fields selected for all pages of your application form.

Show only current page This default setting shows only the fields added to the currently selected page of the application form.

Page Column The first column of the grid indicates the page where each field is located on your form.

Name Column The second column of the grid lists the system-defined field names in the order that you added them.

Label Column This column displays the text label that will be displayed on the application form. Each field's label can be changed in the Field Details section.

Req Column This column tells you if the field has been set as a required field.

Group Column This column displays the group name associated to the field.

Moving Fields Up and Down Fields will appear on your online form in the same order that they appear in the Page Layout Grid. If you would like to move a field to a new position on the form, highlight the field in the Page Layout Grid and click Move Up or Move Down.

Tip: If you highlight the first field in the grid and click **Move Up**, the field will move to the bottom of the previous page. If you highlight the last field in the grid and click **Move Down**, the field will move to the top of the next page.

Grouping Fields

New to IGAM 5, the Group button allows you select multiple fields from the Page Layout Grid and group them together so they can have a common color scheme and border. This will allow logical groupings of related fields into sections that can be color coded on your application forms.

Create a New Group

To group multiple fields together, do the following:

1 Select the fields in the grid that you want to group together.

Note: Fields do not have to be vertically continuous on the list to have the same group style applied. You can hold the CTRL button down to select fields not next to each other on the list.

2 Click the **Group** button to open the Field Group window.

3 Enter a new group name in the text field on top.

Note: As you create more field groups, IGAM saves your title and color settings for future use. The Group drop-down menu can be used to select one of these group settings.

4 Enter a group Title and set the font color and background color as desired for the title bar.

5 In the lower section set the Group Background Color, Border Color, and Border Width for the group fields as desired.

6 Click OK to complete the group process.

7 Click Preview to see how your fields look with the new settings.

Note: Fields with a Right Position setting automatically inherit the style options of the first field on that row.

Add Fields to an Existing Group

1 Select the fields to group and press the Group command button.

2 This brings up the group form.

3 Select the group to add the fields to from the dropdown and press OK.

Note: If one or more of the selected fields are currently in a group, this group will be selected in the group dropdown and the associated properties will be loaded in the property prompts.

Remove Fields From a Group

1 Select the fields that you want to remove from the group.

2 Press the Group command button.

3 Since one or more of the fields you have selected currently belong to a group, you are given a popup menu which gives you the options 'Remove Grouping or 'Edit Group'.

4 Select 'Remove Grouping'.

Edit Properties of a Group

1 Select a field that is part of the group.

2 Press the Group command button.

3 Select 'Edit Group' from the popup menu that appears.

4 The group form will appear. Edit the properties and press OK.

Delete a Group

1 Press the Group command button.

2 If the currently selected field is grouped, you'll get the popup menu, select 'Edit Group'.

3 Select the group from the dropdown that you want to delete.

4 The Delete Group button will appear in the lower left of the form. Press it.

5 A message box will appear asking you to confirm. Press Yes.

6 The group is deleted from the form and all fields that were part of the group are ungrouped.

Field Details

In this section of the Fields tab, you will customize the settings for each field on your form. To customize a field, highlight the field name in the Page Layout Grid above.

Label Type in the actual label that you want your applicants/grantees to see on your form. This label should reflect any common and/or industry terms that may be more clear to your applicants/grantees than the system-defined field name.

Description You may choose to write text that will appear under the field label on the form. This is particularly useful for writing questions for a long text field, or if you feel that the field label alone does not make clear to the applicant exactly what information they need to provide. There is no character limit for the Description field.

Example: You could write a description to accompany a phone number field to let applicants/grantees know that they should enter their number using the (xxx) xxx-xxxx format.

Help Text New to IGAM 5, this field may be used to enter text that will appear in a caption when the applicant clicks on a Help icon located next to the field.

This gives you the option of putting additional information or tips into the Help Text field instead of the Description field, saving valuable space on your forms while still providing extra help to those applicants who need it.

Note: The options available under the Help Text field will depend on the type of field selected on the Page Layout Grid.

Width (in characters) The character width of the field.

Note: Unless you overwrite it, this field displays the system default width. This applies to any GIFTS multi-line fields (e.g., Organization Background).

Height (in lines) If you are currently working with a long text field (e.g., Organization Background) or a Customizer text field, indicate the actual size of the text field on the form.

Important: Changing the number of lines does not change the character limit for the field. The field will scroll to accommodate the applicant's/grantee's answer up to the character limit. You may, however, wish to use this setting to encourage a brief response by providing only a small visible answer field. Conversely, you can enlarge the field when you expect a more thorough answer.

Word Limit Any GIFTS multi-line field(e.g., Organization Background) will have this setting available. It allows you to set the maximum number of words allowed for the specific field.

Word Counter If a word limit is set, you can check this box to let the applicant see a Word Counter displayed below the entry field. This will actively tell the applicant how many words he or she has entered and let them know when they are approaching the limit.

Enable Spell Check A spell check option can now be enabled for text fields in IGAM.

This will add a red check icon next to the field. Applicants can click this icon and automatically check their spelling.

Include Question This field displays for memo fields and allows you to choose whether or not you want to display the question next to the field in the form. If you are including a memo field on a form multiple times, this checkbox allows you to hide the question if you choose.

Display decimals separately This gives applicants two different fields in which to enter monetary amounts, one for whole numbers (such as dollars) and one for partial numbers (such as cents). This eliminates any confusion in foreign applications/requirement forms where commas are used to separate the two amounts.

Min. Value If you are using a numeric, currency or date field, you can use this field to set a minimum value or earliest date for the field.

Max. Value If you are using a numeric, currency or date field, you can use this field to set a maximum value or latest date for the field.

Populate with You can add a default value to the field by selecting Set Value from this drop-down menu and entering the default value in the field that appears to the right. Depending on the field for which you are entering information, you can enter text, select or clear a checkbox, select a drop-down value, enter currency or numbers, enter a specific date, or choose to have the current date display.

Select Stage 1 Value if you are creating a second-stage application and you want fields from the associated first-stage application to be prepopulated by default. To prepopulate any other fields with data from the first-stage application, use the drop-down list to the right of this field to select a first-stage field.

For requirement forms, you can display the current value in GIFTS for the selected field by selecting GIFTS Value from the drop-down menu.

Show Current GIFTS Value Above Entry Field on Requirement Forms

This option is only available on Requirement forms.

This option allows the applicant to see the old value of a GIFTS field on a Requirement form while editing the field. It also allows the GIFTS user to see the old and new value on the HTML version of the Requirement.

The Type dropdown must be set to Optional or Required and the box for Show GIFTS Value must be checked.

If Type is set to Read-Only or Hidden, the check box and Label button will not be enabled.

The Label button allows you to change the label for the current GIFTS value area and enter a description if desired.

For example, an applicant is required to edit the Organization Background. The current value in GIFTS is displayed on the Requirement form as reference in a read-only field, with an editable version beneath it (with the GIFTS value as well).

This provides greater ease for the applicant editing the field, as there is a point of reference while making changes to the field.

Once the value is entered and submitted as the "new" value, this becomes the value for the field in the GIFTS database. The original value is stored in the HTML version of the application (the external document and printer-friendly version, as well as email draft).

Type Use this option to set the selected field on the Page Layout Grid to Optional, Required, Read Only, or Hidden.

Optional If applicants/grantees do not need to complete this data field, check this option.

Required If you wish to require applicants/grantees to complete this data field, check this option.

Read-Only If you would like to make this prepopulated field uneditable by the applicant/grantee, check this option. Note that some fields in requirement forms can only be read-only.

Tip: If you have decided to require that applicants supply a valid U.S. Tax ID number, the Name, Legal Name, AKA, Tax Notes, and Tax Status fields will automatically be prepopulated, if you have included them on the

form. When you are working with one of these fields, you can also check the Read-Only option.

Hidden If you want to hide this field from applicants/grantees, check this option. You can use this option if you are including a read-only field with a default value, and the applicant/grantee does not need to see it.

Require Verification Configure fields to require the same value to be entered twice for verification. This can be used to validate important information where typos frequently occur such as Tax ID numbers, Email addresses, Phone numbers, etc.

Once this option is checked, you can click the Label button to customize it. The default label is 'Verify [field name]'.

Position This setting allows you to align selected fields Below or to the Right of the field listed above it on the Page Layout Grid. This is can be useful when setting up fields that are normally aligned together on forms such as City, State, and Zip Code.

Note: Fields with a Right Position setting automatically inherit the style options of the first field on that row.

Alignment This option is available only on true/false type fields where a check box is utilized. It allows you to set the field label and description to appear to the right of an entry field instead of above.

Public Charity
Example of Above alignment.

☐ ☐ Public Charity
Example of Right alignment.

Codes Tab

On the Codes tab you will specify which GIFTS values should be available to applicants/grantees for each code table you have included as a field on the form. If you have not added any code tables to your form, you may skip this tab.

Code Table This field indicates the code table you are currently working with. The code tables available on this drop-down menu coincide with the code tables you added as data fields on the Fields tab.

How many values may applicants/grantees choose? The value shown in this field indicates the maximum number of code values that applicants/grantees may select from the currently displayed code table. The default value in this field is the same as the maximum number of values designated for GIFTS users in the Administrator preferences. You may lower this number in IGAM by selecting another value from the drop-down menu, but you may not increase it.

Notes:

- For each code you allow applicants/grantees to select, a separate drop-down field will appear on the form.
- This field will not be available if you are using Essential GIFTS, since your system does not support multiple code values.

Codes in this table This list shows the code values from the code table you are currently working with. You will use this list to specify the answer choices available to applicants/grantees on the form. To include a code value as an answer choice on your form, highlight it in the Codes list and click Add. The list on the right side shows the code values that will display to applicants/grantees as answer choices. To delete a value from this list, highlight the value and click Remove. If you wish to remove all of the values from this list, click **Remove All**.

Important: If your GIFTS system is set up to require coding at the lowest level, you will only be able to add codes from the lowest level to the list of choices on the application/requirement form.

If you would like to include most of the values listed, you can save time by clicking **Add All**. You can then remove the values that you don't wish to include.

Include Search prompt Click this checkbox if you want applicants/grantees to be able to search for a code by typing it into a text box. The code values for that field will only include selections that begin with or contain the text entered in a text box above the field, depending on whether or not you select the Begins with or Contains button beneath this field. For example, if an applicant/grantee enters "arts" in the text box next to the Program Area field, selects the Begins with button, and then clicks the eyeglass icon, only code values that begin with "arts" display.

Show Lowest Level First Click this checkbox if you want the lowest level, or the most granular level, of the code values displayed first on the form for the selected code table. If you choose this option, applicants/grantees no longer have to scan the entire code value to arrive at the lowest level.

For example, if you select this option, the code value Civic and Community-Community Issues & Development-Community Organizing-Neighborhood Watch will display as Neighborhood Watch (Civic and Community-Community Issues & Development-Community Organizing) on the form.

Nested List Click this checkbox to have the values displayed in a nested tree structure as opposed to the default straight list.

Display This drop-down menu gives you the option to have your selected code values displayed on the application form as a List, Vertical Radio button/Check box, or Horizontal Radio button/Check box view.

Note: IGAM will switch between Radio button or Check box depending on how many answers are allowed to the applicant.

Include Percentages SQL/Oracle database users can use values from Percentage Code enabled tables in application forms.

This will allow applicants to specify percentages next to the values displayed on the application form.

When the request is considered in IGAM and moved to GIFTS, the percentages will be applied to the Request/Grant amount.

For Example: If the request amount was for $100,000 and the applicant had entered the percentages above (Midwest 30% and Northeast 70%),

when the request is moved to GIFTS, the request amount would be set to Midwest $30000 and Northeast $70000.

Minimum Requirements for Percentage Code Use

- SQL/Oracle database.
- In Administrator, Maximum Number of Selections on each table must be greater than 1 and Track amount Percentages checked.
- If installed, MyGIFTS/ReviewerCONNECT must be version 3.6 or higher.
- If installed, GIFTS Plus Pack must be version 5.1 or higher.

GIFTS Administrator Code Tables Setup

1. Open the Administrator Module in GIFTS (Options ➤ Administrator).
2. Go to Setup ➤ Code Tables to open the Tables Maintenance window.
3. For each table you want to enable, highlight it and then click Edit Table.

4 Set the Maximum # of Selections to 2 or more and check the Track amount Percentage box, then click OK.

5 Upon clicking OK, a process must occur to update the database and enable percentage tracking for this table. Click OK to proceed with this process.

6 Repeat steps 3-5 for each table you want to enable Code Percentages.

Enable Code Percentage in IGAM

1 In the Form Design Wizard, select the Code Percentage enabled tables you desire on the Fields tab.

2 On the Codes tab, select the code table you need to work with and set the How many values may applicants choose to 2 or more.

3 Check the box for Include Percentages and make sure Display is set to List or Radio/Check Vertical.

4 Click the Preview button to check your work.

Attachments Tab

The Attachments tab is where you will select settings for the attachments that you will be collecting along with your applications/requirements.

Size The value indicated in the Size field represents the maximum combined file size (in megabytes) for all attachments submitted with *each form*. The default setting is 25 MB, but the system-defined limit for this value is 1 GB.

Include Attachments Page Check this box to enable the Attachments page on your application form.

Some important notes:

- If you require the applicant to request recommendation letters from external sources, this option must be checked and you must Add a Defined Attachment type that is both Required and Blind enabled.

- If a Defined Attachment type is set to Required, then this option will be checked and cannot be disabled.

Description In this field you can type detailed instructions to your applicants/grantees regarding the attachments you require. This text will appear at the top of the upload area on the form. There is no character limit for this field, so you should be as detailed as possible in describing your attachment requirements.

Define Attachments Selecting this option will allow you to define an uneditable title for each attachment that you require from your applicants/grantees. With this option turned off, applicants/grantees will be able to enter their own titles for attachments.

Tip: If there are no special circumstances that necessitate giving your applicants/grantees control over defining the titles for their own attachments, you should choose to define the titles yourself. Defining uniform titles makes it easier for you to identify attached documents in GIFTS in the future.

To edit or delete an attachment type, highlight it in the Attachments list field and click the appropriate button.

To define a new attachment, click Add. The Attachment window displays.

Enter a name for the Attachment type.

If you want to only allow attachments of one or more file types, type the file extension (such as doc or xls) in the Allowed File Types section, and click Add. To remove a file extension, select it in the right field and click **Remove**. If you do not add any file extensions, all file types are allowed. Click **OK** to close the Attachment window.

Required Selecting this option makes the selected attachment required. Applicants/grantees must upload the required attachments before submitting the form. Required attachments appear in the Titles list field with an asterisk next to them.

Blind Click the Blind check box to restrict the applicant from being able to open or view any uploaded files from recommenders.

Links Tab

The Links tab of the Form Design Wizard allows you to provide your applicants/grantees with links, important on-screen messages, and set up automated two automated email types. Changes to the settings on this tab will be applied to the form you are creating only. The system defaults are determined in the IGAM Tools ➤ Preferences.

For more information about system defaults, see "Links Tab" on page 82.

Links

The Form Design Links tab displays a list of all the links available for use on the application form. Many are configurable to be a button or a link. Some can be used to route your applicants to other helpful webpages. Others also have the option to change position on the webpage between Standard, Left, or Right.

Important Facts about Links

- Type cannot be changed but does not appear on the screen.
- Labels can all be changed to suit your needs.

- Styles can all be changed from Link to Button or vice-versa with the exception of the Review Application and Review Requirement links.
- The Email/Contact Us link should only be used with valid email addresses.
- The Help URL, Document URL, and Exit URL links can be repurposed to take your applicant to any desired webpage URL address.
- The Position of the Next, Save & Finish Later, Review & Submit, Update, and Submit buttons can be modified from Standard to Left or Right.

Customizing a Link To modify a link, simply double-click on it. A Link window will open with the available options. Make your changes as desired and click OK.

Adding Useful URLs to Links If you wish to provide links to helpful resources, such as your organization's website, you can use the Help URL, Documents URL, or Exit URL links. These links do not appear on any forms or IGAM pages until a URL link is added to the Link To field.

To activate one of these links simply double click it, enter a web/email address for the link, and change the label of the link to whatever is appropriate. Once configured they will appear at the top of your application or online requirement form.

Customizing Links Into Buttons or Vice-Versa You can change most of the links to buttons or vice-versa. The only exceptions are Review My Application and Review My Requirements.

Help Site | Help Site

Changing Link/Button Position Some of the links/buttons listed also allow you to change their position from Standard to Left or Right side of the webpage. These include: Next, Save & Finish Later, Review & Submit, Update, and Submit.

Note: If you choose to use buttons instead of links, it's important to know you can now modify button color and font on the Design Tab. For more details, refer to the Design tab section.

Messages

During the form process, certain conditions may occur which warrant information and/or an error message to be returned to the applicant/grantee. There is default text associated with these messages, but you may choose to customize the messages in order to provide your applicants/grantees with more detailed information. The default text for each of the messages is as follows:

Message Type	Conditions	Default Text
Invalid Password Note: This field displays for application forms only.	Displayed when the form password entered by the applicant does not match the value supplied by the form designer.	You have entered an invalid password. Please try again.
Invalid Tax ID Note: This field displays for application forms only.	Displayed when the "Require applicants to enter a U.S. Tax ID" flag is on, but the "Require Tax ID to be on file in the IRS database" flag is off and the Tax ID entered is not found.	The Tax ID you entered was not found in the IRS database. Please check your entry. If it is correct, click OK to begin filling out your application form.
Valid Tax ID Required Note: This field displays for application forms only.	Displayed when the "Require applicants to enter a U.S. Tax ID" flag is on, and the "Require Tax ID to be on file in the IRS database" flag is on, and the Tax ID entered is not found.	The Tax ID that you entered was not found in the IRS database. We cannot accept applications from organizations whose tax information is not on file. Note: You may want to change the first sentence above to "The Tax ID that you entered was not found in the IRS and Canada Revenue Agency databases." This reflects that GIFTS searches both the IRS and Canada Revenue Agency databases.

Message Type	Conditions	Default Text
Tax ID Instructions	Instructional text displayed on application's Tax ID page.	
Incomplete Quiz Note: This field displays for application forms only.	Displayed when the applicant clicks Continue on the Eligibility Quiz without supplying answers for each question.	Please answer all of the quiz questions so that we may accurately assess your eligibility.
Submission Acknowledgement Note: This field displays for application forms only.	Displayed when the applicant submits the application.	Thank you! Your application has been submitted. You should receive an email confirmation shortly.
Save and Finish Later	Displayed when the applicant uses the Save and Finish Later button.	Thank you! Your application has been saved. You should receive an e-mail confirmation shortly.
Recommender Instructions	Displayed on the upload page seen by recommenders.	Please upload a recommendation letter for the applicant.
Requirement Submission Note: This field displays for requirement forms only.	Displayed when the grantee submits the requirement.	Thank you! Your report has been submitted. You should receive an e-mail confirmation shortly.

To edit the contents of your on-screen messages:

1. Double click the message you want to edit from the Messages grid.
2. Edit the contents of the message to reflect the appropriate information.
3. Click **OK** to save your changes and return to the Links tab.

Automated Emails

The automated email listed in this area is created and sent to applicants/grantees when they submit an application or requirement.

The default text for the automated email messages is as follows:

Email	Subject	Body
Submission Confirmation Note: This field displays for application forms only.	Your Application Submission	Thank you for your submission. Your application has been submitted successfully, and the tracking number is {Application ID}. You will be receiving more information on the status of your application shortly. For your records, here is a copy of the contents of your application. {Application}
Save and Finish Later Confirmation	Your Application	Your application has been saved successfully, and the tracking number is «Application_ID». For your records, here is a copy of the contents of your application: «Application»
Requirement Submission Note: This field displays for requirement forms only.	Your Report Submission	Thank you for your submission. Your report has been submitted successfully, and the tracking number is «Requirement_ID». For your records, here is a copy of the contents of your report. «Requirement»

To edit the contents of your automated email messages:

1. Double click the message you want to edit from the Automated Emails grid.
2. Edit the contents of the message to reflect the appropriate information.
3. Click **Save and Close** to save your changes and return to the Links tab.

Tip: Press F3 while you are in the Message window to spell-check the new message text.

Design Tab

The options available on the Design tab allow you to customize the layout, colors, and text properties of your form. Changes to the settings on this tab will be applied to the form you are creating, but the system defaults are determined in the IGAM preferences. For details on working with the Design tab, please see "Design Tab" on page 94.

Important: Any modifications made to the Design tab of a specific form will override the default IGAM system preferences.

Graphics Tab

On the Graphics tab you are able to upload your logo and/or a background graphic to your form. You can also click the **HTML** button to upload custom HTML files for the current form's header, footer, left and right side panels. Changes to the settings on this tab will be applied to the form you are creating, but the system defaults are determined in the IGAM preferences. For details on working with the Graphics tab, please see "Graphics Tab" on page 98.

Note: Graphics must be either .gif or .jpg files residing in a directory that is accessible at the time you preview and activate your application form.

Important: Any modifications made to the Graphics tab of a specific form will override the default IGAM system preferences.

Activate Tab

Important: In order to preview or activate your form, you must have an open connection to the Internet.

From the Activate tab you are able to Preview the form that you have designed, and then publish it on the Internet using the Activate Form button.

You can also set a date and time for Automatic Deactivation.

When you click Preview, your application or requirement will open in your web browser.

Note: In Preview mode any field set to pre-populated with a value from GIFTS or a Stage 1 form will be blank.

Preview Options When you are previewing your online application form, you may wish to simply scan through the pages to verify that everything has been included in the correct place. However, if you'd like to complete the form with sample answers for a more thorough review, you may want to check the "Enforce required fields" option. This will make it necessary for you to enter values in required fields before submitting the form, so you can review the form with an applicant's perspective.

Note: This section displays for application forms only.

System Language This section allows you to choose a label set other than the English default that you can apply to your forms. For more information, see "Creating a New Display Language" on page 183.

Automatic Deactivation

This section lets you set a Deactivation Date and Time for the form.

Caution: It's important to note that option is tracked on the IGAM server according to U.S. Eastern time zone. Be sure to take this into account when setting the Date and Time.

Allow submission of open applications If you would like applicants who have Open (In-Progress) applications saved to be able to complete and submit, you must check the box to Allow submission of open applications.

Message to Applicants Trying to Open a Deactivated Form In the text field to the right, you can enter a message to be displayed to applicants who attempt to access the form after deactivation.

Modifying the Deactivation Settings All of the deactivation settings can be modified whether the form is active or inactive.

Removing the Deactivation Date To remove the deactivation date simply click in the Date field, highlight the date and press Delete on your keyboard. This will clear the Date and Time field.

Important Considerations with Forms Manager There are some important considerations to keep in mind when managing Automatic Deactivation forms with the Forms Manager. For more details, please see "Automatic Deactivation with Forms Manager" on page 168.

Activating Your Form

If everything looks the way you intended it to, return to the Activate tab and click the Activate Form button. This will create a "live" form, which will be

posted on the MicroEdge server and listed in the Active Forms sub-folder of the Forms Manager.

Important: In order to activate your form, you must have a valid email address entered for the "E-mail Sent 'From'" field in the Automated Email section of the system-wide preferences. For details on setting and changing preferences, please see "Automated Emails" on page 103.

When you activate your application form, the URL assigned to your active form will be displayed on your screen (this does not display for requirement forms or Stage 2 forms). You will want to provide the URL to the designers of your website so that they can integrate it into your site. The link itself can be labeled however you want on your website. You may also decide not to make the link available on your website, but instead just provide the URL directly to those applicants whom you wish to apply.

Important: Although forms will be SSL encrypted for security by default, IGAM supports both secure and non-secure communications. To forego SSL encryption, simply publish the URL of your form as an http:// address rather than an https:// address.

Caution: For applications, clicking on the active link to your form will take you to the application form just as if you were an applicant. Note that any applications you submit from here will be billable transactions. If you want to submit test applications, use the Preview option instead; applications submitted through the Preview option are not billable.

The Forms Manager

The Forms Manager is an interface that allows you to access all of your online application and requirement forms. It contains two main folders: **Application Forms** and **Requirement Forms.** Application forms and requirement forms that have been completed and successfully posted to the web reside in the Active Forms sub-folder under each form type. The **Inactive Forms** sub-folders for both form types contain all of your application and requirement forms that are currently not available on the web.

To access the Forms Manager, choose **Forms ➤ Forms Manager** from the GAM Main menu.

Form Title	Description	Stage	Last Updated	Last Updated By	Created	Created By	Site	Deactivation (Eastern U.S.)	ID
Application Forms									
Active Forms									
Eligibility Quiz	Main Eligibiity Quiz w Branch Form Routing	Single Stage (1/1)	6/2/2011	ADMIN	4/24/2002	Admin	Default	7/31/2011 05:00 PM	35001
Form 1 - Mid-Atlantic	Common Application Form	Single Stage (1/1)	6/2/2011	ADMIN	6/1/2011	ADMIN	Default	7/31/2011 05:00 PM	35004
Form 2 - Northeast	Common Application Form	Single Stage (1/1)	6/2/2011	ADMIN	6/1/2011	ADMIN	Default	7/31/2011 05:00 PM	35003
Form 3 - Southeast	Common Application Form	Single Stage (1/1)	6/7/2011	ADMIN	6/1/2011	ADMIN	Default	9/30/2011 05:00 PM	35005
Inactive Forms									
Sample Application 1	Common Application Form	Single Stage (1/1)	6/7/2011	ADMIN	6/1/2011	ADMIN	Default		35006
Sample Application 2	Common Application Form	Single Stage (1/1)	6/7/2011	ADMIN	6/7/2011	ADMIN	Default	8/31/2011 05:00 PM	35008
Stage 1 Form	This is a sample Stage 1 form.	Stage 1 of 2 (1/2)	6/7/2011	ADMIN			Default	9/30/2011 12:00 AM	35000
Stage 2 Form	This is a sample Stage 2 form.	Stage 2 of 2 (2/2)	6/7/2011	ADMIN	6/7/2011	ADMIN	Default	9/30/2011 12:00 AM	35011
Requirement Forms									
Active Forms									
Inactive Forms									
Required Project Details Form	Requirement Form for Project details.		6/7/2011	ADMIN	6/7/2011	ADMIN	Default		35010

Activating Forms

Activating a form moves the form from the Inactive Forms sub-folder to the Active Forms sub-folder. The form is assigned a unique URL and posted to the web. To activate a form:

1 Open the Inactive Forms sub-folder and highlight the form you wish to activate.

2 Choose **Action ➤ Activate** from the Forms Manager menu.

An on-screen message will let you know that the form has been activated. It also provides you with the URL needed to access the active form on the web.

For applications, you may choose to either add a link to this URL on your organization's website, or you may choose to provide the URL to potential applicants on an individual basis.

Tip: You can check the URL for a form at any time by highlighting the form in the Forms Manager and clicking View URL in the toolbar.

Automatic Deactivation with Forms Manager

Deactivation Date and Time is displayed as a column on the grid.

Note: Deactivation is tracked according to Eastern U.S. time zone.

How the Form Manager is Refreshed The grid in the Forms Manager only refreshes when it is reopened or when you open and close the specific form.

Therefore, you must keep some important considerations in mind.

If you have the Forms Manager open and a form reaches it's Automatic Deactivation Time, it will not move immediately to the Inactive folder. You must either open and close the specific form or close and reopen the Forms Manager to refresh the grid.

If you should open a deactivated form that is still listed as Active it will open as if it was still an active form; however, you will not be able to save any changes you make. Closing the form design window will refresh the specific form's status and move it to the Inactive folder. You can then reopen the form from the Inactive folder and make changes as normal.

Manually Deactivating Forms

Deactivating a form moves the form from the Active Forms sub-folder to the Inactive Forms sub-folder, and the form is inaccessible from the web. If a user goes to the URL of a deactivated form, he or she will receive an error message that the form is unavailable.

Caution: Deactivating a requirement form permanently deletes any unsubmitted online requirements associated with it, and all links to the online requirement on grantees' My Account page will be removed. However, if the grantee has already begun filling out the online requirement, a message appears asking if you want the grantee to be able to complete the requirement and submit it.

To deactivate a form:

1. Open the Active Forms sub-folder and highlight the form you wish to deactivate.

2. Choose **Action ➤ Deactivate** from the Forms Manager menu.

Once you deactivate a form, users attempting to access it will receive an on-screen message informing them that the URL is no longer available:

Editing Forms

To edit an existing form, or to finish an incomplete form, you need to open the form in the Form Design Wizard. Highlight the form you wish to edit and choose **File ➤ Open** from the Forms Manager menu, or click the **Edit** Forms button on the toolbar.

Tip: You can also open a form in the Form Design Wizard simply by double-clicking on the form name in the Forms Manager.

Deleting Forms

If you no longer need a form, you may wish to delete it altogether rather than storing it in the Inactive Forms sub-folder. To delete a form, you simply highlight the name of the form and choose **File ➤ Delete** from the Forms Manager menu.

Note: Even if the form has applications or requirements form associated with it, it can be deleted if it is on the Inactive forms list.

Note: When Reports are run on forms in the GAM, Deleted forms will not be available to run Reports on. A deleted form will first have to be restored before running a report on it.

Restoring Deleted Forms

Forms that are deleted from the Inactive forms list are not permanently deleted. They are actually moved to a hidden Deleted Forms folder in IGAM.

To restore a deleted form, go to the **Tools>Recover Deleted Forms** menu option.

Deleted forms will be stored chronologically by the last updated date.

To restore a deleted form, simply click on the form and then click the **Restore** button. At the confirmation prompt, click **Yes**. Restored forms will be moved back to the Inactive forms list.

Copying Forms

The easiest way to create a new application or requirement form is to copy an existing form, and then edit the new form to suit your needs. This

method of form creation may be especially helpful in the following situations:

- You want to create a second-stage application form that needs to include most or all of the fields from the associated first-stage form.
- You want to create multiple versions of a form with only slight variations to meet the needs of applicants from different geographical regions.
- Your organization uses branch security, and you want to use the same form for all of your branches.

To copy an existing form:

1. In the Forms Manager, locate and highlight the form you wish to copy.
2. From the Forms Manager menu, choose **File ➤ Save As**. For application forms, in the sub-menu that opens, choose "Same Stage" or "Stage 2" to indicate the stage of the copied form.

3. Type a new title for the copied form and click **OK**. The copied form is added to the Inactive folder.
4. Double-click on the copied form to open it in the Form Design Wizard, where you can edit, save, and activate your new form.

6 Sending Online Requirements from GIFTS

This chapter explains how you can send online requirements to grantees from the Requirement record in GIFTS after creating them in IGAM. In order to send an online requirement to a grantee, he or she must have an IGAM account.

In This Chapter:

Sending an Online Requirement to a Grantee 174
Removing an Online Requirement from the Web 176
Creating an IGAM Account for a Grantee 177

Sending an Online Requirement to a Grantee

After you have created one or more requirement forms in IGAM, you can send an online requirement to a grantee to whom you want to collect requirement information. Since the grantee accesses the online requirement from his or her IGAM My Account page, he or she must have an IGAM account. For more information about creating an IGAM account, or checking the account status of a grantee, see "Creating an IGAM Account for a Grantee" on page 177.

To send an online requirement to a grantee:

1. From GIFTS, select and zoom on the Request that contains the Requirement for which you want to collect requirement data.
2. Click the Requirements folder and open the Requirement for which you want to collect data.

3 From the Action menu, select Publish to Web. The Publish Requirements window appears.

Note: You can send online requirements in batch by selecting multiple Requirements, and then selecting Action ➤ Publish to Web from the main menu.

Note: If you are using the multiple site IDs functionality, you can only choose from requirement forms that share the same account (or site) as the Request you selected. For more information about multiple site IDs, see "Managing Multiple Sites" on page 285.

4 Select the requirement form you want to send to the grantee from the drop-down menu and then click OK. A confirmation message appears.

Note: If you would like to generate correspondence for the grantee, select the Generate Correspondence checkbox. For information about generating correspondence, see the *GIFTS User's Guide*.

5 Click OK.

Important: Please note that the grantee is not automatically notified when the requirement is published to the web. In order for the grantee to view and complete the online requirement, he or she must access the online

requirement from his or her My Account page. It will appear in the In-Progress Requirements list of the Requirements page.

Removing an Online Requirement from the Web

You can remove an online requirement from the web if you no longer want to allow a grantee access to it. If you do this, any data entered by the grantee on the online requirement that has not been retrieved will be deleted.

Note: You cannot delete an online requirement once it has been submitted.

To remove an online requirement from the web:

1 From GIFTS, select and zoom on the Request that contains the online requirement you want to remove from the web.

2 Click the Requirements folder and open the Requirement that has the online requirement you want to remove from the web.

3 From the Action menu, select Delete from Web. A warning message appears.

Note: You can delete online requirements in batch by selecting multiple Requirements, and then selecting Action ➤ Delete from Web from the main menu.

4 Click OK. A confirmation message appears.

5 Click OK.

Creating an IGAM Account for a Grantee

If the grantee to which you are sending an online requirement does not have an IGAM account, you can create one for him or her.

To create an IGAM account for a grantee:

1 From GIFTS, select the Request that contains the Requirement for which you want to collect requirement data.

2 From the Action menu, select Create IGAM Account. The Create IGAM Account window appears.

Note: If the grantee for the Request already has an IGAM account, the Create IGAM Account option is grayed out. Select Display IGAM Account to view the grantee's IGAM account information for the selected Request.

Note: If you are using the multiple sites functionality, the Create IGAM Account window will contain an Account option. This allows you to select the site in which to give access to the grantee. An error message appears if there are no active requirement forms for that site. For more

information about multiple sites, see "Managing Multiple Sites" on page 285.

3 Enter the grantee's email address in both fields, and then click OK. A confirmation email will be sent to the email address provided. The grantee now has an IGAM account and can log into his or her My Account page to access the online requirement.

Note: If the grantee already has an IGAM account, a message appears asking if you want to link to the existing account. If you do, no email is sent to the grantee.

7 Customizing Display Language

This chapter describes how to customize the display language for application and online requirements in IGAM, and describes what other IGAM text needs to be edited if you want it to match the new application/requirement form display language.

In This Chapter:

About the Custom Display Language 182
Creating a New Display Language 183
Editing Other IGAM Text 185

About the Custom Display Language

Prior to IGAM 5, label sets were required to edit certain hard-coded form text, such as the text on navigation links and buttons.

Tip: Standard Label Sets are still available for Spanish, Portuguese, French, and Welsh but are limited to the default text in IGAM.

Note: For a full list of GIFTS supported languages, see Solution 1317 on the MicroEdge PowerME site.

With IGAM 5, you can now customize the labels for all the links and buttons on your forms and webpages through the Site Design Links and Fields tabs.

Caution: Any translation errors become your responsibility if you take on the task of customizing all the labels to different language yourself.

Note: If you create a label set in a foreign language and want the rest of your automated emails, links, on-screen messages, application/requirement form fields, and form code tables to appear in this language, you must edit this text separately. For more information, please see "Editing Other IGAM Text" on page 185.

Note: In order for a foreign language application form/online requirement to display correctly, the language preferences of the browser in which the form displays must be set to view that language.

For more information about the Form Design Wizard, please see "The Form Design Wizard" on page 118.

Creating a New Display Language

This section describes how to obtain a label set in a different language or customizing the existing English default that you can apply to your IGAM forms.

Important: If you want to create a label set, you should first contact MicroEdge's Technical Support at (877) 704-3343 to discuss the label set you would like to create. They can help guide you through this process.

1. Contact MicroEdge's Custom Programming Services or Technical Support. They will work with you on the necessary steps for adding an additional language or editing an existing default language information.
2. Once you have obtained the necessary information from the MicroEdge CPS team, open the Form Design Wizard for the specific application or requirement form and go to the Activate tab.

3. Select the new label set from the System Language drop-down list.
4. Click Save and Close. A message displays indicating that this form is active.
5. Click OK.

Note: If the form has already been started and saved by one or more applicants or grantees, a message displays indicating that these saved applications/online requirements will not be updated with the new label set. Click **Yes or No** to allow these saved applications/online requirements to be submitted or not. If you click No, the Inaccessible Message window displays. This window displays the default text

applicants or grantees see if they try to access this saved form. For information on editing this text, please see "Application/Requirement Form Edits" on page 188.

Tip: To preview your updated form, select the form from the Forms Manager window, and click View URL. A link displays in a window. Click the link.

Editing Other IGAM Text

If you create a display language in a foreign language and want all automated emails, links, on-screen messages, application/requirement form fields, and application/requirement form code tables for applicants/grantees to appear in this language, you must manually edit this information.

You can edit all automated emails, links, on-screen messages, and application/requirement form code tables to display in a foreign language on a system-wide basis for all your forms.

Note: You can also edit all the links, on-screen messages, and the Submission Confirmation automated email at the form level for individual forms. For more information, see "Links Tab" on page 156.

However, in order to change the language of text in form fields, and to apply code table changes, you must edit each form separately.

System-wide Edits

The following steps only need to be performed once and affect all application/requirement forms:

1. To edit your automated emails, go to Tools ➤ Preferences ➤ Applicant/Grantee View ➤ Options ➤ Site Edit ➤ Automated Email tab. Edit the text in all eight automated email messages' Subject and Body fields in the language you desire. For more information, please see "Automated Emails" on page 103.

   Important: Text that appears within double brackets, such as <<Application_ID>> in the preceding image, are merged fields determined by individual forms and must not be edited.

2. To edit your links and on-screen messages, go to Tools ➤ Preferences ➤ Applicant/Grantee View Options ➤ Site Edit ➤ Links tab. Edit the text in all links and on-screen messages in the language you desire by clicking

on the link, entering the revised text in the Display Label field, and clicking OK. For more information, please see "Links Tab" on page 156.

Note: This does not change link and on-screen message text for previously created forms. To edit this information for a previously created application/requirement form, go to the Links tab of that form's Form Design Wizard. For more information, please see "Links Tab" on page 156.

3 In order to edit form code tables, from the Administrator Module, go to Setup ➤ Code Tables. The Table Maintenance window appears.

4 Edit the text of all codes you intend to use in your forms in the language you desire. For more information about editing codes, please refer to the *Editing Codes* section of the GIFTS Administrator's Guide.

Important: In order for these code table edits to appear in previously created application/requirement forms, you must open the Form Design Wizard for each form, and click **Save and Close**.

Application/Requirement Form Edits

The following steps must be performed for each application/requirement form you create in order to change the text in form fields and to apply any code table edits:

1. Open the Form Design Wizard for a form and go to the Fields tab.

2. Select each field in the Page Layout Grid and edit the Label field text in the language you desire.

   For example, if you wanted to change the Home Address field to French, you would select Home Address in the Page Layout Grid and type Adresse f Personnelle in the Label field.

   For more information about the Fields tab in the Form Design Wizard, please refer to "Fields Tab" on page 133.

3. Click Save and Close.

   Note: If you edited the form code tables, these edits appear in the form when you click Save and Close.

Important: The following steps only apply if the form has already been started and saved by one or more applicants/grantees. If you do not see any messages after clicking **Save and Close**, skip these steps.

4 If the form has already been started and saved by one or more applicants/grantees, a message displays indicating that these saved applications/online requirements will not be updated. Click **Yes or No** to allow these saved applications/online requirements to be submitted or not. If you click No, the Inaccessible Message window appears. This window displays the default text applicants/grantees see if they try to access this saved form.

5 Edit this text in the language you desire, and click OK.

Note: Click the Include a link to the new version of this form checkbox if you want to include a link to the updated form when applicants/grantees view this message.

The following steps are optional steps that you can take to edit the submission confirmation email.

Note: This is the same submission confirmation email that you edited in "System-wide Edits" on page 185, although these edits are only applicable for the current form.

1 Click the **Links** tab.

2 In the Automated Emails section, double-click **Submission Confirmation or Requirement Confirmation**.

3 Edit the text in the **Subject and Text** fields in the language you desire, and then click **Save and Close**.

8 Retrieving and Handling Pending Applications and Online Requirements

Applications and online requirements can be retrieved from the MicroEdge IGAM server manually by users, or automatically based on your IGAM preferences. Retrieved applications appear in the Pending sub-folder of the GAM. There, applications and their attached files can be viewed, printed, and checked for errors before processing. You can also delete Pending applications without first processing them.

In This Chapter:

Retrieving Applications, Requirements, and Attachments..194

Viewing Pending Applications 200

Viewing Attachments.....207

Checking Pending Applications for Errors.....207

Researching Applicants 211

Transferring Applications to Another Branch.....212

Deleting Pending Applications.....214

Retrieving Applications, Requirements, and Attachments

Submitted applications and online requirements are stored on MicroEdge's IGAM server. In order to view and process these applications and online requirements, you need to retrieve them from the server.

Retrieving an application converts it to a pending application in the GAM. Pending applications remain in the Pending folder until you reject them or consider them and transfer them to GIFTS.

Retrieving a online requirement automatically transfers the data in the online requirement to GIFTS. No other action is required by you to process the online requirement. While you cannot view the data before it is transferred into GIFTS, an IGAM Update Activity is created in GIFTS that details the old and new information. The Activity is associated with the Organization and Request. The online requirement is attached to the Requirement as an HTML file in GIFTS, along with any online requirement attachments.

Options for Retrieving Applications and Online Requirement

You can retrieve applications and online requirements yourself while you are logged in to IGAM, as described in "Retrieving Applications, Requirement Forms, and Attachments" on page 195. You can also set up IGAM to check for and retrieve new applications and online requirements automatically:

- each time you log in to IGAM
- once every designated time period after you have logged in (e.g., every 15 minutes, every two hours, etc.), during specified hours

These two options—which can be enabled together, separately, or not at all—are set up in the Application Handling section of the IGAM system-wide preferences. For details on these options, please see "Application Handling" on page 63.

If IGAM finds new applications and/or online requirements on the server when performing these checks, you will be alerted and offered the same retrieval options described in "Retrieving Applications, Requirement Forms, and Attachments" on page 195.

Retrieving Applications, Requirement Forms, and Attachments

Before You Begin: IGAM connects to the MicroEdge IGAM server over the Internet. In order to retrieve applications and online requirements, the workstation that you are using must have access to the Internet.

To retrieve applications and online requirements:

1 In the Main menu, select **Action ➤ Retrieve**. If there are applications and/or online requirements on the server, a message informs you of the number of applications and/or online requirements, and asks if you want to retrieve them:

Note: If you are using the multiple sites functionality, you will be prompted for each site that contains applications and/or online requirements on the server. For more information about multiple sites, see "Managing Multiple Sites" on page 285.

2 Choose one of the following options:

- Click **Retrieve Applications** if you want to retrieve the applications and their attachments. The applications and all attached files will be downloaded.
- Click **Retrieve Requirements** if you want to retrieve the online requirements and their attachments.
- Click **Close** if you want to retrieve the applications and/or online requirements at another time.

If you click Retrieve Applications or Retrieve Requirements, the files are downloaded and IGAM summarizes the results of the retrieval.

Note: If you are only retrieving a single application, the following screen appears:

3 Choose whether or not to generate acknowledgement correspondence.

Note: The option to generate correspondence upon retrieval can be disabled in your system-wide preferences. If this is the case, the option to generate correspondence will not appear.

If you choose to generate correspondence, the Correspondence Wizard is displayed. You can use the Wizard to create email or printed correspondence, as described in "Generating Correspondence" on page 266.

Re-Retrieving Applications and Online Requirements

Copies of submitted online applications and online requirements are stored on the MicroEdge IGAM server. Pending applications and online requirements that have been retrieved may be re-retrieved from the server. You may want to do this when you wish to work with a pending application or an online requirement that was previously deleted.

Note: Application and online requirement attachments cannot be re-retrieved.

To re-retrieve applications and/or online requirements from the MicroEdge IGAM server:

1 From the GAM Main menu, select **Tools ➤ Re-Retrieve**. The Re-retrieve window appears:

2 Select the kind of forms you want to view using the **Specify forms to choose from** drop-down menu.

3 Refine the list of applications or online requirements to be re-retrieved:

- Click **Specify Date Range** in the Re-retrieve window toolbar, and you can limit re-retrieval to applications or online requirements whose original retrieval date falls within a specified range.

  Click **Clear Date Range** to remove the date filter.

- The Specify Forms section allows you to choose the form or forms used to create the application(s) or online requirement(s) you wish to re-retrieve. Note also that you can select multiple items from the list of forms.

  Selecting an item in the drop-down menu allows you to limit the list to those forms of a specific stage.

4 Click **Re-retrieve**. The resulting list of applications or online requirements opens in the Re-retrieve window:

5 Select the check box next to each application or online requirement you wish to re-retrieve, then click **Retrieve.**

Before re-retrieving applications from the MicroEdge IGAM server, your system will first check each application to see if it currently exists in your GAM (this is not true for online requirements). It then re-retrieves the applications based on the following rules:

- If the application is *not* found in your GAM (if, for example, it was previous deleted), the application is re-retrieved to your Pending folder.
- If the application is found in the History folder of your GAM (that is, it has already been considered or rejected), the application is *not* re-retrieved.
- If the application is found in the Pending folder of your GAM, the application is re-retrieved and the previously retrieved application is overwritten with the new one. (This will undo changes made to application in the GAM, such a linking and spelling checking.)

A process monitor displays the results of your re-retrieval.

Viewing Pending Applications

Retrieved applications are maintained in the Pending folder while you review them. You can search Pending Applications and customize the manner in which they are displayed.

The Pending Folder

To view the Pending folder, click the **Pending** icon.

By default, the following information is displayed in the Pending folder.

Column		Description
Attachments		If the icon is displayed, there are files attached to this application.
Charitable/Non-Charitable Organization?		If the icon is displayed, applicant is a non-charitable organization.
Complete/ Incomplete Application?		If the icon is displayed, the application is flagged as Incomplete.
Stage		One of three values appears, indicating the stage of the application: ❖ 1/1 - A single-stage application ❖ 1/2 - The first stage of a two-stage application ❖ 2/2 - The second stage of a two-stage application

Column	Description
Linked?	If the icon is displayed, a link between the application and records in your GIFTS database has not been attempted.
Organization (Name/Full Address/Tax ID)	The applicant Organization's name, address, and Tax ID.
Request Contact (Full Name/Title/Phone/Fax/ Email)	The Request contact's name, title, telephone numbers, and email address.
Organization Contact (Full Name/Title/Phone/Fax/ Email)	The Organization contact's name, title, telephone numbers, and email address.
Request (Date/Amount/ Budget)	The application request date, the requested amount, and proposed Project Budget.
Project (Title/Description)	The short and long descriptions of the project.
Program Area Primary Block	The program under which the applicant organization or proposed project falls, such as 'Education' or 'Health and Human Services.'
Geographical Areas Primary	The geographic location served by the applicant organization or the proposed project (not necessarily the organization's location).
Age Group	Used to track the age group served by the project.
Ethnicity	Used to track the ethnic group served by the project.
Population Served	A general category used to track the groups that are served by the project. Often used to track economic status or specific disabilities.
Organization Background	Background information on the applicant organization. This might include a brief history of the organization and their mission statement.

Column	Description
Application ID/Record ID/ Form ID	Applications generated from the same Form are assigned sequential Application ID numbers. When an application is retrieved into the database, it is also assigned a Record ID to identify the record in the database. The Form ID identifies the online application Form from which the application was generated. The Application ID and the Form ID together comprise an ID that is unique among all other applications in the system.

Customizing the View Columns

If the information that you want is not displayed, you can add it to the display in new columns.

You can do this by going to **View ➤ Show Columns** just like in GIFTS.

For Multi Site ID users, the Application category now has a Site_ID column which can be added to Views or Advanced Searches to find applications specific to a SID.

For more information on adding or removing columns, please refer to the *GIFTS User's Guide*.

Opening and Printing Pending Applications

To open an application in either the Pending or History folder, double-click the item in the grid. The application opens in a "printer-friendly" view. Specifically, it opens as an HTML web page in your default web browser. This allows you to read the application as it will appear when printed.

To print the application, print the web page in which it is displayed using your browser's print command.

Searching for Pending Applications

You can search for pending applications as you would any record in GIFTS. For example, you can search the Pending folder for all applications from a specific Organization.

If you are not familiar with GIFTS search techniques, please refer to the *GIFTS User's Guide*. This section summarizes the Quick Find properties for the Pending folder only.

To run a Quick Find search for pending applications, go to the Pending folder and choose **Edit ➤ Find** from the Main menu.

You can search the Pending folder using the following Quick Find properties.

Property	Description
Age Group	The age group served by the proposed project.
Application ID	Applications that are generated from the same form are assigned sequential Application ID numbers. (The Application ID coupled with the Form ID comprises a unique identifier to distinguish the application from other applications on your system.)
Application Stage	Limit your search results to applications of a certain stage: single-stage applications, first-stage applications, or second-stage applications.
All	Select this option to display all applications in the Pending folder.
Coding Sheet	Used to search applications by code.
Ethnicity	Used to track the ethnic group served by the project.
Form	The online application form.
Gender	Used to track the gender group that is served by the project.
Geographical Area Served	The geographic location served by the applicant organization or the proposed project (not necessarily the organization's location).
Multiple Submissions by Organization	Displays applications for which the organization is identical. You can use this to help identify applications that are submitted by the same organization.
Multiple Submissions by Request Contact	Displays applications for which the Contact Last Name is identical. You can use this to help identify applications that have the same Contact.
Organization Charitable	A flag indicating that the organization is a public charity.
Organization City	The city in the organization's postal address.
Organization Country	The country in the organization's postal address.
Organization Name	The name of the organization that submitted the application.
Organization State	The state in the organization's postal address.

Property	Description
Organization Tax ID	The organization's tax ID.
Organization Type	Describes the main focus of the organization's efforts, such as 'Arts and Culture' or 'Civic and Community.'
Population Served	Groups that are served by the project. Often used to track economic status or specific disabilities.
Program Area	The program under which the efforts of the funding request fall, such as Education or Health and Human Services.
Project Title	The applicant's description of the project.
Recommended Amount	If you generate applications for internally recommended grants, the recommended grant amount.
Recommendation Comment	Any comments regarding the internally recommended grant.
Request Amount	The Request grant amount.
Request Contact's Last Name	The last name of the Request's contact person.
Request Date	The date on which the Request for funding was made, usually the date of the proposal or the date the application was received.
Submitted Date	The date that the application was submitted to the Mailbox.

Setting the Folder View Options

By default, all applications in the Pending or History folders are displayed when you log on. If you only work with a specific group of applications—in a particular program area for example—you can populate your folders with the results of a search each time you log on.

The option that you specify here applies to your workstation only, it does not affect the way that other users' folders are displayed.

To choose the manner in which applications are initially displayed:

1 Select **Tools ➤ Preferences** from the Main menu. The Preferences window is displayed. In the Category section, click on User Specific/View Options. These options now appear on the right section of the window:

You can set user-specific view options for both the Pending and History folders. The options are the same for both GAM folders.

Selection	Description
Empty	No applications are displayed in the folder when you log in. You can populate the folder by searching it.
View all applications	All applications in the folder are displayed each time you log in.
View only “x” applications	Select one of the following options from the drop-down menu: Single Stage, Stage 1 of 2, or Stage 2 of 2. Only applications generated from Forms of the selected stage will be displayed.
View only those applications submitted using this Form	Only applications generated from the Form you select here are displayed in the folder.
Use a saved search	The folder is populated by a saved search that you specify. Click the search icon to browse the available saved searches.

2 Select one of the options above to determine the applications with which each folder will be populated.

Note: If you do not select 'View All Applications' you can still view all applications in the folder by selecting 'All' in Quick Find. For details, see "Searching for Pending Applications" on page 203 or "Searching in the History Folder" on page 244.

3 When you are finished, click **OK**. The next time that you log in, the folders are populated in the manner you specified.

Viewing Attachments

You can open and view files attached to applications after you have retrieved the applications from the IGAM server. This option is available in both the Pending and History folders of the GAM.

Note: Requirement form attachments are attached to the associated Requirement in GIFTS in the Document folder and can be viewed there.

To open and view a file attached to a retrieved application:

1 Select (highlight) an application in the GAM Organizer grid.

2 From the Main menu, select **View ➤ View Attachments**. The View Attachments window appears.

3 From the list, click on the file you want to review.

Checking Pending Applications for Errors

Before reviewing applications and making your decisions to reject or consider them, you can check to see if they are complete, contain any misspellings, or represent multiple submissions of other applications in your Pending folder.

Marking Applications as Incomplete

If you review an application and find you need more information—perhaps you want to request that the applicant send a detailed project description—you can mark the application as Incomplete. When you receive the information, you can mark it Complete.

Tip: You can still consider an application that is marked Incomplete. If you want to track the receipt of materials and other grant requirements for an application that is being considered, create Requirements for them in GIFTS.

To mark applications as Incomplete:

1. Highlight one or more applications and choose **Action ➤ Mark as In/Complete**.

   Note: If you are marking a batch of applications, the information that you provide here is applied to each application in the batch.

2. Clear the Application Information is Complete checkbox. You can enter Notes regarding the incomplete applications.

3. When you are finished, click OK. The applications are marked Incomplete and the Incomplete icon is displayed in the Pending folder.

To mark applications as Complete, choose Action ➤ Mark as In/Complete and select the Application Information is Complete check box.

Checking Spelling

To ensure that the application information you transfer to GIFTS is correct, you can identify and correct spelling errors on applications before you consider them.

Note: This step is not required. However, your Administrator can configure your system to notify you when you consider an application that has not been spell checked. For more information on this option, please see "Application Proofing" on page 60.

To check the spelling in applications:

1. Highlight the applications that you want to check for spelling errors.
2. From the Main menu, choose **Tools ➤ Spelling**, or press **F3**. The spell checker verifies that each word in the application is spelled correctly.
   - If no words are misspelled, a message indicates that the spell check is complete.
   - If there are spelling errors, the Spell Checking window is displayed.

The **Change To** field contains the word that was not found in the Spell Checker's dictionary. The following options are available:

Option	Description
Ignore	Ignore the current word and proceed to the next misspelled word.
Ignore All	Ignore all occurrences of this word within the field you are spell checking.

Option	Description
Add	Add the current word to your Custom Dictionary; it is permanently saved to the Custom Dictionary on your workstation. The filename of your Custom Dictionary is specified in the Add Words To field. The Spell Checker uses both its Main Dictionary and your Custom Dictionary. Regardless of the Custom Dictionary you are using, the spell checker always has access to its Main Dictionary.
Change	Change the current word to the word displayed in the Change To field. If the word in the Change To field is not the correct word, you can choose another from the Suggestions list or type the correct word into the Change To field.
Change All	Change all occurrences of this word to the word displayed in the Change To field.
Cancel	Cancel the Spell Check.

Searching for Multiple Submissions

Multiple submissions result when an applicant submits the same project information two or more times.

Multiple submissions can:

- Take up space in your Pending folder.
- Lead to duplication of effort if staff members review different applications for the same proposal.
- Cause duplicate Requests in GIFTS if you consider them.

After you retrieve applications, you can search the Pending folder for multiple submissions and reject them. Use the Pending folder Quick Find to search for multiple submissions by Organization and/or Request Contact.

Multiple Submissions by Organization Displays applications that have an identical Organization.

Multiple Submissions by Request Contact Displays applications that have an identical Request Contact.

If your search identifies multiple submissions for the same proposal, you can reject them as described in "Rejecting Applications" on page 239.

Researching Applicants

The GAM makes it easy for you to research organizations that apply for funding. You can view the applicant's website and confirm their non-profit status without leaving the GAM.

Important: In order to review applicant websites and research non-profit status, your workstation must have access to the Internet.

Viewing an Applicant Organization's Website

If the applicant provides an organization website address, you can access it directly from the Pending folder. You can continue working in the GAM while you review the applicant's website.

To go to the applicant organization's website:

1 Highlight the application and choose **Action ➤ View Applicant Website**. The GAM opens the applicant website from your Internet browser.

Researching an Applicant's Non-Profit Status

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

1 Highlight the application and choose Action ➤ Research from the Main menu.

The GAM takes you to a website that provides detailed information on non-profit organizations. (The site that you use is defined by your Administrator.)

For example, if your Administrator has set up your system to research applicants using GuideStar®—and the applicant has provided a valid Tax ID—a summary of the applicant's non-profit status is displayed.

If no Tax ID was provided, or the ID was not valid, you can search the site for the applicant organization.

Transferring Applications to Another Branch

If you are using the GAM with branch security, you can retrieve and process applications that originated from Forms that are mapped to your branch. If you want to re-direct a Pending application to another branch—perhaps the proposal serves an area covered by another branch—you can transfer it if you are a member of the Admin user group.

Note that when a GIFTS Request is created from an application, its branch assignment will be determined by your system setup (transferring an application in IGAM does not override the rules set up for your system):

- If you are using decentralized branch security, the Request will be assigned to the branch of the user who considers (or rejects, if Requests are created for rejected applications) the application.
- If you are using centralized branch security, the Request will be assigned to the branch specified in the application form's properties.

To transfer applications to another branch:

1. Highlight the applications that you want to transfer. From the Main menu, choose Tools ➤ Transfer Branch.

   Note: This menu option is only displayed if you are logged in as a member of the Admin user group.

2. Select the branch to which you want to transfer the applications and click OK. You are notified that the application was successfully transferred.

Note: If you are transferring a batch of applications, all applications in the batch are transferred to the branch you specify. If you want to transfer applications to several different branches, transfer them individually.

Deleting Pending Applications

You can delete selected applications from the Pending folder.

1 Select the application or applications and select **File ➤ Delete** from the Main menu.

2 If any of the selected applications has files attached, the following window opens:

Important: If you are planning to re-retrieve these applications, you should probably not delete the attached files (attachments cannot be re-retrieved from the MicroEdge IGAM server). For information on re-retrieving applications, please see "Re-Retrieving Applications and Online Requirements" on page 197.

Click **Yes** to delete both the application and its attachments; click **No** to delete only the application; click **Cancel** to delete neither.

9 Processing Application Decisions

Retrieved applications in the Pending folder of your Grant Application Manager (GAM) can now be reviewed and decided upon, and your decisions processed. This chapter provides overviews of the decision-making processes for both single- and two-stage applications, followed by detailed instructions on performing the decision-making procedures.

Note: Online requirements do not require this step. After they have been retrieved from the IGAM server, online requirement data is automatically transferred into GIFTS. No further action is required.

In This Chapter:

Processing Single-Stage Applications **216**

Processing Two-Stage Applications **217**

About Linking Applications with GIFTS **221**

Linking Applications with GIFTS..... **227**

Considering Applications **236**

Rejecting Applications..... **239**

Working in the History Folder..... **242**

Processing Single-Stage Applications

Your two options when reviewing any pending application are to *Consider* the application, or to *Reject* it.

When you *Consider* an application, the application moves from the GAM's Pending folder to the History folder, and a new Pending Request is created in GIFTS containing the data from the online application. After this, all decisions on the applicant's request for funds are processed in GIFTS using that Request record.

When you *Reject* an application, the application moves to the GAM's History folder. (A rejected application can be rolled back to Pending; see page 241 for details.) An option in the IGAM preferences can be set to create a Declined Request in GIFTS representing the information from a Rejected IGAM application. This option is turned off in the IGAM's default configuration; please see "System-Wide Options" on page 60 for details on changing this option.

Considering a Single-Stage Application

The decision to create a Pending Request in GIFTS for an online application is called *considering* an application. Any retrieved application in your GAM Pending folder can be considered. The procedure for considering a pending IGAM application follows:

Step 1: Linking the application with GIFTS Linking an application means designating the existing Organization and Contact records in GIFTS that represent the applicant. If a Request has already been entered in GIFTS for this request for funds, you have the option (but are not required) to link the online application to the Request as well.

The value of linking applications before considering them is explained in "About Linking Applications with GIFTS" on page 221. Instructions for performing this task can be found in "Linking Applications with GIFTS" on page 227.

Step 2: Considering the application After linking is performed, you can process your decision to consider the application. A Pending Request is

created in GIFTS, and the application moves from the Pending folder to the History folder of the GAM.

For details on the procedure for considering an application, please see "Considering Applications" on page 236.

You can now move to GIFTS to work with the Pending Request as needed in order to process your eventual decision on the request for funds.

Rejecting a Single-Stage Application

The process for rejecting an application depends on how your IGAM administrator has decided to handle rejected applications.

When your IGAM preferences are set to their defaults, no equivalent GIFTS Request records for rejected applications are created or used. (Since the application has already been rejected, your administrator may feel there is no need to track the application in GIFTS.) The rejected application moves from the GAM Organizer's Pending folder to the History folder, and the rejection is fully processed.

However, your IGAM administrator may choose to have IGAM create new *Declined* Request records in GIFTS to track these rejected applications. (Organizations that want a more complete history of *all* requests made of them may choose this option.)

In this case, you must first link the application to GIFTS (see "Linking Applications with GIFTS" on page 227) before you can reject it.

For details on the procedure for rejecting applications, please see "Rejecting Applications" on page 239.

Processing Two-Stage Applications

Your two options when reviewing either stage of a Pending two-stage application are to *Consider* the application, or to *Reject* it.

Although a completed two-stage application necessarily means two different Application records in the GAM, the two stages are linked and create only one GIFTS Request record. After you have received and considered both

stages of a two-stage application, a single Pending Request in GIFTS allows you to complete your ultimate decision on the applicant's request for funds.

Considering a First-Stage Application

Online applicants will only be allowed to fill out the second stage of a two-stage application after you have decided to consider the first stage. The second-stage form is made available to the user automatically when you consider the first stage.

The process for considering the *first* stage in a two-stage application is similar to that for considering a single-stage application:

Step 1: Linking the application with GIFTS Linking an application means designating the Organization, Contact, and (optionally) Request records in GIFTS that represent equivalent fields in the online application.

The value of linking applications before considering them is explained in "About Linking Applications with GIFTS" on page 221. Instructions for performing this task can be found in "Linking Applications with GIFTS" on page 227.

Step 2: Considering the application After linking is performed, you can process your decision to consider the application.

For details on the procedure for considering an application, please see "Considering Applications" on page 236.

The results of considering a first-stage application follow:

- The first-stage application moves to the GAM Organizer's History folder.
- A Pending Request representing the first stage data is created in GIFTS.

  The Pending Request in GIFTS is flagged as Incomplete, so that no one will approve or decline the Request before the data from the second stage is received. This is true even if the 'Default New Requests to Complete' option in the GIFTS Administrator General Preferences tab is activated.

  Note: You can manually mark the Request as Complete in GIFTS before you receive the second application, if you wish. You cannot, however, decline the pending Request until the second-stage application has been retrieved and rejected. If you want to decline the Request and deactivate

the second-stage application before it is retrieved, you should reject the corresponding first-stage application located in the History folder of the GAM. For details see "Rejecting First-Stage Applications" on page 246.

- The second stage of the two-stage application is automatically made available to the applicant. You can select the second-stage application when you process consideration of the first stage, or in the History folder.

  You can also generate email notification of the second-stage application's availability, when processing consideration of the first stage or from the History folder.

Users whose first-stage application is considered will have the opportunity to fill out and submit the second-stage application. After it is completed, you can retrieve it from the GAM Organizer's Pending folder for processing.

Rejecting a First-Stage Application

If you R*eject* the first stage of a two-stage application, the first stage moves to the GAM Organizer's History folder. The online applicant is not given an opportunity to fill out a second stage.

The process for rejecting an application depends on how your IGAM administrator has decided to handle rejected applications:

- When your IGAM preferences are set to their defaults, no equivalent GIFTS Request records for rejected applications are created. The rejected application moves from the GAM Organizer's Pending folder to the History folder, and the rejection is fully processed.

- However, your IGAM administrator may choose to have IGAM create a new *Declined* Request record in GIFTS to track these rejected applications.

  In this case, you must link the application to GIFTS (see "Linking Applications with GIFTS" on page 227) before you can reject it.

For details on the procedure for rejecting an application, please see "Rejecting Applications" on page 239.

Considering or Rejecting a Second-Stage Application

Once a second-stage application and its attachments have been retrieved, you can then consider or reject the application.

Note: Pending second-stage applications may not need to be linked to GIFTS before processing. Data entered in the second-stage application will simply update the Pending Request created by its first-stage counterpart. If additional contact roles are included in the second stage, however, you will be required to link the second-stage application to equivalent Contact records in GIFTS before processing.

When you *consider* a second-stage application, the following occurs:

- The Pending Request in GIFTS is updated with data from the second-stage application. *No new or additional Request is created.*
- If any fields are repeated in both stages of the application, data entered in the Request record from the *first-stage* application is overwritten by new entries from the *second stage*. (If a repeated field in the second-stage application is left blank by the applicant, any data entered in this same field during the first stage is left as is.)

  The following fields are exceptions: Evaluation, Project Long Description, and Organization Background. If these fields occur in both stages of a two-stage application, the method for dealing with new data in the second stage is governed by an IGAM preference. For more information, please see "Updating GIFTS" on page 66.
- The Pending Request is now flagged Complete or Incomplete, based on whether the 'Default New Requests to Complete' option in the GIFTS Administrator General Preferences is turned off or on. For more information, please see "Defining Default Complete/Incomplete Status" on page 111.
- The second-stage application moves from the Pending folder to the History folder in the GAM.

For details on the procedure for considering an application, please see "Considering Applications" on page 236. After you finish, the Pending

Request in GIFTS contains all data from both stages of the application and can now be approved or declined as desired.

When you *reject* a second-stage application in the GAM, the following occurs:

- Data from the second-stage application is entered in the corresponding GIFTS Request record, following the same rules as stated above.
- The Disposition of the Request is changed to Declined.
- The second-stage application moves from the Pending folder to the History folder in the GAM.

For details on the procedure for rejecting an application, please see "Rejecting Applications" on page 239.

About Linking Applications with GIFTS

In GIFTS, each Request is associated with an Organization and a Primary Contact. Before you consider an application—and transfer it to GIFTS as a Pending Request—you can link it with existing Organizations, Contacts, and Requests in GIFTS.

You are required to attempt to link an application with Organizations and Contacts in GIFTS before you can consider it. Your Administrator can optionally require you to link with Requests as well.

Note: Pending second-stage applications may not need to be linked to GIFTS before processing. Data entered in the second-stage application will simply update the Pending Request created by its first-stage counterpart. If additional contact information is included in the second stage, however, you will be required to link the second-stage application to equivalent Contact records in GIFTS before processing.

When you attempt to link an application by searching for matching records, the GAM "remembers" that a link was attempted. Once you attempt to link an application, you are not required to do so again.

If you want to search for records added to GIFTS since you initially attempted to link the application, you can *re-link* it.

Why Link Organizations and Contacts?

When you consider an application, the new Pending Request that is created in GIFTS must be associated with an Organization and a Primary Contact. If GIFTS created a unique Organization and Contact record for each application you considered, your database would soon be cluttered with duplicate Organizations and Contacts.

To avoid this, the GAM lets you link an applicant's organization and contact to existing Organizations and Contacts in GIFTS. The Request that is created when you consider the application is automatically associated with the linked Organization and/or Contact.

If you are unable to establish links—because no matching Organizations or Contacts were found—a new Organization and/or Contact is created when you consider the application.

Note: When overwriting Organization and/or Contact information, an IGAM Update Activity is automatically created for the Organization or Contact record in GIFTS. This Activity contains both the old and updated information.

Tip: Before you link Pending Applications, you can review them and reject those that you do not want to consider. This saves time by reducing the number of applications that you have to link. (This is not the case if your IGAM administrator has chosen to have IGAM create new Declined Requests from rejected applications. These must be linked before they are rejected.)

Why Link Requests?

If you consider an application that is already in GIFTS—perhaps the Request was entered into GIFTS manually by another staff member—you can inadvertently create a duplicate Request record in GIFTS.

To prevent duplicate Requests, you can match your applications with existing Requests in GIFTS before you consider them. If you link the

application to a matching Request in GIFTS, the application is automatically rejected when you save the link.

Note: Data from the linked application will *not* be reflected in the Request in GIFTS.

If no link to an existing Request is established, a new Pending Request is created in GIFTS when you consider the application.

By default, you are not required to link Requests. However, your Administrator can require you to perform this step before you consider an application.

Why Re-link Applications?

You can *re-link* applications:

- That have already been linked.
- For which linking was attempted and no matches were found.

Re-linking applications can help you prevent duplicate records in GIFTS in cases where Organizations, Contacts, or Requests are added to GIFTS after you have attempted a link, but before the application is considered.

> **Example:** An organization submits two applications, each for a different project. You attempt to link the first application with Organizations in GIFTS, but no matches are found. If you consider the application at this point, a new Organization will be created in GIFTS. Instead you decide to consider it later—perhaps you are waiting for more information.
>
> In the meantime, you consider the second application—creating a new Organization record in GIFTS for the applicant organization.
>
> The first application is not linked to the new Organization. If you consider it, a duplicate Organization record will be created in GIFTS. To prevent this, you can re-link the first application and link it to the new Organization that was added since you first attempted the link.

Important: If you re-link an application with Organizations in GIFTS, any record of an attempted Request link is cleared from the application. To help

prevent duplicate Requests, be sure that you re-link Requests after you re-link an application to an Organization.

Tip: Although you are not required to re-link, it is a good idea to re-link applications that were linked and then not considered right away.

Organization Matching Logic

When you attempt to link an applicant with Organizations in GIFTS, the GAM matches the applicant organization's Tax ID, Name, State, and Postal code with Organizations in GIFTS by using the following logic:

If the Tax ID...	...and the Name and State...	...then...
matches or is not supplied	match	the Organization is considered a match.
matches	do not match	the Organization is considered a match.
is not supplied	do not match	the Organization is *not* considered a match.
does not match	match	the Organization is considered a match.
does not match	do not match	the Organization is *not* considered a match.

Tip: You can control what the system uses to match Organizations or Contacts by going to **Tools > Preferences > Match**. Instead of using all fields listed for the match, you could use only one or two in order to expand the search results.

Organizations with the same name and state will be listed first by default, followed by Organizations with the same name, followed by all other matches.

Tip: You can control how the system lists the search results by going to **Tools > Preferences > Match** and moving the fields up or down to reset sort priority.

Contact Matching Logic

When you attempt to link the applicant's contact information with Contacts in GIFTS, the GAM matches the contact's First Name, Middle Name, Last Name, and Telephone Number.

In addition, if you have previously linked the application to an Organization in GIFTS, the GAM also matches the linked Organization ID with Contacts' Organization IDs.

If the Organization ID...	**...and the First Name, Middle Name,** and **Last Name...**	**...then...**
matches or is not yet linked	match	the Contact is considered a match.
matches or is not yet linked	do not match	the Contact is *not* considered a match.
does not match	match	the Contact is *not* considered a match.
does not match or is not yet linked	do not match	the Contact is *not* considered a match.

Request Matching Logic

Request linking is the final step in linking your applications with GIFTS. If you linked the application to an Organization in GIFTS, the application is matched to all Requests for the linked Organization.

You can narrow the focus of the Request matching search by selecting additional Request Matching Criteria. For more information, please see "Step 4: Linking Requests" on page 234.

Linking Applications with GIFTS

The Link Helper guides you through the linking process.

Step 1: Start the Link Helper

To link applications with records in GIFTS, highlight the applications that you want to link and choose Action ➤ Link to GIFTS.

The Link Helper lists the number of applications:

- Which are linked.
- Which are "New" (i.e., for which linking was attempted, but no matches were found).
- For which linking has not yet been attempted.

Step 2: Linking Organizations

When you link Organizations, the Linking Helper scans your GIFTS database and lists Organizations that match the applicant organization. You can link the application with the matching Organizations or search for another Organization.

You can also re-link Organizations that have already been linked or those for which no matches were found previously.

For details on the logic that the Helper uses to match Organizations, please see "Organization Matching Logic" on page 224.

To link applicant organizations with Organizations in GIFTS:

1 Click Organization. If the application(s) are already linked, you can choose to re-link the linked applications or maintain the existing links.

2 The Helper lists the applicant organizations and the possible matching Organizations in GIFTS.

Column	Description
Applicant	The applicant organization
# of Hits	The number of possible matching records in GIFTS.

Column	Description
Link To	Possible matching Organizations in GIFTS. If there are multiple possible matches, you can select among them by clicking the down arrow. If none of the Match Options is appropriate, you can search all Organizations by clicking the binoculars. **Example:** You receive an application from the Brooklyn Dance Collective, which you know is another name for the Brooklyn Ballet. You can search for the Brooklyn Ballet and link the application to it. If no matches are found, “New Organization” is displayed. If you consider the application, a new Organization will be created in GIFTS.

Column	Description
Update GIFTS	Click the box in this column will open the Update Details form. This is used to overwrite the linked Organization fields in GIFTS with the corresponding application fields during the consideration process. The following Organization record fields cab be included in the GIFTS update: - Address - City - State - Zip/Postal - Country - Phone - Extension - Fax - Email - WWW Address - Organization Annual Budget You can uncheck fields you do not want updated in GIFTS. NOTE: Blank application fields do not overwrite corresponding GIFTS fields. However, if the application form contains Phone information but not Extension information, any Extension information for the associated GIFTS record will be erased. If this feature is used to overwrite an Organization's Address, all Contacts associated with the Organization that share the same Office Address as the Organization will have their Office Address overwritten. However, if this feature is used to overwrite a Contact's Office Address, the Primary Organization associated with the Contact will not have their Address overwritten, and will no longer share their Office Address with the Contact.

3 Select an Organization from the Link To options and proceed to Step 6, or click the Search button to select another Organization using the Quick Find search.

Note: If you select "New Organization," GIFTS creates a new Organization record when you transfer the application from the GAM.

4 Enter search criteria for the Organization, and then click **Find Now**. The Search for Organization window displays.

Note: The fields displayed depends on your Organizer view. For more information about the Quick Find search, see the "Using the Quick Find Search" section in Chapter 4 of the *GIFTS User's Guide*.

5 Select the Organization to which you want to link the application form, and click **OK**.

Tip: Click **Search** to return to the Quick Find search.

6 Repeat Step 3-5 for each applicant organization listed.

7 When you are finished, click **Accept Links**. The Link Helper summarizes the links you have established and asks you to confirm that you want to save them.

8 Click **Yes**. If you are linking a batch of applications, a process log summarizes your links. You can click **Print** or **Save As** to keep the contents of the log for your records.

Step 3: Linking Contacts

When you link Contacts, the Link Helper scans your GIFTS database and lists Contacts that match the applicant's contact. You can link the application with the matching Contacts or search for another Contact.

You can also re-link contacts that have already been linked or those for which no link was found previously.

For details on the logic that the Helper uses to match Contacts, please see "Contact Matching Logic" on page 225.

To link applicant contacts with Contacts in GIFTS:

1 Click **Contacts**. If the application(s) are already linked, you can choose to re-link the linked applications or maintain the existing links.

2 Make your selection and click **OK**. The Helper lists the applicant contacts and possible matches.

Column	Description
Applicant	The applicant contact.
# of Hits	The number of possible matching Contacts in GIFTS.
Link To	Possible matching Contacts in GIFTS are listed in the Link To column. If there are multiple possible matches, you can select among them by clicking the down arrow. If none of the options is appropriate, you can search for the Contact using the binoculars icon. **Example:** You receive an application with Linda Freud as the Contact (you knew her formerly as Linda Stevens). You can search for Linda Stevens and link the application to her. If no matches are found, "New Contact" is displayed. When you consider the application, a new Contact will be created in GIFTS.

Column	Description
Update GIFTS	Click the box in the Update Details column to open the Update Details form for Contacts. This is used to overwrite the linked Contact fields in GIFTS with the corresponding application fields during the consideration process. This updates the following Contact record fields if they are included on the application: - Home/Office Address - Home/Office City - Home/Office State - Home/Office Zip/Postal - Home/Office Country - Home/Office (Main) Phone - Home/Office (Main) Extension - Home/Office Fax - Mobile - Pager - Email NOTE: Blank application fields do not overwrite corresponding GIFTS fields. However, if the application form contains Phone information but not Extension information, any Extension information for the associated GIFTS record will be erased. You can uncheck the specifc field you do not want updated in GIFTS. If this feature is used to overwrite an Organization's Address, all Contacts associated with the Organization that share the same Office Address as the Organization will have their Office Address overwritten. However, if this feature is used to overwrite a Contact's Office Address, the Primary Organization associated with the Contact will not have their Address overwritten, and will no longer share their Office Address with the Contact.

3 Select a Contact from the Link To options and proceed to step 6, or click the search button to select another Contact using the Quick Find search.

Note: If you select "New Contact," GIFTS creates a new Contact record when you transfer the application from the GAM.

4 Enter search criteria for the Contact, and then click **Find Now**. The Search for Contact window displays.

Note: The fields displayed depend on your Organizer view. For more information about the Quick Find search, see the "Using the Quick Find Search" section in Chapter 4 of the *GIFTS User's Guide*.

5 Select the Contact to which you want to link the application form, and click **OK**.

Tip: Click **Search** to return to the Quick Find search.

6 Repeat Step 3-5 for each applicant contact.

7 When you are done linking Contacts, click **Accept Links**. The Link Helper summarizes the links you have established and you are asked to confirm that you want to save them.

8 Click **Yes**. If you are linking a batch of applications, a process log summarizes your links. You can click **Print** or **Save As** to keep the contents of the log for your records.

Step 4: Linking Requests

When you link Requests, by default the Link Helper matches all Requests associated with the Organization to which the application is linked. You can narrow your search by selecting more detailed search criteria. In addition, you can re-link applications for which you were previously unable to find a matching Request.

Note: Data from the linked application will *not* be reflected in the Request in GIFTS.

Applications that you link to a Request are automatically rejected and transferred to the History folder when you save the links.

Note: By default, this step is optional. However, your Administrator can require that you attempt to link Requests before you consider an application.

To link the applications you selected with your Requests in GIFTS:

1 Click **Request**.

You can narrow your search by choosing more detailed Matching Criteria. If you don't specify Matching Criteria, the Helper matches all Requests that are associated with the applicant organization.

Matching Criteria	Matches Requests that are associated with the applicant organization and...
Request Date Range	the Request Date falls within the specified range.
Request Amount	the Request Amount is identical to the application's Request Amount.
Program Area	the Program Area is identical to the application's Program Area.
Project Title	the Project Title is identical to the application's Project Title.

2 When you are finished, click **OK** to continue. Similar to linking Organizations or Contacts, the Link Helper lists the applications and possible matching Requests.

- If a Request matches the application, you can link them by selecting the Request from the menu list. The Request is then displayed in the Link To column. When you save the link, the application is rejected and transferred to the History folder.
- If no Requests match the application, choose 'None' from the list. When you consider the application, a new Pending Request is created.

3 Repeat Step 2 for each application in the Applicant column.

4 When you are done linking Requests, click **Accept Links**. You are asked to confirm that you want to save your links.

5 Click **Yes**. If you are linking a batch of applications, a process log summarizes your links. You can click **Print** or **Save As** to keep the contents of the log for your records.

Considering Applications

Single-stage and first-stage applications which you have linked to GIFTS can now be considered and transferred to GIFTS as Pending Requests. Second-stage applications are linked to Pending Requests upon retrieval; they can now be considered, updating the corresponding Pending Request with the new details provided.

From that point on, you manage the application as you would any other Request in GIFTS. Considered applications are removed from the GAM Pending folder and maintained in the History folder.

To consider an application or applications:

1 Highlight the application or applications in the GAM Pending folder and choose **Action ➤ Consider** from the Main menu.

Note: If your Administrator set the spell checking option and the spelling in the application has not been checked, you are notified and asked if you want to continue. Choose **Yes** to continue, or **No** to return to the Pending folder and check the spelling.

Please note that all applications in a batch must be of the same stage (i.e., all single-stage, all first-stage, or all second-stage). If applications of different stages are included in a batch you try to consider, you will be asked to choose a stage:

2 Select a stage and click **OK**. The Consider Application windows opens:

If you are considering the first stage in a two-stage application, select the 'Generate Stage 2' check box. When you click OK, a list appears from which you can select the second-stage form you want the applicant to complete.

If you skip this now—for example, if you're not sure which applicants you want to include in the next round—you can do it from the History folder.

Select the Generate Correspondence checkbox if you want to create email or printed correspondence for these considered applications. When you click OK, the Correspondence Wizard is displayed.

You can enter the following Request information which will be added to the new Request created from the application.

Field	Description	Req'd ?
Request Type	Most grant makers use only the standard Type of 'Cash Grants.' Other grant makers, particularly corporate giving programs, may have additional Types, such as 'In-Kind' or 'Matching GIFTS.'	✔
Request Status	The Status of the Request.	

Field	Description	Req'd ?
Staff assigned to Request	The staff member responsible for the new Request.	
Meeting Date	The date of the meeting during which the new Request will be reviewed.	

Note: If you are considering a batch of applications, the Request information is added to all applications in the batch.

3 Click **OK**.

If you are considering first-stage applications and selected the 'Generate Stage 2' checkbox, a window listing applicable second-stage applications opens and asks you to select the desired application. Select an application and click **OK**.

4 Review the process log to see a summary of the results:

- If you are considering single-stage or first-stage applications, the Request ID's of the new Requests are listed in the process log. (If you have already linked these applications to Requests, the Request ID's of the updated Requests are listed.)

- If you are considering second-stage applications, the process log lists the Request ID's of the updated GIFTS Requests (or of new Pending Requests, if the previous Request cannot be found).

The original application is removed from the Pending folder and archived in the History folder of the GAM.

Rejecting Applications

If an application does not meet your funding requirements, you can *reject* it. Rejected applications are removed from your workflow and transferred to the History folder. You can record a Rejection Reason and generate rejection correspondence.

If you inadvertently reject an application, you can roll back its status to Pending. For details, see "Rolling Back a Rejected Application" on page 241.

Note: If you are rejecting single-stage and first-stage applications *and* your IGAM administrator has selected the preference to create Declined Requests in GIFTS for these rejections, you must first link the applications to GIFTS. For more information, please see "Linking Applications with GIFTS" on page 227.

To reject an application or a batch of applications:

1 In the Pending folder, highlight the application or applications you want to reject and choose **Action ➤ Reject** from the Main menu. The Reject Application window opens:

Select the Generate Correspondence checkbox if you want to create email or printed correspondence for these rejected applications. When you click OK, the Correspondence Wizard is displayed as described in "Generating Correspondence" on page 266.

You can enter the following information for Rejected applications:

Field	Description
Reason for Rejection	Reason for Rejection is a coded field. Your Administrator should define the reasons used by your Organization.
Comment	Any additional notes you want to make regarding this Rejected application.
Generate Correspondence	Select this checkbox to generate rejection letters and/or email messages.

Note: If you are rejecting a batch of applications, the rejection information you provide is applied to all applications in the batch.

2 Click OK. The rejected applications are transferred to the GAM History folder. A process log summarizes the results:

- If you are rejecting second-stage applications, the process log lists the Request ID's of the Pending Requests in GIFTS that have been changed to Declined.
- If your IGAM administrator has selected the preference to create Declined Requests in GIFTS for single-stage and first-stage applications, the process log also lists the new Declined Requests created, and/or the linked Requests that have been changed to Declined.

3 Click Print or Save As to keep a copy of the log for your records.

Rolling Back a Rejected Application

If you inadvertently reject an application or want to re-evaluate it, you can roll back its status to Pending. You can roll back any Rejected applications—including those that were rejected because they were duplicates.

To roll back a Rejected application:

1 Highlight it in the History folder.

2 Choose Action ➤ Rollback to Pending from the Main menu.

The application is transferred from the History folder to the Pending folder, and you are notified that the application was rolled back successfully.

Working in the History Folder

When you reject or consider applications, they are transferred to the History folder. You can search the History folder and customize the manner in which it is displayed. Applications remain in the History folder until they are purged.

The History Folder

To access the History folder, click the History icon.

By default, the following information is displayed in the History folder.

Column	Description
Attachments	If the icon is displayed, there are files attached to this application.
Application Disposition Status	The application was considered and transferred to GIFTS as a Pending Request. The application was rejected. The application was rejected because it was a duplicate. For details on duplicates, see "Avoiding Duplicate Records" on page 11.
GIFTS Request Disposition	If a Request has been created in GIFTS for this application, the disposition and disposition date of the Request are displayed here.

Column	Description
Stage	One of three values appears, indicating the stage of the application: ❖ 1/1 - A single-stage application ❖ 1/2 - The first stage of a two-stage application ❖ 2/2 - The second stage of a two-stage application
Organization (Name/Full Address/Tax ID)	The applicant organization's name, address, and Tax ID.
Request Contact (Full Name/Title/Phone/Fax/ Email)	The Request contact's name, title, telephone numbers, and email address.
Organization Contact (Full Name/Title/Phone/Fax/ Email)	The Organization contact's name, title, telephone numbers, and email address.
Request (Date/Amount/ Budget)	The application request date, the requested amount, and proposed project budget.
Rejection (Date/Reason/ Notes)	If this application was rejected in the GAM, the date, reason, and notes from that rejection are displayed in this column.
Project (Title/Description)	The name and a short description of the project.
Program Area Primary Block	The program under which the applicant organization or proposed project falls, such as 'Education' or 'Health and Human Services.'
Geographical Area Primary Block	The geographic location served by the applicant organization or the proposed project (not necessarily the organization's location).
Age Group	Used to track the age group served by the project.
Ethnicity	Used to track the ethnic group served by the project.
Population Served	A general category used to track the groups that are served by the project. Often used to track economic status or specific disabilities.
Organization Background	Background information on the applicant organization. This might include a brief history of the organization and their mission statement.

Column	Description
Application ID/Record ID/ Form ID	Applications generated from the same Form are assigned sequential Application ID numbers. When an application is retrieved into the GAM, it is also assigned a Record ID to identify the record in the database. The Form ID identifies the online application Form from which the application was generated. (The Application ID and the Form ID together comprise an ID that is unique among all other applications in the system.)

Searching in the History Folder

This section summarizes the search properties for the History folder. If you are not familiar with search techniques, please refer to the *GIFTS User's Guide*.

To run a Quick Find search for historical applications, go to the History folder and Choose **Edit ➤ Find** from the Main menu.

You can search the History folder using the following properties.

Property	Description
Age Group	The age group served by the proposed project.
Application Disposition	The Disposition of the application.
Application Disposition Date	The date the application was rejected or considered.

Property	Description
Application ID	Applications generated from the same Form are assigned sequential Application IDs.
Application Stage	The stage of the application.
All	Select this option to display all applications in the History folder.
Approval Date in GIFTS	The date the associated Request was approved in GIFTS.
Coding Sheet	Used to search applications by code.
Declination Date in GIFTS	The date the associated Request was declined in GIFTS.
Ethnicity	Used to track the ethnic group served by the project.
Form	The online application form.
Gender	Used to track the gender group that is served by the project.
Geographical Area Served	The geographic location served by the applicant organization or the proposed project (not necessarily the organization's location).
Organization Charitable	A flag indicating that the organization is a public charity.
Organization City/State/Country	The city, state, or country in the organization's postal address.
Organization Name	The name of the organization that submitted the application.
OrganizationTax ID	The organization's tax ID.
Population Served	Groups that are served by the project. Often used to track economic status or specific disabilities.
Program Area	The program under which the efforts of the funding request fall, such as Education or Health and Human Services.
Project Title	The applicant's description of the project.

Property	Description
Request Contact's Last Name	The last name of the Request's contact person.
Request Date	The date of the Request, as entered by the applicant.
Submitted Date	The date that the application was submitted.

Generating Second-Stage Applications

The second application in a two-stage process can be generated from the History folder. Highlight a considered first-stage application in the History folder and click the **Generate Stage 2** button on the folder toolbar. A window listing applicable stage-two applications opens and asks you to select the desired application. Select an application and click **OK**.

Rejecting First-Stage Applications

Once you have considered a first-stage application and generated a corresponding second-stage application, you may not decline the pending Request in GIFTS until the second-stage is retrieved. If you want to decline such a Request before receiving the second-stage application, you must reject the first-stage application in the History folder of the GAM. Simply highlight the appropriate application in the grid and select **Action ➤ Reject** from the GAM menu.

Rejecting a first-stage application will decline the pending Request in GIFTS, as well as deactivating the second-stage application form. If the applicant

attempts to access the second-stage form, they will be informed that the form has been deactivated.

Opening and Printing Processed Applications

To open an application in either the Pending or History folder, double-click the item in the grid. The application opens in a "printer-friendly" view. Specifically, it opens as an HTML web page in your default web browser. This allows you to read the application as it will appear when printed.

To print the application, print the web page in which it is displayed using your browser's print command.

Deleting Applications

You can delete selected applications from the History folder.

1. Select the application or applications and select **File ➤ Delete** from the Main menu.
2. If any of the selected applications has files attached, the following window opens:

   Important: If you are planning to re-retrieve these applications, you should probably not delete the attached files (attachments cannot be re-retrieved from the MicroEdge IGAM server). For information on re-retrieving applications, please see "Re-Retrieving Applications and Online Requirements" on page 197.

3. Click **Yes** to delete both the application and its attachments; click **No** to delete only the application; click **Cancel** to delete neither.

Purging the History Folder

Users with proper permission can purge outdated applications from the History folder. Purging the History folder does not affect Pending applications, or your GIFTS data.

You can purge the History folder at any time. Your Administrator can also set up your system to purge automatically each time you exit the GAM. In either case you are asked to confirm that you want to purge applications before they are removed from the History folder.

Caution: Applications that you purge from the History folder cannot be recovered. Before you purge applications, it is a good idea to back up your GAM data.

To purge the History folder:

1. From the Main menu, choose **Tools ➤ Purge Applications**. GIFTS notifies you of the date and time that the folder was last purged and prompts you to specify a date. Applications submitted prior to this date will be purged from the History folder.
2. Click **OK**. You are prompted with the number of applications to be purged and are asked to confirm that you want to purge them.
3. Click **Yes**. The applications are purged from the History folder.

10 Working with Correspondence

This chapter describes how to create and edit the correspondence templates needed for your online application review process, and how to generate correspondence from those templates. The settings and options described in this chapter are only available to the Administrator of your IGAM system. If you are not the Administrator, you can skip this chapter.

Note: Users of Essential GIFTS without the Correspondence option do not have access to the features described in this chapter.

In This Chapter:

About Correspondence Templates 250

Creating New Templates 254

Editing Templates 262

Generating Correspondence 266

Automated Email Messages 273

About Correspondence Templates

At key points in the review process, users can generate correspondence that merges email and letter templates with data from grant applications. This section discusses how to create these templates and manage them within the Grant Application Manager (GAM) Template Library.

Note: In IGAM, correspondence templates are used in conjunction with applications only, not online requirements.

TK: For version 5.0, this section can be removed from the GAM documentation. It is duplicated in the Admin Guide.

About the Template Library

Correspondence templates are maintained in the Template Library. To access the Library, choose **Tools ➤ Email and Letter Library** from the GAM menu.

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.

Column	Description
Letter?	If this icon is displayed, the template can be used to generate printed letters.
Email?	If this icon is displayed, the template can be used to generate email correspondence.
Description	A short description of the template. **Example:** "Rejection email for non-charitable Organizations."
Letter File Name	If the template is for generating printed letters, the template's document file name.
Created By	The staff member who created the template.

Templates are organized by event. The event determines when the template is available to generate correspondence or reports.

Event	Description
Application	You can use Application Templates to generate write-ups that merge fields from your applications. *Note that these templates are not used for correspondence.*
Considered	For correspondence that is generated when users consider an application. This would include letters notifying applicants that their proposal has been accepted for further consideration. If you are using two-stage applications, be sure to create a Considered event template specifically for considered *first-stage* applications. This template can include the applicant's account login URL (available as the "Applicant Account URL" merge field) and instruct the applicant to log in order to fill out the second-stage application.
Pending	For Pending applications only. Acknowledgement letters and requests for further information would fall into this category.
Rejected	For rejected applications only. Rejection letters would fall into this category.

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.

About Email and Letter Templates

You can create three types of correspondence templates that merge with information from your online grant applications.

Template	Description
Email	Generates email messages only. Use this template type if you want to correspond by email 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 your word processor.
Letter/Email	If the recipient's email address is in the GIFTS database, this template generates an email message; otherwise it generates a printed letter.

About Letter/Email Templates

Letter/Email (or Automatic) templates are really two templates in one. If you use this template to generate correspondence, applicants that provided an email address receive their correspondence by email. Otherwise, the IGAM prints a letter.

For details on creating and editing Letter/Email templates, see "Working with Letter/Email Templates" on page 260.

About Editing and Synchronizing Letter/Email Templates

If you are working with a Letter/Email template, and you want to customize the appearance of your letters by taking advantage of your word processor's advanced formatting features, you can edit the "letter" portions of the template in your word processor.

Once you edit a Letter/Email template in your word processor, the template is split into two templates—an email template and a separate letter template; the templates are no longer "synchronized."

The template still functions in the same manner—that is, it generates email correspondence if the applicant provides an email address; otherwise it generates printed correspondence. However, the text in the Template Viewer may not accurately reflect the text of the letters that are generated by the template.

Example: You create Body text for a Letter/Email template and then edit the letter template Body in your word processor—to add customized fonts or paragraph formatting, for example. The email text and the letter text no longer match—they are not synchronized. The texts of the email and printed correspondence that you generate with the template may differ.

When you edit the letter template in your word processor, you must continue to edit the letter portions in the word processor. (You can still edit the email sections as described in "Working with Email Templates" on page 256.)

If you want to revert back to the original combination template—and edit the letter and email portions in the Template Viewer—you can synchronize the letter and email templates.

Note that when you synchronize the templates, the template that you edited in your word processor is deleted. Changes that you made in the word processor are *not* transferred back to the Letter/Email template. The letter portions of the template are restored to their original state before you edited them in the word processor.

Creating New Templates

To create a new correspondence template:

1. From the GAM menu, choose **Tools ➤ Email and Letter Library**. The Template Library is displayed.
2. Highlight the event for the template that you wish to create.
3. Click **New Template**. You are prompted to enter a template Name and Description. Keep in mind that both should be clear to other users who will use the template.

Select the type of correspondence the template will be used to generate.

Note: If you are creating this template for the application event, you do not need to select a template type. Application event templates are used to generate printed write-ups rather than correspondence.

4 Click **OK**. You are prompted to choose the merge fields that you want to include in the template.

Add the merge fields that you want to use.

- Choose a category of information from the list on the lower left. The available columns for the category are displayed in the area on the left.
- Highlight a field and click **Include** to add it to the template. It is displayed on the right side of the screen. Note that the field name is preceded by the name of the category. For instance, 'Organization: Legal Name.'
- Note that for date and currency fields, there are options that you can use to determine how the field will be displayed in your letters. The options for a field are not displayed until you click Include and highlight the field listed on the right side of the screen.

  Here are the options that are available for displaying currency fields in your correspondence.

Note that WordPerfect template headers can accommodate no more than 56 merge fields. There is no limit for Microsoft Word templates.

5 When you have included the fields that you want to use, click **OK**. The new template is displayed.

- If you are creating an email template, please proceed to "Working with Email Templates" on page 256.
- If you are creating a letter template, please proceed to "Working with Letter Templates" on page 259.
- If you are creating a letter/email template, please proceed to "Working with Letter/Email Templates" on page 260.

Working with Email Templates

If a template will be used to generate email, the Template Viewer is displayed.

The email template is divided into four sections:

Section	Description
Email Subject	Appears in the Subject section of the message. Note that this is a text-only section; merge fields cannot be inserted here.
Email Heading	Appears at the top of the message. **Example:** The applicant's name and title.
Body	This might include a salutation and the applicant contact's name, followed by the text of the email message.
Email Close	Appears at the end of the email message. **Example:** A closing and the signer's name and title.

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 email messages are compatible with the recipient's email program, they are created in the Plain Text Format only. Text formatting options in the Email Template Viewer toolbar are disabled.

2 When you are finished, skip to the next step or click Preview Email to review your work in the Document Viewer.

In the Document Viewer, you can:

- View the email 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 copy for your records, choose File ➤ Print Email. You are returned to the Template Library.

The template is listed below the event with which you are working. The email icon indicates the template can be used to generate email correspondence.

Tip: IGAM 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 email 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, the IGAM opens a new document in your word processor.

To create a letter template:

1 Use your word processor's mail merge feature to add merged fields and text to the template. For instance, here is a Rejection letter template in Microsoft Word:

2 When you are finished defining the template, save the word processor file and close it. IGAM uses a number as the filename of the document (such as 04102022.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 Template 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 and click Save and Close. You do not have to close your word processor. 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/Email Templates

Before You Begin: Review "About Letter/Email Templates" on page 252 and "About Editing and Synchronizing Letter/Email Templates" on page 253.

If the template will be used to generate email when an applicant's email address is available and printed letters when no email address is available, the Template Viewer is displayed.

The Letter/Email template is divided into six sections:

Section	Description
Email Subject	When the template is used to generate an email message, this section appears in the message's Subject field.
Email Heading	When the template is used to generate an email 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 email 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 email and printed correspondence.
Email Close	When the template is used to send an email message, this section appears at the end of the message. **Example:** A closing and the signer's name, title, and email address.

Section	Description
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 a signature.

Note: If you are working with an existing template that was previously edited in your word processor, the "letter" sections of the template are not displayed. You can edit the "letter" sections separately in your word processor, or you can synchronize them with the Letter/Email template. For details, please see "About Editing and Synchronizing Letter/Email Templates" on page 253.

To add merge fields and text to the combination Letter/Email template:

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: IGAM does not automatically place carriage returns between the Subject, Heading, Body, and Close sections. If you want blank lines between these sections in the merged email 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 your word processor. To do this, click Edit Letter in Word Processor and add merge fields and text as described in "Working with Letter Templates" on page 259.

2 When you are finished, click Save and Close to save the template or click Print Preview to review the template.

To keep a copy of the template for your records, choose File ➤ Print. You can print the email template or the letter template.

3 When you have reviewed and saved your work, return to the Template Library.

The template is listed below the event with which you are working. The email and letter icons indicate the template can be used to generate both email and printed correspondence.

Note: You can also work with the "letter" portions of the Letter/Email template in your word processor. For details, see "Working with Letter Templates" on page 259.

Editing Templates

From the Template Library, you can open letter templates to edit them and, if necessary, add merge fields to the templates' headers.

1 From the Main menu, choose Tools ➤ Email and Letter Library. The Template Library is displayed. 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, click Open Template and skip to the next step.

- 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.

Note that to ensure that you do not remove merge fields that have already been used within the template, there is no Remove button.

When you have added the fields that you need, click **OK**.

3 The template is displayed.

- If you are editing an email template, please proceed to "Working with Email Templates" on page 256.
- If you are editing a letter template, please proceed to "Working with Letter Templates" on page 259.
- If you are editing a Letter/Email template, please proceed to "Working with Letter/Email Templates" on page 260.

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...
Email	an email template -or- the email sections of an email/letter template.
Letters	a letter template.
Email and Letters	a letter/email 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 Email" would be copied as "Copy of Rejection Email."

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.

2 Enter the new template name and click **OK**. The template is renamed.

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."

Deleting a Template

Once a template is deleted, it is no longer available from the Template Library. If you have saved the merged letters generated from the template, they 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.

Generating Correspondence

The Correspondence Generation Wizard helps you create email and printed correspondence when you retrieve, reject, and consider applications.

You can also generate correspondence for an application at any time by highlighting the application and choosing **Action ➤ Send Correspondence** from the Main menu.

Merge text and document preferences that you define for your correspondence are summarized at the bottom of the Wizard.

The Correspondence Generation Wizard appears.

To generate email or printed correspondence:

1 If you have already defined signer information for your correspondence, you can skip to the next step. Otherwise, choose **Document ➤ Signer** from the Wizard menu and specify the signer information that will be used for your correspondence.

Option	Description
Signer	The staff member who signs the correspondence. You can type the signer's name or choose it from the list.
Position	The signer's position.
Preparer	The initials of the staff member preparing the correspondence.

Tip: If the correspondence that you generate will have the same signer, you only need to specify this information once. You need to repeat this step only if you want to change the signer information.

When you are finished, click **OK**. You are returned to the Wizard.

2 If you have already defined delivery options for your correspondence, you can skip to the next step. Otherwise, choose **Document ➤ Preferences** from the Wizard menu. The delivery preferences appear.

- If you are generating printed correspondence, select 'View/Edit' to review your correspondence or 'Directly to Printer' to print the letter without reviewing it.
- If you are generating email correspondence, you can request that an email return receipt be sent to you when the recipient reads their message.

Tip: If the correspondence that you generate will have the same delivery options, you only need to specify this information once. You need to repeat this step only if you want to change the delivery options.

When you are finished, click **OK**. You are returned to the Wizard.

3 From the Wizard toolbar, choose Mode and select the type of correspondence that you want to create.

Option	Description
Printed Correspondence	GIFTS uses your word processor to generate a printed letter.
Email Correspondence	GIFTS generates an email message and allows the attachment of additional correspondence templates. You may send the Email to multiple contacts from the application form. If no email addresses are available, no correspondence is generated.
Automatic	If the recipient has an email address, GIFTS generates an email message. Otherwise GIFTS generates a printed letter.

The templates available for the correspondence type you choose appear.

4 Select the template that you want to use to create your correspondence.

5 Click **Next** or click the **Who** tab. You can define the salutation that is added to your correspondence, and add any users who should receive a copy of the correspondence in the CC field. If the salutation is not appropriate for the correspondence you are generating, you can edit it.

Note: If you are generating correspondence for a batch of applications, the Who tab is not displayed. Batch correspondence is sent to the application's Contact. You cannot edit the salutation for a batch of correspondence.

6 Click **Finish**.

- If you chose to print your letters without reviewing them, the process is complete: the letters are sent to your printer.
- If you chose to review your printed letters—and your Administrator set up GIFTS to save batches of documents to a single document file—they are displayed in your word processor. Scroll up or down in the document to view the letters in a batch.

  When you are finished reviewing the letters, you can print them directly from the word processor.
- Otherwise, your correspondence is displayed in the Correspondence Viewer.

  For details on reviewing and editing correspondence in the Correspondence Viewer, see "Working with the Correspondence Viewer" on page 272.

Email Mode Attachments

When sending correspondence in Email mode, you now have option to attach an additional template and then send the email to multiple recipients.

Some notes to consider:

- Additional templates must be created in the Email and Letter Library in the same status category as the correspondence being sent (Considered, Pending, or Rejected).
- Only one attachment is allowed per email.
- In batch mode, the Applicant is automatically selected as the main recipient.
- The list of possible recipients will depend on the number of contacts available on the application.

The following is an example of the Email Correspondence process.

1 In IGAM, select one or more applications and then go to Action ➤ Send Correspondence or click the Send Correspondence button to open the Correspondence Generation Wizard window.

2 On the Correspondence Generation Wizard's What tab select an attachment from the drop-down menu on the bottom.

If you do not see the drop-down menu, make sure you are in Email mode by clicking the Mode button.

3 Click Next to move to the Who tab.

4 On the Who tab, click the **To..** button to select recipients for your email and the attachment selected.

IGAM will display all contacts entered on the application. You can check the ones you desire to receive the email or choose Select All and then click OK.

Note: If multiple applications were selected for the email, the To button will not be available...

5 Click the **Finish** button to generate the email and open the Correspondence Viewer.

6 From the Correspondence Viewer, click **View Attachment** to see your attached document before sending.

Working with the Correspondence Viewer

If you are working with email messages—or your Administrator set up GIFTS to save printed letters to individual document files—you can review and edit your correspondence in the Correspondence Viewer.

- If you are working with a batch of correspondence, you can navigate from one message to another by clicking **Previous or Next**.
- To edit the email message or letter that is displayed in the Viewer, click Open. If you are editing email messages, they are displayed in the Email Editor. Otherwise, GIFTS opens the printed letter document in your word processor. When you save your changes after editing the document, you are returned to the Correspondence Viewer.
- To prevent a message or letter in a batch from being sent—perhaps you are unsure if the Contact's name is correct—click **Skip**. When you send the batch, the skipped message is not sent and no Correspondence Activity information is recorded. You can go back and generate the correspondence later.

When you are ready to deliver your correspondence, click **Send All**. IGAM records the date that the correspondence was created and the template that was used. Email messages are sent to the address in the email header. Printed letters are sent to your printer.

Automated Email Messages

There are certain instances when IGAM will automatically send email messages to applicants. Automated emails are sent when an applicant or grantee:

- Opens an account.
- Changes their password.
- Has his or her IGAM password changed in GIFTS
- Forgets their password.
- Uses the **Save and Finish Later** button.
- Submits an application.
- Submits an online requirement.
- Sends a copy of an application.
- Creates an IGAM account in GIFTS.

The templates for these automated emails do not reside in the template library, but rather in the Automated Emails section of the IGAM preferences. You can open the Preferences window by choosing **Tools ➤ Preferences** from the GAM Main menu. For details on customizing the contents of these messages, see "Automated Emails" on page 103.

You can also edit the Submission Confirmation automated email at the form level for individual forms. For more information, see "Links Tab" on page 156.

11 Reporting from IGAM

This chapter describes how to report on the number of online applications you are receiving, how to print information displayed in the IGAM folders, and how to get up-to-date information on IGAM transaction charges your organization is accruing.

In This Chapter:

Standard IGAM Form Reports 276
Ad Hoc Reporting from IGAM Folders 284

Standard IGAM Form Reports

Eleven standard reports are available in IGAM 5. They can be used to present totals from applications, online requirements, as well as responses from eligibility quizzes.

Reports on Applications can be run on In Progress or Submitted forms.

Reports on Online Requirements can be run on In Progress, Submitted, or Outstanding forms.

There is one report on eligibility quizzes.

Note: As Online Requirements are initiated from GIFTS, you can also run ad-hoc reports on requirements in GIFTS. For more information, see the *GIFTS User's Guide*.

Detailed Reports These reports list the details of each application/requirement grouped by form. They include form name, organization, email, project title, submit/create date, ID number, number of attachments, and total attachment size.

Summary Reports These reports list only the Form, Stage, Number of Applications/Requirements, Number of Attachments, and Total Attachments Size.

Reporting on Applications

Submitted Applications This includes all applications that have been submitted by an applicant.

In Progress Applications These include *any* application started but unfinished by online applicants or applications that have been specifically saved by the user (by clicking the **Save & Finish Later** button). This may also include applications left unfinished by users who simply left your site without saving. In certain cases, these unfinished applications are saved by the system for a certain length of time before being purged.

Note: If you have the multiple site functionality, you can create IGAM reports for individual sites. For more information, see "Running Reports for Different Sites" on page 292.

The Submitted Applications Detailed Report:

Submitted Applications Detailed

Thursday, July 7, 2011

Form/Stage	Organization [Tax ID]	E-mail Address	Project Title	Submit Date	App ID	Attach #	Attach Size
Mid-Atlantic Application [35007]	Computers for Kids [9793829]	jsanguancheu@microedge.com	August MA 2011	7/6/2011 5:20 pm	20009	0	0K
Single Stage	Computers for Kids [9793829]	jsanguancheu@microedge.com	Fall 2011 Southeast Drive	7/6/2011 5:44 pm	20016	0	0K
				Total for Form 35007	**2**	**0**	**0K**
Northeast Application [35006]	Computers for Kids [9793829]	jsanguancheu@microedge.com	August 2011 NYC Fund	7/6/2011 5:15 pm	20006	0	0K
Single Stage	West 54th Community Center [13245678]	jsanguancheu@microedge.com	Fall NYC 2011 Drive	7/6/2011 5:29 pm	20014	0	0K
				Total for Form 35006	**2**	**0**	**0K**
Southeast Application [35008]	Computers for Kids [9793829]	jsanguancheu@microedge.com	August SE 2011 Fund	7/6/2011 5:24 pm	20011	0	0K
Single Stage	Central Florida Relief [9793829]	jsanguancheu@microedge.com	Fall 2011 Disaster Relief Fund	7/6/2011 5:49 pm	20017	0	0K
				Total for Form 35008	**2**	**0**	**0K**
				Grand Total	**6**	**0**	**0K**

The Submitted Applications Summary Report:

Submitted Applications Summary

Thursday, July 7, 2011

Form	Stage	Submitted Applications	# of Attachments	Total Size of Attachments
Mid-Atlantic Application [35007]	Single Stage	2	0	0K
Northeast Application [35006]	Single Stage	2	0	0K
Southeast Application [35008]	Single Stage	2	0	0K
	Grand Total	**6**	**0**	**0K**

The In Progress Applications Detailed Report:

In Progress Applications Detailed

Thursday, July 7, 2011

Form/Stage	Organization [Tax ID]	E-mail Address	Project Title	Created	Last Updated	App ID	Attach #	Attach Size
Northeast Application [35006]	Computers for Kids [9793829]	jsanguancheu@microedge.com	NYC Summer Computer Camp 2011	7/5/2011	7/6/2011	20004	0	0K
Single Stage								
					Total for Form 35006	**1**	**0**	**0K**
Southeast Application [35008]	South Maryland Dreams [4865465]	jsanguancheu@microedge.com	Thanksgiving Project 2011	7/6/2011	7/6/2011	20018	0	0K
Single Stage								
					Total for Form 35008	**1**	**0**	**0K**
					Grand Total	**2**	**0**	**0K**

The In Progress Applications Summary Report:

In Progress Applications Summary

Thursday, July 7, 2011

Form	Stage	In Progress Applications	# of Attachments	Total Size of Attachments
Northeast Application [35006]	Single Stage	1	0	0K
Southeast Application [35008]	Single Stage	1	0	0K
	Grand Total	**2**	**0**	**0K**

Reporting on Online Requirements

IGAM 5 added six new standard reports for querying online requirements data. There is a Detailed and Summary report for each type of online requirement listed below.

Submitted Online Requirement Requirements that have been filled out and submitted by the applicant.

Outstanding Requirements Requirements that have not been accessed or submitted by the applicant.

In Progress Requirements Requirements that have been accessed by the applicant but have not been submitted.

The Submitted Requirements Detailed Report

Submitted Requirements Detailed

Thursday, July 7, 2011

Form	Organization [Tax ID]	E-mail Address	Request ID	Project Title	Submit Date	Requirement ID	Attach #	Attach Size
Project Plans [35011]	Central Florida Relief	jsanguancheu@microedge.com	8	Fall 2011 Disaster Relief Fund	7/7/2011 5:03 pm	41	1	1K
					Total for Form 35011	**1**	**1**	**1K**
Site Visit [35010]	Computers for Kids	jsanguancheu@microedge.com	9	Fall 2011 Southeast Drive	7/7/2011 5:00 pm	33	0	0K
	Computers for Kids	jsanguancheu@microedge.com	13	August 2011 NYC Fund	7/7/2011 5:03 pm	40	0	0K
					Total for Form 35010	**2**	**0**	**0K**
					Grand Total	**3**	**1**	**1K**

The Submitted Requirements Summary Report

Submitted Requirements Summary

Thursday, July 7, 2011

Form	Submitted Requirements	# of Attachments	Total Size of Attachments
Project Plans [35011]	1	1	1K
Site Visit [35010]	2	0	0K
Grand Total	**3**	**1**	**1K**

The Outstanding Requirements Detailed Report

Outstanding Requirements Detailed

Tuesday, June 07, 2011

Form	Organization [Tax ID]	Email Address	Request ID	Project Title	Created	Requirement ID	Attach #	Attach Size
Required Project Details Form [35010]	Computers for Kids	jsanguancheu@microedge.com	715	Maryland Summer 2011 Drive	6/7/2011	3590	0	0K
	Computers for Kids	jsanguancheu@microedge.com	714	New Jersey Summer 2011 Drive	6/7/2011	3592	0	0K
					Total for Form 35010	**2**	**0**	**0K**
Site Visit [35012]	Computers for Kids	jsanguancheu@microedge.com	715	Maryland Summer 2011 Drive	6/7/2011	3589	0	0K
	Computers for Kids	jsanguancheu@microedge.com	714	New Jersey Summer 2011 Drive	6/7/2011	3591	0	0K
					Total for Form 35012	**2**	**0**	**0K**
					Grand Total	**4**	**0**	**0K**

The Outstanding Requirements Summary Report

Outstanding Requirements Summary

Tuesday, June 07, 2011

Form	Outstanding Requirements	# of Attachments	Total Size of Attachments
Required Project Details Form [35010]	2	0	0K
Site Visit [35012]	2	0	0K
Grand Total	**4**	**0**	**0K**

The In Progress Requirements Detailed Report

In Progress Requirements Detailed

Thursday, July 7, 2011

Form	Organization [Tax ID]	E-mail Address	Request ID	Project Title	Created	Last Updated	Requirement ID	Attach #	Attach Size
Progress Report [35012]	No organization specified	jsanguancheu@microedge.com	8	Fall 2011 Disaster Relief Fund	7/7/2011	7/7/2011	34		0K
						Total for Form 35012	**1**		**0K**
Project Plans [35011]	No organization specified	jsanguancheu@microedge.com	10	Fall NYC 2011 Drive	7/7/2011	7/7/2011	37		0K
	No organization specified	jsanguancheu@microedge.com	8	Fall 2011 Disaster Relief Fund	7/7/2011	7/7/2011	41		0K
						Total for Form 35011	**2**		**0K**
Site Visit [35010]	No organization specified	jsanguancheu@microedge.com	9	Fall 2011 Southeast Drive	7/7/2011	7/7/2011	33		0K
	No organization specified	jsanguancheu@microedge.com	13	August 2011 NYC Fund	7/7/2011	7/7/2011	40		0K
						Total for Form 35010	**2**		**0K**
						Grand Total	**5**		**0K**

The In Progress Requirements Summary Report

In Progress Requirements Summary

Thursday, July 7, 2011

Form	In Progress Requirements	# of Attachments	Total Size of Attachments
Progress Report [35012]	1		0K
Project Plans [35011]	2		0K
Site Visit [35010]	2		0K
Grand Total	**5**		**0K**

Reporting on Eligibility Quizzes

You can run a report to view responses from all eligibility quizzes, or only those quizzes for specific application forms.

Note: This report only provides responses on eligibility quizzes processed after IGAM's server was upgraded on March 29, 2009.

The Eligibility Quiz Information Report.

Eligibility Quiz Information

Thursday, July 7, 2011

Quiz Summary for Selected Forms

Status/Response	Count	Percent %
Passed	2	100%
Total	**2**	

Quiz Details for Eligibility Quiz / 35005

Status/Response	Count	Percent %
Geographical Area Served?		
Central (correct)	2	100%
Is your organization 503(c) certified?		
Yes (correct)	2	100%
What types of programs do you support?		
Civic and Community (correct)	2	100%
Are you seeking annual funding or an individual request?		
Individual Request (correct)	2	100%

Running IGAM Reports

To utilize an IGAM standard report:

1 From the IGAM menu, select **Forms ➤ Reports**. The Reports window opens:

2 From the drop-down menu, choose a report you want to run.

3 Filter the data on which you wish to report:

- You can click the **Specify Date Range** button in the Reports window toolbar and limit the numbers reported to those for which the retrieval date falls within a specified range.

  If you are reporting on eligibility quizzes, you can click **Specify Date Range** in the Reports window toolbar and limit the responses to those that were received within a specified date range.

  Click **Clear Date Range** to remove the date filter. Date Range filters cannot be applied to reports on in-progress applications.

- The Specify Forms section allows you to choose the form or forms used to create the application(s) you wish to include in the report. Note also that you can select multiple items from the list of forms.

  Selecting an item in the drop-down menu allows you to limit the list to those forms of a specific stage.

4 Click **Run Report**. The report opens in another window.

Note: To export the report to Excel, select **Action ➤ Export to Excel.**

Ad Hoc Reporting from IGAM Folders

Ad hoc reporting allows you to print application data in report form. You can use the Grant Application Manager's search facilities and customizing options to select and display applications that you want to include in the report. Then, you can print the contents of the IGAM grid. From the main menu, select **File ➤ Print ➤ Print Grid**.

Note: For details on formatting and printing ad hoc reports, please refer to Chapter 5 of the *GIFTS User's Guide*, "Reporting from the Organizer." The preview and print options described there are also available in IGAM.

Data displayed in the Pending and History folders can also be exported to an Excel spreadsheet, or to an HTML file. Select **File ➤ Export ➤ Excel** or **File ➤ Export ➤ HTML** to export the data displayed in the grid.

Note: Details on exporting data are also described in Chapter 5 of the *GIFTS User's Guide*, "Reporting from the Organizer."

12 Managing Multiple Sites

This chapter describes how to set up and use IGAM 5.5 with multiple site IDs (SIDs), which allows users to create and configure several My Account pages and assign different IGAM forms to different sites.

Note: This feature is only available for clients who purchase multiple IGAM sites. If you want this feature, please contact your MicroEdge sales representative.

In This Chapter:

Overview of Multiple Sites **286**

Configuring Multiple Sites **287**

Assigning Sites to Forms **288**

Retrieving IGAM Forms **289**

Running Reports for Different Sites **292**

Overview of Multiple Sites

Upon Request MicroEdge can now configure your installation of GIFTS to support multiple Site IDs without need for special software installs.

In order to use the multiple site functionality, MicroEdge must first enable this feature on the IGAM server.

Once enabled, your next entry into IGAM will query the server for additional Site ID's and assign them to your account.

The images below show two different My Account pages that you could create using the multiple site functionality.

Configuring Multiple Sites

You can configure the additional site(s) using the IGAM Preferences window.

To access the additional site(s), choose **Tools ➤ Preferences** from the GAM menu, and then go to **Applicant/Grantee View ➤ Options**.

The following window appears.

Each site appears in the Options window with a Name and SiteID. You can change the site name, as well as manage all other global IGAM options, including Links, Design, Graphics, Email, and Request/Payment Status.

The My Account page for each site will have it's own look and feel, depending on how you set these preferences.

For more information, see "Site Design Wizard" on page 82, "Automated Emails" on page 103, and "Request / Payment Status" on page 108.

To edit a site:

1 Highlight the site in the Options window, and click **Edit**. The following window appears.

2 Edit the information as necessary. For more information, see "Site Design Wizard" on page 82 and "Automated Emails" on page 103.

Assigning Sites to Forms

The default account (or SID) for any form will always be the original, default SID.

- To assign a different account to a form, the form must be Inactive and never previously activated.
- To assign a different SID after activation, the user must use the Save As function to copy the form and create a new, inactive form.

The Site drop-down list will only be enabled for new, inactive and never previously published IGAM applications. It will display the available SIDs for assignment.

To assign a form to a specific site, there is a Site drop-down menu on the Properties tab of the Form Design Wizard that allows you to select the site name.

This Site menu will also be available for new and inactive Requirements.

Note: You cannot assign an active form to a different site.

This field is disabled for Stage 2 forms as they inherit the associated Stage 1 form's site.

Once the form is saved and activated, applicants will receive email, view links, and access all My Account page options and view the My Account page designed for this site.

For more information about the Form Design Wizard, see "The Form Design Wizard" on page 118.

Retrieving IGAM Forms

Retrieval preferences can be found in the **Preferences ➤ System Wide ➤ Application Handling** page. Options allow for selecting one or all SIDs for automatic retrieval upon login.

If set to All Sites, when retrieving applications you will receive different prompts for each site that has applications to be retrieved. For example, if there are no applications for site 944, but one application for site 986, you will receive the separate prompts for each.

Once retrieved, all multiple site applications function as any other application, and the linking and considering process is the same.

Re-retrieval will also be SID specific, with the ability to select the SID for re-retrieval as an additional drop-down.

For more information, see “Retrieving Applications, Requirements, and Attachments” on page 194, and “Considering Applications” on page 236.

Site ID Column

To allow users to know the SID that corresponds to an application, the **Site ID** column is available in the Show Columns window.

1. Go to View Show Columns to open the Columns window.
2. Select the Application category from the 'Select available columns from' drop-down menu.
3. Highlight Site ID and then click Include to move it to the visible columns list on the right.
4. Click Save and Close.

Running Reports for Different Sites

With the multiple site functionality, you can create IGAM reports for individual sites. The Reports window contains the **Select Account to choose from** menu which allows you to specify the site for which you want to run a report.

For more information about IGAM reports, see "Reporting from IGAM" on page 275.

Index

A

accessing in-progress applications 29
accounts
    grantee 30
Activate tab
    Form Design Wizard 162
activities
    IGAM Update Activity 222
applicant accounts
    about 30
    creating 34
    home page 31
    linking to login page 30
    logging in 33
applicant home page 31
applicant login page 30
applicant view
    preferences 80
applicants
    researching 211
application display language
    creating 183
    customizing 181
    editing other IGAM text 185
application fields
    setting character width 142
    setting word limit 143
application forms. *See* forms
application retrieval
    automatic 63
    preferences 63
applications
    checking for errors 207
    checking spelling 209
    considering 236
    deleting 214, 247
    handling preferences 63
    linking to GIFTS 227
    marking as Incomplete 208
    opening 203, 247
    printing 203, 247
    proofing preferences 60
    rejecting 239
    re-linking to GIFTS 223
    re-retrieving 197
    retrieving 195
    searching for Pending 203
    searching for processed 244
    transferring branch 212
    viewing in History folder 242
    viewing in Pending folder 200
attachments
    opening 207
    preferences 65
    purging for rejected applications 66
    required 155
    retrieving 195
Attachments tab
    Form Design Wizard 153
automated e-mails 103
    editing contents 104
automated emails 55

B

branch security
    transferring applications 212

C

code tables
- displaying lowest level code value first 149
- restricting code values 149

Codes tab
- Form Design Wizard 148

common grant applications 117
considering applications
- definition 216
- first-stage 218
- processing consideration 236
- second-stage 220
- single-stage 216

Contact fields
- updating in GIFTS 233

Contacts
- additional 125
- linking 231

copying correspondence templates 263
correspondence
- preferences 62

correspondence templates 250
- copying 263
- creating 254
- deleting 265
- editing 262
- e-mail 250, 252
- events 251
- letter 252
- printed 250
- renaming 264
- synchronizing 253, 261

customizing display language 181

D

declined Requests
- for rejected applications 62

deleting applications 214, 247
Design tab 94
- color options 96
- layout options 94
- text format options 97

Design Wizard 82
- color options 96
- Design tab 94
- Graphics tab 98
- layout options 94
- Links tab 82
- text format options 97

Display decimals separately 143
display language
- creating 183
- customizing 181
- editing other IGAM text 185

disposition date 61
documentation
- conventions xi
- online Help xii
- Solutions Knowledgebase xv
- using ix-xiii

duplicate records
- avoiding 11
- duplicate Requests 11
- duplicate search preference 61
- multiple submissions 11

duplicate Requests
- avoiding 11

E

editing
- correspondence 272
- correspondence templates 262

eligibility quiz
- including on a form 122
- new question 130
- setting up 128

e-mail
editing contents 104
see also automated e-mails 104
templates 252
exporting application data 284

F

field description 142
field label 142
firewalls 77
first-stage applications
considering 218
form description 121
form design
planning 115
system requirements 114
Form Design Wizard 118
Activate tab 162
adding Contacts 125
Attachments tab 153
Codes tab 148
creating pages 125
eligibility quiz, new question 130
Fields tab 133
ineligibility text 130
Properties tab 120
quiz tab 128
setting a password 127
tax ID setting 127
form title 120
Forms 170
forms
activating 167
adding fields to 133
copying 170
creating pages on 125
deactivating 168
deleting 170
editing 169
Form Design Wizard 118
Forms Manager 166
limiting access to 115
previewing 163
single-stage vs. two-stage 116
Forms Manager 166
foundation code
preference 72

G

getting started 47
grantee accounts 30
Graphics tab 98
graphics, adding to forms 98

H

History folder 242
purging 61, 248
rolling applications back to Pending 241
searching 244
summary information 10
viewing 242

I

IGAM path field
preference 65
IGAM permissions 12
IGAM Update Activity 222

Include Search prompt 149
ineligibility text
    writing 130
IRS tax data
    foundation code 72
    preferences 70
    subsection code 72

L

linking
    Contacts 231
    Organizations 227
    Requests 234
linking applications 227
    about 221
    matching logic 224-225
    re-linking 223
    the Linking Helper 227
links
    setting defaults 88, 156, 161
Links tab
    Design Wizard 82
logging in to applicant accounts 33
logos, adding to forms 98

M

maintenance and support program xv
Managing 285
messages, on-screen
    setting defaults 90, 159
MicroEdge Solutions Knowledgebase xv
multiple site IDs (SIDs) 285
multiple sites 285
multiple submissions
    about 11
    avoiding 11

O

online Help xii
Online requirements 173
online requirements 173
    removing 176
    retrieving 193
opening applications 203, 247
opening attachments 207
Organization fields
    updating in GIFTS 230
Organization fields, suppressing 122
Organizations
    linking 227

P

Page Layout Grid 137
password
    resetting 112
    setting up 127
Pending folder 200
    summary information 10
    view options 205
Preferences
    applicant view 80
    application handling 63
    application proofing 60
    application retrieval 63
    attachments 65
    attachments download path 65
    automated e-mails 103
    automatic application retrieval 63
    correspondence settings 62
    default complete/incomplete

status 111
Design Wizard 82
duplicate search 61
external 64
foundation code 72
IGAM path field 65
Internet connection 66
IRS tax data 70
maintenance 61
purging attachments 66
purging historical applications 61
research options 110
subsection code 72
system-wide 60
updating GIFTS 66
updating text fields 68
user view 79
printing ad hoc reports 284
printing applications 203, 247
Properties tab
Form Design Wizard 120
proxy servers 75
purging the History folder 248

Q

Quick Start Guide 47
quiz
see eligibility quiz

R

rejected applications
creating declined Requests for 62
rolling back to Pending 241
rejecting applications
definition 216
first-stage 219
processing rejection 239
second-stage 220
single-stage 217
re-linking to GIFTS 223
re-linking Contacts 231
re-linking Organizations 228
re-linking Requests 234
Removing online requirements 176
reporting IGAM data
ad hoc reports 284
exporting to Excel 284
exporting to HTML 284
numbers of applications 276
standard IGAM reports 276
request status 108
uploading from GIFTS 109
Requests
linking 234
requiring duplicate search 61
Require Account Login 127
requirement forms 4
requirement workflow 26
re-retrieving applications 197
researching applicants 211
preferences 110
Restoring Deleted Forms 170
retrieving
attachments 195
retrieving applications
about 194
automatic 63

S

searching
- for multiple submissions 210
- for Pending applications 203
- for processed applications 244
- in the History folder 244

second-stage applications
- considering 220
- generating 237, 246
- rejecting 220
- workflow for completing 23

Security Settings 84
Show Lowest Level First 149
SID 285
signer information 266
single-stage applications
- considering 216
- rejecting 217
- workflow for completing 16

site IDs (SIDs) 285
Solutions Knowledgebase xv
spell check
- performing 209
- requiring 60

SSL encryption
- bypassing 165

standard IGAM reports
- description 276
- running 112, 283

subsection code
- preference 72

summary information
- History folder 10
- Pending folder 10

support
- for IGAM users xiii
- for your applicants xiv

synchronizing correspondence
- templates 253, 261

system requirements 114

T

templates, correspondence 250
text fields
- updating 68

U

U.S. tax ID
- requiring 127

Update GIFTS 230, 233
user view
- preferences 79

W

Width (in chars) 142
Word Limit 143
workflows
- for IGAM users 5
- for online applicants 15
- second-stage application 23
- single-stage application 16