MicroEdge

GIFTS® Online

Legal Notice

Manufacturer is MicroEdge, LLC. 619 W. 54th Street, New York, NY 10019.

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Contents

Welcome to GIFTS Online

GIFTS Online is a web-based grants management system based on decades of best-in-class grants management technology from MicroEdge, the leading provider of solutions for the giving community.

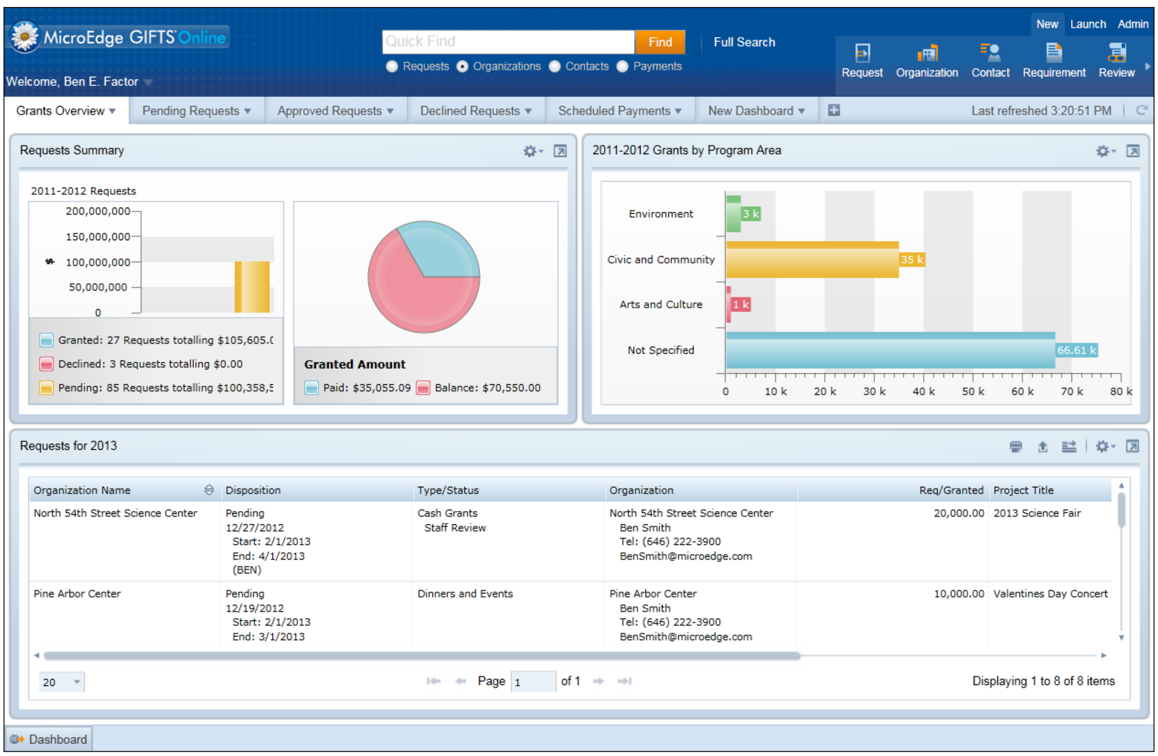
With more than 2,400 clients worldwide, MicroEdge software and services empower organizations to be more strategic and focused with their giving.

GIFTS Online helps accomplish this by putting the information most important to you right up front on a tailored home page, and then allowing you to drill down to the details you need.

Images in the Online Help

Some of the larger images in the Online Help topics are minimized.

Simply ***click the image*** to expand it to full size and click again to return to normal.



System Requirements for GIFTS Online

While GIFTS Online is a hosted solution, there are some requirements for the client workstation.

Microsoft Silverlight

The GIFTS Online interface is based on Microsoft's Silverlight technology and requires all GIFTS Online users to have it installed.

If your computer does not currently have Silverlight installed, you may pre-install it on your workstation(s) using this link: http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx.

NOTE: Grantee applicants using online applications DO NOT require Silverlight.

Installing Silverlight

NOTE: The following procedure assumes use of IE 10. Use of another browser may result in slightly different prompts. You must have sufficient administrative privileges to install Silverlight on the workstation.

1. If the computer does not have Silverlight installed, the first time you attempt to login to GIFTS Online the browser will prompt you to **Update and Launch GIFTS Online**.
2. Click the **Update and Launch GIFTS Online** button to begin the direct download of Silverlight from Microsoft.
3. If you get a Security Warning, click **Run** to continue. The download progress will be displayed.
4. When the download is complete, the system may prompt for confirmation to install. Click **Run**.
5. When the Silverlight Install prompt is displayed, click Install now.
6. Once the Installation Successful message appears, click **Close**.
7. The GIFTS Online login screen will be displayed. Login to go to the homepage.

The Document Template Manager

The new Document Template Manager requires a quick install the first time you use it. A prompt will ask for confirmation and the installation should be very quick. You will then be taken to the GIFTS Online login screen.

For more details, please see About the Template Manager.

IMPORTANT: The Document Template Manager will only work on a Windows OS workstation.

Accessing the Document Template Manager After Install

After the initial install you will use the Document Template Manager icon placed on your desktop to start the Template Manager.

NOTE: If you attempt to use the menu option **Admin > Template Manager** again, a message will be displayed prompting you to use the icon on your Windows desktop instead.

Technical Support

For technical assistance please refer to the link below:

MicroEdge Maintenance and Support Program

Understanding and Customizing GIFTS Online

GIFTS Online pages are the Web pages used to view and work with your giving data.

Types of user pages include the home page, search pages, and edit forms.

The GIFTS Online basic look and feel can be customized depending on your user group.

Some options include:

- Manage which dashboard parts you want displayed on your homepage and arrange them to your liking
- Manage the number of columns displayed on the home page
- Manage the number of items displayed in search results
- Change your password

For more details about GIFTS Online, see the following topics:

The GIFTS Online Homepage

GIFTS Online Basics

MicroEdge Support Program

As a GIFTS Online subscriber, you receive unlimited telephone consultation on the use of the software, assistance in error isolation and correction, and prompt furnishing of any available problem solutions relating to GIFTS Online.

Our toll-free Technical Support hotline is available Monday through Friday, 8:00 A.M. to 8:00 P.M. Eastern time.

You may contact MicroEdge's Technical Support Team as follows:

Phone

(877) 704-3343

Fax

(212) 757-1784

Email

helpdesk@microedge.com

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

GIFTS Online Basics

This section introduces some basic concepts and ideas you will work with when using GIFTS Online.

GIFTS Online Modules

GIFTS Online uses a modular approach to functionality: separate modules can be linked, allowing each client to build a system that meets their specific needs.

Some features discussed require an optional module to be purchased separately and enabled by MicroEdge. To read more about GIFTS Online Core applications and optional Modules, please see *About GIFTS Online Modules*.

Searching for Data

Before you can work with your grant making data or run reports, you need to find the relevant information. The GIFTS Online search features allow you to create a set of search criteria that tell the system exactly what you are looking for.

- Quick Find
- Full Search
- Recent Searches
- Saved Searches
- The Search Results Page

Editing Data in GIFTS Online

Once you've found the record you want to work with, your next step may be to update or edit it. GIFTS Online edit forms are similar for all record types such as Organizations, Requests, or Affiliations.

Branch Security

Branch Security allows grantmakers with multiple sites to capture all of their information in a centralized database, while preventing users from different branches from editing (or viewing, if desired) each other's data.

NOTE: This is an optional feature; your GIFTS Online system may not use Branch Security.

Understanding Branch Security

Batch Updates

Batch updates are actions that can be performed on more than one record. They are available from both the Search Results page and Related Records grids.

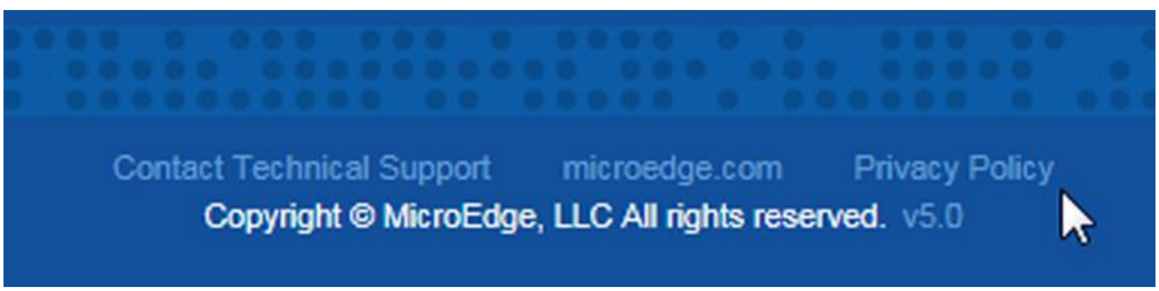
GIFTS Online supports several batch update features from the Actions menu.

These include:

Record Type	Action
Organization	Update Coding Sheet
Contact	Update Coding Sheet
Request	Update Coding Sheet
Request	Update Request Type/Status
Request	Update Meeting Date
Request	Update Staff Assignments
Request	Update Project Assignments
Payments	Update Codes

Privacy Policy Link on Login Page

The MicroEdge Privacy policy is accessible by users from the footer of the login page.



When the user clicks on the link, the user will be taken to the following page in a new browser tab: http://www.microedge.com/Special/Privacy.aspx.

The login page will remain open in the previous tab.

Inactivity in GIFTS Online

Please note that for security purposes GIFTS Online will time out after 30 minutes of inactivity.

When a GIFTS Online user's activity for the session has been idle and is 2 minutes from expiring, a popup message will show alerting them to this. This popup will appear above all open browser windows.

It will allow users to continue the session by clicking the **OK** button in the message. Clicking **OK** will refresh the session.

The following GIFTS Online modules will have their own session timers.

- The Document Template Manager
- The Forms Manager

About GIFTS Online Modules

GIFTS Online uses a modular approach to functionality: separate modules can be linked, allowing each client to build a system that meets their specific needs. In keeping with this approach, some modules are standard with every GIFTS Online system, and others are available for purchase separately.

Below is an overview of the features of the GIFTS Online core, and each of its optional modules.

The GIFTS Online Core

The core system includes all of the functionality necessary for online grants management. With a few noted exceptions, the features described in the following topics are available in all GIFTS Online systems:

Working with Organizations

Working with Requests

Working with Payments

Working with Contacts

Working with Affiliations

Working with Activities and Requirements

Managing Documents

Generating Reports and Correspondence

The Accounts Payable (A/P) Module

The optional GIFTS Online Accounts Payable (A/P) Module allows you to process your payments in two ways:

1. **A/P Link:** Exchange payment information between GIFTS Online and your accounting system using import/export functionality.
2. **Check Writer:** Select pending payments to merge into a check template and print directly to your own check stock.

Click here for more details on the A/P Module.

The Blueprint Module

GIFTS Online Blueprint is a comprehensive set of tools which have been built using the new GIFTS Online interface to help create custom fields and forms which can be used to personalize your GIFTS Online system using your own language and terminology through the system and tailoring of the experience of each of your users.

Click here for more details on the GIFTS Online Blueprint Module.

The Budget Module

This optional module is for grant makers who wish to track their giving against a pre-defined annual budget. A budget is established at the beginning of the fiscal year and all grant Payments for that year are appropriated from the budget. This enables you to compare your spending against your budget and produce statistical and summary reports.

Click here for details on the features of the Budget.

Internal and External Reviews Modules

Internal and External Reviews modules are designed to give reviewers access to your proposals. They can then provide instant feedback on new proposals by editing and submitting Review data online.

These two optional modules are sold separately; which you need depends on who you seek feedback from:

- Internal reviewers are staff members whom you rely on for regular feedback during your grant workflow.
- External reviewers are outside consultants, subject-matter experts, and other people you want occasional feedback from.

Click here for details on working with Reviews and reviewers, both internal and external.

The Online Applications and Requirements Module

The Online Applications and Requirements Module enables you to post grant applications and requirements online, then receive completed applications and requirements in GIFTS Online. Applications can either be rejected or converted to pending Requests for further review. Requirements are automatically transferred to GIFTS Online.

Click here for details on working with grantees online using Online Applications and Requirements.

Understanding Branch Security

NOTE: Branch Security is an optional feature; your GIFTS Online system may not use it.

Branch Security allows grant makers with multiple sites or branches and separate giving programs to capture all of their information in a centralized database, while preventing users from different branches from editing (or viewing, if desired) each other's data.

Users cannot edit or view data from other branches unless they are granted permission to do so. In addition, reports and searches generated by users only include data for the branches for which they have "view" rights.

To accomplish this, you can enter a code for each of your branches into the system. Each Request and its associated Activities, Payments, and Requirements are then stamped with a primary branch. Each group's access can then be restricted to records based on the branch stamp.

NOTE: Access to Organization and Contact information is not limited to specific branches. This ensures that you maintain an accurate giving history for Organizations that are funded by more than one branch.

When you set up Branch Security for your system, you must choose one of two ways Requests (and thus their associated Activities, Payments, and Requirements) can be stamped with a primary branch:

- A Request can be automatically stamped with the primary branch of the user creating it.
- The Request form can include a branch field, allowing a user to enter a specific branch him- or herself.

The option you chose to have MicroEdge implement depends upon which of two different data entry models you use.

Centralized Data Entry Model

The centralized data entry model is most likely to be used by organizations that manage several different, wholly separate funds.

In this case, a single user group is accepting, entering, approving, and declining grant requests for many various funds. However, you also want representatives of the individual funds to be able to view the data for their fund (and their fund only).

In this case, you want your users to enter the branch for each Request manually. This allows a single user to enter Requests for several different branches.

For example, you could create a "Headquarters" branch that has access to all data; these users would be employees of your central organization. Then you can create a branch for each fund you represent, adding the fund's representatives to the appropriate branch.

Your users will then assign a branch to each Request they enter, depending on the specific fund being appealed to. Representatives for each fund (or "branch") will then be able to access data concerning their fund only.

When following this model, the branch must be entered in each new Request manually. You will not be allowed to save a new Request without entering a branch. The branch field appears in the Request form only if you choose this Branch Security option.

The branch field may also appear on the following forms when using this Branch Security option:

Activities	If you are creating a new Activity not associated with a Request, the branch field will appear. If you create an Activity associated with a Request or Payment, the Activity is automatically stamped with the Request's (or the Payment's Request's) branch, and the branch field is unavailable.
Budget Items (Categories, Line Items, and Reserve Funds)	**NOTE:** The Budget Module is an optional feature; your GIFTS Online system may not include the Budget. In the Budget, an editable Branch field will appear on new budget items, if those items are children of first-level Categories. (You can also select the branch for top level Reserve Funds.) Children of each second-level Category will all have the same Branch, which cannot be edited.

Decentralized Data Entry Model

This data entry model is appropriate if members of your various branches or divisions are receiving, entering, approving, and declining grant requests more or less independently of one another. Your GIFTS Online data is all stored centrally; however, each branch or division works almost exclusively with Requests and grants that they have entered themselves.

For most foundations and corporations with branches or divisions, this is the model they follow.

In this case, you would want Requests to be automatically stamped with the primary branch of the user creating it. This allows members of each branch to enter Requests (and other associated GIFTS Online records) that can only be viewed or edited by other members of the same branch.

IMPORTANT: If your GIFTS Online system includes the optional Annual Budgets feature, budget items must still be stamped with a branch manually, as described for the centralized data entry model above.

Multiple Site ID (SID) Support

Many users have different foundations or entities that have different branding and/or other institutional differences that require that not only different forms be used but different My Account and Account Login pages as well.

To meet this requirement, GIFTS Online clients are now allowed multiple SIDs upon request.

IMPORTANT: To add more SIDs, the Online Applications server must first be configured by MicroEdge to support the number desired for your organization.

The retrieval process for Online Applications and submitted Requirements will not change. When a retrieval is triggered, applications or submitted Requirements from all SIDs will be retrieved and processed together.

Multi-SID functionality will be supported in GIFTS Online through a number of small changes to several pages in the GIFTS Online system.

For those who have multiple sites enabled, the following changes will be noticeable:

- A new Site column will be visible in several locations throughout GIFTS Online.
- Several entry forms will also now display a Site selection menu.
- Site will be available as a search filter on the Query Builder form for Requests and Requirements.

The GIFTS Online Homepage

GIFTS Online has been designed using Microsoft Silverlight technology to improve not only the look of the interface but the functionality of many of the tools, forms, and menu options.

Header Area

Each page or form will have a common header area with the following elements:

- **The GIFTS Online logo** is located in the upper left corner of all pages and serves as a home link, navigating back to the Dashboard from whatever other page you happen to be on. When on the Dashboard itself, clicking the logo refreshes the content of the Dashboard.
- **The User Menu** is located in the upper left-hand corner below the current user's name. To open the menu, click the down arrow next to the user name. This menu includes standard options such as Logout, Change Password, Views, Searches, Quick Find, and Help.
- **The Quick Find field** is located in the middle of the header area and allows you to quickly locate a record by simply typing in some text, selecting the appropriate record type radio button, and then clicking the **Find** button or pressing **Tab/Enter**.
  The default record types are Request, Organization, or Contact. However, other options such as Requirements, Activities, or Payments can also be configured. The user can determine which types of records to make available, and choose which fields to search from a list of the most likely fields.
  To access the Quick Find options form, click **Quick Find** in your user's menu under the GIFTS Online logo.
- **The Full Search link** gives you access to the Search form where you can access Recent Searches, Saved Searches, or create a new search using the Query Builder.
- **The New menu** allows you to create new records for most of the major record types from 'scratch'. You will need to provide the necessary relationships when you create the new record.
- **The Launch menu** provides access to Reports, Job Status, Budget, Applications, Tax Status Lookup and Import A/P Data. **NOTE:** Some choices may not be available depending on the options you have installed.
- **The Admin menu** provides Grant Managers with access to the Template Manager, Manage Dashboards, Manage Watchlists, and Classifications forms.
- **The Action menu** will be visible on all Edit Forms. The options available will change according to the type of record currently being viewed.

NOTE: The available options on the menus sometimes exceeds the space available to display them. When this occurs, a blue arrow button will be visible on the right side of the ribbon menu. Clicking this will slide the menu options to the left revealing the additional options.

The User Menu

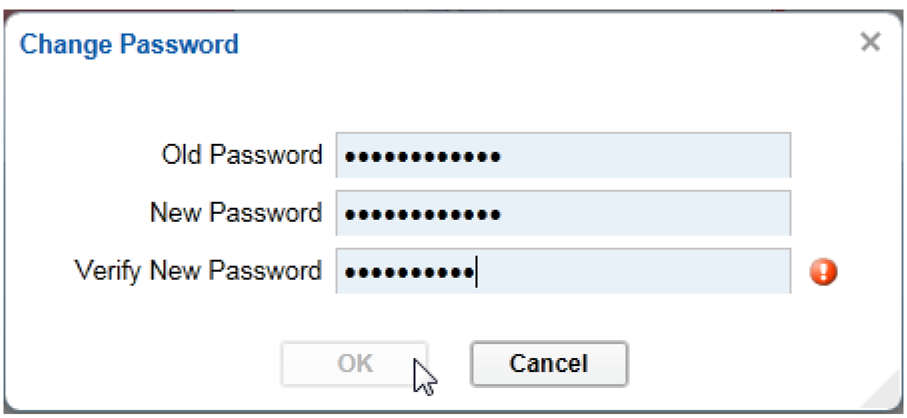
This menu is located in the upper left-hand corner below the current user's name. To open the menu, click the down arrow next to the user name.

This menu includes the following options:

- **Logout** - logs you out of GIFTS Online.
- **Change Password** - Opens the Change Password popup.
- **Views** - Takes you to the Manage Saved Views page.
- **Searches** - Takes you to the Manage Saved Searches page.
- **Quick Find** - Displays the Setting Up Quick Find options window.
- **Help** - Opens the GIFTS Online Help.

Change Password

Clicking Change Password will open the Change Password form.



Simply enter your existing password in the Old Password field and then enter your new password in twice.

All fields are required and the **OK** button will not be enabled until all fields are filled.

TIP: By Request to MicroEdge Services (Services@Microedge.com), an option can be turned on to restrict the number of passwords a user has used from being reused. This may be required by some organizations who need to have their users change passwords on a regular basis and want to prevent reuse of recently used passwords.

Views

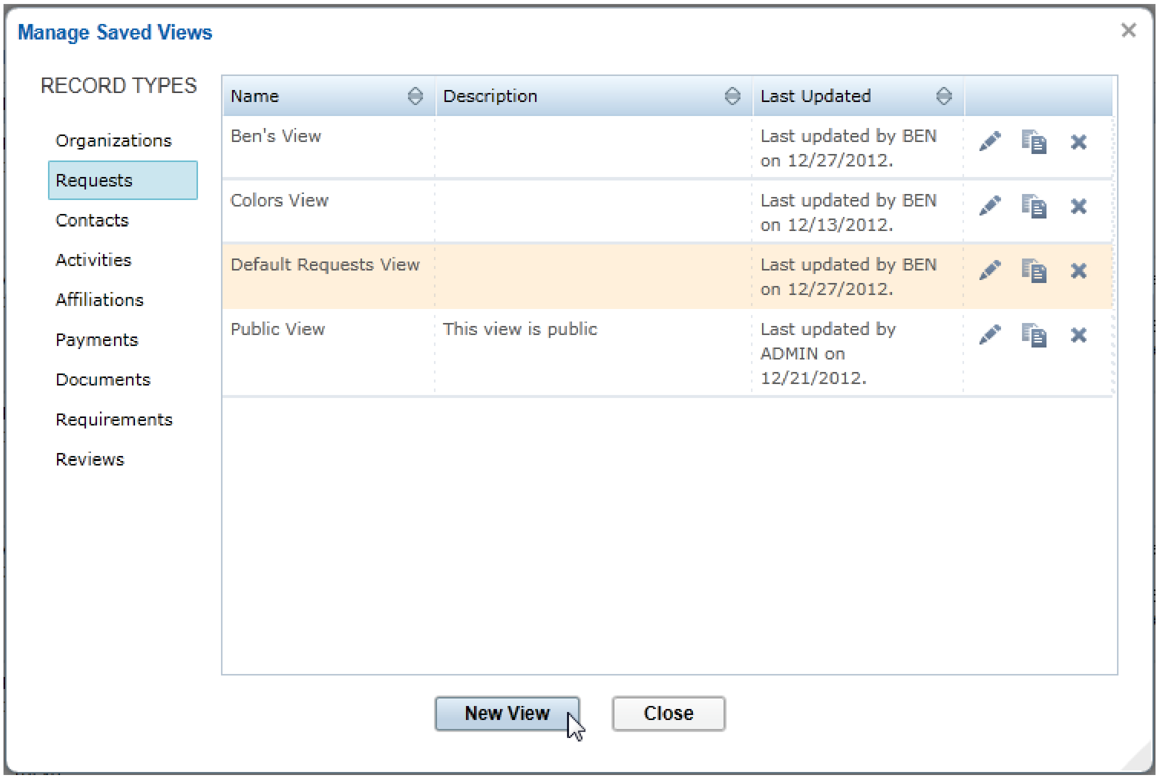
The Views option in the User Menu opens the Manage Views form.

This page allows you to access any of your saved views according to record type.

A Record Type can be chosen on the left panel and available saved views will be displayed on the right side listing.

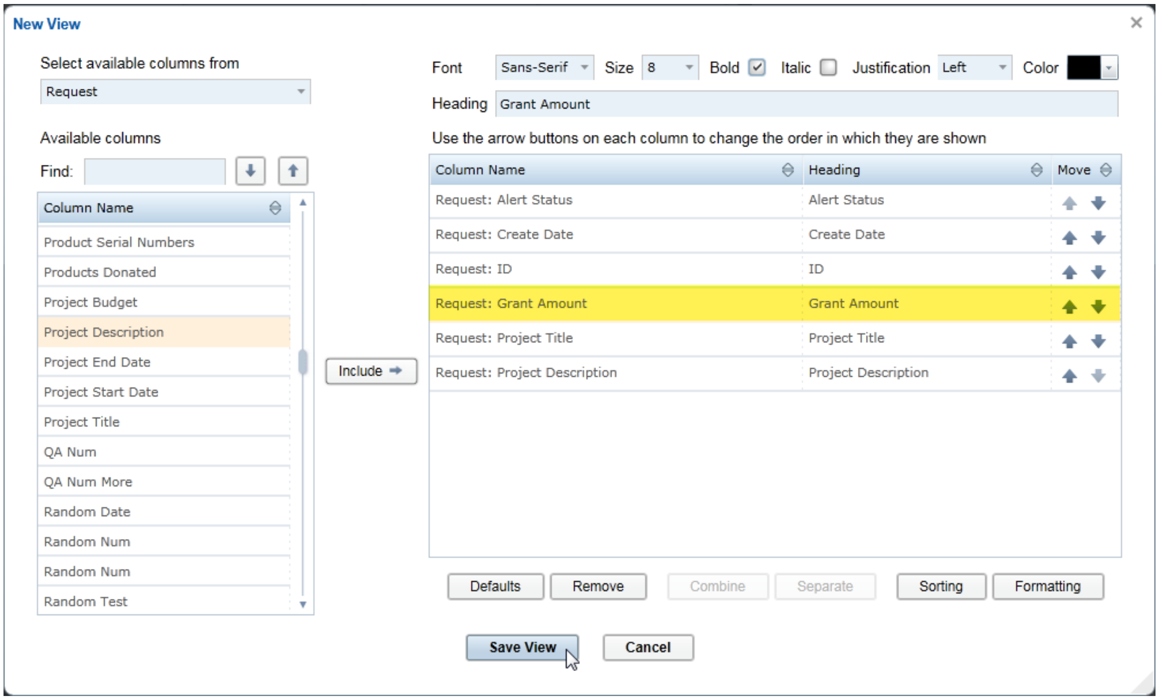
Column headings for **Name**, **Description**, or **Last Updated** can be clicked to sort in ascending or descending order.

Edit, Save As, and **Delete** options are available on the right side column for existing Views.



Creating a New View

Clicking the **New View** button will take you to the New View form where you can create a view manually and Save the view to your saved views list.



1. Select a category of columns from the drop-down menu in the top left of the form.
2. Highlight columns you desire and click the **Include** button to move them to the right. You can also use the Find field to look for a specific field in the category.
3. Once on the include list, you can click on a field to select it and then use the up/down arrows in the Move column to reorder fields.
4. Click **Save View** to open the Save View form.
5. Enter a **Name** and **Description**.
6. Check the **Allow others to use this View** box if you want to allow other users to use the view.
7. Click **OK** when done to return to the Manage Saved Views list.

Saved Searches

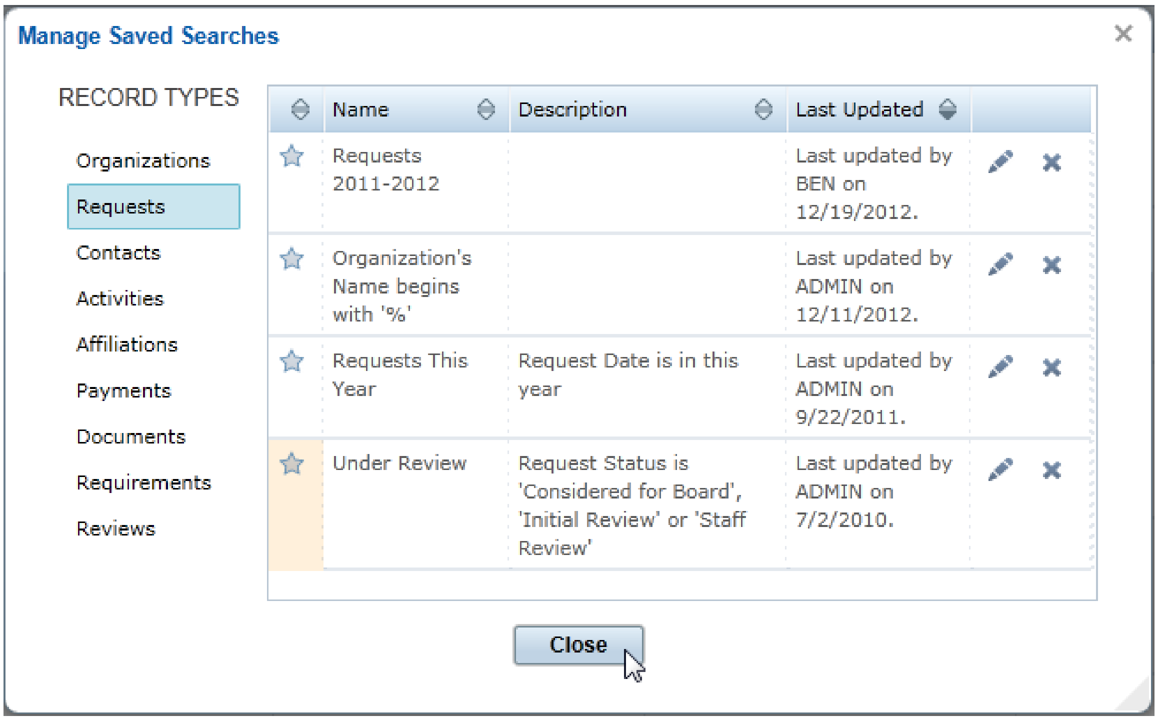
Clicking on the Searches option in the User Menu takes you to the Manage Saved Searches form.

This page allows you to access any of your saved searches according to record type.

A Record Type can be chosen on the left panel and available saved searches will be displayed on the right side listing.

Column headings for **Name, Description, or Last Updated** can be clicked to sort in ascending or descending order.

Edit and **Delete** options are available on the right side column..



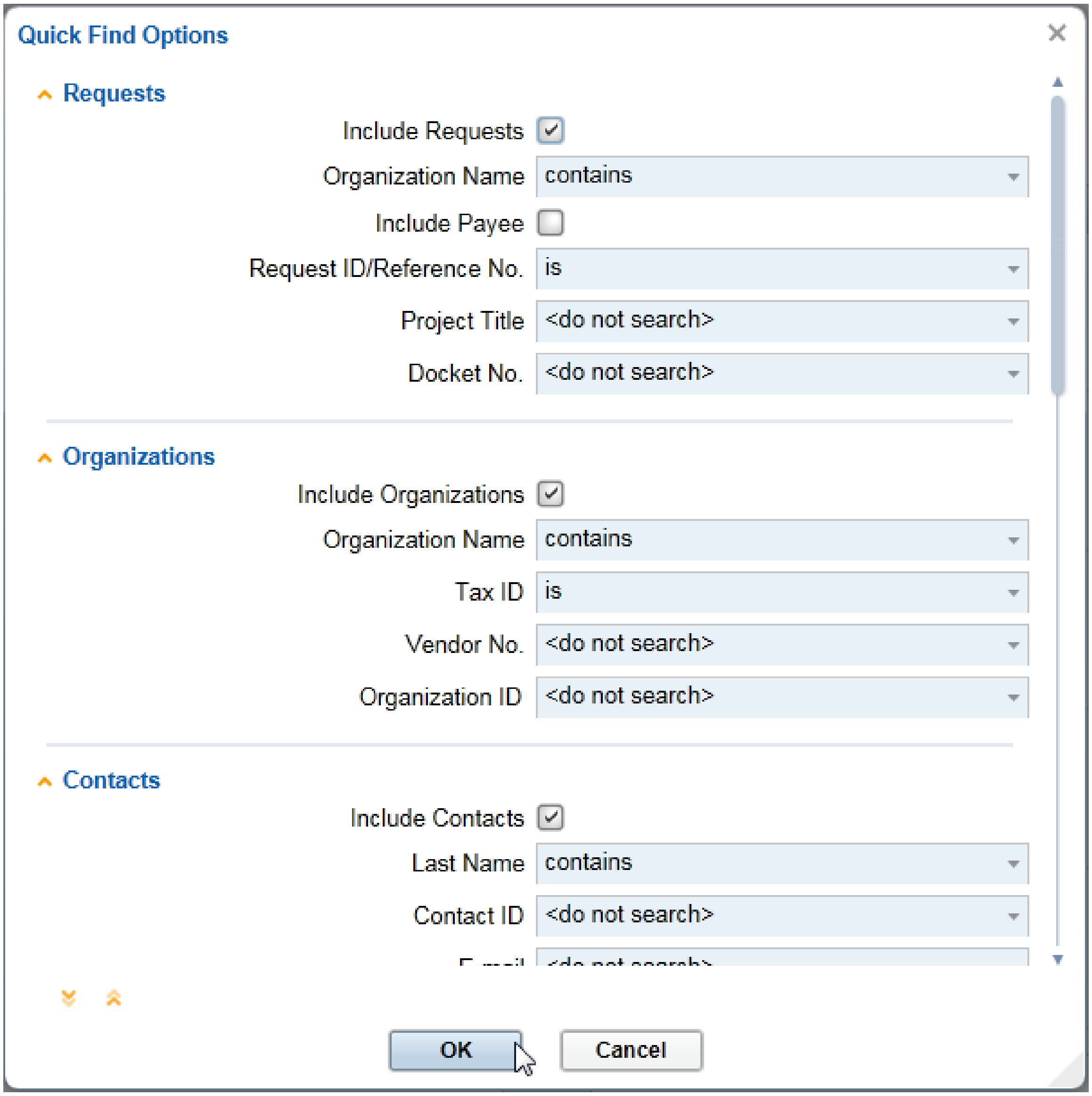
New searches must be created using Quick Find or the Query Builder.

Setting Up Quick Find

To configure Quick Find, click the **Quick Find** link in the User menu.

NOTE: Some users may not have this option depending on their permissions.

This will open the Quick Find Options form.



On this form you can:

- Specify the data fields to be searched when a specific record type is selected.
- Enable other record types to be available under the **Quick Find** field by checking the **Include** box.

The table below specifies all the available record types and search fields available for each:

NOTE: Some fields are set to <do not search> by default to improve search performance. They can easily be enabled by accessing the Quick Find Options and changing the setting.

Record Type	Field	Search Option Default
Requests	Organization Name	contains
	Include Payee	No (unchecked)
	Request ID/Reference No.	is
	Project Title	<do not search>
	Docket No.	<do not search>
Organizations	Organization Name	contains
	Tax ID	is
	Vendor No.	<do not search>
	Organization ID	<do not search>
Contacts	Last Name	contains
	Contact ID	<do not search>
	E-mail	<do not search>
	Primary Organization Name	<do not search>
Payments	Organization Name	contains
	Check No.	is
	Request ID/Reference No.	<do not search>
	Payment ID	<do not search>
Requirements	Organization Name	contains
	Request ID/Reference No.	<do not search>
	Requirement ID	<do not search>
Reviews	Reviewer Last Name (External)	begins with
	Reviewer (Internal)	begins with
	Organization Name	contains
	Request ID/Reference No.	<do not search>
	Review ID	<do not search>
Documents	Organization Name	contains

	Request ID/Reference No.	<do not search>
	Document ID	<do not search>
Activities	Organization Name	contains
	Request ID/Reference No.	<do not search>
	Activity ID	<do not search>

Using Quick Find

The Quick Find field is designed to help you quickly and easily search for records.

To use Quick Find to locate a record, enter a search value in the field, select a record type from the radio buttons displayed, and click the **Find** button.

You can also press **Tab** or **Enter** to begin the search.

The Quick Find tool will initially only offer Requests, Organizations, and Contacts searches by default.

Each record type is also limited to the most commonly searched fields as described in the table below.

Some fields are also set to <do not search> by default to optimize performance.

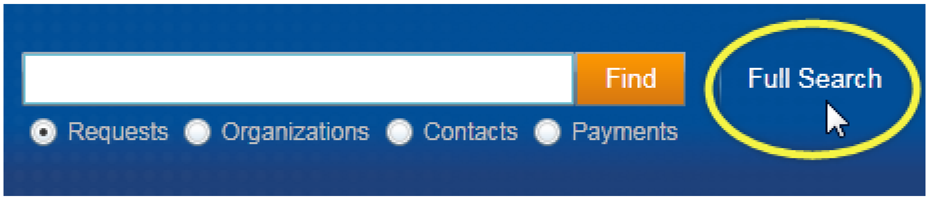
To enable other record types and fields, you must access the Quick Find settings through the **User Menu > Quick Find** option.

TIP: To use other fields as filters, the Query Builder in the **Full Search** option must be used.

Record Type	Field	Search Option Default
Requests	Organization Name	contains
	Include Payee	No (unchecked)
	Request ID/Reference No.	is
	Project Title	<do not search>
	Docket No.	<do not search>
Organizations	Organization Name	contains
	Tax ID	is

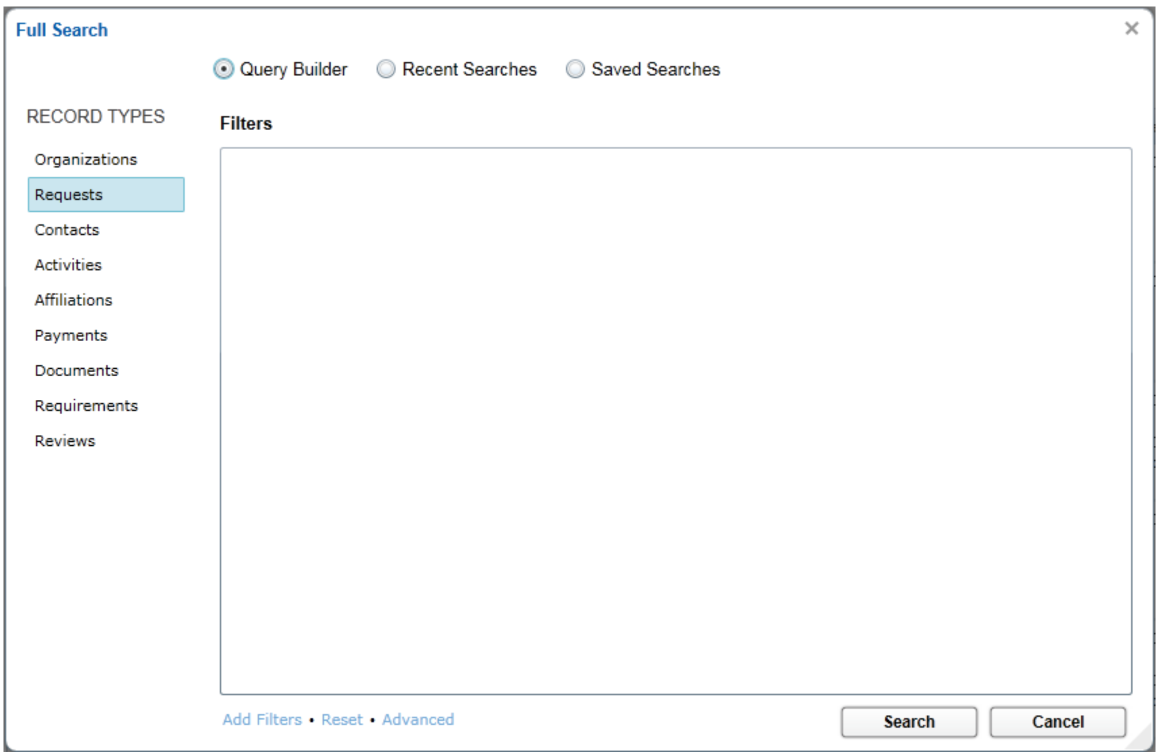
	Vendor No.	<do not search>
	Organization ID	<do not search>
Contacts	Last Name	contains
	Contact ID	<do not search>
	E-mail	<do not search>
	Primary Organization Name	<do not search>
Payments	Organization Name	contains
	Check No.	is
	Request ID/Reference No.	<do not search>
	Payment ID	<do not search>
Requirements	Organization Name	contains
	Request ID/Reference No.	<do not search>
	Requirement ID	<do not search>
Reviews	Reviewer Last Name (External)	begins with
	Reviewer (Internal)	begins with
	Organization Name	contains
	Request ID/Reference No.	<do not search>
	Review ID	<do not search>
Documents	Organization Name	contains
	Request ID/Reference No.	<do not search>
	Document ID	<do not search>
Activities	Organization Name	contains
	Request ID/Reference No.	<do not search>
	Activity ID	<do not search>

Full Search



The **Full Search** link on the header opens the GIFTS Online - Full Search form which gives your access to:

- The **Query Builder** to create a new search or Ad Hoc report
- **Recent Searches** to access a list of recent searches in chronological order
- **Saved Searches** to access a list of saved searches by record category type



NOTE: The Full Search form will initially open with the Query Builder selected. However, it will remember which of the three options you used last and open to that option the next time you open the Full Search form.

The Basic Query Builder

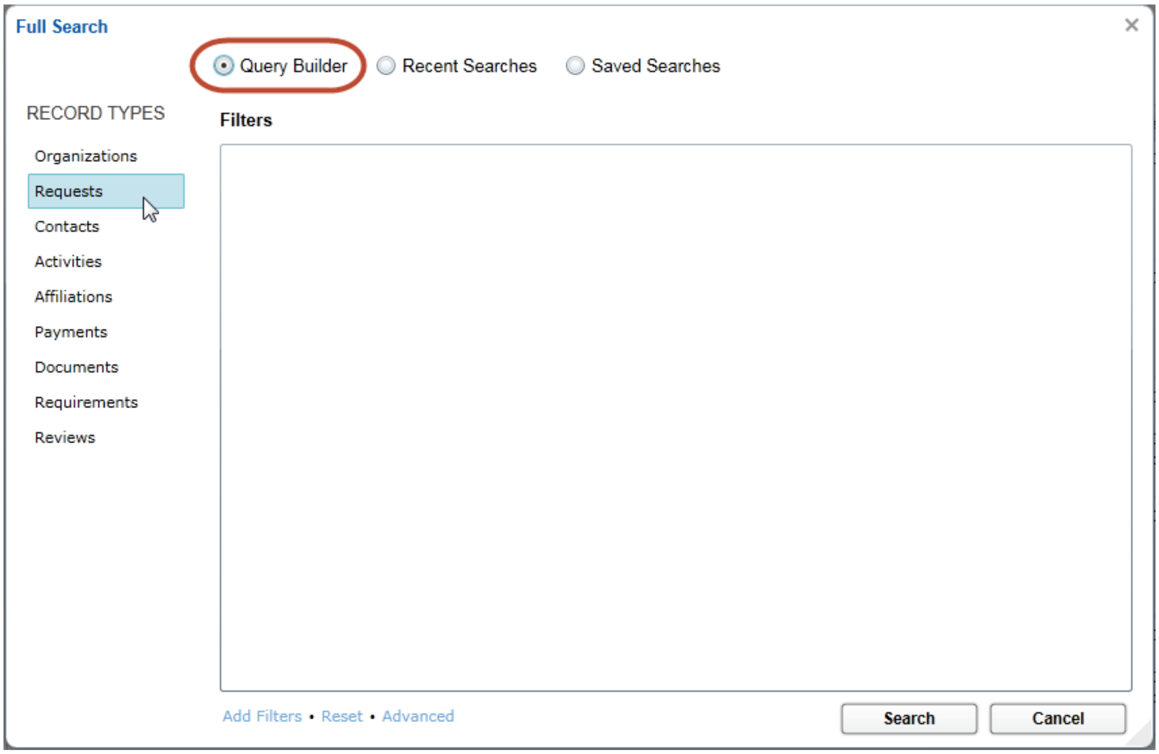
The Query Builder can be access in one of two ways:

1. Click **Full Search** at the top.
2. Perform a Quick Find, Recent Search, or Saved Search and then click the **Change this search** link.

The Query Builder allows you to enter specific search criteria based on the Record Type selected.

NOTE: If you used option one above to access the Query Builder, the Filters area will be blank. If you used option 2, the Filters area will be pre-populated with the last search criteria used.

This is an example of what the initial Query Builder page may look like:

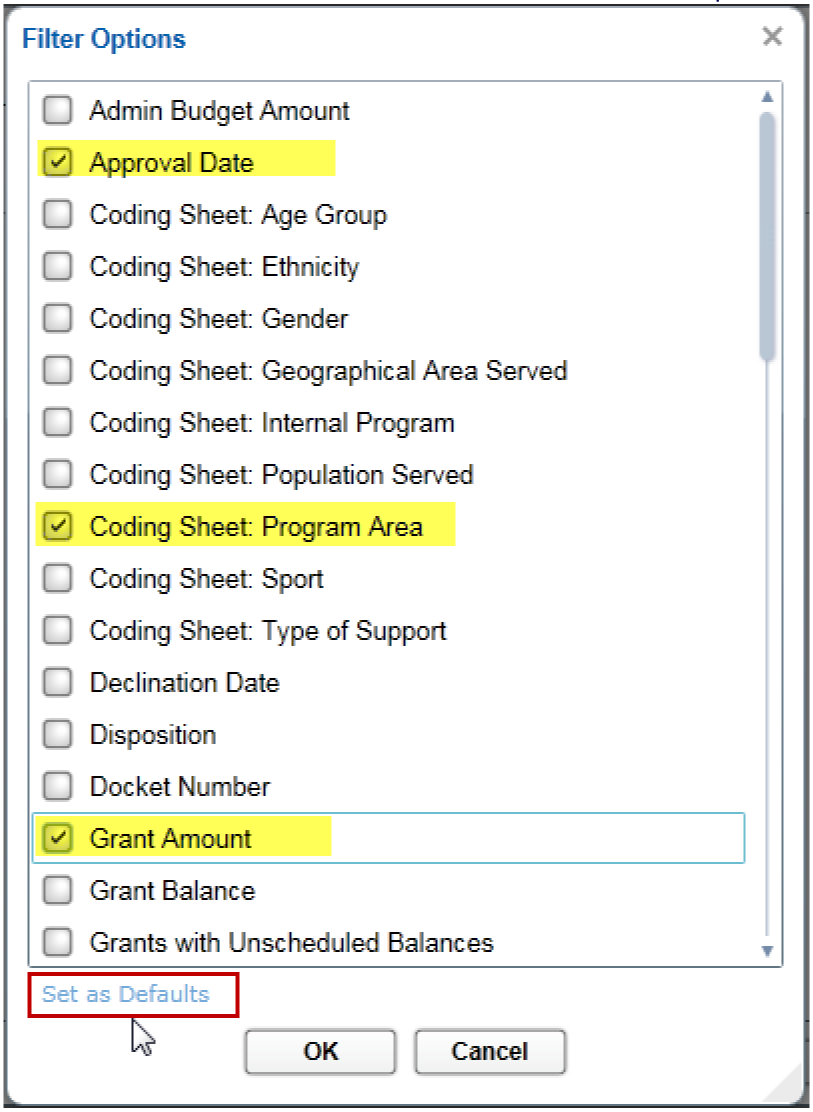


Building a New Search

The following section provides information on how to build and to run your searches from the Query Builder.

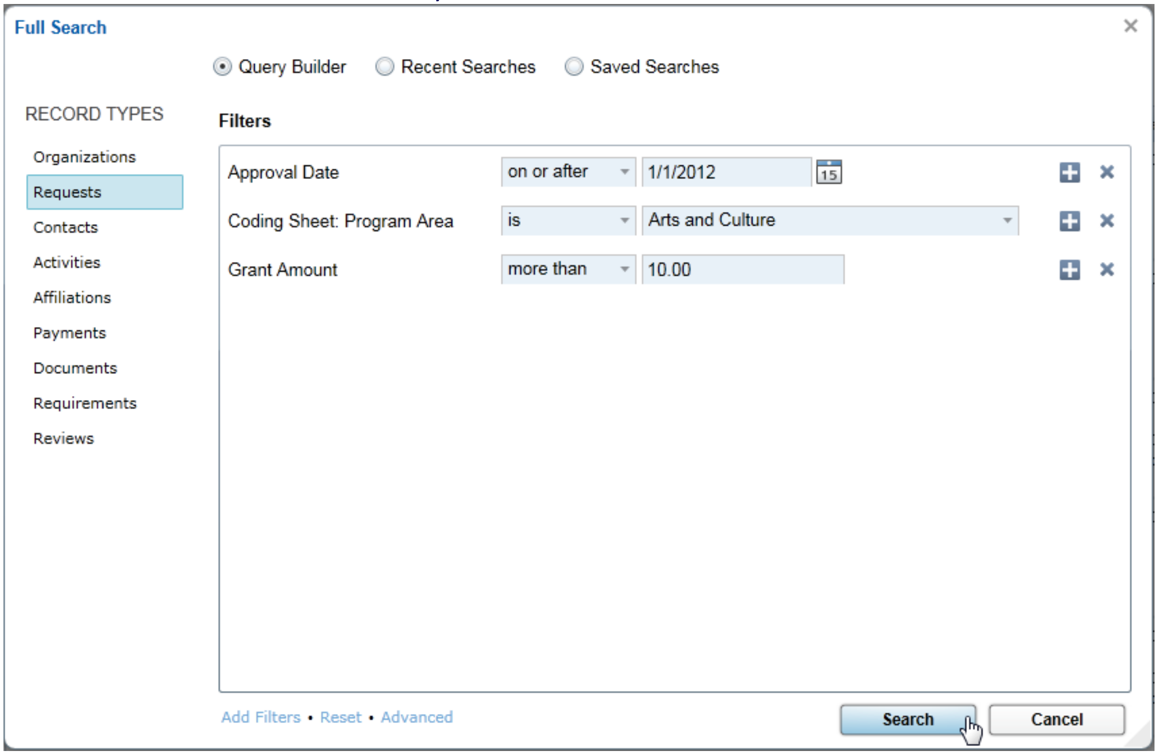
1. Make sure the **Query Builder** radio button option is selected on top.
2. The Filters section should be clear. If not, click the **Reset** link on the bottom left of the form.
3. Select a **Record Type** from the list on the left panel.

4. Click the **Add Filters** link on the bottom left of the form to open the Filter options form.



5. Scroll down the list as needed and check the boxes for the desired filters.
6. If you would like the filters you've selected to become the default for the specific record type, click the **Set as Defaults** link above the **OK** button.
7. Click **OK** when done selecting filters and return to the main Full Search form which will now be filled with the filters you selected.
   TIP: Most filters will have an **X** and a **+** next to them on the Query Builder. Clicking the **X** removes the filter. Clicking the **+** adds another instance of the same filter to the query so you can further refine your search criteria.

8. Use the various filter fields to enter your search criteria.



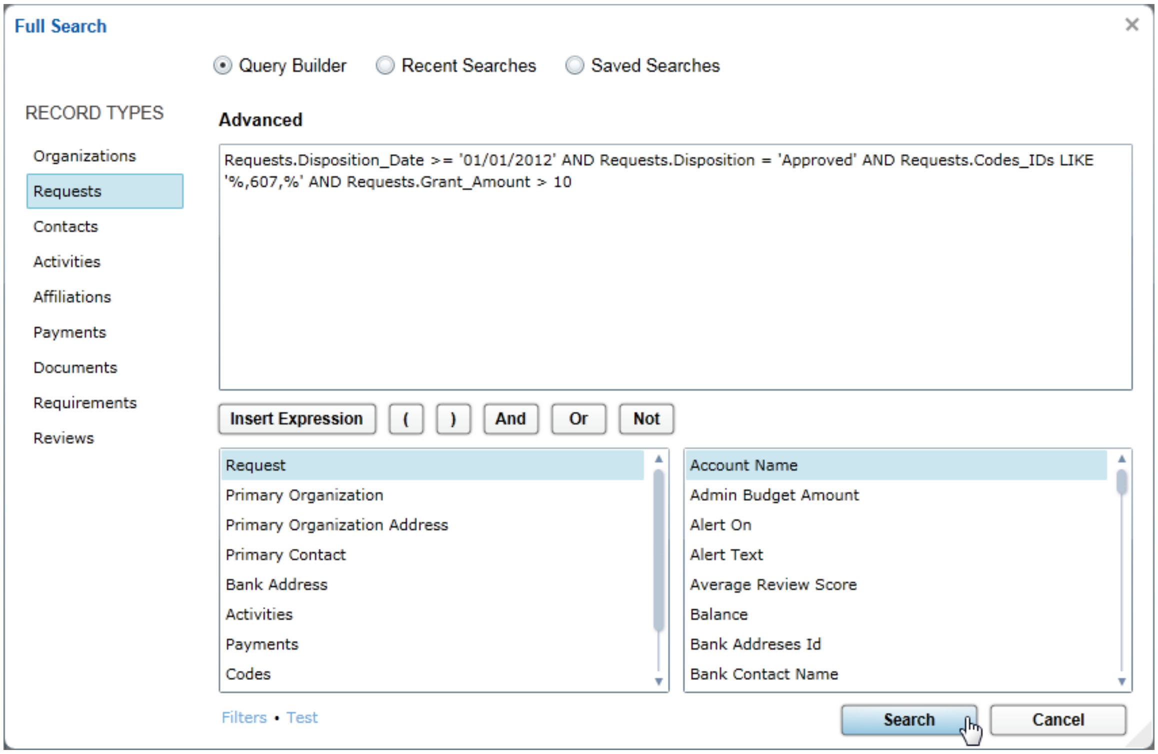
9. Click **Search**. Your results appear in the Search Results page.

Advanced Query Builder

The Advanced Search feature allows you to 'plug in' or edit a SQL type query for a search.

Only Grant Managers will have access to this link on the bottom. Other users will not see the link on the form.

Clicking **Advanced** link will open the Advanced Query form.



At the bottom of the Advanced Query Builder are the following control links and buttons:

- **Filters** - takes you back to the basic Query Builder form.
- **Test** - checks your current SQL query code for any syntax errors.
- **Search** - runs the query as displayed in the Advanced field.
- **Cancel** - closes the Query Builder without running the query.

Advanced Criteria

This text box contains the search criteria. It defaults to a database syntax "translation" of any search criteria in the Search form when it was opened.

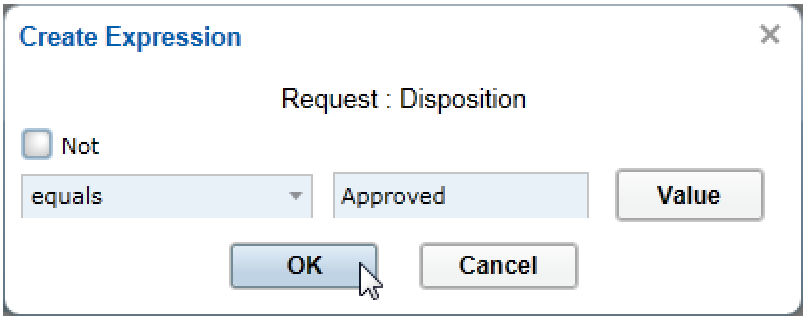
Users can type directly in this field and also be able to select, select all, cut, paste, and so on..

Criteria Editing Buttons

This row of buttons represents different ways (other than typing or pasting clipboard text) to add things to the search criteria above.

The **Insert Expression** button opens the Create Expression popup which allows you to add another search expression, based on the category and field selected below.

NOTE: Double-clicking the field on the list will also open the Create Expression popup.



The **Not** checkbox can be used to create a negative expression.

The **parentheses, And, Or, and Not** buttons can be used to insert conjunctions to group expressions for the desired effect. Once familiar with these options, you can easily type them in manually into the Search criteria field.

Search Categories and Fields

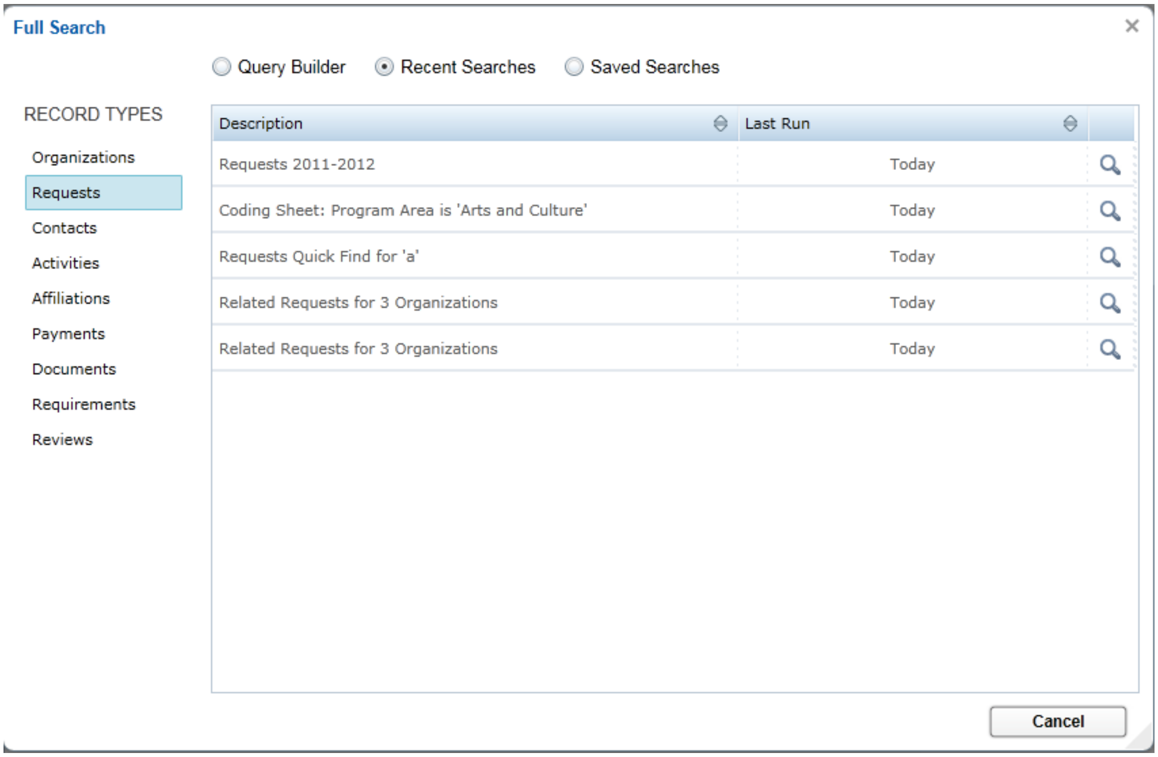
Users who want to add expressions to their advanced search first select the category and field here and click **Insert Expression**, or double-click on the field.

The left side lists categories of fields. These represent record types or more complex database tables with multiple fields an advanced user might want to search.

The Category selected in the left list determines the fields which will be listed on the right.

Recent Searches

The Recent Searches feature provides access to your most recent searches. The system currently stores the 10 most recent searches for each record type.



The list can be sorted by Description of Last Run simply by clicking the column header.

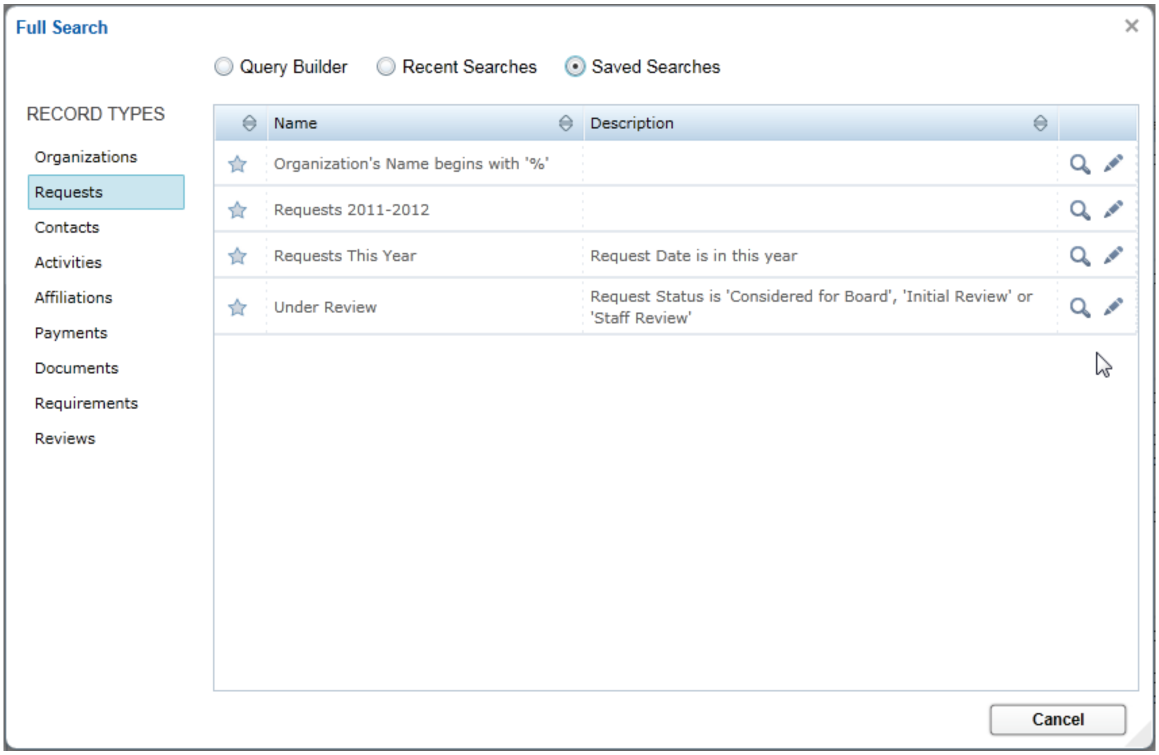
Record Type can be selected using the list on the left panel.

Searches can be run by clicking on the Search icon (magnifying glass).

Saved Searches

The Saved Searches option functions just like the recent searches, except that only saved searches are listed here.

For each record type, the saved searches are listed in alphabetical order by Name with favorites listed first and then the remaining, non-favorite searches.



NOTE: To delete a Saved Search, you must go to the **Saved Search Library** option located in the User Menu.

The saved searches list can be sorted by Favorite, Name or Description simply by clicking the column headers.

To set a search as a favorite, click the star to the left of the name to turn it orange. To remove the favorite status, click the star again.

To run a saved search, click the **Search** icon (magnifying glass).

To change a saved search, click the **Modify** icon (pencil).

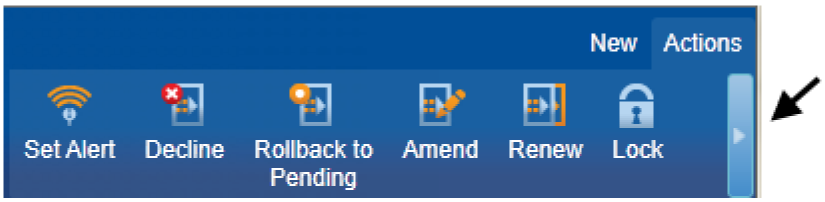
Choosing to modify a saved search will display its current filters in the Query Builder. You can then choose to add or remove filters as needed before running the search again.

Notice when accessing the Query Builder in this manner, an additional **Save As** link option is available at the bottom next to Advanced. This allows you to save your modified search with a new name.

The Ribbon Menus

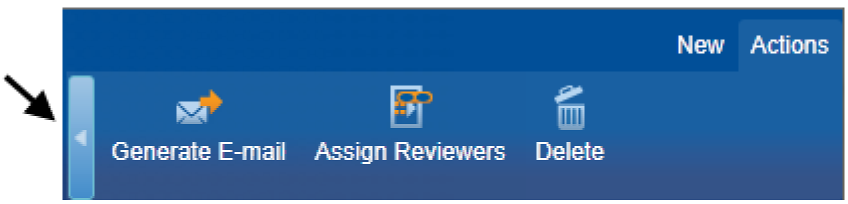
GIFTS Online employs ribbon menus to provide you with various action options depending on your location in the system.

Instead of opening vertically, these menus open horizontally as additional options become available.



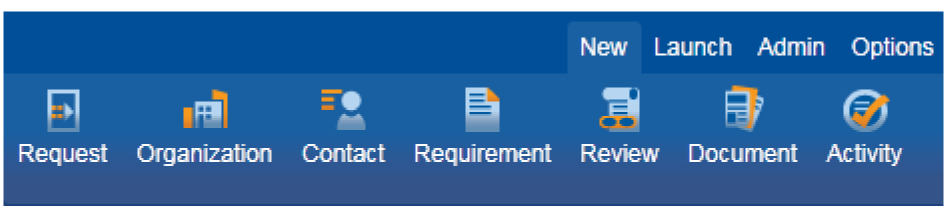
If the number of options available exceeds the number allowed to be displayed at one time, an scroll button will be displayed on the right.

Click this to slide the menu to the left to reveal the other options.



The *New* Menu

This menu allows you to quickly create new records for most of the major record types from 'scratch'. You will need to provide the necessary relationships when you create the new record.

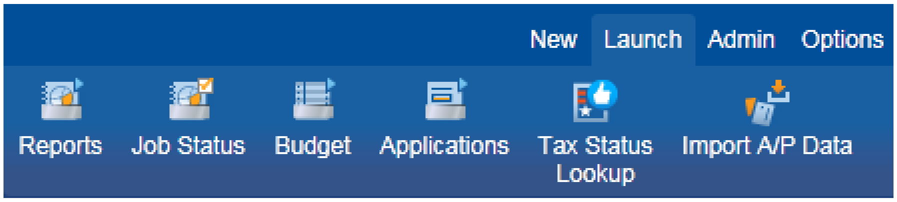


By default, it is included on the home pages for Grants Managers and Program Officers.

Possible options on this menu include:

- Request
- Organization
- Contact
- Requirement
- Review
- Document
- Activity

The Launch Menu

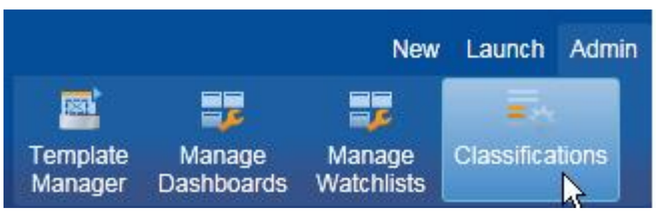


The Launch Menu on the right of the header gives you access to the following possible options depending on how your site is configured:

- **Reports** - allows you to access all of the standard reports available through GIFTS Online
- **Job Status** - if installed, displays the status of any ad-hoc/custom reports that are scheduled to run
- **Budget** - Budget module required
- **Applications** - Online Applications and Reporting Module required
- **Tax Status Lookup** - opens the Tax Status Lookup utility to search for organizations
- **Import A/P Data** - Account Payable Module required. Allows you to import A/P data for paid grants.

The Admin Menu

The menu provides Administrators and Grant Managers with access to the following tools:



- Template Manager
- Manage Dashboards
- Manage Watchlists
- Classifications

For more information on each tool, please click the links above.

The Action Menu

This menu will be visible on all Search Result pages and Edit Forms. The options available will change according to the type of record currently being viewed.

NOTE: The available options on the Action menu sometimes exceeds the space available to display them. When this occurs, a blue arrow button will be visible on the right side of the ribbon menu. Clicking this will slide the menu options to the left revealing the additional options.

The Dashboards

The main area of the homepage is called the Dashboard and houses all of the dashboard parts assigned to a user's account.

Default dashboard parts on the Dashboard depend on the role each user is assigned for GIFTS Online. Users assigned to the Grant Manager role will have the ability to modify their own dashboard parts as well as the Dashboards of other users.

Up to 10 different dashboards can be created by Grants Managers and assigned to other users as needed.

NOTE: Other user groups will not be able to add or delete dashboard parts.

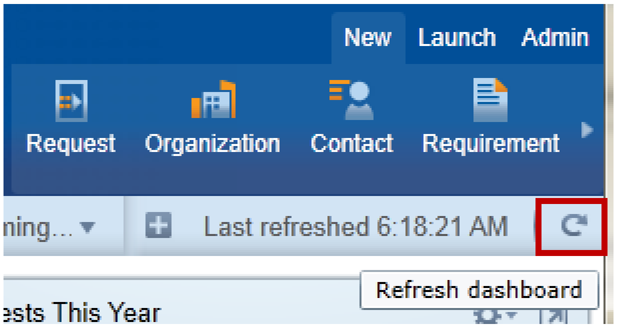
Drilling Down Through a Dashboard Part

Some of the dashboard parts allow you to drill down to see individual records by either double-clicking on a listed record or part of a chart. When you click on a value on the dashboard part, the record type that is associated with the dashboard part search filter will determine the record that opens for view/edit.

For example: If the dashboard part displays Request search results, double-clicking on a displayed record in any column will open the Request edit form. Once the edit form is displayed, Organization and Contact information can be accessed through the Primary Relation Cards on the right panel of the edit form.

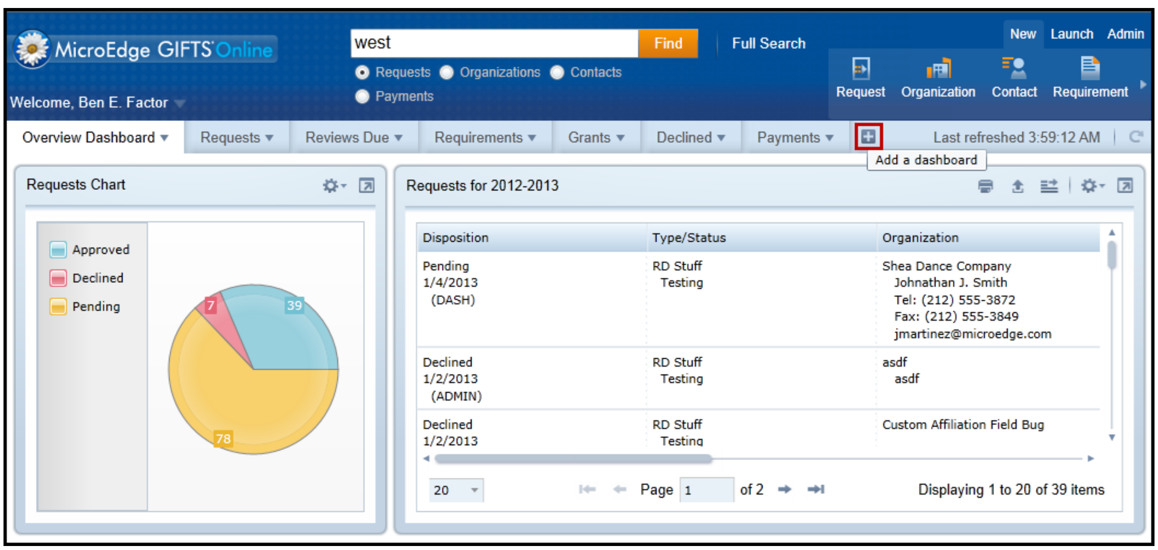
Refreshing the Dashboard

In GIFTS Online, the current dashboard is refreshed using the **Refresh Dashboard** icon located just below the ribbon menu. The dashboards will also refresh as you tab from one to the next, or return from the workspace.

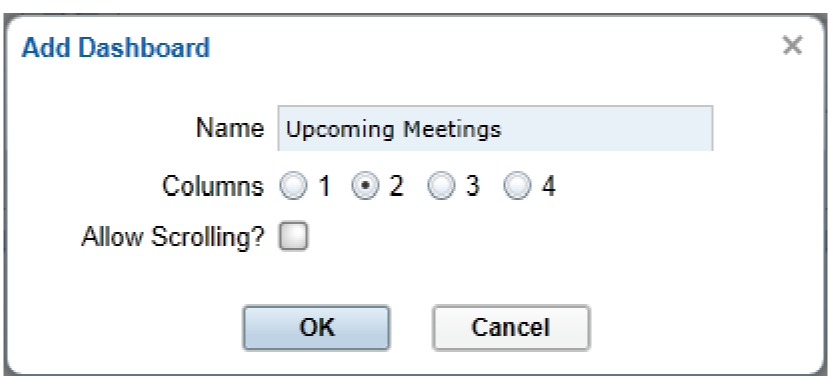


Adding a New Dashboard

To add a new dashboard, do the following:



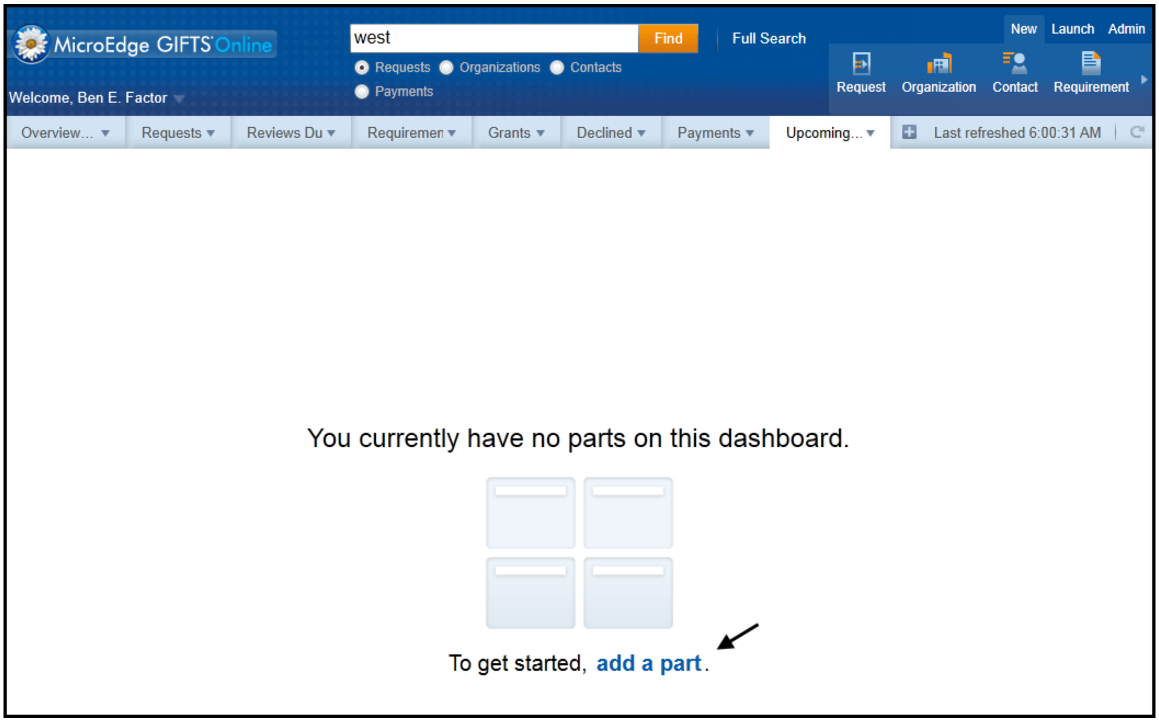
Click **Add a Dashboard [+]** button to the right of the last dashboard tab.



With the Add Dashboard form open:

1. Enter a **Name** for the dashboard.
2. Select the number of **Columns** of dashboard parts allowed.
3. Check the box to **Allow Scrolling**, if desired.
4. Click **OK**.

You will notice a new dashboard tab has been created with the name you provided. The main area will be blank until you add some dashboard parts.

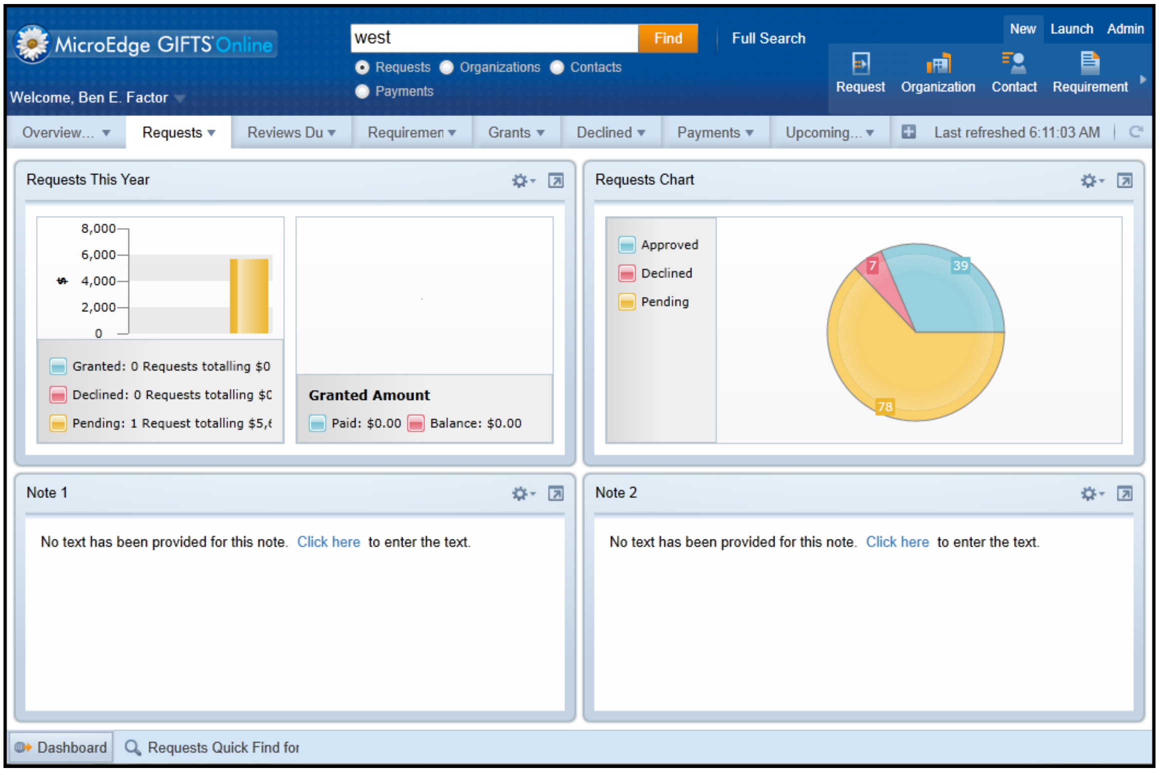


Dashboard Layout Examples

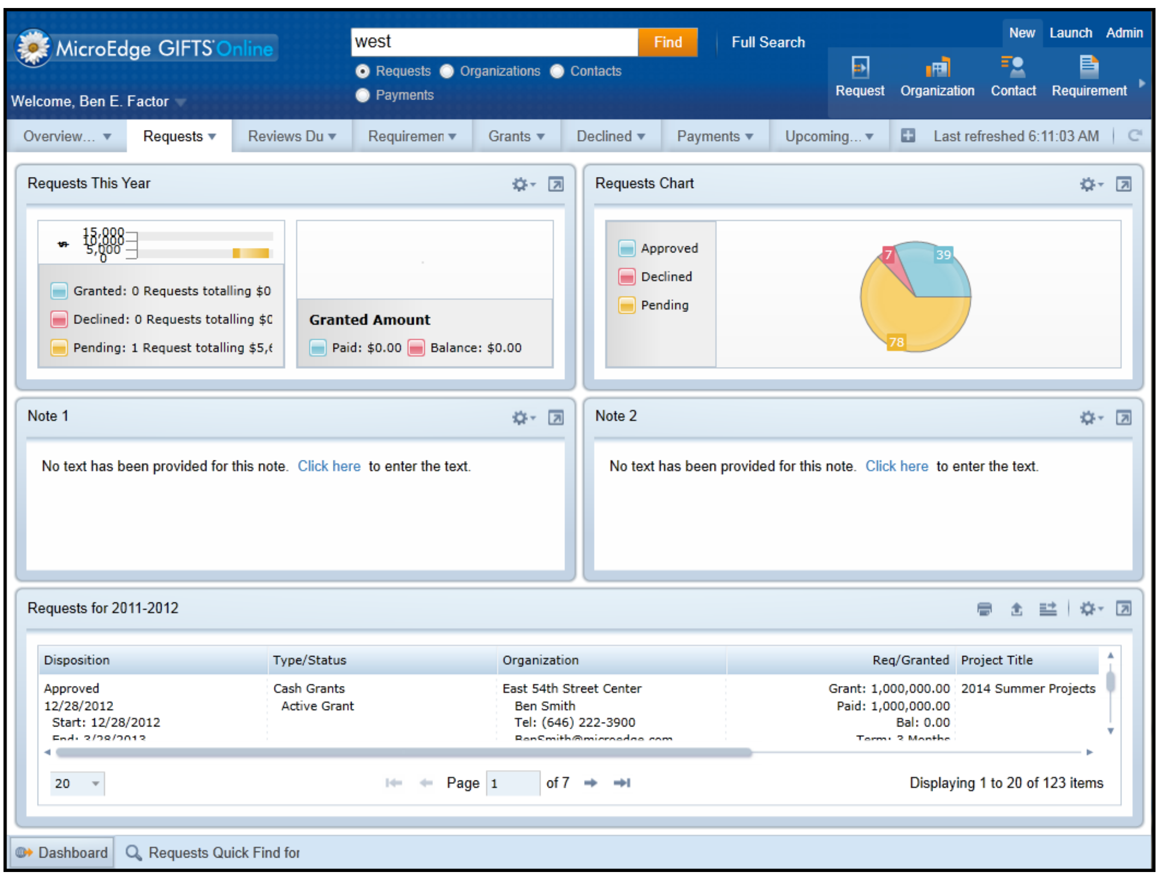
In GIFTS Online, each dashboard can be set to have up to four "columns". Dashboard parts will expand to fill the "columns" equally based on how many parts are in the row.

Example:

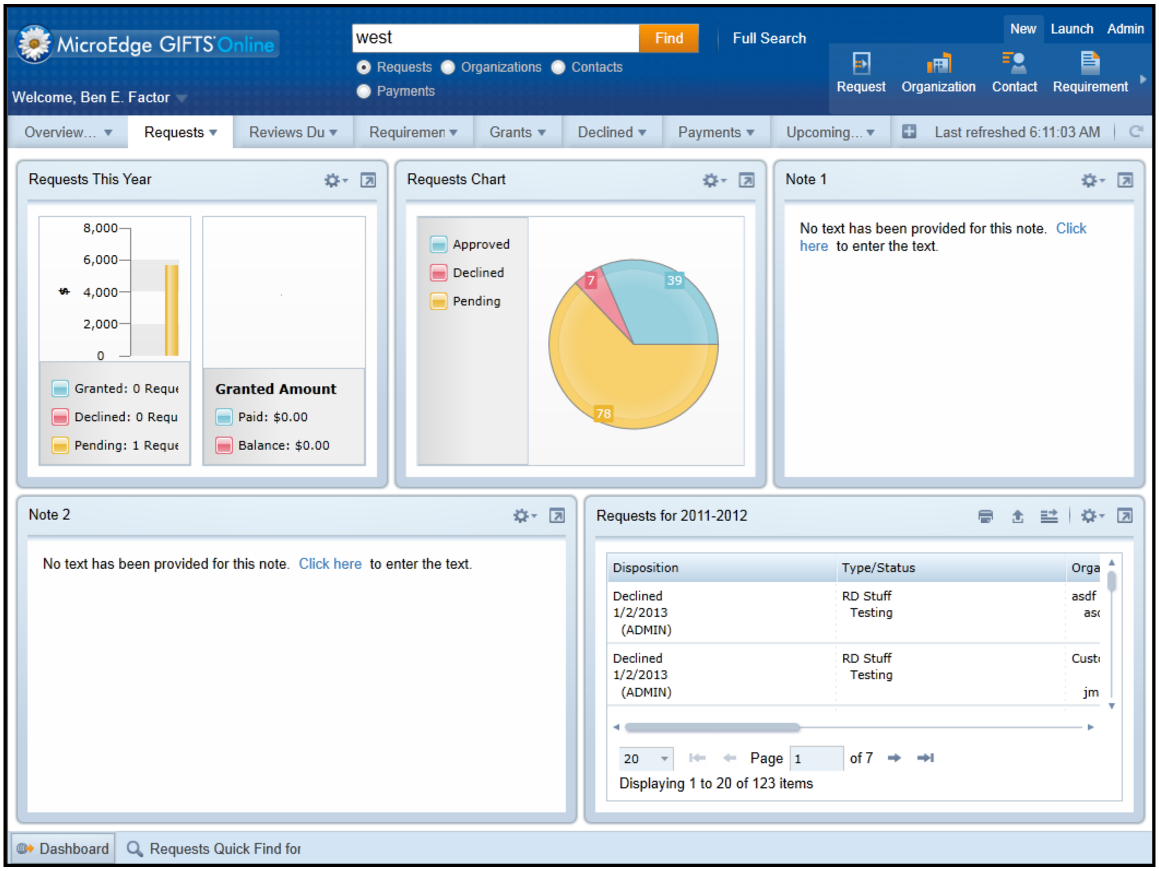
If a user sets up a dashboard with two columns and adds four dashboard parts, they are arranged in two rows of two parts, in order as if reading from left to right:



If a fifth part is added, it will appear on a third row, and span from left to right across the page:



However, if the dashboard were to allow three "columns," the parts would move to this configuration:



Managing Dashboards

Dashboard parts on each dashboard can be managed in several ways.

Resizing Parts

A user can resize the parts on his or her dashboard, using the mouse to drag the divider between parts up, down, left, or right.

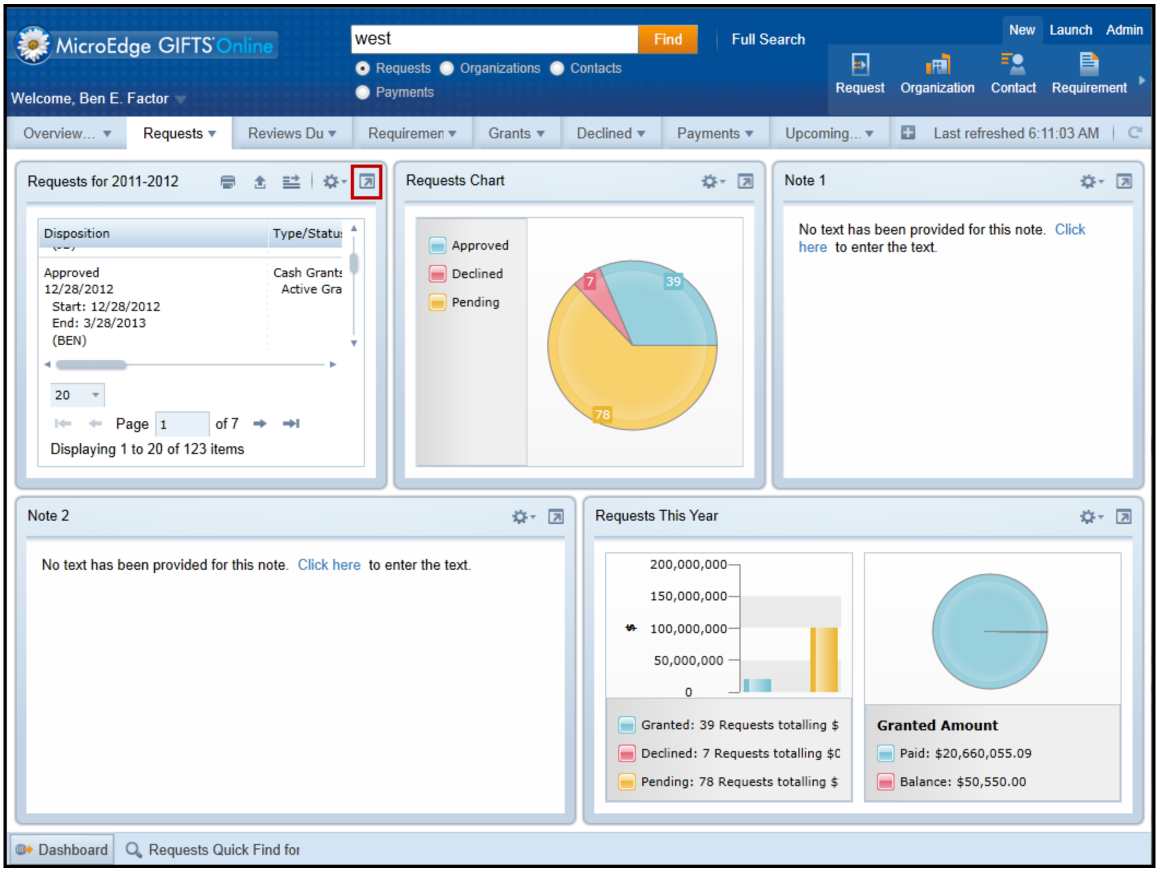
NOTE: Changing the height of a part will automatically change the other parts in the same row to match. Parts on the same row will always remain the same size vertically.

Moving Parts

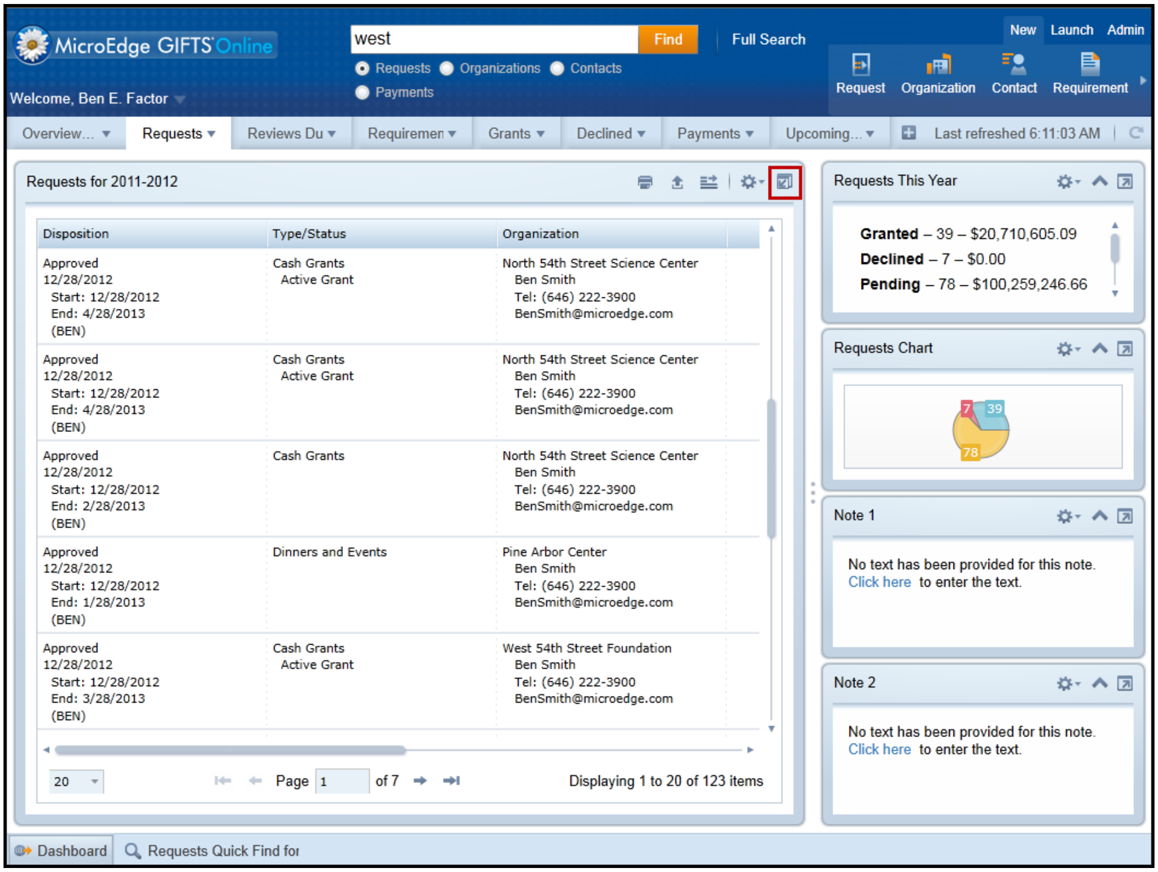
Any user can move parts around within a dashboard simply by using the mouse to drag one part over another. When dropped, the parts switch places in order.

Maximizing and Restoring Parts

While the panel look shown above is the default view, users can maximize any given part by clicking the **Maximize** icon in the part's title bar:



This will expand the selected dashboard part so it takes up the majority of the viewing area. The other dashboard parts will be minimized along the right.



This is especially useful for Table parts which list many records. This functionality allows the user to see more of the information in a part while still providing a minimized view of the other parts.

To return to the normal view, the user must click the **Restore** icon seen in the title bar of the maximized part.

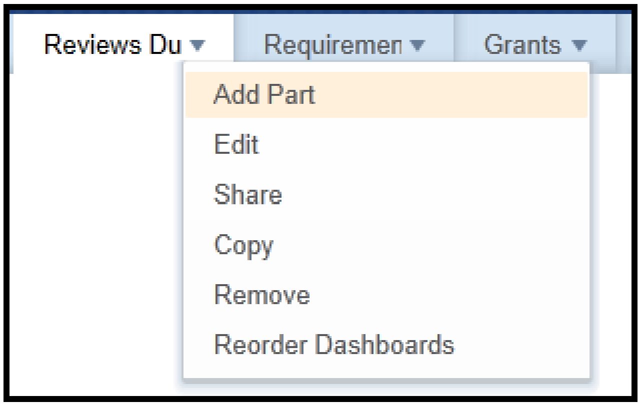
Note that the original order of parts is preserved after leaving maximized part mode.

NOTE: Only Grants Managers will have access to the dashboard menus and dashboard part actions (gear) menu.

The Dashboard Menu

The dashboard tabs across the top will display the dashboard's name and (for Grants Managers) have a menu for dashboard-related actions.

The menu on each dashboard tab will have the following options:

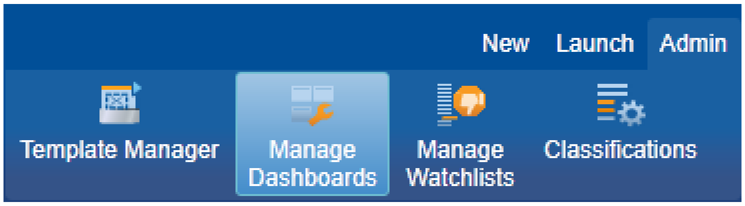


Menu Option	Description
Add Part	A new part can be added to a dashboard by selecting Add Part in the dashboard menu to open the Add Part form.
Edit	After a Dashboard has been added, its name, number of columns, and scrolling setting can be changed by opening the dashboard menu and clicking Edit.
Share	Users may share one of their dashboards with another user by selecting Share from the dashboard menu.
Copy	This action adds a copy of the current dashboard to the same user's site so that the same data can be displayed for a different purpose. For example, a user may want the same data for three different Program Areas.
Remove	Removes the current dashboard after the user confirms the action.
Reorder Dashboards	Allows the order of dashboards to be rearranged as needed.

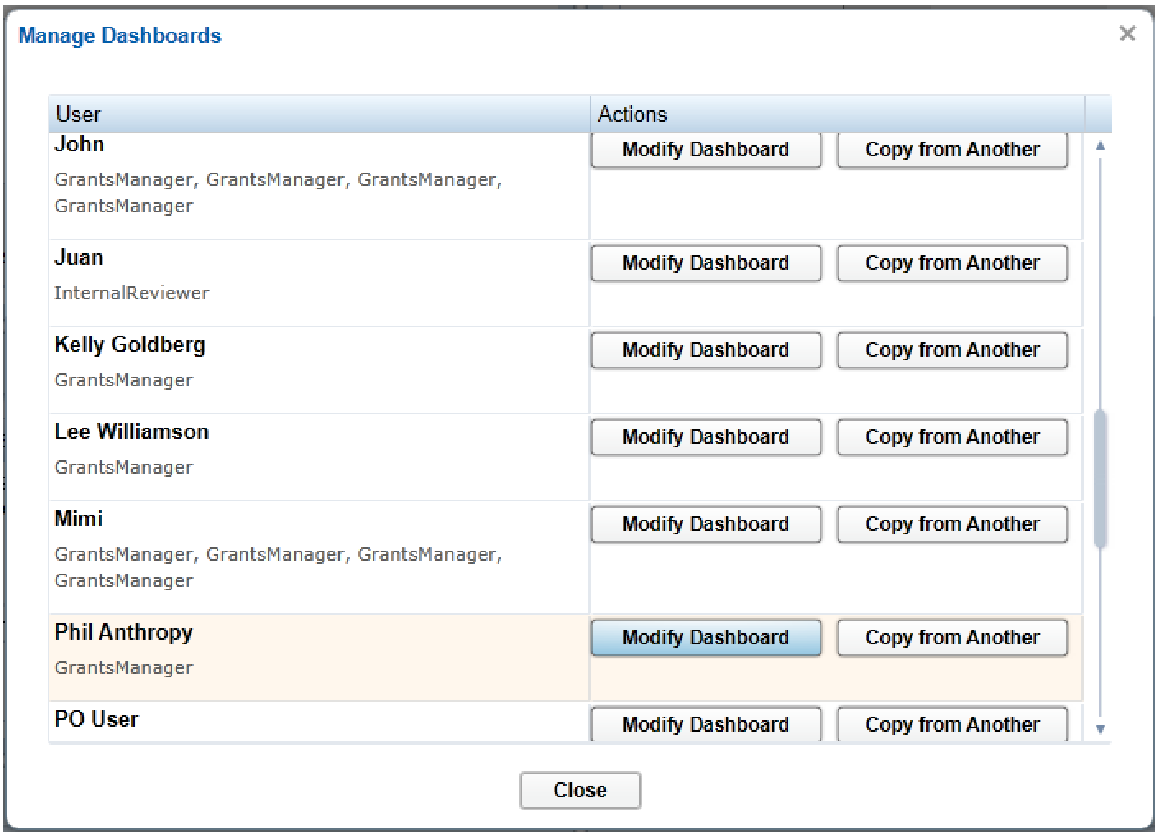
Assigning Dashboards

In GIFTS Online, users associated with the Grants Manager role are given the ability to "alias" another user and make changes to their Dashboard, as well as assign a Dashboard from one user to another.

To access the Manage Dashboards page, go to **Admin > Manage Dashboards**.

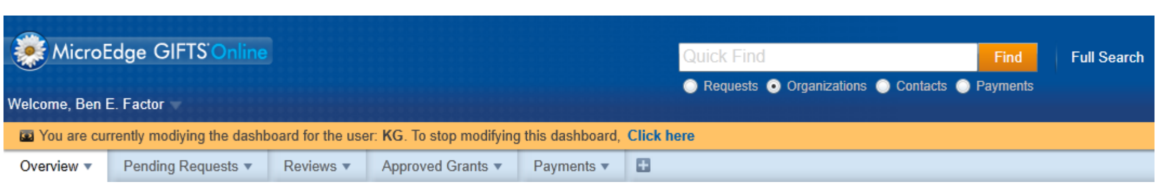


The Manage Dashboards popup is only visible to users associated with the Grants Manager Role.



User – Users will be listed in alphabetical order. Below each user's name will be the Role(s) with which they are associated.

Modify Dashboard – Clicking this link closes the popup and navigates to the Dashboard in "alias" mode.



The following message/dialogue will display at the top of the Dashboard:

> *You are currently modifying the dashboard for the user {Aliased User Name}. To stop modifying this dashboard. Click here.*

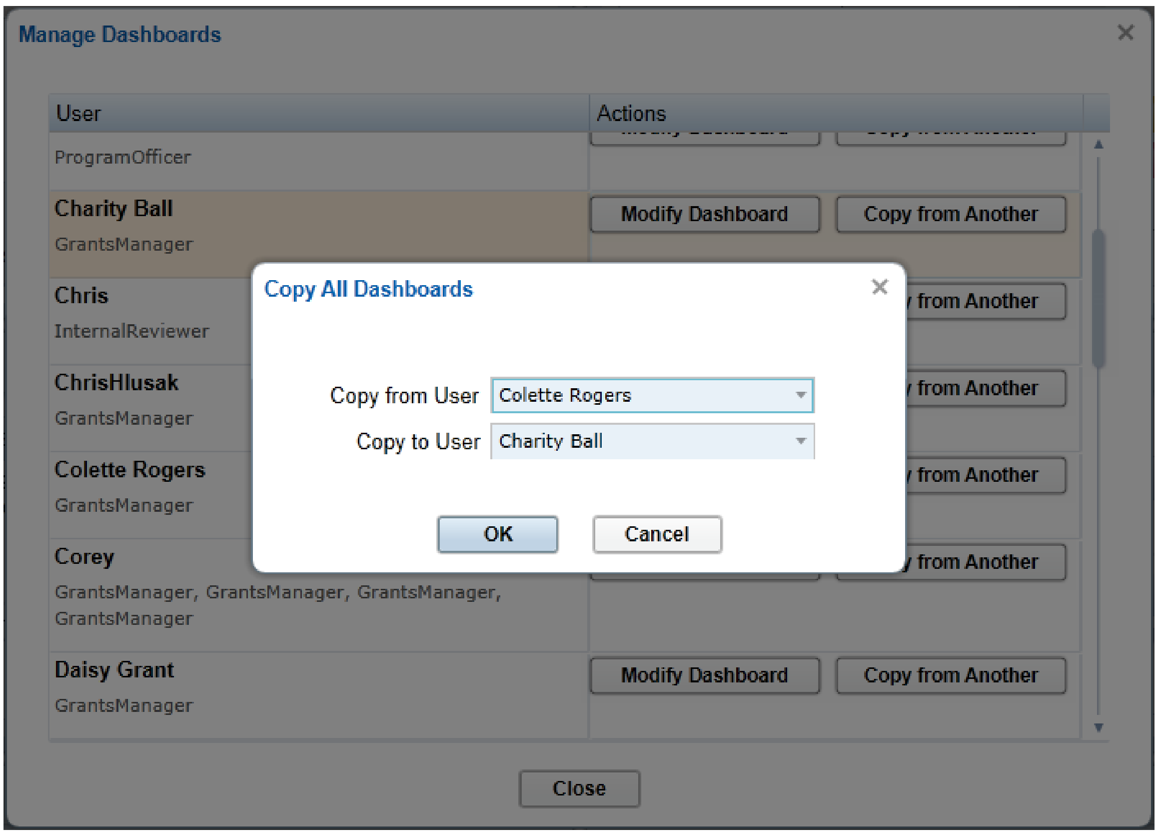
The user's name in the header will not change.

- If the aliased user is "locked", then only the options to edit the dashboard part properties options will be available. You will not have the option to Add or Remove dashboard parts.
- If the aliased user is "unlocked", the options to add and remove dashboards and parts will be available in addition to those described above.

The changes to the dashboard will be reflected on the target user's dashboard the next time they refresh.

When the user clicks the click here link, the current user's normal dashboard will re-display, without the "aliasing" message.

Copy from Another – copies the entire dashboard from one user to another. This includes all dashboards, dashboard parts and their properties, and dashboard settings.



The drop-down will be filtered to include only users with the same Role as the user whose dashboard is being assigned.

NOTE: Only one user be assigned at a time.

Close – closes the popup without copying any dashboards.

About Dashboard Parts and the Dashboard

Dashboard parts are areas on the GIFTS Online dashboards that provide you with a means of viewing and interacting with data from your GIFTS Online database and the Internet.

NOTE: Some dashboard parts may be unique to your system. These unique dashboard parts are added by MicroEdge Services during your setup process.

The dashboard parts look like mini windows and may be customized for appearance and content as needed.

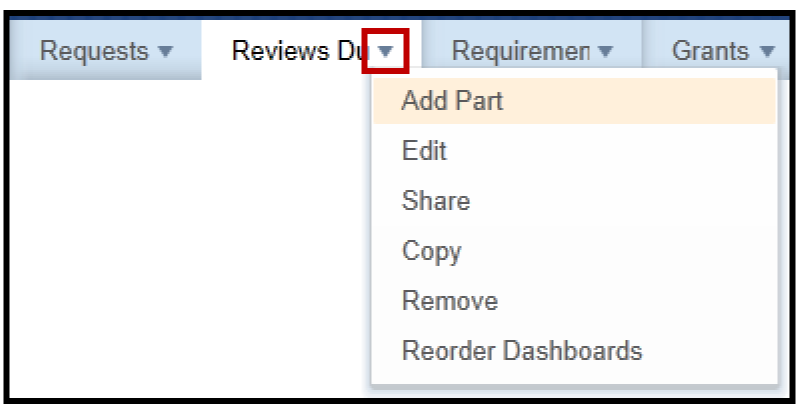
There are a number of different uses for dashboard parts, including:

- Displaying GIFTS Online data
- Viewing saved GIFTS Online documents
- Searching for GIFTS Online data
- Creating reports from your GIFTS Online data
- Creating and editing GIFTS Online records
- Displaying Activities, Requirements, or Payments due

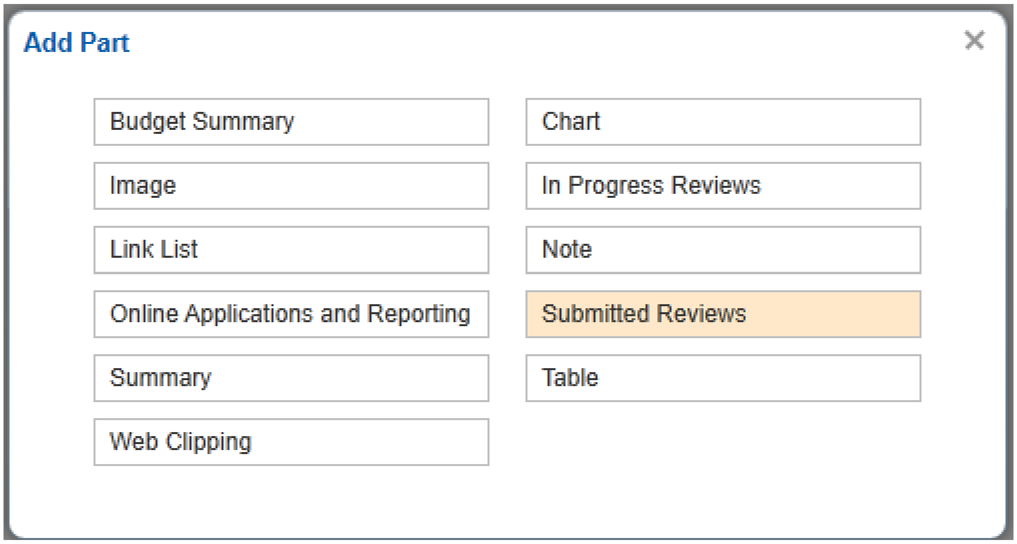
Adding Dashboard Parts

To add a dashboard part do the following:

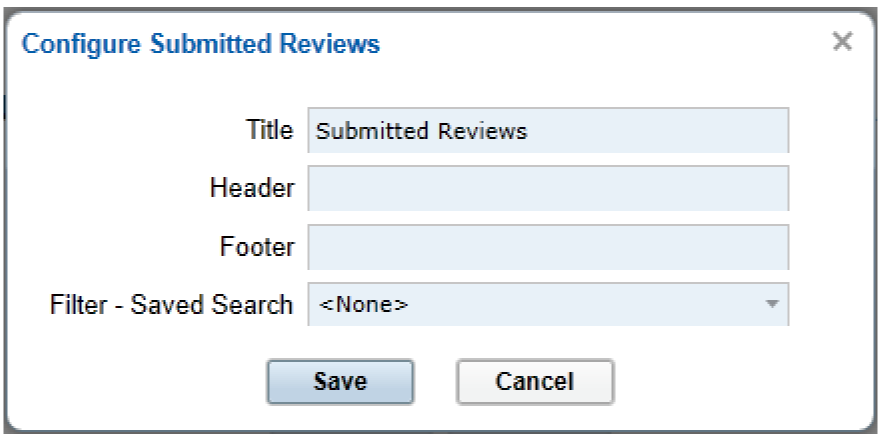
1. Click on the tab for the specific dashboard you want to add the part to.
2. Click on the menu arrow on the dashboard's tab.
3. Select **Add Part**.



4. On the Add Part form, select the dashboard part you wish to add.



5. Fill in the selected part's configuration form as needed and click **Save**.



The part will now be added to the current dashboard.

Edit Dashboard Part Settings

To edit the settings for a dashboard part:

1. Click the **Configure** menu icon in the top right corner of a dashboard part, and then select **Edit**.

2. Make any necessary changes to the settings, then click **OK**.

The dashboard part configuration forms will contain various fields specific to the dashboard part.

Grant Manager Dashboard Options

In GIFTS Online, users associated with the Grants Manager role have the ability to "alias" another user and make changes to their Dashboard, as well as assign a Dashboard from one user to another.

This allows you to set up the dashboard parts on multiple dashboards for one user and simply copy them to several other users at once.

For more details, see Assigning Dashboards.

Available Dashboard Parts

The following dashboard parts are available:

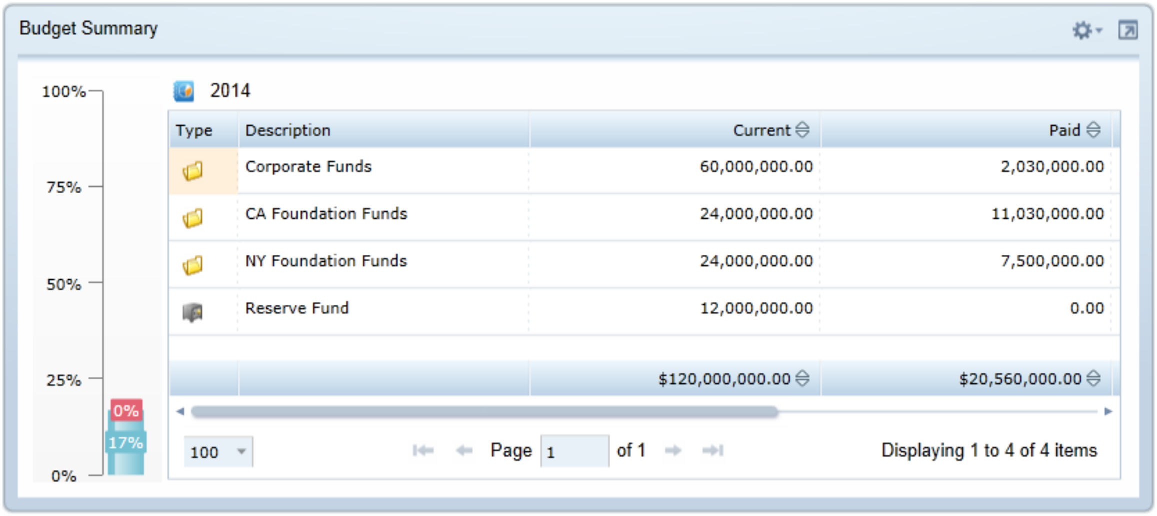
Dashboard part	Notes
Budget Summary	**Budget Module required**
Chart	Chart tool with many formatting options
Image	Display images.
In-Progress Reviews	**Reviewers Module required**
Note	Add notes for yourself in this part.
Online Applications and Reporting	**Online Applications and Reporting Module required**
Submitted Reviews	**Reviewers Module required**
Summary	Displays Grant and Payment information.
Table	Displays records as a list.
Web Clipping	Displays the contents of a specified webpage.

The Budget Summary Dashboard Part

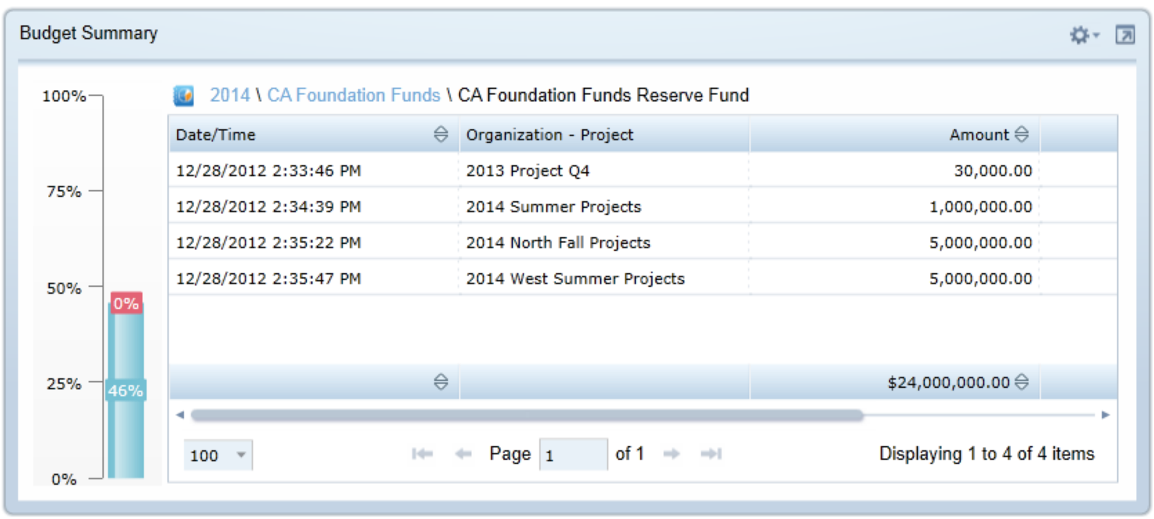
NOTE: This dashboard part is only available with the optional Budget module installed. If your GIFTS Online system does not include the Budget module, you may disregard this information.

NOTE: These dashboard parts let you see the status of all of an open budget, or just a part of it. For example, if you are Program Officer, your Budget Summary dashboard part might be set to show only your program's part of the budget.

You can quickly see the progress toward your giving goals by comparing the budgeted amounts to be paid vs. committed amounts, and see the remaining balance of each budget item.



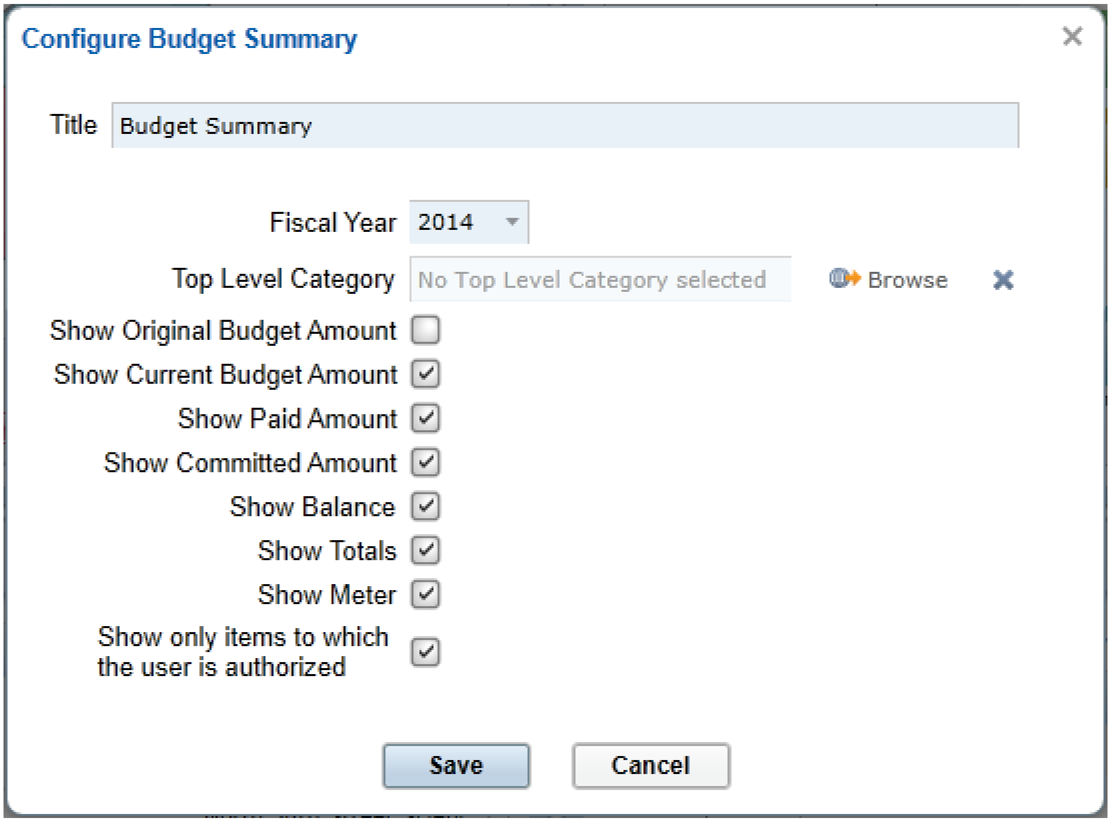
If your Budget Summary dashboard part includes the Budget Meter, you can get a visual representation of your progress toward paying out the budget totals. Each budget item listed is a link, allowing you to drill down and see commitments and balances at the next level of the budget hierarchy.



TIP: Hover your mouse pointer over the red or blue part of the budget meter on the left to see the percentage and amount committed or paid, respectively.

Add a Budget Summary Dashboard Part

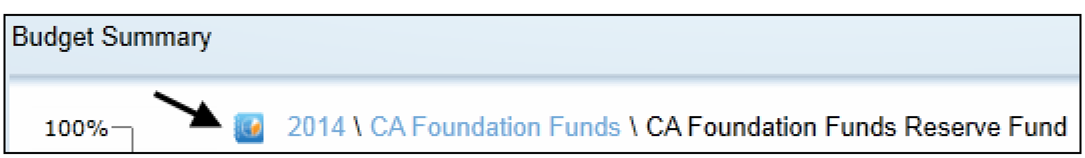
To add a Budget Summary dashboard part:



1. On the Dashboard, click the dashboard menu and select **Add Part**.
2. On the Add part form, select the **Budget Summary**.
3. Enter a Title for the part.
4. Select a fiscal year.
5. Select a Top Level Category, if desired.
6. All options will be checked except "Show Original Budget Amount". Check it if you would like to see that as well.
7. Click **Save** to continue to finish the Budget Summary settings.
8. You will return to the current dashboard with your new dashboard part displayed.

Budget vs Actual Report

You can generate a Budget vs Actual Report for any branch in the budget hierarchy to which you have access by clicking the blue View report icon next to the budget year.



The report - which can be printed, exported to Word or Excel, or saved as a PDF - presents budget versus actual figures for the selected budget Category and its children.

The Chart Dashboard Part

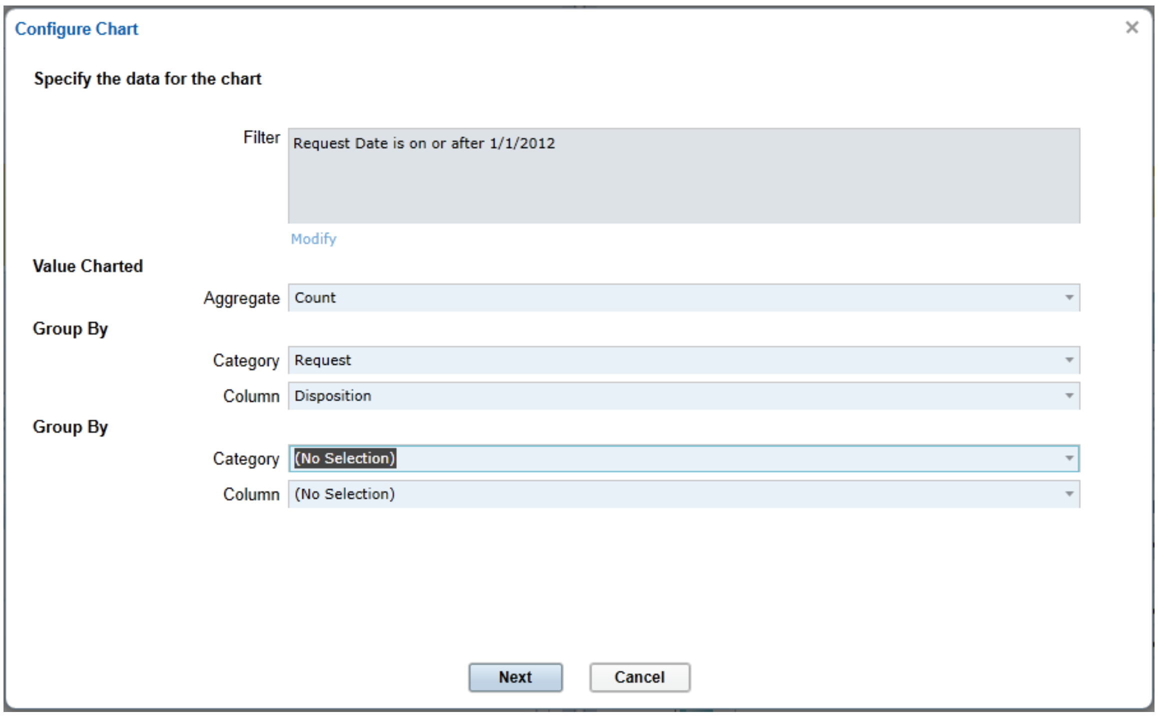
The Chart dashboard part allows a MicroEdge Product Specialist or a Grant Manager to place charts on the GIFTS Online home page of any user.

Add A Chart

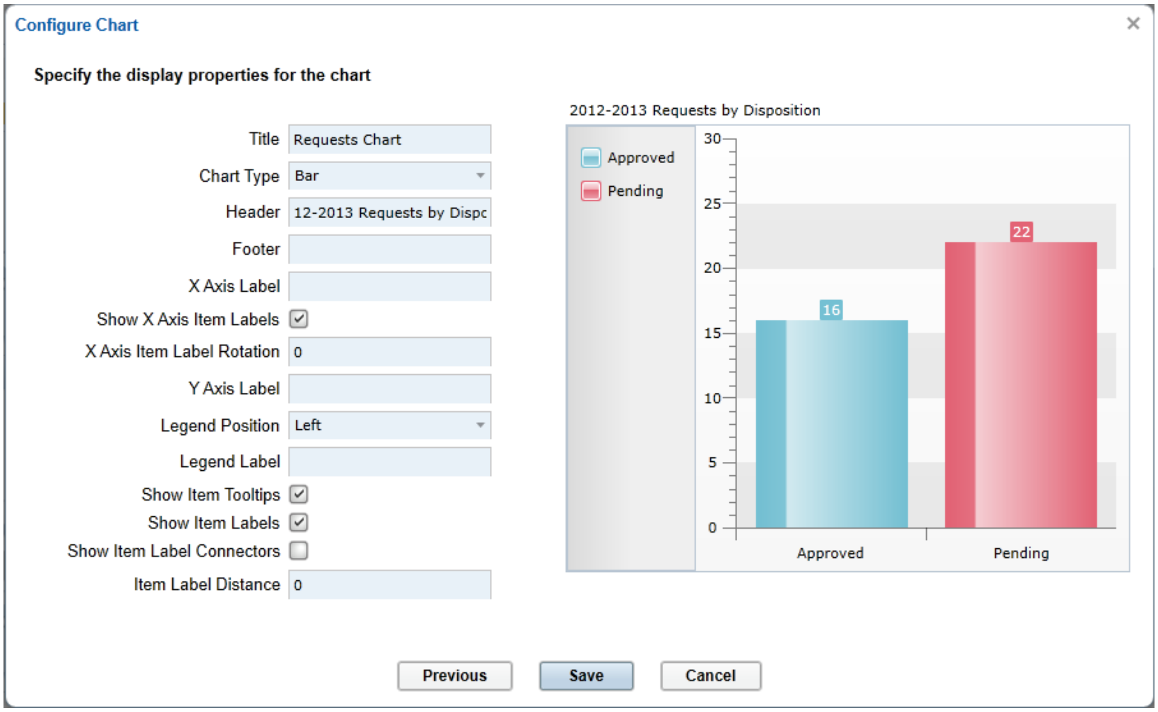
To add a Chart dashboard part:

1. On the Dashboard's menu, click **Add Part**
2. On the Add part form, select **Chart**.
3. There are actually two pages to the chart configuration process:

a) The first page lets you set up search parameters and grouping requirements.



b) The second page is where you set up visual aspects such as Title, Chart type, Header/Footer text, etc.



See **Chart Options** below for details regarding all the settings available.

4. Make changes as necessary on the settings forms.
5. Click **Next** on the first page to go to page 2.
6. On page 2, a preview area will show you what your chart will look like as you make changes.
7. To complete your chart and place it on the dashboard, click **Save**.

Chart Options

This section discusses the configuration options in the Chart Settings form.

Option	Description
Page 1:	
Filter	This field will be gray and read-only. It will either show the name of the current Saved Search assigned or the search logic defined. Clicking the **Modify** link below will open the standard Search form where you can choose to use the Query Builder to create/edit a search, or select from a Recent Search or Saved Search. If an ad hoc search is already associated with the part when the user clicks the **Modify** link, the search form will display with the existing criteria loaded into the query builder, so the user can make changes. Clicking the **Select** button will save any changes and return you to the Configuration form.

Option	Description
	NOTES: • If a Saved View or ad hoc View is associated with a Saved Search, this read-only prompt will be populated with the name of that search, and the **Modify** link will be disabled. • If a Saved Search associated with a View is selected and no View parameters have been defined, the part View will automatically default to that View. (But the option to modify it will still be available.) If View information has already been defined, the user will be asked if they wish to overwrite it. • If the user changes the Record Type of the Filter, any associated View information will be cleared automatically.
Value Charted	**NOTE:** Hidden if no Filters are defined. The calculation to be done when plotting the records on the chart. Options include **Count, Sum, Average, Min and Max**. If Sum, Average, Min, or Max is selected, Category/Column fields will give you more options. Only the numeric and currency values that can be summarized are available.
Group By	**NOTE:** Hidden if no Filters are defined. Lets you group the data returned by Category and Column. If the chart is one of the bar-type charts, a secondary **Group By** set of prompts will also display. This provides the user with the ability to group at a sub-level as well.
Page 2:	
Title	Enter the title as you want it to appear on the Dashboard.
Header	Optional text that appears above the Dashboard part content just below the title.
Footer	Optional text that appears at the bottom of the part.
Chart Type	The following chart types are available: Bar, Stacked Bar, Horizontal Bar, Horizontal Stacked Bar, Line, Step Line, Spline, Area, Pie, Donut, 3D Bar, 3D Stacked Bar, 3D Line, 3D Area, 3D Pie, 3D Donut. Drill down with 2D charts will open the Search Results for the record set. **NOTE:** Drill down is not supported for 3D charts.
Formatting	**Height** - Controls the default overall height of the chart dashboard part. **Width** - Controls the default overall width of the chart dashboard part.

Option	Description
	X Axis Label – the label across the bottom of the chart. **Show X Axis Item Labels** - uncheck this box to turn off labels for the x axis of Bar and Line charts. **X Axis Item Label Rotation** – An angle to tilt the labels that appear with the values going across the chart **Y Axis Label** – a label across the side of the chart **Legend Position** – top, bottom, left and right **Legend Label** – a label that appears above the legend bar **Show Item Tooltips** – with this enabled, hovering over an item on the chart shows the values in a tooltip **Show Item Labels** – shows labels for the items on the chart. **Show Item Label Connectors**- draws a line from the item label to the item **Item Label Distance** – the distance between the item label and the chart segment it represents.

Viewing Chart Details

You can click on a section of a chart to view the list of records represented and then drill-down to individual records.

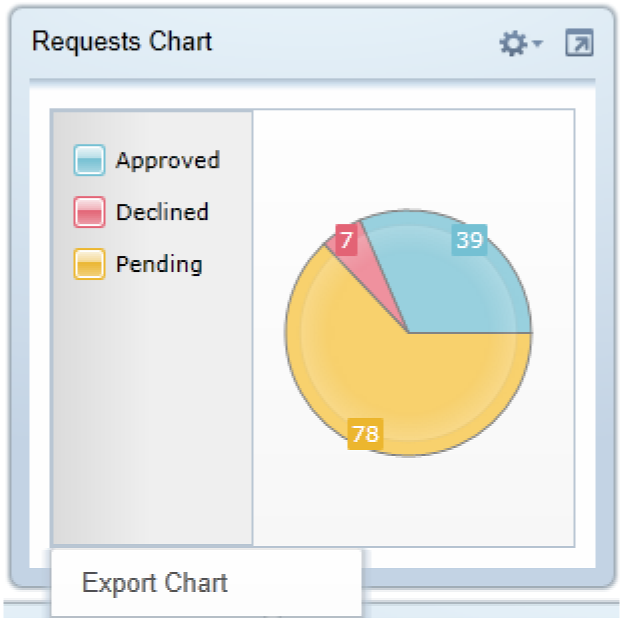
NOTE: 3D charts do not have the drill down feature.

To return to the Dashboard, click the **GIFTS Online logo**.

Exporting Charts to Excel

Chart parts displayed on a dashboard can now be exported to Excel with a simple click of your mouse.

Right-clicking anywhere on a chart part will display an Export Chart option in the lower left corner.



Clicking on Export Chart will open a Windows browse window allowing you to name the export file and Save it to a location of your choice.

Clicking on Export Chart will open a Windows browse window allowing you to name the export file and Save it to a location of your choice.

Available Export formats include:

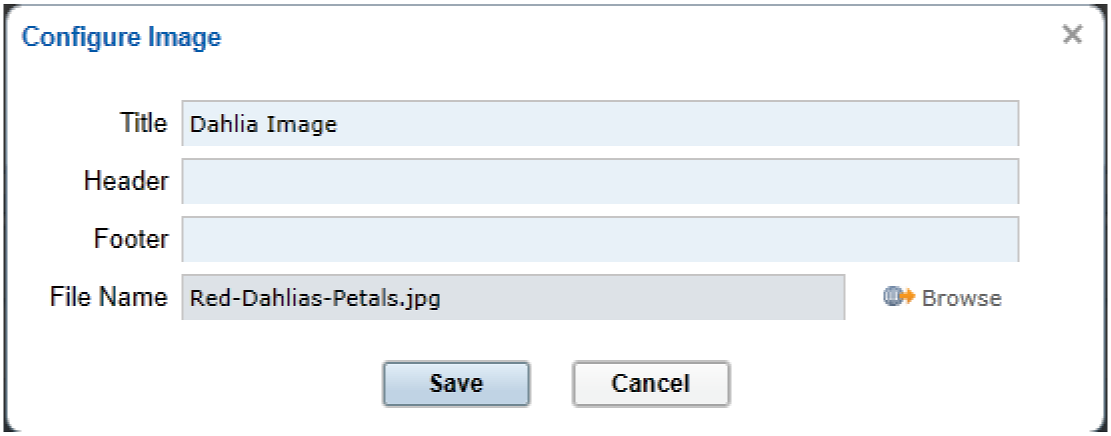
- MS Excel
- PNG (Portable Network Graphic format)
- BMP (Bitmap image format)
- XPS (XML Paper Specification)

NOTE: If exported to Excel, when you open the saved file a warning message may be displayed. Simply click **Yes** to continue. It's OK to open the file. You may need to **Enable Editing** if modifications are required.

The Image Dashboard Part

This dashboard part lets you add an image to your Dashboard.

You can add your own Title, Header, or Footer.



Click the **Browse** button to search for the image file.

Click **Save** to load the image into GIFTS Online.

When done uploading, you will return to the current dashboard where the image will be displayed.

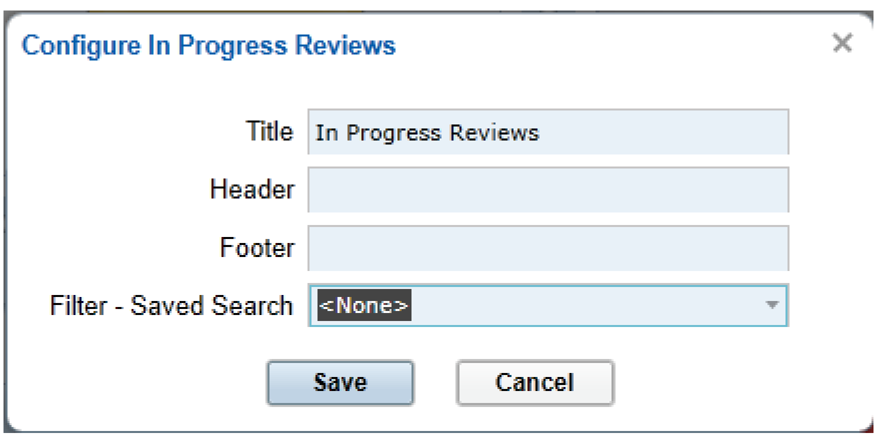
CAUTION: Try to select small images that will not take up all your workspace.

In-Progress Reviews Dashboard Part

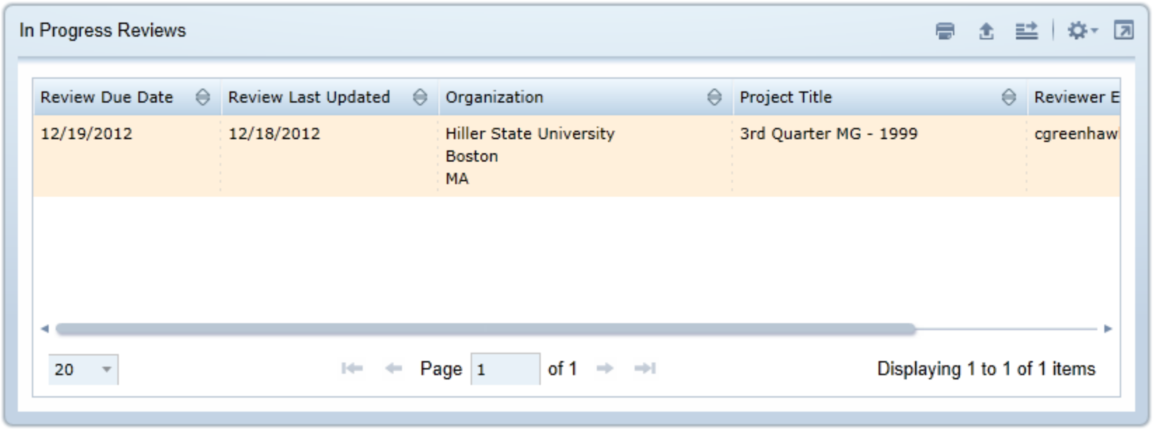
NOTE: This part is only available with the Reviews module installed.

This part displays all Reviews that not yet completed.

The configuration form allows you to enter a Title, Header, Footer, and select a Saved Search if available.



The dashboard part will look similar to the example below:



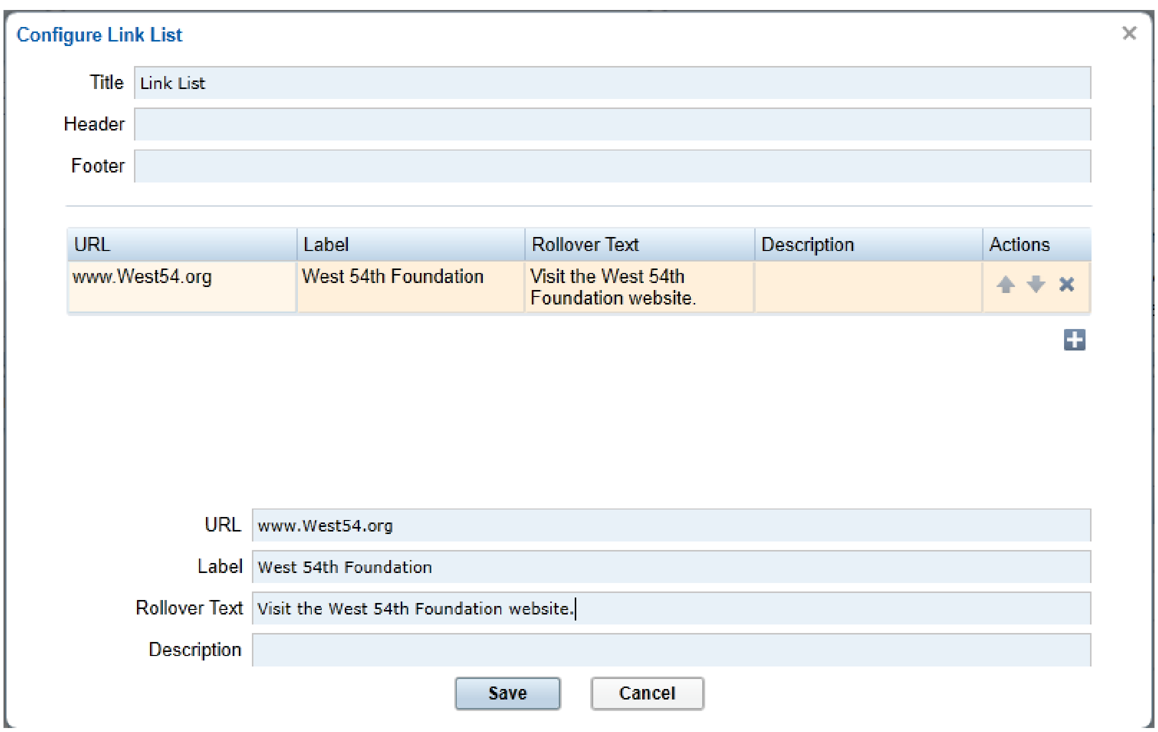
Link List Dashboard Part

NOTE: This part can only be created and configured by MicroEdge Services.

This part is used to list one or more links at once. The links could be to other websites or other pages on your own website.

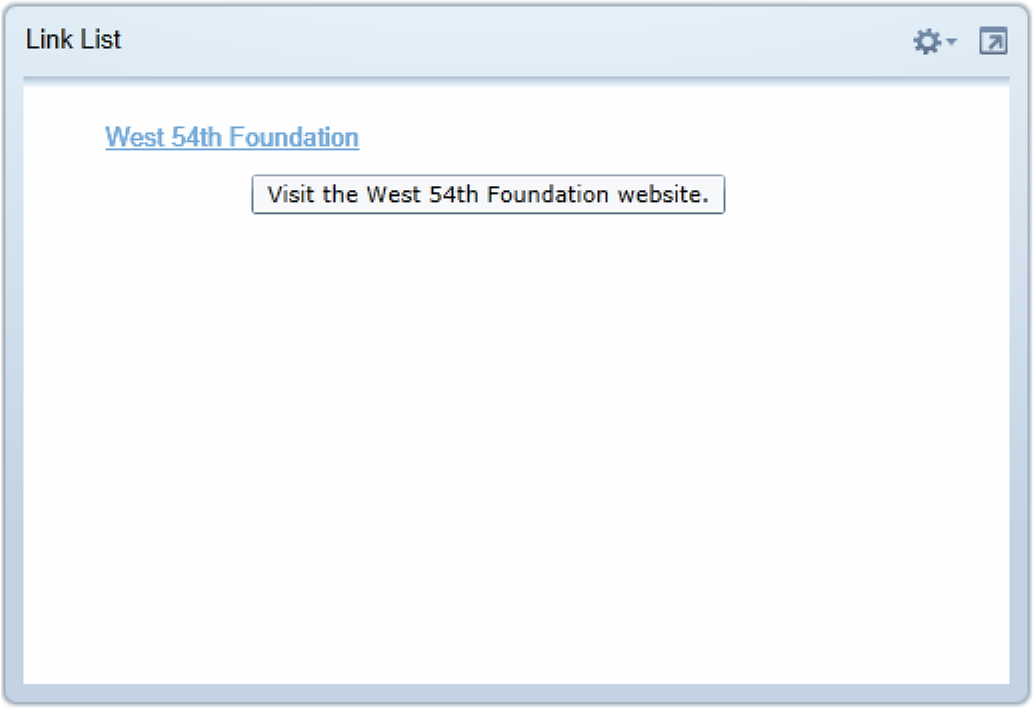
To add the part:

1. Select **Add Part** from the dashboard submenu.
2. Click on **Link List** part button.



3. Enter a Title, Header, and Footer if desired.
4. Click the **[+]** icon in the middle to add a nee URL entry.
5. Fill in the **URL address, Label, Rollover Text,** and **Description**.

6. If there are multiple links entered, you can use the arrows in the Actions column to move a link up or down.
7. Clicking the **X** in the Actions column will remove the link.
8. Click **Save** when complete.

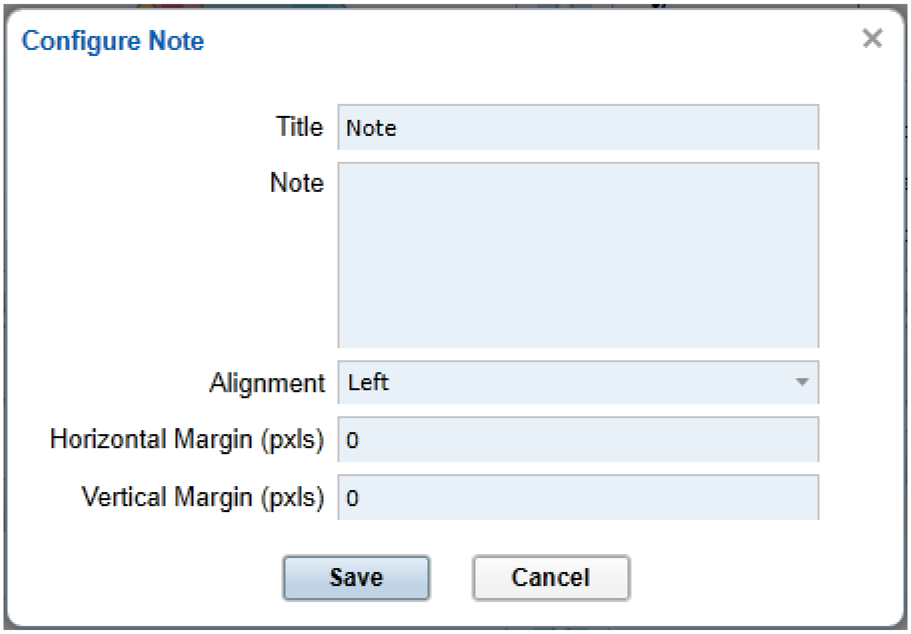


The Note Dashboard Part

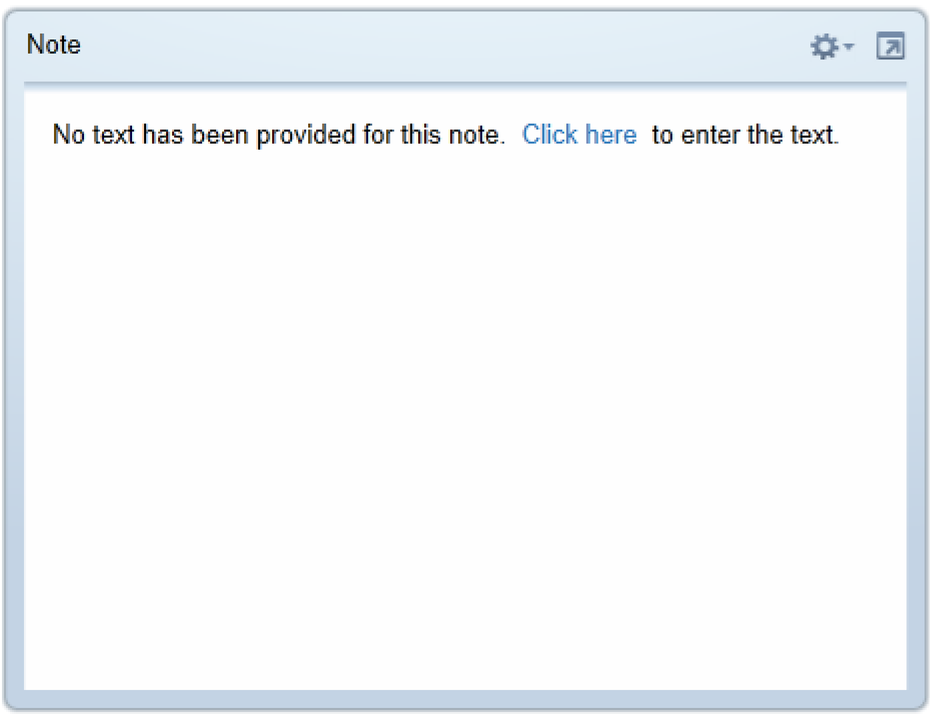
The Note dashboard part provides you with a space on your Dashboard to enter and save brief notes.

To add it to your Dashboard:

1. Click the **Add Part** menu option from the Dashboard submenu to open the Add Part form.
2. Select **Note** from the dashboard part menu.
3. Select Title, Note, Alignment, and Margins as desired.



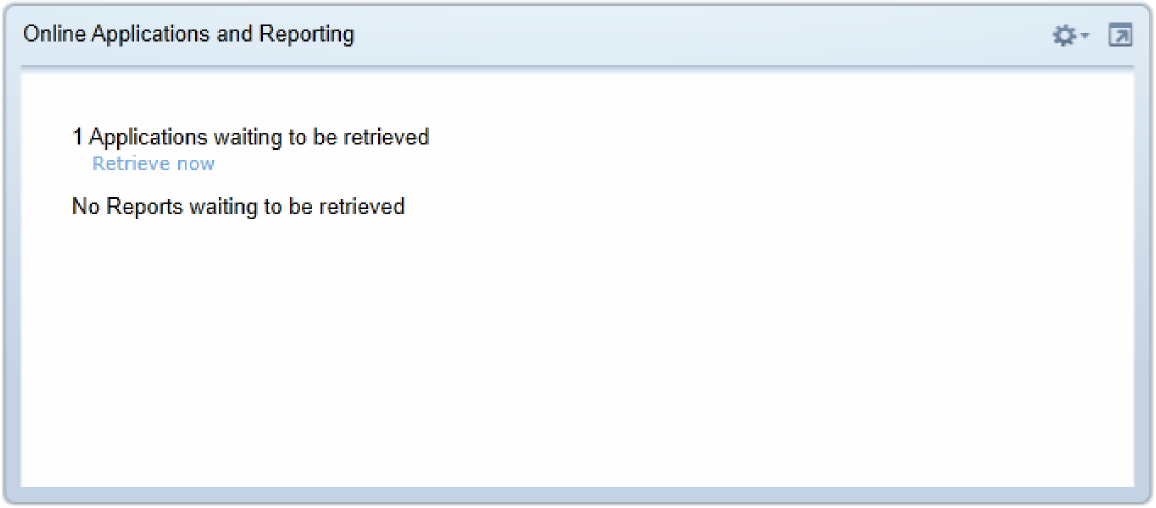
4. Click **Save** when done to go to Note edit form.



5. If you did not add a note in the configuration form, you can click the **Click here** link to enter a note directly into the dashboard part.

Online Applications and Reporting

This new dashboard part allows users to see on an ongoing basis if they have any pending applications or requirements which need to be retrieved and reviewed for consideration.



Default Title – Online Applications and Reporting

Applications – The applications line has the following content:

- The count of applications waiting to be retrieved since the last refresh
- Label "Applications waiting to be retrieved"
- A **retrieve now** link – is disabled if the count is zero. Clicking this link will navigate to the Retrieve and Manage Applications page and will automatically begin the download.

Reports – Similar to Applications above, however, the **retrieve now** link will go to the Retrieve Submitted Requirements page.

Last Refresh Date/time – The date and time the counts were last refreshed

Refresh button – Refreshes the counts for both the applications and the reports

When on the Dashboard, the counts will only be refreshed when you first log in to GIFTS Online.

Unlike other dashboard parts that display data from the database, the counts will not be refreshed each time the dashboard itself is refreshed as this could negatively impact IGAM server performance.

NOTE: In GIFTS Online, access to the Retrieve and Manage Applications or the Retrieve Submitted Requirements pages is through the **Launch > Applications** menu.

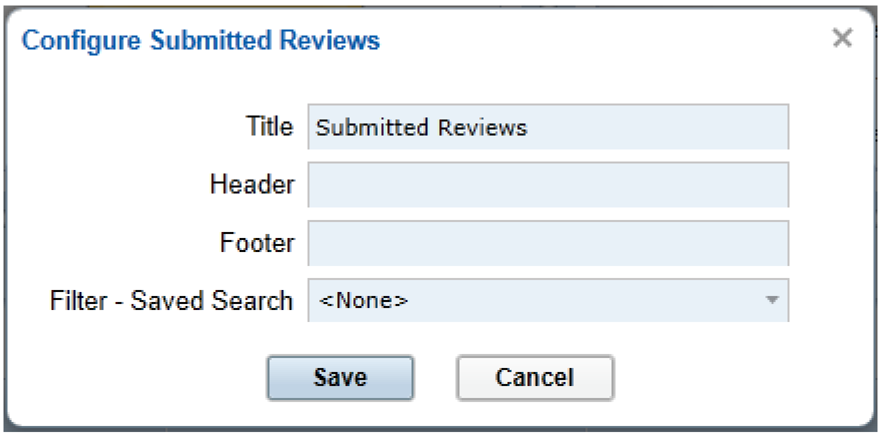
Submitted Reviews Dashboard Part

NOTE: This part is only available with the Reviews module installed.

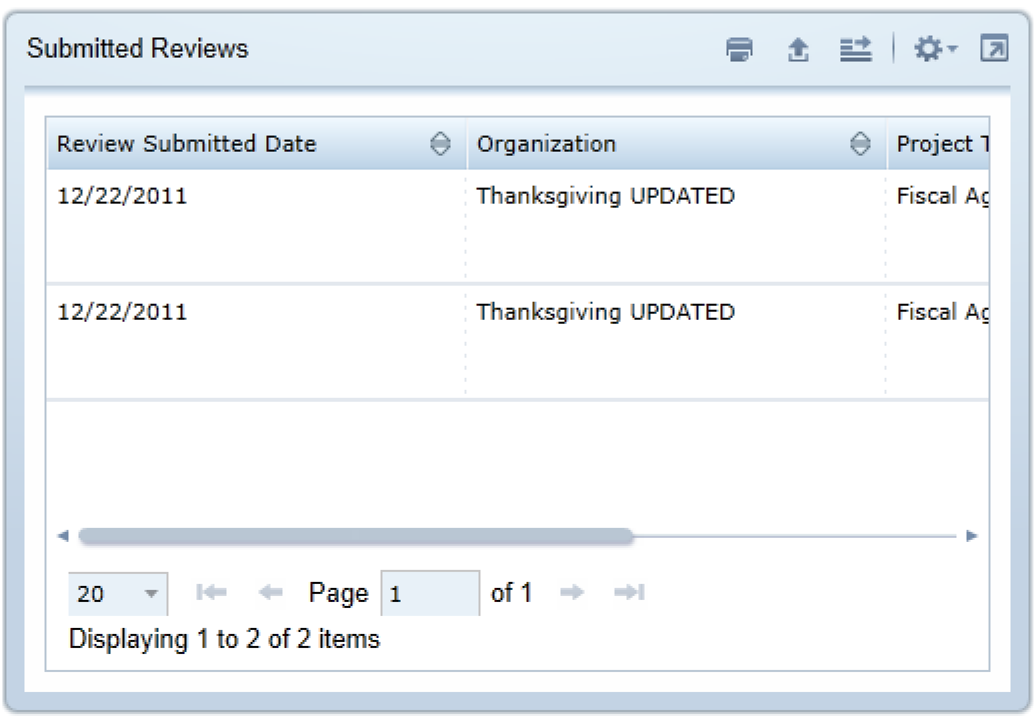
This part lists all Reviews that have been submitted.

To create a Submitted Review part, do the following:

1. Select Add Part from the dashboard submenu.



2. Fill in the **Title, Header, Footer** and select a **Saved Search** as needed.
3. Click **Save** when done.



The Summary Dashboard Part

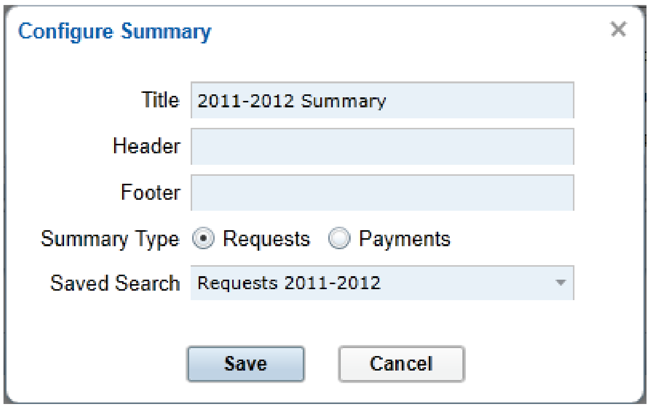
This dashboard part provides a summary of the records resulting from a saved search.

The saved search must be of a Request or Payment type.

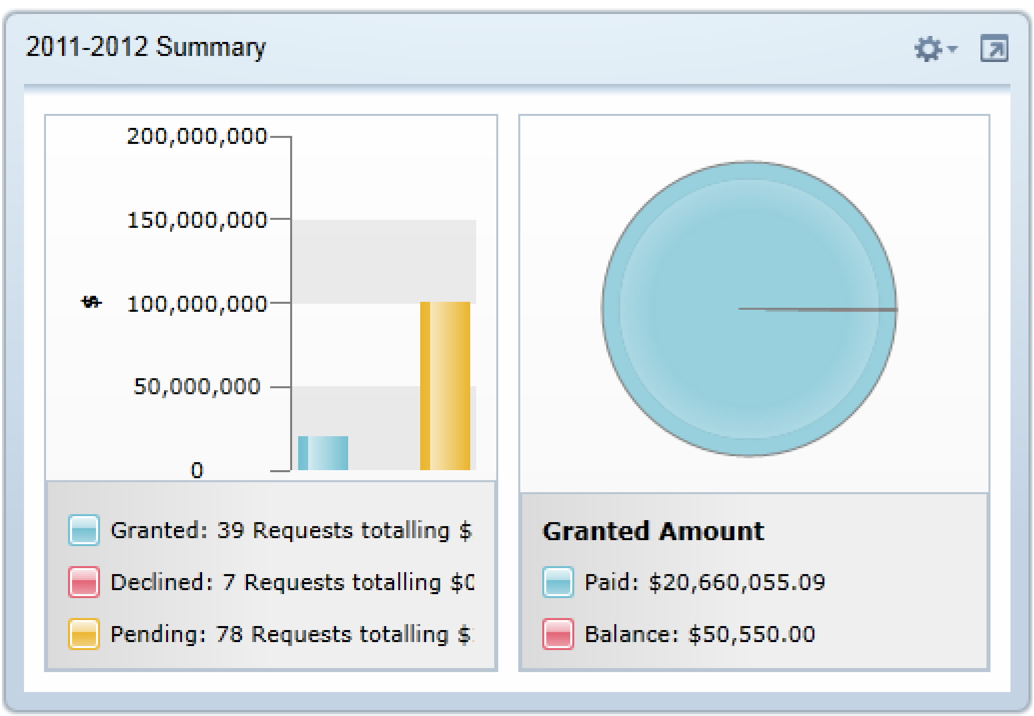
Adding a New Summary dashboard part

To add a new Table dashboard part:

1. Click **Add Part** on the Dashboard.
2. Select Summary from the dashboard part menu and modify the Title, Header, Footer, Summary Type (Requests or Payments), and apply a Saved Search.



3. Select the **Summary Type.**
4. Select the desired **Saved Search** to apply using the menu and then click **OK**.



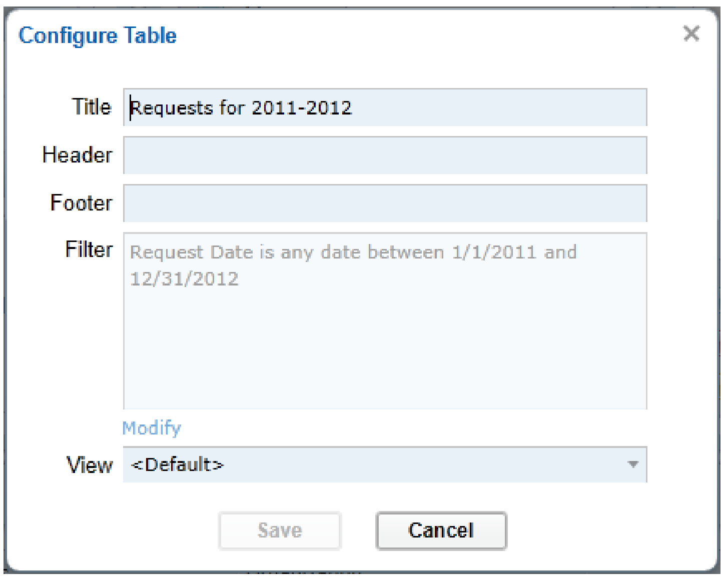
The Table Dashboard Part

The Table dashboard part is a new generic dashboard part that will use a Saved Search or View to construct the table. You will be able to use all of the content options that can be seen in the Search Results.

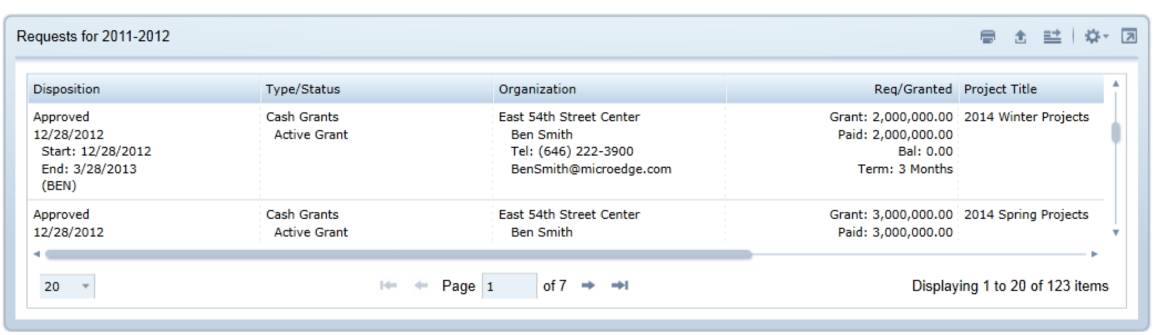
Adding a New Table Dashboard Part

To add a new Table dashboard part:

1. Click **Add Part** on the Dashboard.
2. Select **Table** from the dashboard part menu and modify the Title, Header, Footer, Filter, and View assigned.



3. The **Filter** field will at first be blank, so click the **Modify** link below it to open the Search form.
4. On the Search form, select a Saved Search or use the Query Builder to create a new search.
5. The **View** drop-down can be used to select a standard view or a saved view, if available.
6. Click **Save** when done to return to the Dashboard.



Dashboard Part Properties

Filter: All table dashboard parts are associated with filters that determine the data to be displayed. The user can associate a Saved Search, or create a new query just as they would do from the standard Search popup.

- The field will display the name/criteria of the current search.
- The **Modify** link will open a version of the Search popup.
- This version of the popup differs from the standard in the following ways:
    - There is no access to Recent Searches
    - The Search button is relabeled **Select**.
- If you choose a Saved Search or click **Select**, the search popup will close and the Filters for the dashboard part will be updated accordingly.
    - Note that if the user changes the Record Type here, then the View selection (described below) will be reset to "(defaults)".

View: This drop-down determines the columns and sort order for the table.

The user will have the option of using the system defaults (the default option) or choose a Saved View. There is no link here to create or modify a saved view.

If the dashboard part has been created from the Search Results, it will use whatever columns and sorts were in place on the Search Results page at that time. In this case, the drop-down will be set to "(search results)". The user can choose a saved View instead, but will have no other way of changing the columns and sorts except by removing the dashboard part and recreating it.

Display

The Table dashboard part will include the following options:

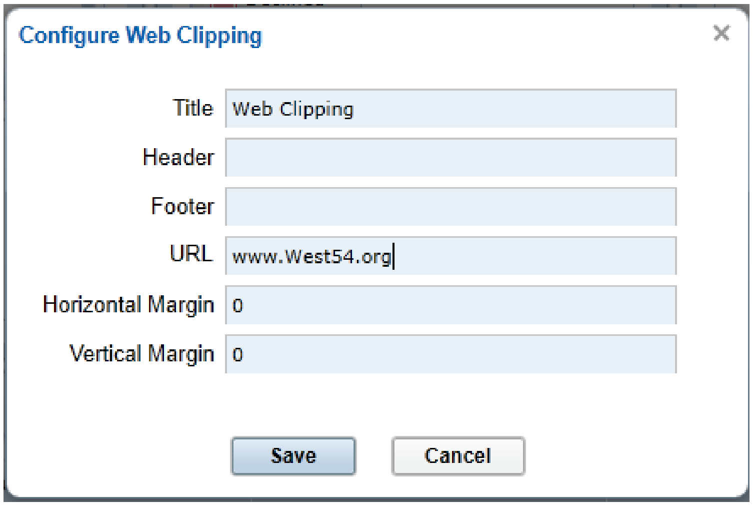
- Printer-friendly version
- Export to Excel
- Open in Workspace
- Configure menu
- Minimize/Restore
- Navigation controls on the bottom

The Web Clipping Dashboard Part

The Web Clipping dashboard part displays the contents of a specified webpage.

NOTE: For security reasons, if you would like this part hidden please contact MicroEdge Support.

Click **Add Part** on the dashboard.

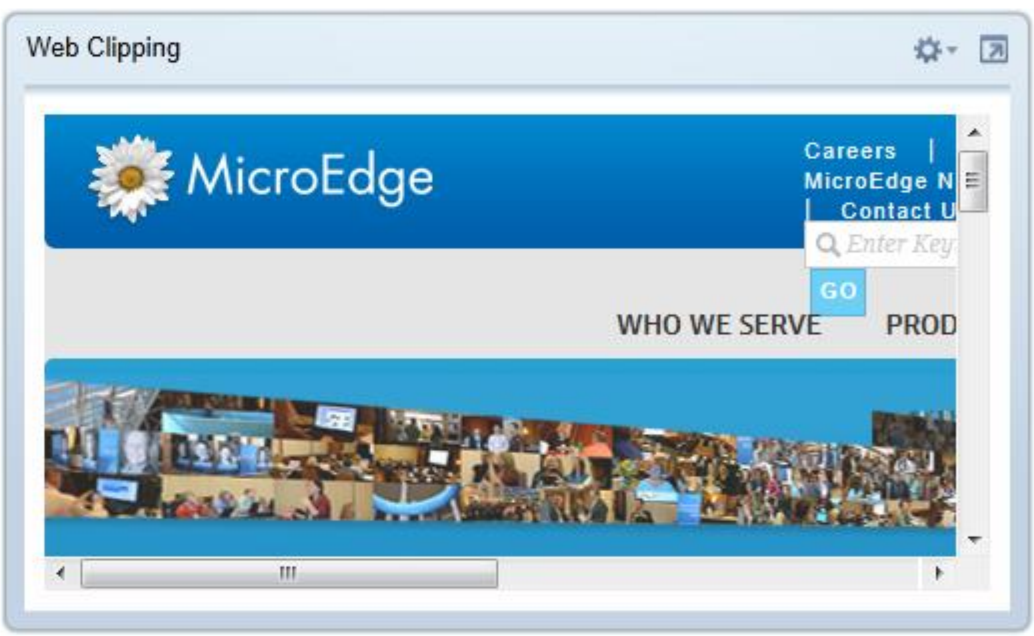


The configuration form will have settings for Title, Header, Footer, URL, and Margins.

The contents of the chosen URL (webpage address) will be displayed on the dashboard part just like it if it was in a mini-browser window.

NOTE: None of the fields are required. However, if the URL field is left blank, the part will display on the dashboard with the message "Please specify a URL for this part."

There is no limit to the number of times you can add the Web Clipping dashboard part to the dashboard. Each Web Clipping dashboard part will refer to a specific URL and all links displayed will be functional.



CAUTION: Web Clippings is recommended only for sites that may be embedded in iFrames or otherwise displayed in web pages. For security reasons, some websites do not support iFrames. If such a webpage is used for the web clipping dashboard part, browser issues may occur. For example, using www.nytimes.com will cause an issue. However, using the RSS feed for content from the NY Times site will work: http://feeds.nytimes.com/nyt/rss/Americas. If you experience this issue with your web clipping dashboard part, please contact MicroEdge Support for assistance.

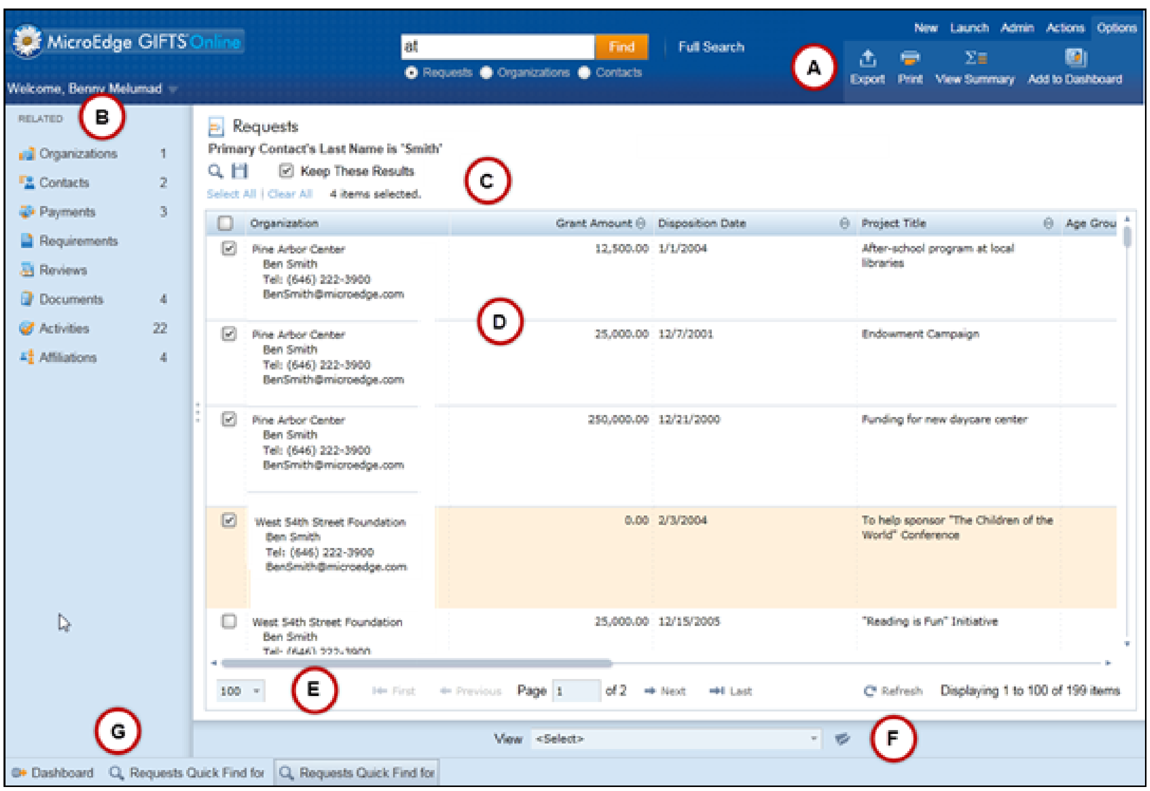
The Search Results Page

Whenever you run a search using either Setting Up Quick Find, Full Search, Recent Searches, or Saved Searches, the results will be displayed in what is known as the Workspace.

This page is composed of a grid detailing the records returned by the search. Here you can review the matching records, double-click each to see its details, or select a batch of records for which to generate emails, letters, or write-ups.

NOTE: The Workspace also displays if you double-click a section of a 2D chart.

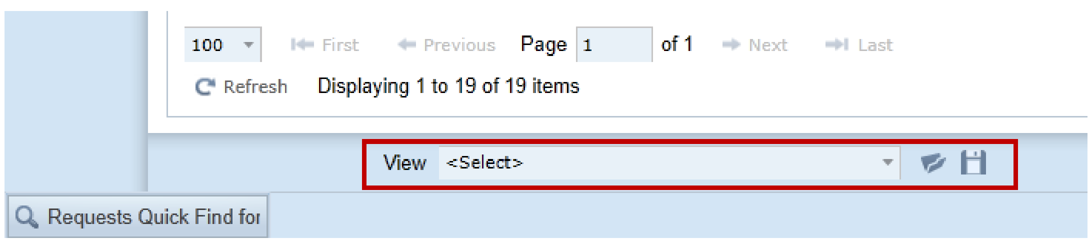
TIP: If you run a **Saved Search** that is associated with a **Saved View**, the view will be applied to the search results on the Workspace. Otherwise, your search results will display in the default view. You can also apply a **Saved View** to this page by simply selecting from the **View** drop-down menu on the bottom of the page.



Links in the Search Results Page

There are a number of links within the Workspace that you can use to locate data, to configure your personal viewing preferences, or to print or export your search results:

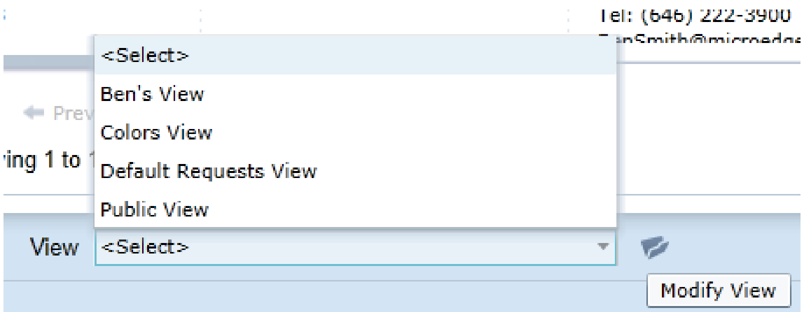
Element	Description
A	In addition to the existing New, Launch, Admin, and Actions menus, a new Options menu will be added with the following options:
•	**Export** – Exports the current results to Excel
•	**Print** – Opens a new browser window with the search results ready for printing.
•	**View Summary** – Only available for Requests and Payments. This displays a summary of all the records in the search results, regardless of records which may be selected. **For Requests** – A bar chart displays Granted, Declined, Pending total amounts and a pie chart displays Paid and Balance totals. **For Payments** – A pie chart displays number of Payment records, Total Scheduled Payments, Total Paid and Balance to be Paid.
•	**Add to Dashboard** – Adds the current search results to a selected dashboard as a table part.
B	**Related Records Panel** This panel provides links to view the records related to the selected record(s). The count beside the record type indicates the number of related records of that type. Clicking a related record type with a count will open a new GIFTS Online page on the workspace to display the associated records. A new workspace taskbar tab will be created for each list you open. **TIP:** See the Related Records section on next page for more details.
C	**Search Results** Search results title and sub-title will show the record type searched and summarize the search criteria.
•	**Magnifying Glass** icon (Change this search) to modify and rerun the search.
•	**Disk** icon (Save this search) to Save the search.
•	**Keep these results** – Check this box if you want to keep the search results available as a separate tab.
•	**Select All** – selects all records (up to 1000).

•	**Clear All** – clears all records selected
•	# items selected – shows the current number of records selected.
D	This is the search results grid itself. Columns displayed will vary according to the current view selected.
•	**Select All/Clear All Checkbox** – this checkbox on the left column will select all or clear all records on the page.
•	**Column Sort** – to the right of some column headers(not all columns are sortable from the column header) is a double arrow sort icon which can be used to sort all results in ascending or descending order by that column. This grid also allows users to adjust column width by mouse.
E	Also found in the area below the search results grid are the page options for number of records per page, previous/next, first/last, jump to a page, and refresh the page.
F	The **View** menu lists applicable views. Also to the right of the menu are options for Change Display and Save View.  **NOTE:** The **Save View** option is only available if the current view has been changed.
G	Search results tabs along the bottom allow you to switch between record sets from multiple searches, and the dashboard if you check the **Keep these results** box for each search.

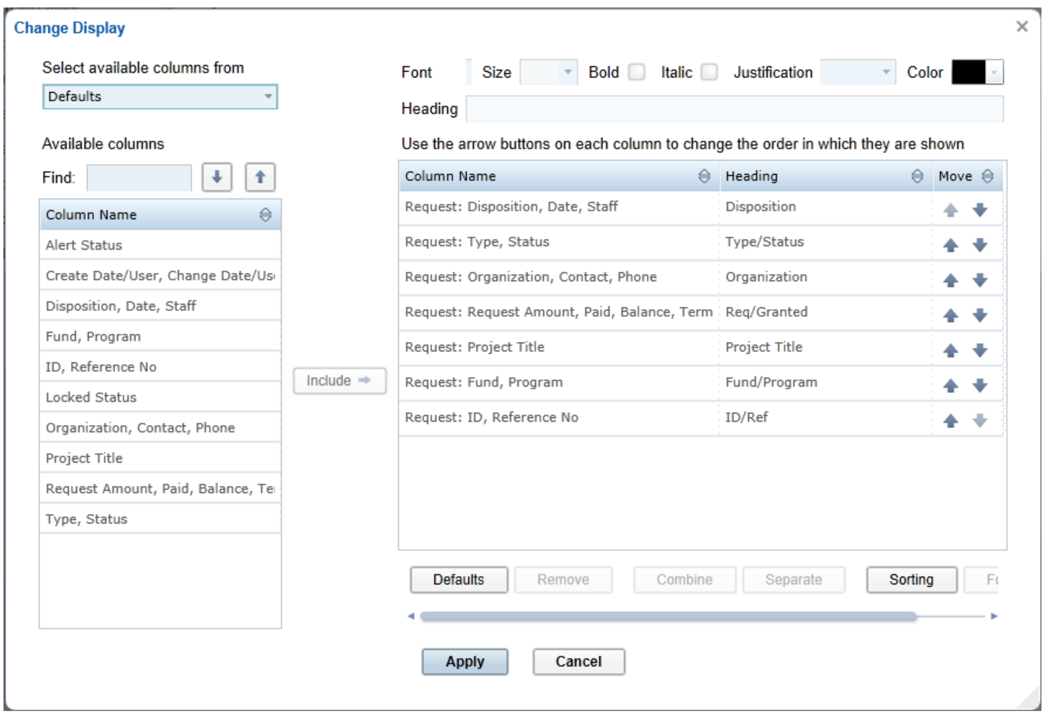
Search Results: Change Display

The Change Display option allows you to change the columns that are displayed for the selected View in the Workspace and edit the formatting for each column heading.

To access the Change Display window, click the **Modify** icon, to the right of the View menu on the bottom.



The following image displays the Change Display form:



From this section, you can:

- Add columns to the View
- Edit the column headings
- Specify the format—such as font, font color or justification—of the data in each column
- Change the order (from left to right) in which the columns are displayed
- Remove columns
- Combine columns, displaying the data they contain in a single column
- Sort columns
- Reset the default columns

Adding Columns

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

You can use Select available columns from drop-down menu to choose a category of information. Note that the Defaults category always lists the default columns provided with GIFTS Online.

To add a column to the View grid:

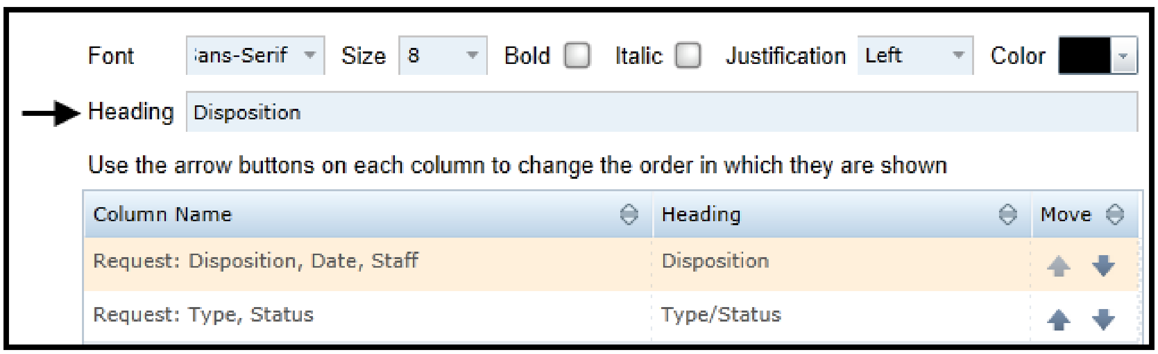
1. Choose a category of information from the Select available columns from drop-down menu. The available columns for that category appear.
2. Highlight a column and click **Include** to add it to the View grid. It appears in the column list on the right of the screen.

   NOTE: The column name is preceded by the name of its category. For instance, "Organization: Legal Name."

3. Click **Apply**.

Editing Column Headings

To edit any column:

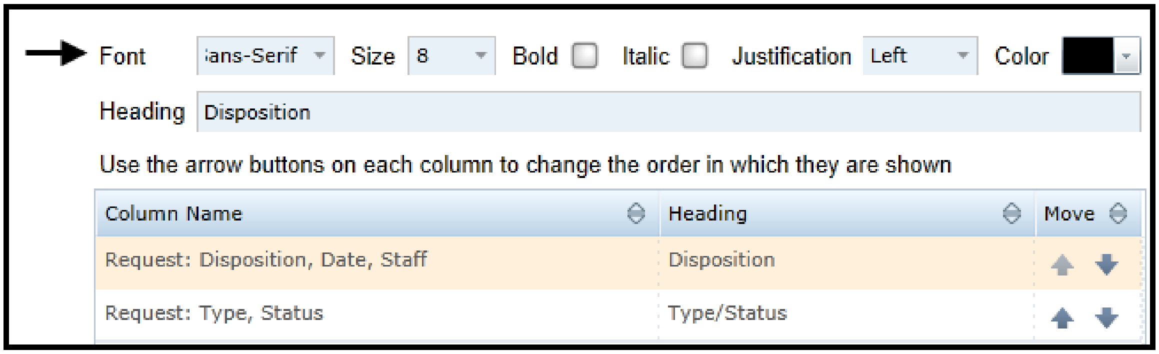


1. In the View grid on the right side of the screen, select the column whose heading you wish to change.
2. Edit the heading in the Heading field.

   TIP: You can click the right mouse button to access standard Windows editing functions like cut and paste.

Formatting a Column

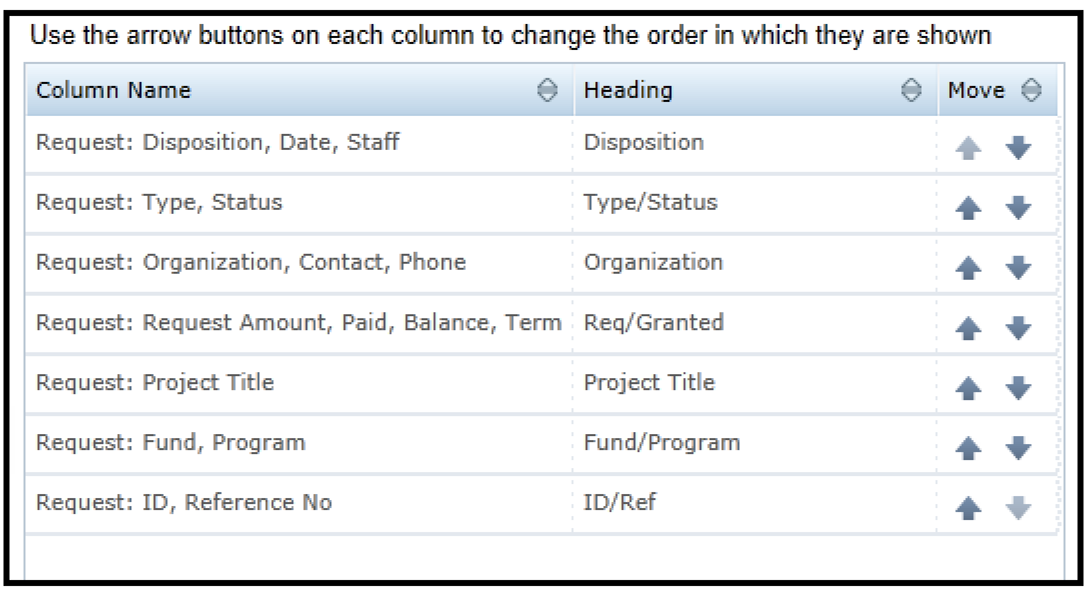
Each column displayed in the View grid on the right side of the screen can be customized with its own font, font color, alignment, and other formatting options. To format a column:



1. In the View grid, select the column you wish to format. The buttons in the formatting toolbar become available.
2. Use the formatting toolbar to customize the column. You can select font, font size, and font color. Text within the column can be aligned to the left, right, or center. You can also format column text to be bold, italicized, and/or underlined.

Changing the Column Order

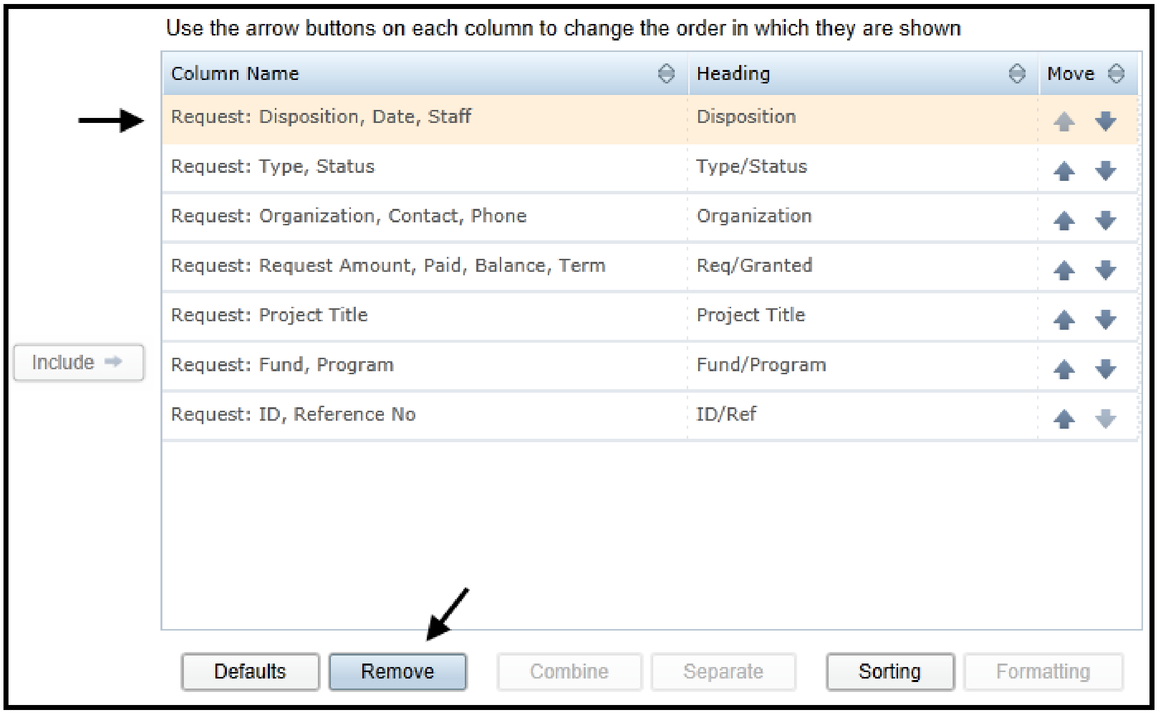
To determine the order (from left to right) of the columns in the View grid, you can click the Move icon on the right side of the column to drag the column to a new position within the View grid.



Removing Columns

To remove a column:

1. In the View grid, select the column you wish to remove.
2. Click **Remove**. The column is removed from the list, and will not be displayed in the View grid.



Combining Columns

Combining columns allows you to maximize the amount of data displayed in the View. When columns are combined, data from each column is listed line by line in a single column.

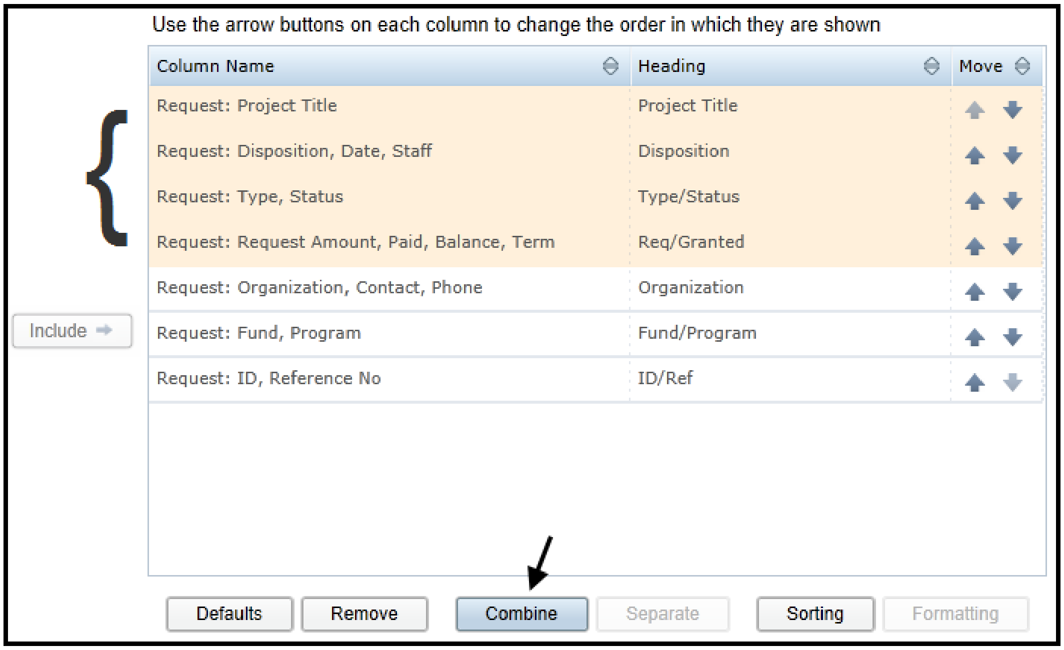
Combined columns can be edited, formatted, moved, and resized like regular columns. You can also separate one or more (or all) columns after combining them.

To combine columns:

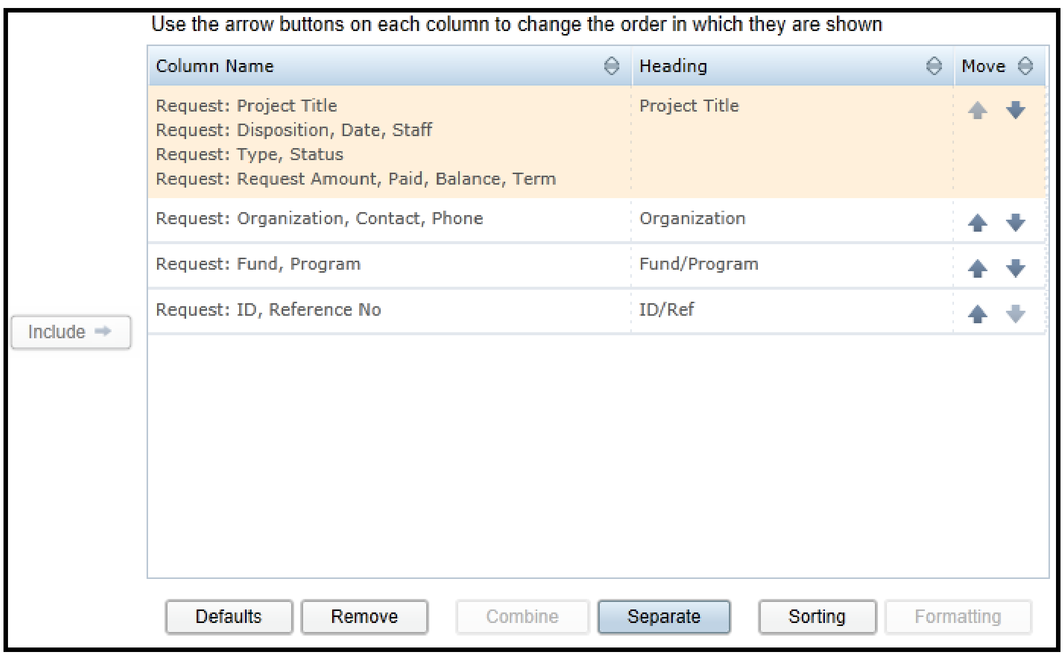
1. In the View grid, select the columns you wish to combine.

   TIP: Press **CTRL** to select more than one column.

2. Once all columns you wish to combine are highlighted, click **Combine**. The columns are combined.



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



To separate elements from a combined column:

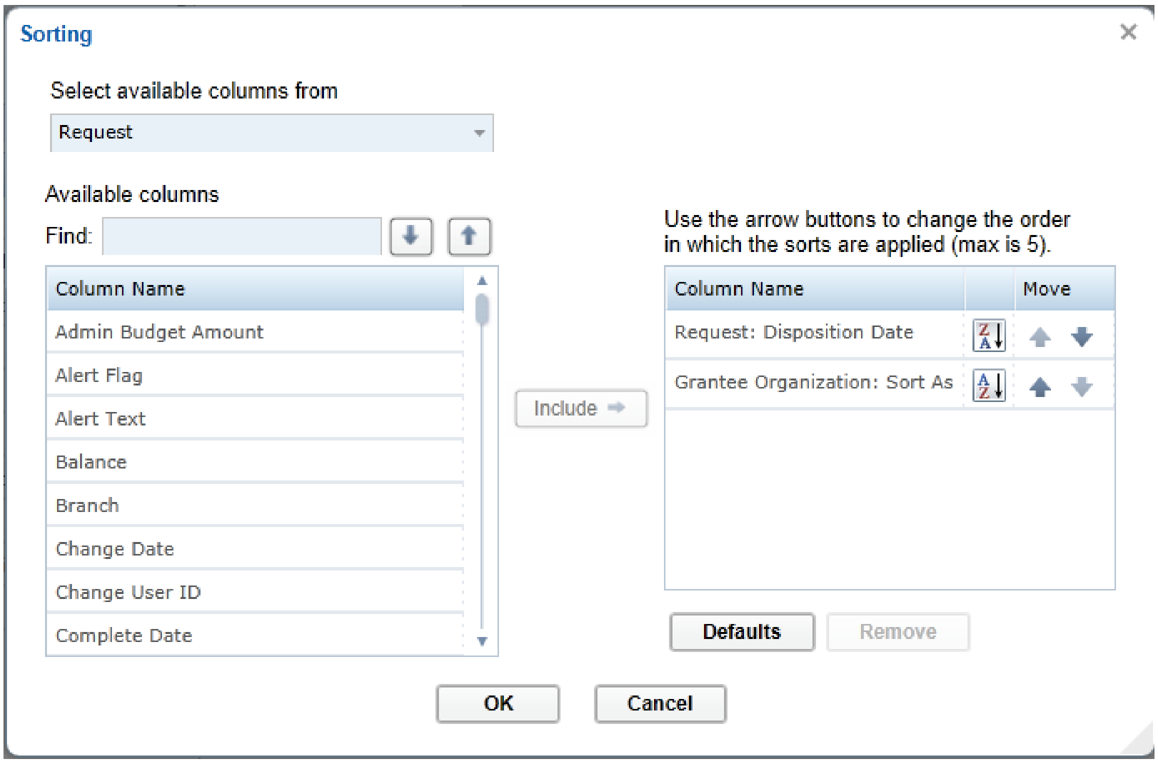
1. In the View grid, select the element you wish to remove from the combined column. If you are removing more than one, press **CTRL** as you click them.
2. Click **Separate**. The column is separated and placed in order just below the combined column. The Column numbers change accordingly.

Sorting Columns

By default, records in Views are sorted either alphabetically or by date. For example, Organizations are sorted alphabetically and Payments are sorted according to their Schedule date. You can sort records based on a number of properties—such as the Program Area of Requests—and choose whether the sort order is ascending or descending.

In case two or more records have the same value in the sorting property—for instance if you are sorting Requests by Grant Amount and several of your grants are for $5,000—you can set as many as four secondary sort properties.

To change the sort order for the View:



1. Click the **Sorting** button on the Change Display page.
2. Choose the primary sort category. The available columns are divided into the categories of information that they represent.

   The View will sort records according to the values in the column that you choose. For example, if you choose the Request Amount column and enable the Descending checkbox, the Request with the largest amount would be listed first, and the one with the smallest would be listed last.

   To choose a sort column, first choose the category to which it belongs; only the columns that belong to the category you choose are available in the Column list. Note that there is always a **Defaults** link, which lists the default column that GIFTS Online uses to sort records. Then, choose whether you want the sort order to be ascending or descending.

   NOTE: If you want the records to display in ascending order, you do not have to do anything. However, if you want the records to display in descending order, enable the Descending checkbox.

3. Choose secondary sort columns, as desired, and specify whether they are ascending or descending sorts. Groups of records that have the same value in a sort column will be sorted according to the next secondary sort column.

   EXAMPLE: If you chose **Coding Sheet. Program Area** as the primary sort column for Requests, GIFTS Online uses the next secondary sort column to sort all of the Requests that share the same Program Area.

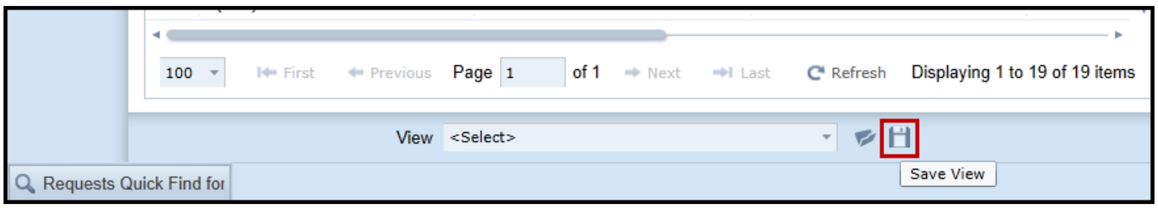
4. Click **OK** to save the new sort order.

Resetting the Default Columns

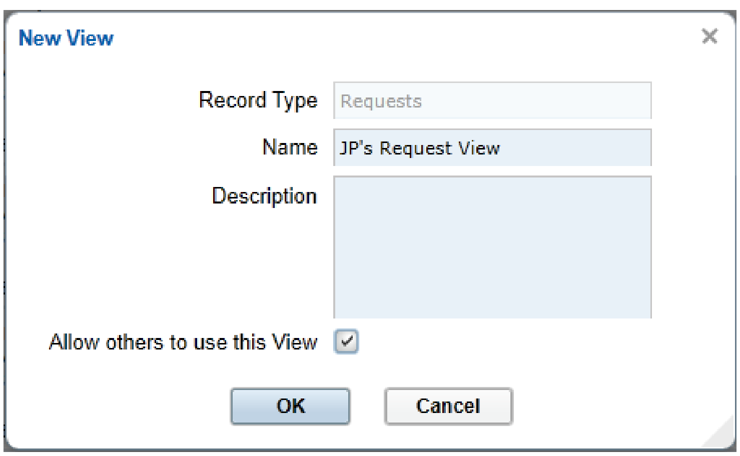
While working with the columns and their headings, you may decide that you want to start from scratch, or that the default settings are the most appropriate for your needs. At any time, you can revert the columns, column headings, and column formatting to the defaults by clicking **Defaults**.

Search Results: Save View

Once you have modified the View of the Workspace and click **Apply**, a **Save View** icon will be available to the right of the **Modify** icon.



Clicking the **Save View** icon opens the New View form which allows you to save the current view under a new name.

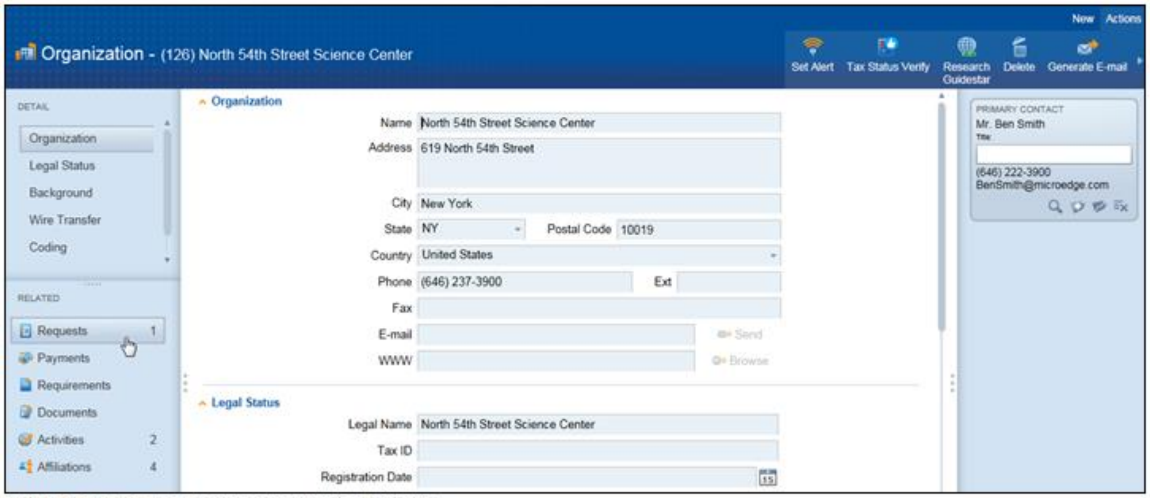


Editing the Name and Description and Sharing the View

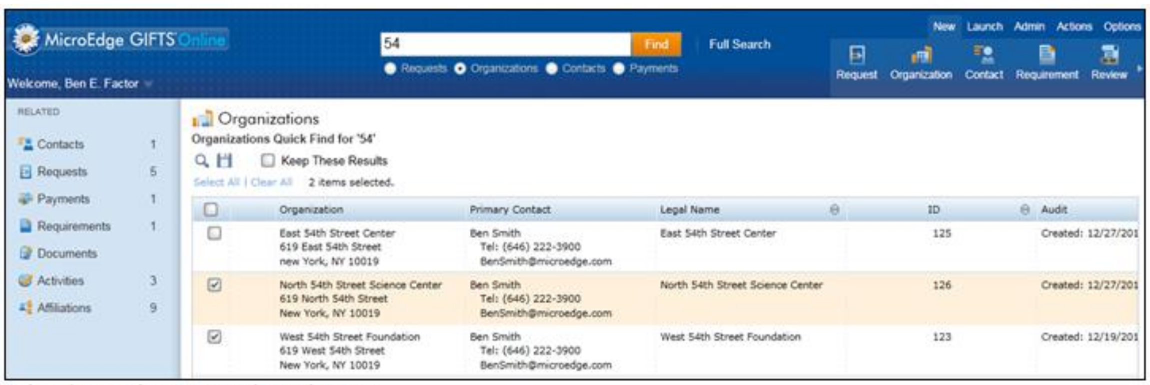
You can edit the **Name** and **Description** of the saved View. If you want to allow others in your organization to access this View, enable the **Allow others to use this View** checkbox.

Working with Related Records

The Workspace is designed to give you the easiest access to as much information as possible. One of the main ways it does this is with the Related Records panel which is available on the left side of all search results pages and record edit forms.



Related Records on an Organization's edit form



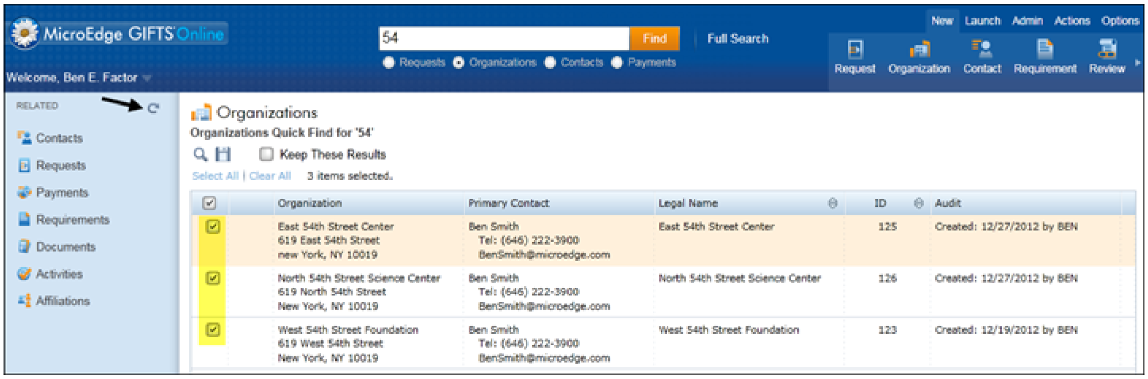
Related Records on a search results page

Working with Related Records on a Search Results Page

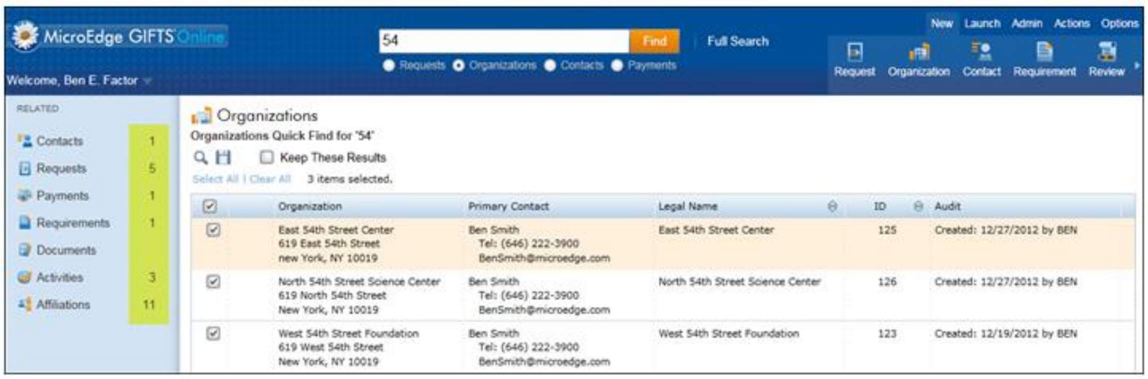
When you select records on a search results page, the system displays a Refresh icon next to the RELATED title. Clicking the Refresh icon will make the Workspace automatically locate all of the information related to the records currently selected and display counts next to each record type.

For example:

If you perform a search for Organizations and then select 2 or 3 of them, the Refresh icon will be displayed next to the RELATED title.

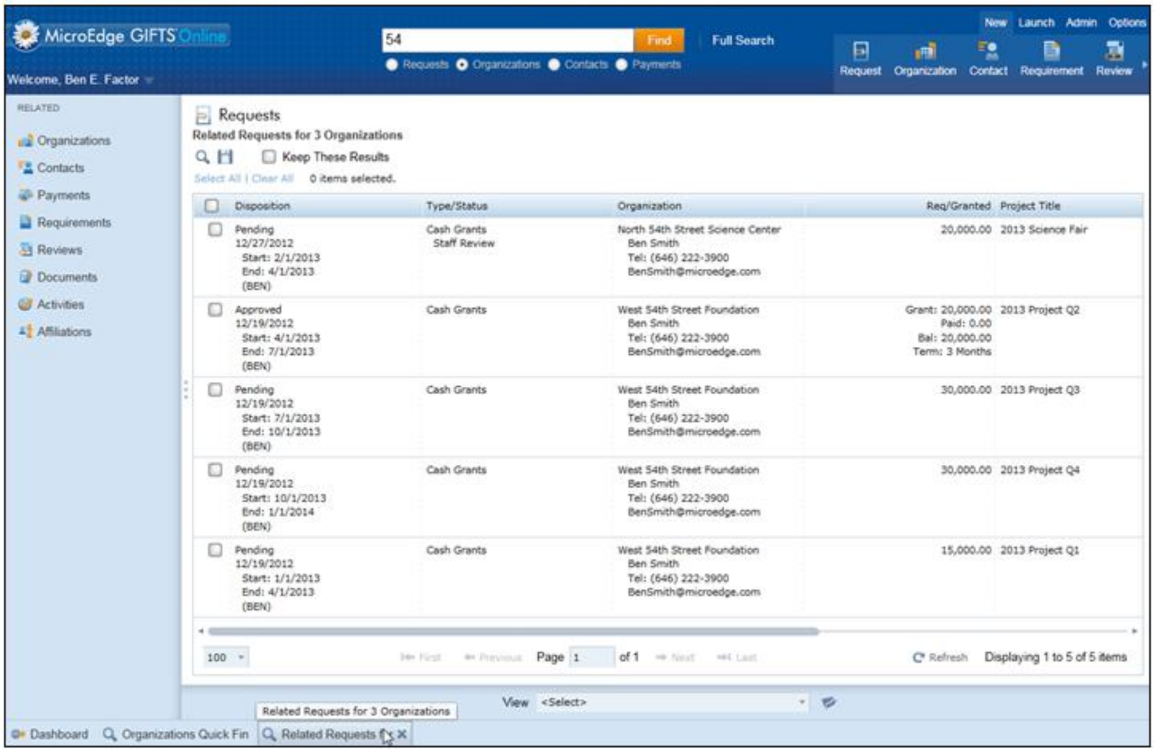


Clicking the Refresh icon will display counts for all of the related records. This could include Contacts, Requests, Payments, Requirements, Activities, and so on.



You can click one of the Related Record types with a count next to it to display all those related records in a new GIFTS Online page.

Here is the new related Requests page:



Notice on the bottom Workspace taskbar, a new tab is available for the Related Requests list page.

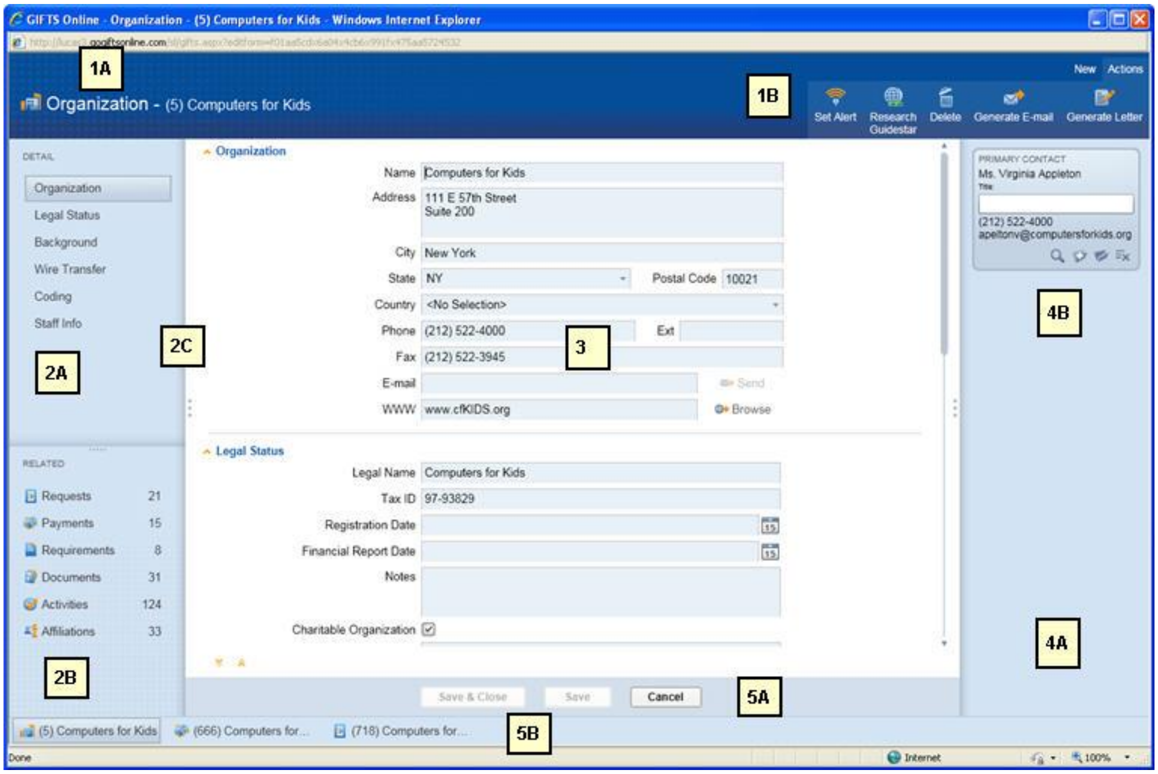
The original Organizations Quick Find search results page is also represented by a tab.

You can simply click back and forth between the different record type tabs, viewing and accessing information as necessary.

About GIFTS Online Edit Forms

The edit form allows the user to view and edit the information in the record. It also provides access to the other types of records related to the current record.

After doing a search, double clicking a record will open the edit form for the selected record.



You can click **Save** or **Save and Close** to save your changes when finished. **Save**, **Save and Close** and **Cancel** buttons appear at bottom of all edit forms.

NOTE: Depending on your permissions, some GIFTS Online fields may be read-only or hidden from view entirely.

Section	#	Content
Header	1A	The left portion of the header displays the record type icon and form title, and for some records, read-only status information about the record. The header also displays the Alert message, if one exists.
	1B	The right portion includes ribbon menus that allow you to take actions on the record. Most forms will have menus for New and Actions.
Left Panel	2A	The data entry fields are divided into sections, which are represented by the buttons in the top portion of the left panel. Clicking on a button 'jumps' to the first prompt at the beginning of that section.
	2B	The lower portion shows the other types of records to which the current record may be related, and counts of each. Clicking one of these links replaces the

<table>
<tr><td></td><td></td><td>center section of the form (where the data entry fields are displayed) with a grid showing the related records.</td></tr>
<tr><td></td><td>2C</td><td>A minimize/maximize feature allows you to control whether or not the panel displays.
A splitter between the top and bottom sections allows you to resize as desired.</td></tr>
<tr><td>Data Entry Fields</td><td>3</td><td>The center section of the form includes the data entry fields. In general, fields are arranged in a single, vertical column, but some exceptions (such as for the related phone number/extension fields, or city/state/zip) are arranged horizontally.
Groups of fields are divided into sections by headers that can be used to collapse or expand a section.
By default, all sections are displayed expanded when an edit form is opened.
NOTE: If you are experiencing slow loading times due to a large number of custom fields or sections, you can do the following to improve load times:
1. Click the Collapse All link in the lower left corner.
2. Expand only the sections you prefer to display most often.
3. Click the Remember link.
In the future, any edit form opened of the same record type will be displayed the same way.</td></tr>
<tr><td>Right Panel</td><td>4A</td><td>The upper section displays 'cards' that provide information on the record's 'primary' (1:1) relationships. You can search for and associate an existing record for this relationship, create and associate a new record, or open the edit form for the current record.</td></tr>
<tr><td></td><td>4B</td><td>The bottom portion of the right panel automatically displays any image files associated with the current record. If more than one image is available, the user can scroll through them. If no images are available, the section will display as collapsed.</td></tr>
<tr><td>Footer</td><td>5A</td><td>The footer contains the command buttons for Save, Save & Close, and Cancel.</td></tr>
<tr><td></td><td>5B</td><td>When multiple related records are opened, the Edit Form Task Bar will display buttons to directly jump to those records.</td></tr>
</table>

Resolving Conflicting Changes

Since it is possible for multiple users with correct permissions to edit a record at one time, GIFTS Online checks for conflicts before saving any changes. Once you click **Save** or **Save and Close** in an edit form, GIFTS Online compares your changes to the current record in the database. If there are no conflicts, the record is saved and you are returned to the record's edit form.

If you have changed a field that has also changed in the database since you last accessed the record, the edit form will reopen with a message at the top warning you of the conflict. You can then decide whether you wish to overwrite the record with your changes, or leave the current record unchanged. You may also choose to edit the record further and resubmit your changes.

When you receive a conflict message:

- Click **Save** or **Save and Close** to overwrite the record with your changes. If you have made any new changes, the record is checked again for conflicts with the current database.
- Click **Cancel** to ignore your changes.

Validating Changes

If the changes you make to a record affect other GIFTS Online records, GIFTS Online re-displays the edit form with a list of issues at the top.

For example, if you change the address of an Organization, this change impacts the Contact records affiliated with that Organization. GIFTS Online displays a message giving you the option of changing the address for the Contacts as well.

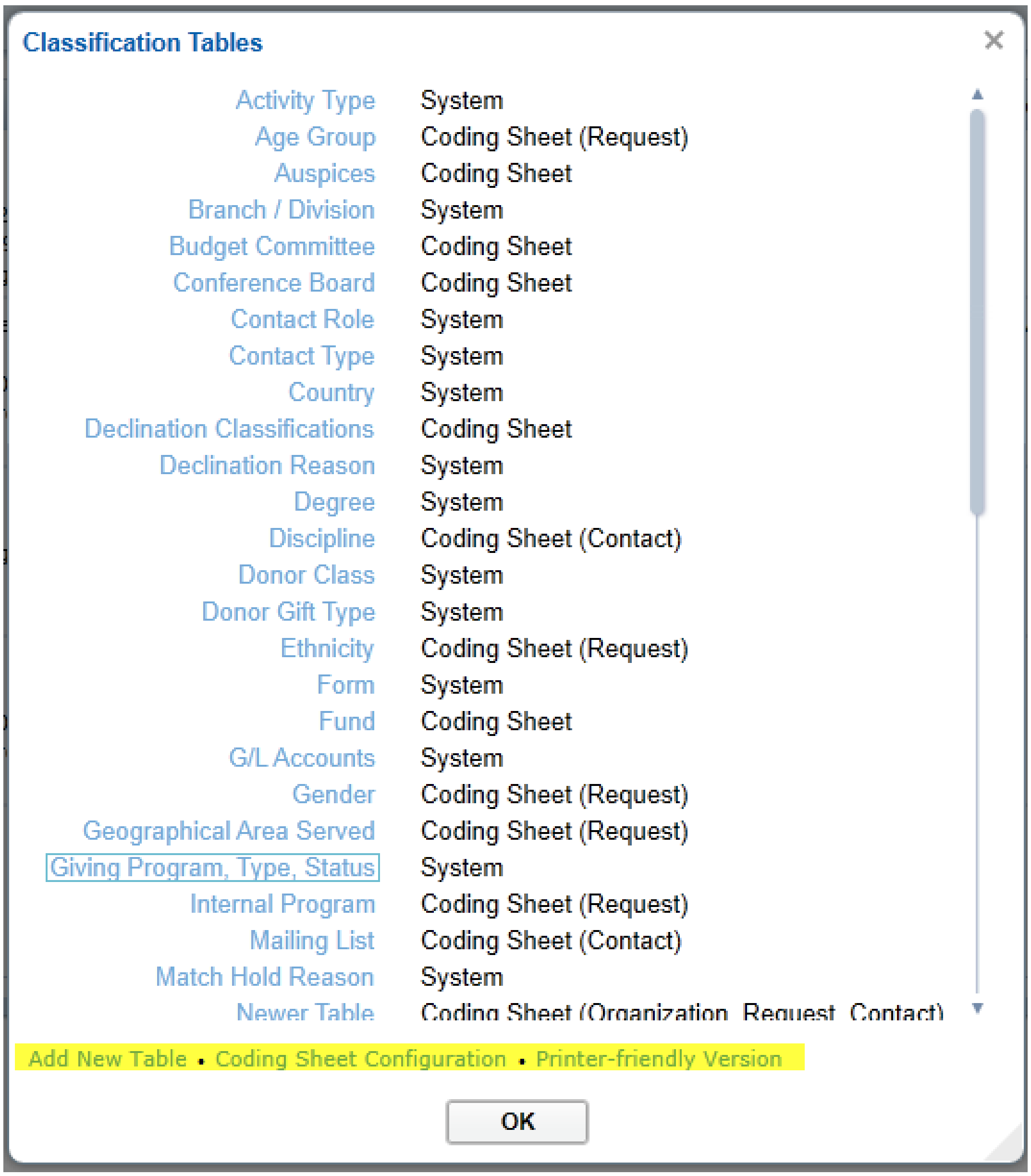
Select the affiliated Contacts whose address you would like to change, then click **Save** or **Save and Close** to apply your selections. Click **Cancel** to save the record without the changes.

Classifications Administration

In previous versions of GIFTS Online, the configuration of code tables for each client's site was done by MicroEdge staff. With GIFTS Online, a new **Admin** menu option called **Classifications** will allow you to access and modify your Classification code table settings directly.

NOTE: This option will only be visible to Grant Managers initially but can be made available to other roles by submitting a request to MicroEdge.

Clicking this option will open the Classification Tables window.



All existing tables will be listed alphabetically along with the table/sheet type and can be clicked to open an edit form for modifying settings.

NOTE: For the G/L Accounts table only, if Branch Security is enabled, you may first need to indicate which branch you wish to work with.

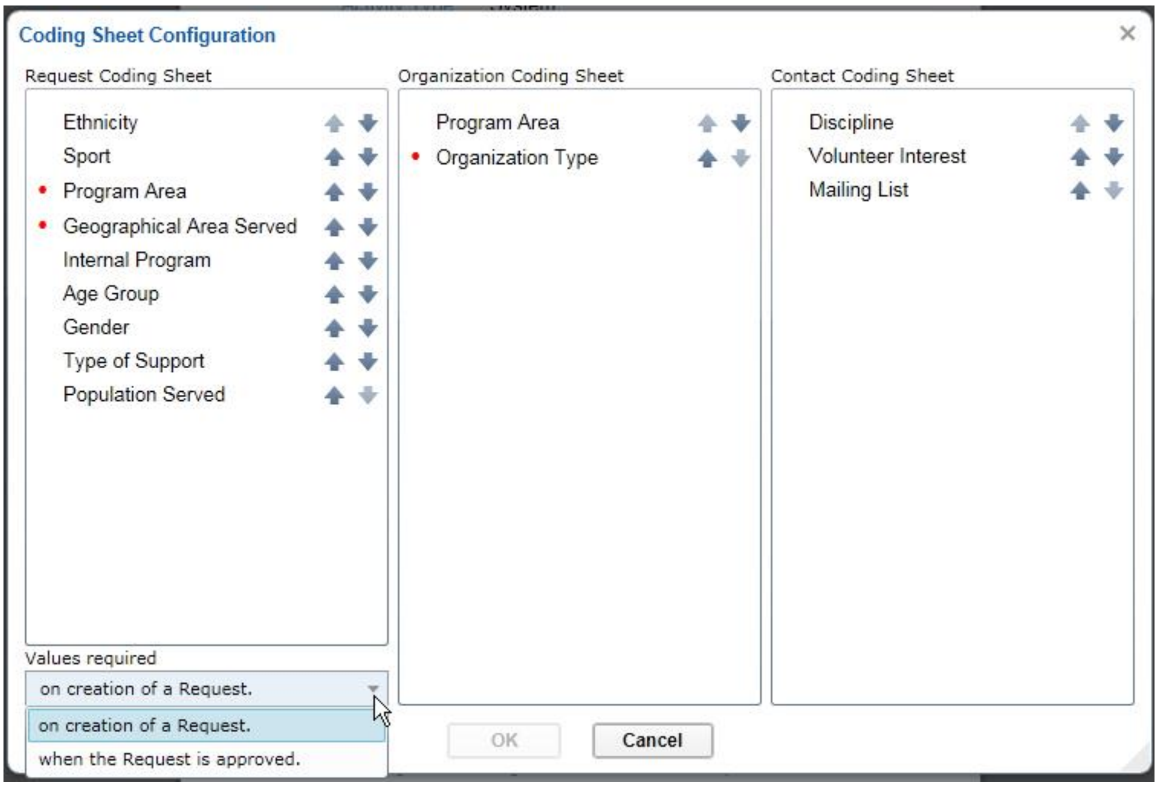
GIFTS Online divides classification tables into two broad categories – "System" tables, which have some specific purpose in the business logic, and "Coding sheet" tables, which can be included in the Coding Sheet sections of the Organization, Request, and Contact data entry forms.

Add New Table

This link will open a new classification table edit form similar to the one shown above with the **Name** and **Levels** fields enabled.

Coding Sheet Configuration

This link opens the Coding Sheet Configuration form allowing you to re-order the coding sheets which appear on the Request, Organization, or Contact edit forms.

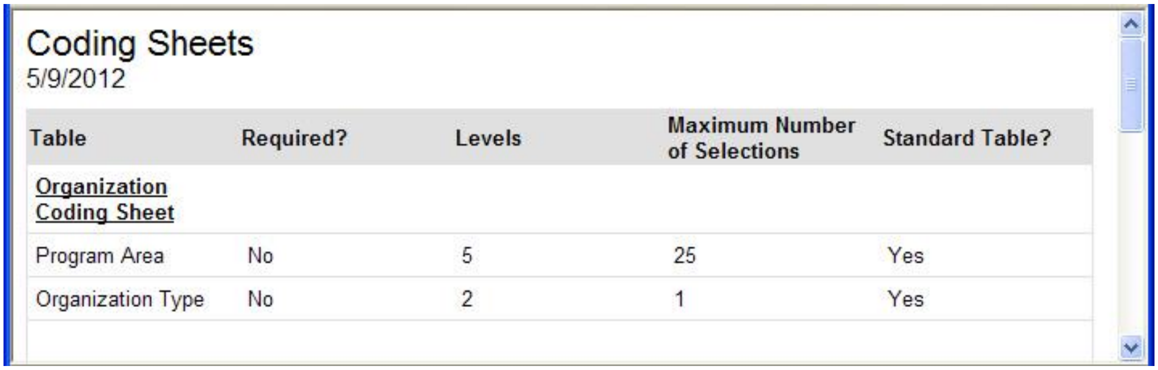


Note that red dots mean a required code selection.

For Requests only, a menu on the bottom lets you choose whether to make the selected required coding sheet mandatory at time of creation or approval of a Request.

Printer-friendly Version

Clicking Printer-friendly Version link on the main Classification Tables form will display a summary report of the Coding Sheets currently in use on your Organization, Request, and Contact edit forms.

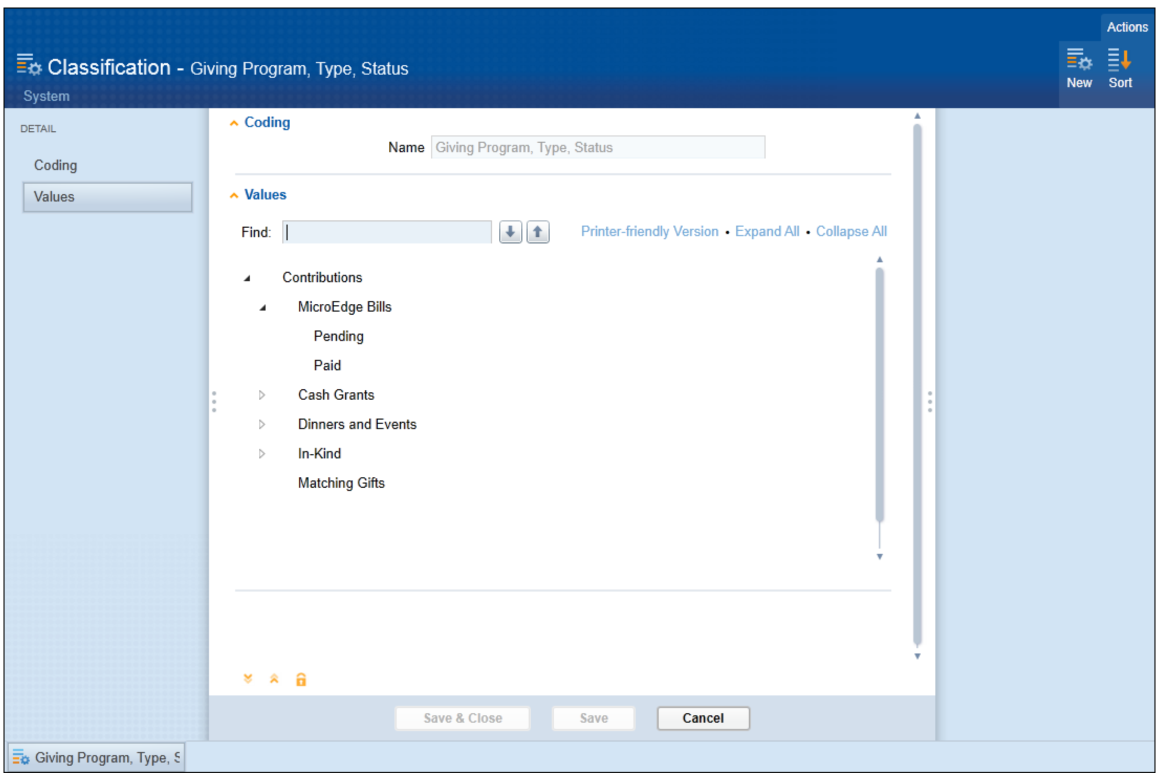


Coding Sheets
5/9/2012

Table	Required?	Levels	Maximum Number of Selections	Standard Table?
Organization Coding Sheet				
Program Area	No	5	25	Yes
Organization Type	No	2	1	Yes

Editing a Coding Sheet

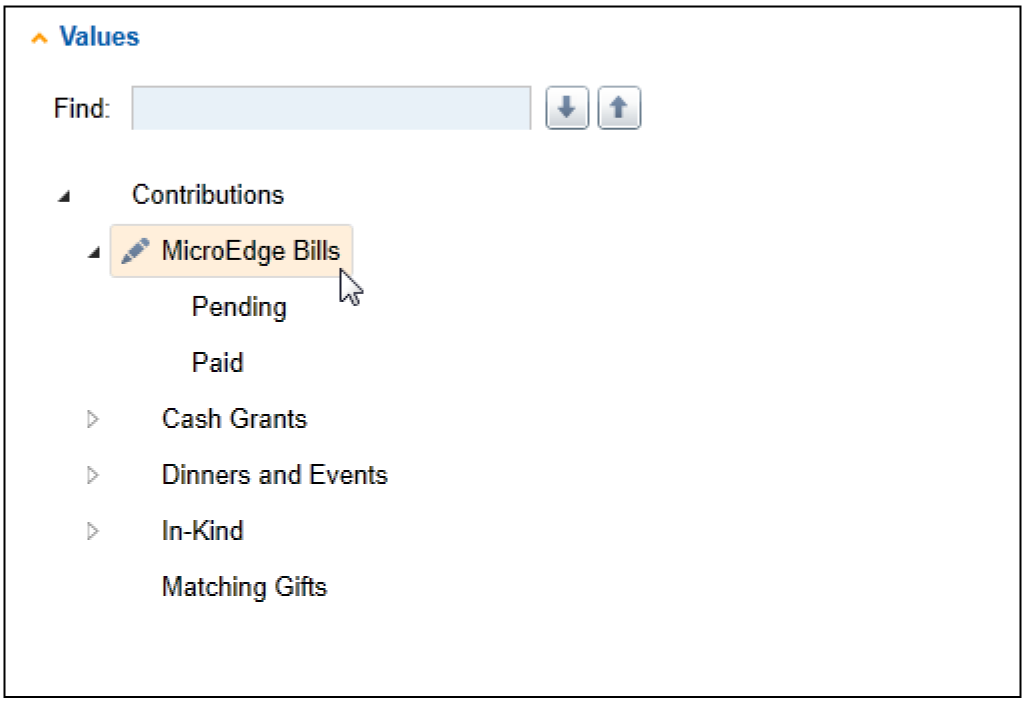
Clicking on a coding sheet link will open the Classification edit form.



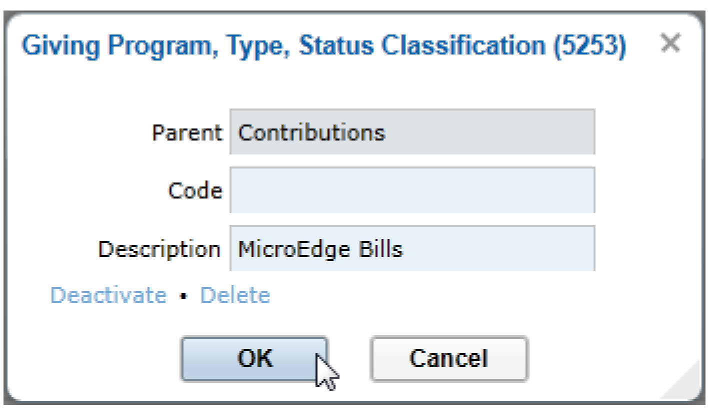
- **Left Panel:** The left panel includes navigation links for the two sections of the form, Coding and Values.

- **Action Menu:**
  - **New** – create a new code in the table
  - **Change Branch** - this option only appears on the G/L Accounts table if it is configured for branch security
  - **New Sub** – create a new sub-level code to the table

  - **Sort** – sort the codes listed in the Values section by Code or Description
  - **Delete** - removes the entire table from the database. This option will only be available for custom tables.
- **Coding:** Settings which affect the behavior of the whole code table.
  - Set the maximum number of codes which can be selected
  - Require entry at lowest level of a branching code table
  - Track percentages on Requests
- **Values:** This section lists all of the classification codes within that table. For tables with many values you can use the Find field. Simply enter the value you are looking for and click either the Previous(Down) or Next(Up) arrow buttons.



To edit a value, hover the mouse cursor over it and click the **Pencil** icon.



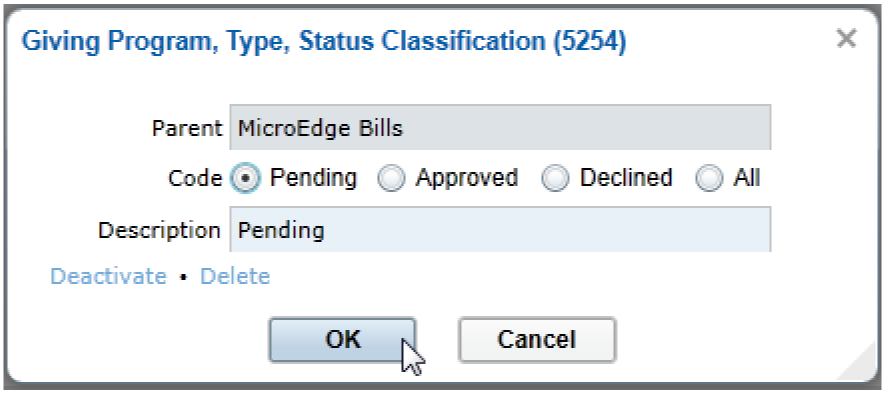
The popup form gives you access to the following fields and options:

Parent - displays the code value and description of the next level up for 2nd and 3rd level values. Hidden if the current level is 1.

Code - (optional) a short version of the code (20 chars max). Only available on 1st and 2nd level values.

Description - (required) the actual name of the code value. (255 chars max)

Disposition – Only available on 3rd level values. This field lets you define which disposition to make the value available for. Pending, Approved, Declined, or All(default).



Deactivate/Activate- toggles the status of the code value.

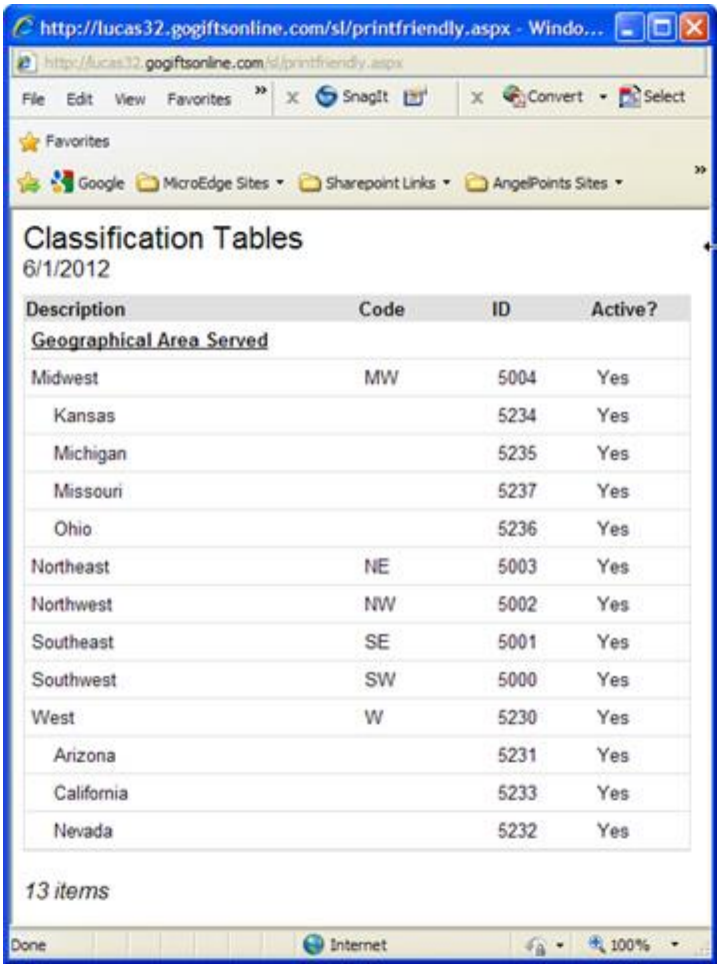
Delete - deletes the specific code value.

OK - closes the popup and refreshes the display to reflect the new value.

Add Another - only displayed creating a New/New Sub code value. Saves the current value and clears the popup form so you can add more values.

Cancel - Closes the popup without saving.

Printer-friendly Version: Clicking the Printer-friendly Version link on the edit form will open a new window displaying the classification table's Description, Code, ID number, and Active status for all values.



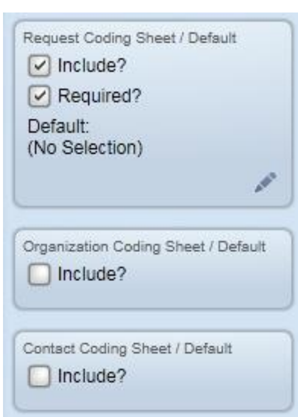
Classification Tables
6/1/2012

Description	Code	ID	Active?
Geographical Area Served			
Midwest	MW	5004	Yes
Kansas		5234	Yes
Michigan		5235	Yes
Missouri		5237	Yes
Ohio		5236	Yes
Northeast	NE	5003	Yes
Northwest	NW	5002	Yes
Southeast	SE	5001	Yes
Southwest	SW	5000	Yes
West	W	5230	Yes
Arizona		5231	Yes
California		5233	Yes
Nevada		5232	Yes

13 items

Expand All/Collapse All: Expands or Collapses all levels of the value tree to the top level.

- **Right Panel:** Options here allow you to choose to include the coding sheet in your Request, Organization, or Contact edit forms. You can also make some required, if necessary. Clicking the **Pencil** icon will allow you to select a default value from a popup form.



NOTE: The configuration options available will depend on the type of coding sheet selected.

Working with Organizations

An Organization record in GIFTS Online is similar to a file folder for an organization that you are considering for funding. Organization records include all your information about an Organization, including its background, tax status, mailing and web addresses, and telephone numbers.

The Organization record is also linked to the other records that apply to it, such as Request records for its proposals and Contact records for the people affiliated with the Organization.

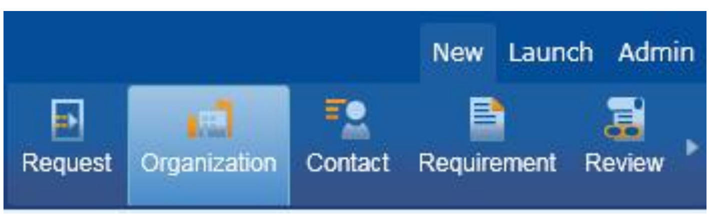
This section contains the following topics:

Adding an Organization

Grants Managers and Program Officers can add a new Organization record; the process begins on the home page.

NOTE: A new Organization record may also be created by considering an application submitted by a grant seeker not already in your system.

1. In the New menu, click the **Organization** button.



2. If configured by your administrator, the Duplicate Checking page opens. Before adding the new organization, you will search your current records to ensure you aren't adding a duplicate record. Type in part of the organization name and click **Search**. Search results open.

3. If you see the organization you want to add already listed, you can select the radio button next to it and click **Select** to go to its Organization edit form.

   If your new organization is not listed, click **New**. An Edit Organization form opens.

   NOTE: The partial name you searched by defaults into the Name field.

4. Enter the organization data and click **Save & Close** to save the new Organization. The Organization detail page opens.

The Organization Edit Form

The Organization edit form displays details on an Organization and provides an overview of your history with it. An Organization's edit form is shown when you click a link to the organization anywhere in GIFTS Online.

The main data entry area of the form includes:

Organization: Contact information such as Name, address, phone number, and email address.

Legal Status: Legal data such as Tax ID, Tax Status, and Charitable Organization.

Background: Includes background history, aka name, vendor number, and annual budget.

Wire Transfer: Bank information

Coding: Default Organization Type. Click the link to change the code value.

Staff Info

For a details on working with each area of the Organization's edit form, please see About GIFTS Online Edit Forms.

Organization Available Actions

A combination of the following Actions may be included on the Organization Edit Form:

Edit Organization	The standard Organization edit form is displayed in the center of the screen where you can make changes to any fields that you have permission to edit.
NEW	
Request	Displays a standard Request edit form where you can create a new Request for the Organization.
Requirement	Displays an edit form where you can create a new requirement and relate it to an existing Request or Payment.
Document	Displays an edit form where you can create a new Document Activity by uploading an external document to GIFTS Online.
Activity	Displays a standard Activity edit form where you can create a new Activity for the Organization.
Affiliation	Allows you to affiliate a Contact with the Organization. Click here for details. An Affiliation is a record that describes the relationship between a Contact and an Organization or Request.

ACTIONS	
Set Alert	If you have permission to edit Organization alerts, you can use the Alert section of the edit form to change, add, or remove alert information.
Research Guidestar	Opens the Guidestar Advanced Search webpage.
Delete	Deletes the Organization. (You are prompted for confirmation before the deletion is completed.) Be sure you want to delete the Organization, as there is no way to undo the deletion.
Generate Email	Displays a Generate Email page where you can create a new email.
Generate Letter	Displays a Generate Letter page where you can create a new letter.
Primary Contact	The Primary Contact Card have four icons that allow you to: • Search for a contact • Add a New Contact • Open the Edit form for the Primary Contact • Remove the Relationship
View Related Records	Links on the lower left panel will display any related records.

Changing the Organization's Primary Contact

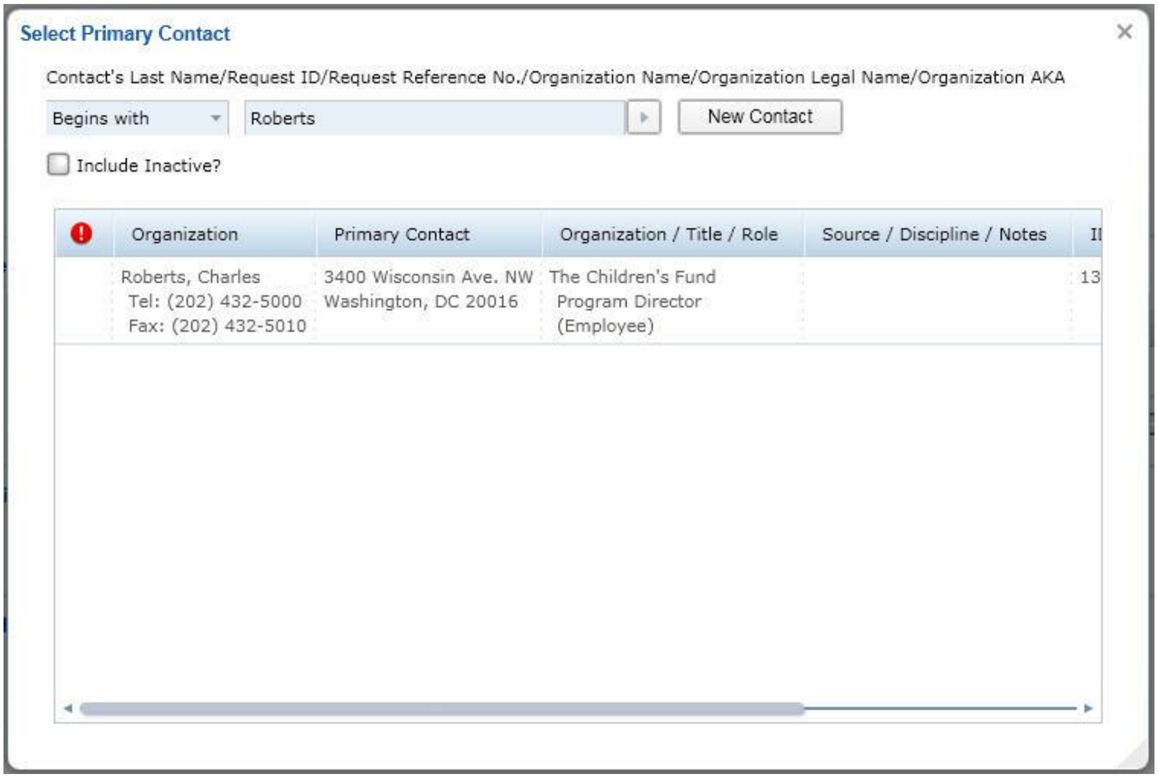
To change an Organization's Primary Contact:

1. Open the Organization Edit Form.

   NOTE: If GIFTS Online is configured to automatically search for duplicate Contacts, the New button is not displayed until you have searched for an existing Contact.

2. Click the **spy glass icon** under the current Primary Contact for the organization.

2. When the Select Primary Contact search form opens, type the last name of the Contact you wish to assign as the new Primary Contact for the Organization, and then click the arrow button. The search results display.



2. To choose a Contact from search results, double click it from the list.
3. If no existing Contact records match your search, you can run another search or click **New** to create a new Contact record.

Duplicate Consolidation

Over time, it is quite common to end up with duplicate records in your database, particularly Organizations and Contacts. These can lead to inaccurate reporting and embarrassing mistakes.

In order to help identify duplicate organizations and contacts, Crystal Report templates were created.

- Duplicate Organizations (by Name)
- Duplicate Contacts (by Last Name)
- Duplicate Contacts (by Social Security Number)

These reports are included in the Reports Library.

Once you have identified the possible duplicates, the option to **Consolidate Duplicates** on the **Actions** menu of Search Results page for both Organizations and Contacts can be used.

To consolidate duplicate Organizations or Contacts, do the following:

1. Perform a **Quick Find** or **Full Search** for Organizations or Contacts which you know are duplicates from the above reports.
2. Select the duplicate Organizations on the search results page.
3. Go to **Actions > Consolidate Duplicates** to open the Consolidate Duplicates form.

The first record selected will be placed in the Valid Record side of the form and all others will be displayed on the right side as Duplicates.

4. To make an Organization on the right side the valid record, click the arrow icon on the top right corner of its card. The current record on the valid side will be moved to the duplicates side.
5. Click the **Consolidate** button.
6. A confirmation message will ask if you wish to delete all duplicate records.
   - **Yes** - moves all related data to the valid record and deletes the duplicates.
   - **No** - moves all the related data to the valid record without deleting the duplicates.
   - **Back** - takes you back to the Consolidate Duplicates form.
7. Click **OK** at the next message to continue.
8. Click **OK** at the success message.

Working with Requests

The term “Request” is the term GIFTS Online uses for all requests for funding, regardless of their status or disposition. Grants, proposals, and declinations are all considered Requests.

Whenever you need to edit an existing Request record, you should access the Request edit form by either running a search or clicking on a link to the Request in any part of GIFTS Online. Then locate the Actions menu and click on the appropriate link.

This section contains the following topics:

Adding a Request

If you receive a grant seeker's proposal offline, you can enter it yourself.

NOTE: New Requests are also created by considering applications submitted by grant seekers online.

1. In order to create a Request, you must first identify the Organization submitting the proposal. Once you have searched for and found the Organization, go to its Organization edit form and click **New > Request** in the Actions menu. The New Request page opens.

   NOTE: If the organization is not yet saved in your system, create a new Organization record for it for it first, then continue with these steps.

2. The Request edit form for the pending Request opens. Enter the request data and click **Save & Close**

   You can enter Request coding information directly in the edit form.

Request Edit Form

The Request Edit Form displays details on a Request and provides an overview of its payment and requirement schedules. A Request's edit form is shown when you click a link to the proposal or grant anywhere in GIFTS Online.

At any given time, each Request has a Disposition and a Status. You can use these two indicators to keep track of which stage in your workflow a particular Request has reached. There are three Dispositions, which give a general indication of a Request’s place within your workflow: Pending, Approved, or Declined. The three Dispositions are permanently defined by the system because these general classifications can apply to all Requests in any workflow.

This overview describes the different dashboard parts seen on the Request edit forms. Note that the edit forms are a bit different for each Request disposition (pending, approved, or declined). Those differences are noted below.

Title

Across the top span of the page, the Title dashboard part shows key information about the Request.

The number after the Request title is always the Request ID number unless it is a new request that has not been saved yet.

The information is different for each disposition.

Pending Requests	Title is labeled Proposal, and shows the Request amount and Request date, followed by the Recommended Amount.
Approved Requests	Title is labeled Approved, and shows grant Amount and the Award Date.
Decline Requests	Title is labeled Declination, and shows the Declination Date and Reason.

Edit Form Categories

The following categories may be available on your Request form depending on :

- General
- Approval
- Request
- Coding: This section allows you to keep track of any code table values assigned by your administrator.

  NOTE: The code sheet is now built into the Request edit form instead of being a separate form.

- Meeting
- Evaluation
- Renewal
- Wire Transfer

Working with Request Coding Sheets

The Request Coding section is used to classify proposals and grants for reporting and queries.

While you may not use all these categories, the following classifications are included by default in GIFTS Online Requests:

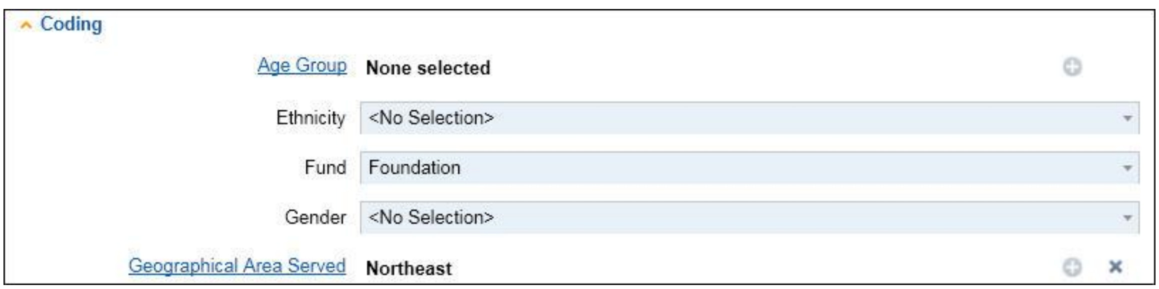
- Age Group
- Fund
- Geographical Area Served
- Internal Program
- Population Served
- Program Area
- Type of Support

The codes themselves - the classifications you enter for each of the categories listed above - are set up specifically for your grant-making activities. These codes serve as consistent terms tailored to your grant-making to make consistent reporting easier.

Editing the Coding Sheet

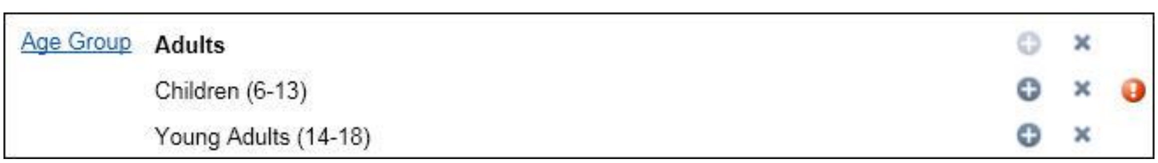
You can add, edit, or remove coding from a Request from its Edit Form:

1. Open the Request Edit Form and scroll down to the Coding Sheet section or click the **Coding** details link.



For code tables that allow more than one value, you must click the link to open the code table form.

For code tables that allow only one value, a drop down menu will be available.



2. Once code values are selected, they will be displayed on the Coding section.

   For code tables with multiple values, a **+** or **X** symbol will be available. The plus sign allows you to add additional values if the code table allows it. If not, a red warning symbol will appear and you will need to use the **X** to delete values until you have the right amount.

3. To remove a code, click the X next to the value or change the menu selection to <No Selection>.
4. If a category allows multiple codes, the value selected first becomes the primary; the other codes are secondary codes.

   TIP: Most GIFTS Online reports use primary codes to group records. The use of primary codes also ensures that records are not repeated within the report, which would "inflate" the total information for the report.

   To modify a primary code, click on the code table's link to open the code selection form and clear all the values. Select the value you want as primary first and then add the other values back in.

6. Once you have finished adding, removing, or re-prioritizing, click **Save**.

   IMPORTANT: No changes you made to the Coding Sheet will be saved until you click **Save** or **Save & Close**. Make sure you complete this step. You can click **Cancel** to cancel your changes and return to the Request detail page.

Request Available Actions

Aside from the edit form categories described in Request Edit Form, the following menu actions will be available.

NEW	
Payment	Displays a standard Payment edit form where you can create a new Payment for the Request.
Requirement	Displays an edit form where you can create a new requirement and relate it to an existing Request or Payment.
Document	Displays an edit form where you can create a new Document Activity by uploading an external document to GIFTS Online.
Activity	Displays a standard Activity edit form where you can create a new Activity for the Request.
Affiliation	Allows you to affiliate a Contact with the Request. An Affiliation is a record that describes the relationship between a Contact and an Organization or Request.
ACTIONS	
Set Alert	If you have permission to edit Organization alerts, you can use the Alert section of the edit form to change, add, or remove alert information.

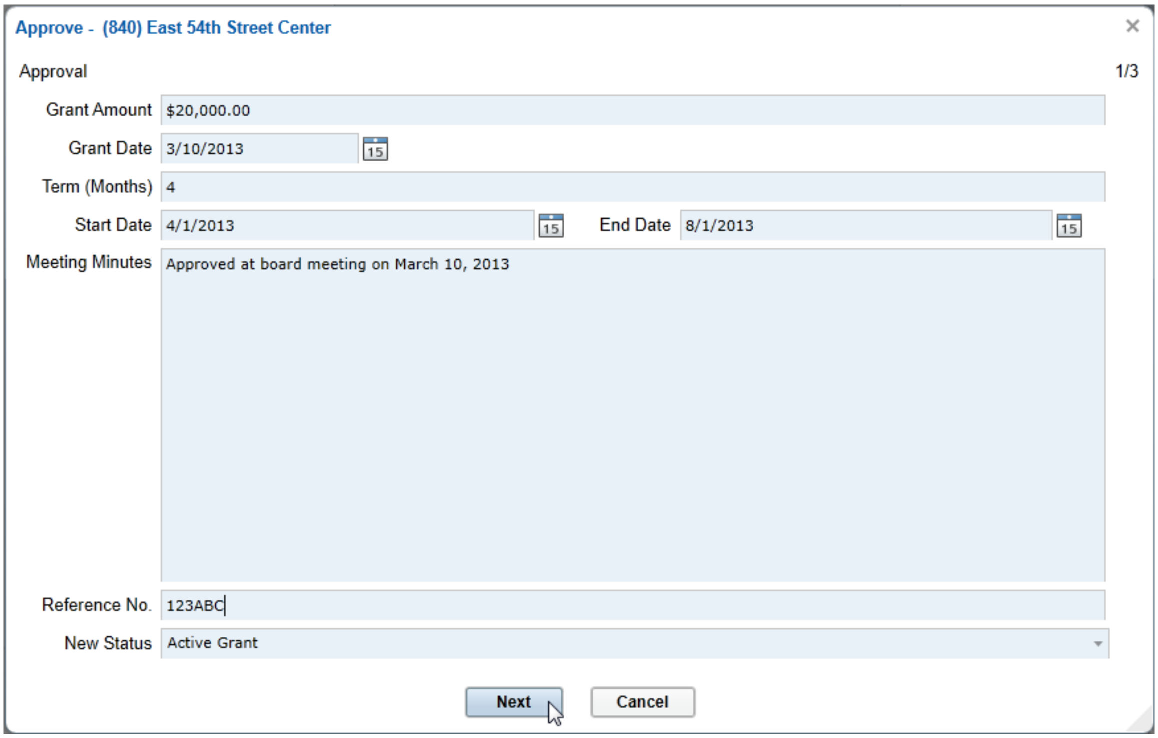
Approve	Approve the request.
Decline	Decline the request.
Lock	Lock the request.
Create Grantee Account	Only with Online Applications and Requirements module.
Write-Up	Displays a Generate Write-Up page where you can create a write-up.
Generate Letter	Displays a Generate Letter page where you can create a new letter.
Generate Email	Displays a Generate Email page where you can create a new email.
Assign Reviewers	Assign reviewers to the request.
Transfer to Another Branch	**NOTE:** This link is only seen if you have Branch Security, an optional feature; your GIFTS Online system may not use Branch Security. You can transfer a Request (and its Payments, Activities, Requirements, and Reviews) to another branch for future handling. For users of the optional Budget Module: If any Payment(s) for this Request have appropriated funds from your Annual Budget, you cannot transfer this Request to another branch without first deleting the appropriated Payment(s).
Primary Relationship Cards	
Organization	The Organization Card has three icons: • Search for an organization • Add New Organization • Open the Organization record
Contact	The Contact Card have four icons that allow you to: • Search for a contact • Add a New Contact • Open the Edit form for the Contact • Remove the Relationship
View Related Records	Links on the lower left panel will display any related records.

Approving a Request

Each new Request is automatically created with a disposition of Pending, meaning that it is awaiting a decision on whether it will be approved or declined. When you approve a Request, you can record the grant amount, the grant date, and other important information. You can have the system automatically schedule payments as well.

1. In order to approve a Request, you must first go to the Request's edit form. Once you have searched for and found the Request, go to its Request edit form and click **Approve** in the Actions menu.

   The Request Approval page opens:



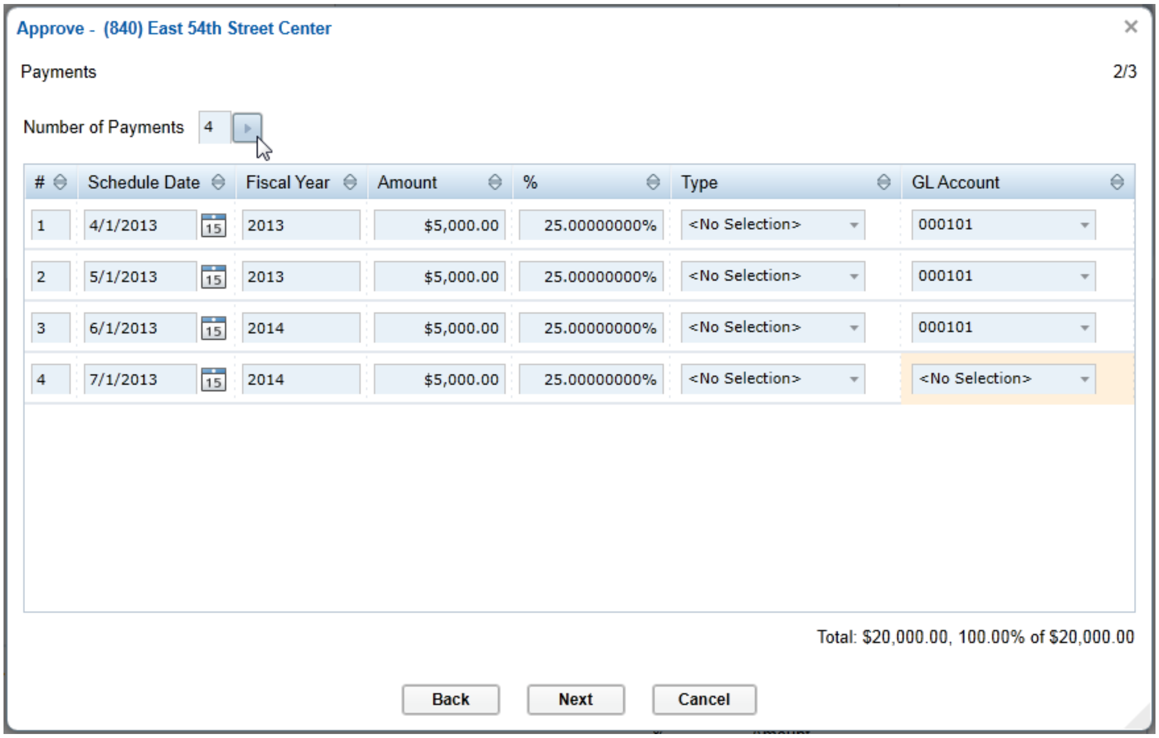
2. The **Grant Amount** defaults to the Recommended Amount of the Request and the **Date** defaults to the current date.
3. The **Term** of the project in months should fill in automatically.
4. The **Start Date** and the **End Date** should fill in automatically.
5. Enter **Meeting Minutes** and a **Reference Number** if desired.
6. For **New Status**, select *Active Grant* if you wish to designate the number of payments. If *Closed Grant* is selected, the payments will default to one time.
7. Click **Next** to continue to the Payments form.
8. Initially, the **Number of Payments** is set to 1. This can be changed if you would like multiple payments.

   NOTE: You can add Payments later if you do not want to schedule them now.

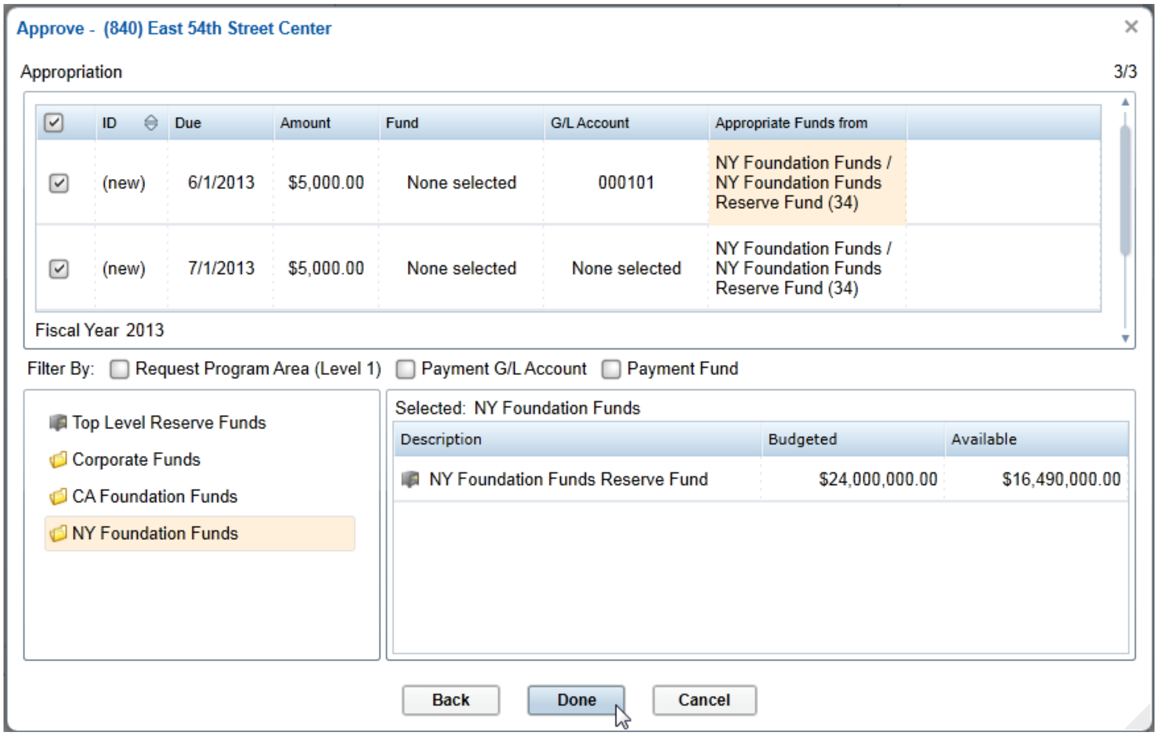
   - If you keep the "1", a single Payment for the full grant amount is scheduled for the Award Date.

- If you enter two or more, the system splits the grant amount evenly over the number of payments specified.
- If there is an open budget or budgets for the new Payments' fiscal years, you will be required to appropriate funds for the payments before proceeding.

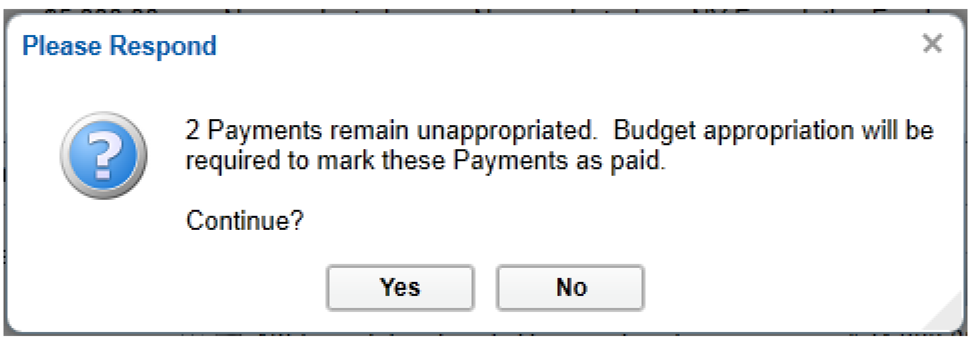
9. If you would like to set up multiple payments, modify the **Number of Payments** and click the arrow button. Confirm the change by clicking **Yes** when prompted. Notice the number of payment lines below will change to match.



10. Once you have the number of payments set, you can select the **Type** and **G/L account** to use for each.
11. Click **Next** to continue.
12. If you have the Budget module, the next page will require you to select a fund to appropriate funds for the grant's payments. This is done by select the payment(s) checkbox in the Appropriation window and then selecting from the available funds listed below.



NOTE: If you have the Budget module and do not appropriate funds, you will be reminded that these payments will need to be appropriated before the payments can be marked as paid when you click **Done**.



13. Click **Done** to complete the approval and then click **OK**.

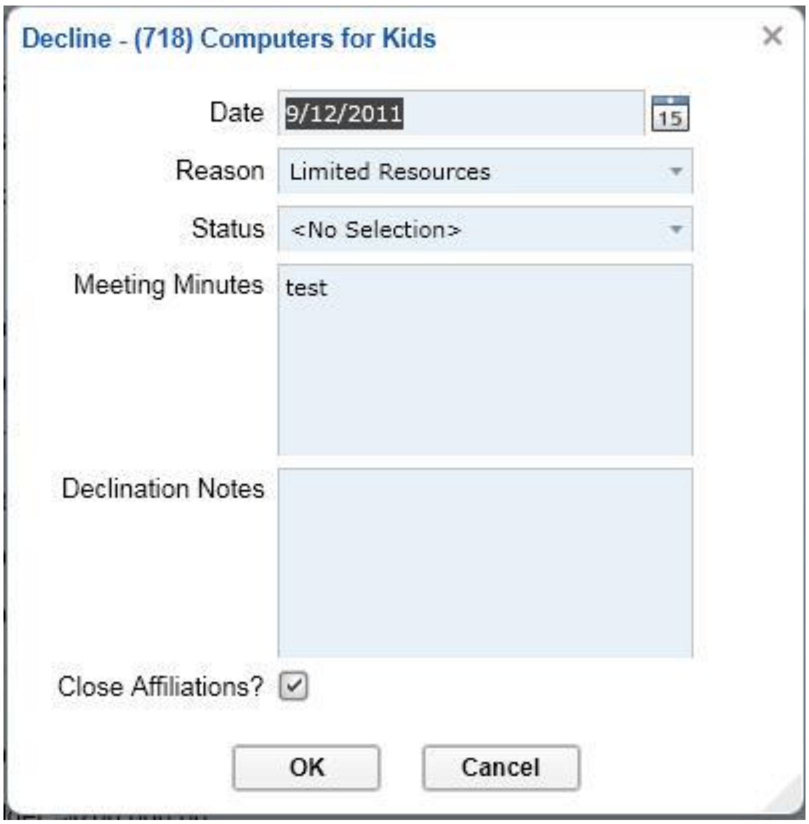
14. The grant edit form will now refresh and the new Payment(s) will be accessible through the Related list.

Declining a Request

When you decline a Request, you can record the declination date, a declination reason, and other pertinent information.

In general, only pending Requests are declined. However, in some cases, if a grant was approved prematurely or a similar error was made, you may wish to decline an approved Request. GIFTS Online allows you to do so.

1. In order to decline a Request, you must first go to the Request's edit form. Once you have searched for and found the Request, open to its Request edit form and click **Decline** in the Actions menu. The Request Declination page opens.



2. Enter the declination information, including **Date** and the **Declination Reason**, which are required.

   TIP: If you select the Close Affiliations check box, the current date will be entered as the end date of all Contacts' Affiliations with this Request, effectively closing those Affiliations.

3. Click **OK** to complete the process.

Amending a Grant

Occasionally, the award amount of a grant may change. The amount originally awarded to the grantee may increase, or a future Payment may be canceled, decreasing the total Grant Amount. When you amend the amount of a grant, GIFTS Online maintains the original amount as historical data.

NOTE: Only Grants Managers have permission to amend grants.

Grant Amendments are triggered when you make changes to a grant's Payment Schedule that affect the total Grant Amount, such as the addition of a new Payment. You are automatically prompted to by GIFTS Online to perform a Grant Amendment to accommodate the change.

If you open an approved Request record (a Grant), you will notice that the **Granted** field is disabled and Read-Only.

1. To make a change, you must choose **Amend** from the Actions menu.

2. Enter the new Grant amount in the **Amended** field. (If you're here because you're adding a Payment, the new grant amount will reflect that Payment.)
3. You can also update the **Terms**, **Start/End Dates**, **Activity Date**, **Fiscal Year**, and add a **Note**, if desired.
4. Click **OK** to save the amendment
5. Click **Save & Close** to save the record.

Changing the Request's Primary Contact

To change a Request's Contact:

1. On the Primary Contact Card, click the **Search** icon.

2. Type the last name of the Contact you wish to assign as the new Primary Contact for the Request, and then click **Search**. The search results appear.
3. To choose a Contact from search results, double click it on the list.
4. If no existing Contact records match your search, you can run another search or click **New** to create a new Contact record.

Percentage Coding

Percentage Coding allows the assignment of percentages to code values selected from Request type code tables. The percentages are then used to calculate corresponding Request/Grant dollar amounts. These allocations can then be displayed in Views, Ad-Hoc reports, Charts, and the Request record where they are assigned. They may also be assigned in Online Applications.

Tables That Can Be Enabled

The following standard Request Coding Tables can be enabled for percentages:

- Age Group
- Ethnicity
- Fund
- Gender
- Geographical Area Served
- Population Served
- Program Area
- Type of Support

Maximum Number of Selections Per Table

To enable percentages for a code table, ME Support must set the maximum number of selections to greater than one.

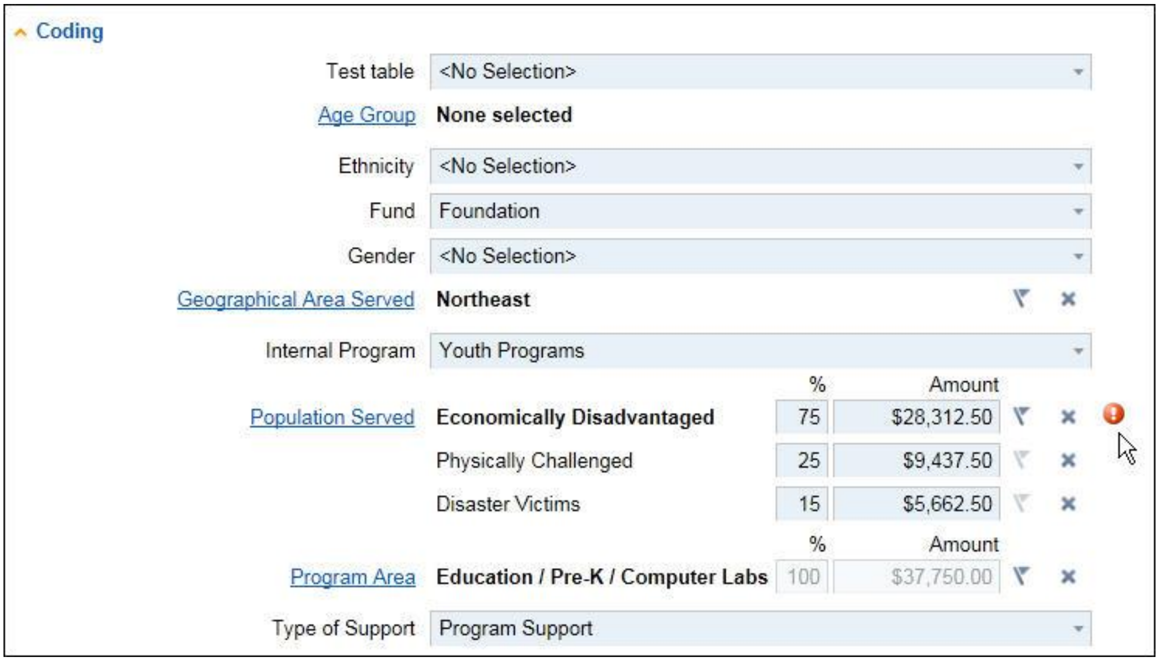
Please consider the maximum number of codes (2 to 20) you want to allow per table so you can advise ME Support.

The current GIFTS Online maximum is 20 for each table.

IMPORTANT: Please contact ME Support if you wish to enable Percentage Coding for specific code tables.

Percentage Coding in Requests

If at least one code table is enabled for percentage coding, the Coding section of a Request will display two additional columns. One column will be for **Percentage** and the other for **Amount**. Only enabled code tables will display values in these columns.



You can enter a value in either column and the system will automatically calculate the associated value when you **Tab** or click out of the field.

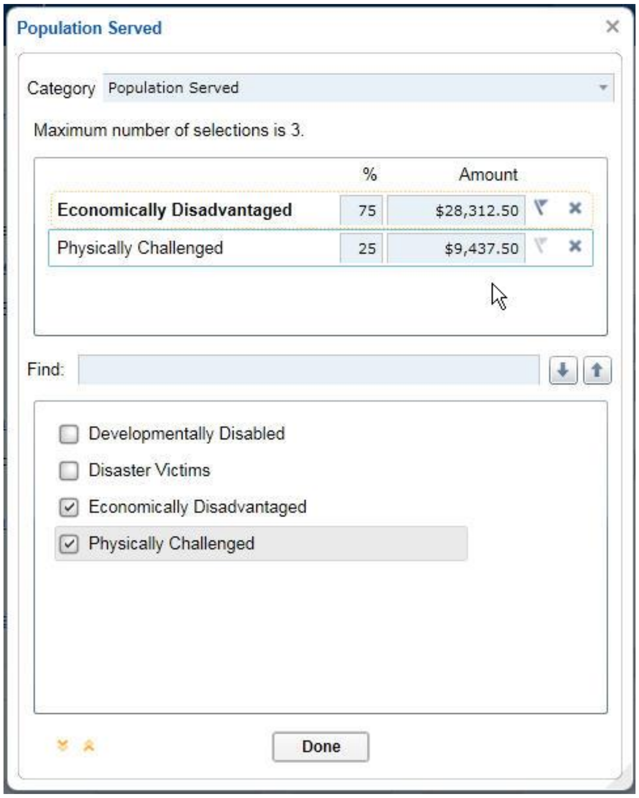
IMPORTANT: An exclamation mark next to the primary amount means you are over or under 100% allocation.

Two icons are available next to each value selected.

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

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

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



Percentage Coding Validation

The following validation rules apply when saving and closing the Request:

- The first code specified within a category will be set to 100% with the full request/grant amount.
- The second code selected will be assigned 0% initially. The fields will become editable from this point onwards.
- If only two codes are specified, changing one will automatically recalculate the other.
- If more than two are set, no automatic adjustments will be made.
- Percentages only support whole numbers.
- If a category's subtotal is not 100% of the Request/Grant amount, you will not be able to **Save & Close**.

Percentage Coding with Request Approval or Rollback to Pending

When a Request is approved or rolled back to Pending, and the Grant amount changes, the system will automatically adjust the amounts in the Coding section.

Percentage Coding for Grant Amendments

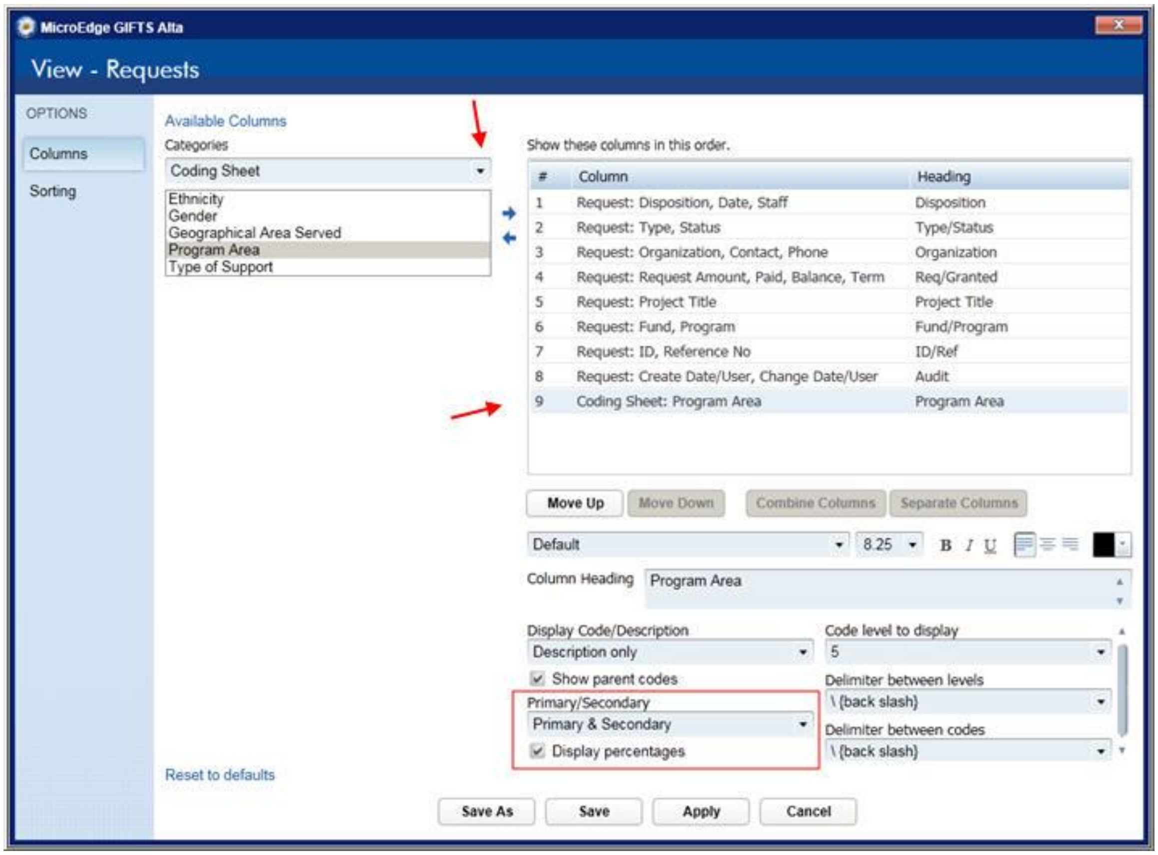
Amending a Grant will prompt the user to amend the allocations by opening a form entitled *Grant Amendment - Adjust Percentage Coding*.

In order to proceed, percentages will have to be manually adjusted to account for the new Grant amount.

Percentage Coding in Request Views

Percentage Coding can be displayed in custom Request Views by doing the following:

1. In the GIFTS Online Search Results page, select **Change Display** in the **Options** menu.
2. Under Available Columns, select *Coding Sheet*.



3. Add the percentage coding enabled table to the Show list on the right.
4. Click on the new table on the right to display its options below.
5. It is recommended to set the column display to *Primary and Secondary* if you have multiple percentage codes for each request.
6. Check the box for **Display percentages**.
7. Click **Save** and then click **Apply** to see your new View.

Percentage Coding in Search Results

Percentages can also be displayed on the Search Results pages and saved Views by enabling a new option under the column's Formatting settings.

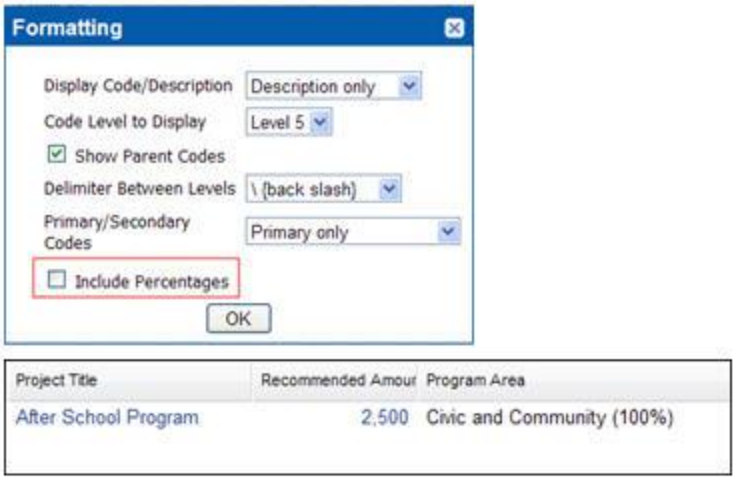
1. From the Search Results page, select **Options > Change Display**.

2. If not currently in the Include list on the right, add a Coding Sheet table with percentages enabled.

3. Select the **Coding Sheet** column, and then click the Formatting button.

4. In the Formatting window, check the box to Include percentages.

5. Click **OK** and then Apply.



When this box is checked, the percentage amount will appear alongside the value.

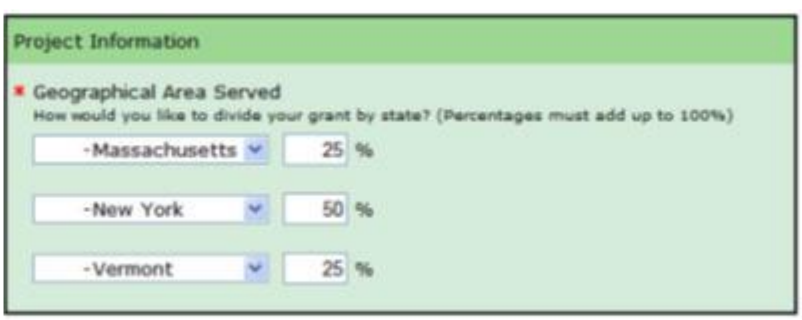
Note that this will also apply to Table dashboard parts added to the Dashboard for Search Results, and to a table dashboard part associated with a saved View.

Percentage Coding in Online Applications

Requirements:

- Must have the Online Applications module configured.
- Must have Percentage tracking enabled for Coding Sheet tables desired.
- Must have Percentage enabled fields inserted in your applications forms by MicroEdge Support or Services.

Percentage coding can be used in Online Applications to allow applicants the opportunity to enter percentages, but not the corresponding amounts.



The retrieval process will bring in the percentages when creating or updating a Request, and calculate or recalculate the associated amounts.

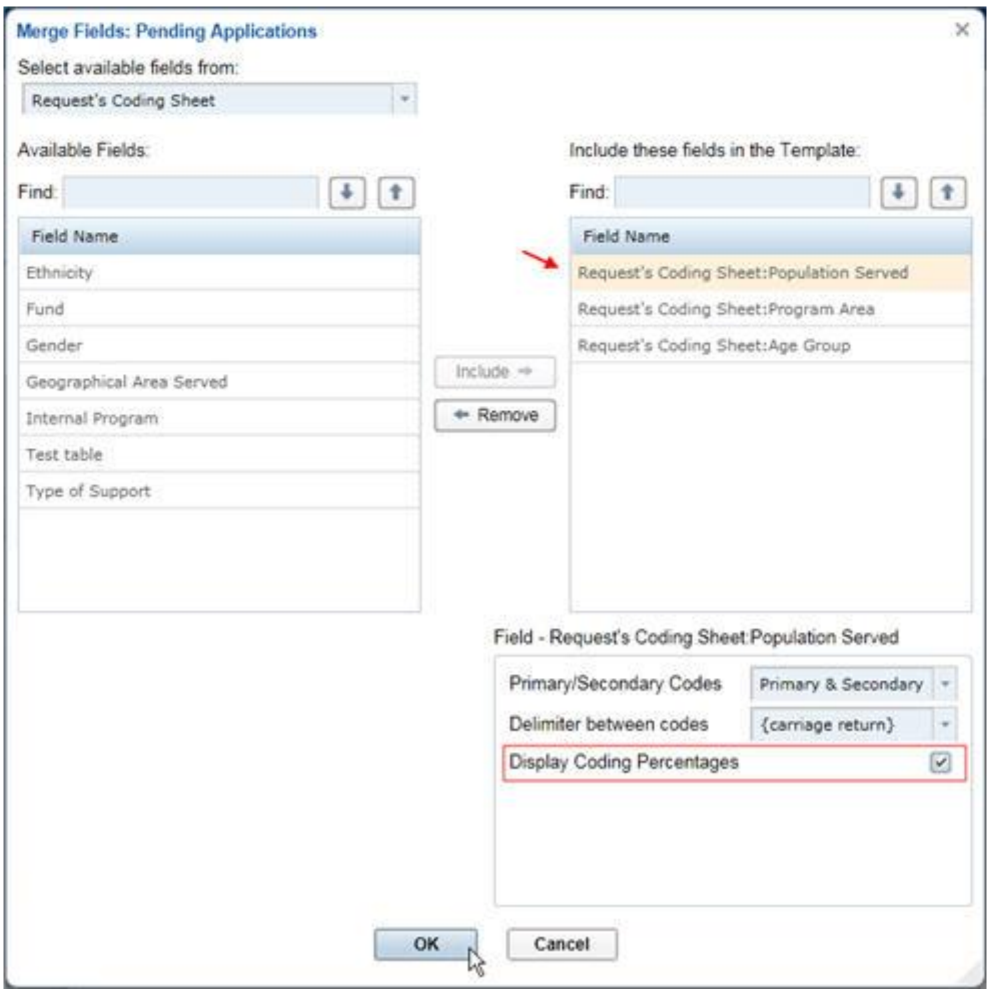
Percentage Coding in Correspondence

Percentage Coding can be enabled to appear in letter or email correspondence through the GIFTS Online Document Template Manager.

TIP: Before accessing the Document Template Manager, make sure to take note of the tables that are currently enabled on your GIFTS Online site for percentages.

To Add Percentages to a New Template:

1. Open the Document Template Manager on a Windows OS computer.
2. Select a Correspondence Category on the left panel.
3. To create a new template, Go to **New > New Template**.
4. Enter the Template Name, Description, and select a Template Type.
5. Click **OK** to continue to the **Merge Fields** form.



6. For the **Select available fields from** menu, select **Coding Sheet** or **Requests Coding Sheet**. This may vary depending on the Correspondence Category you initially selected.

7. Highlight the table in the list on the left that you want to include in the template and click Include.
8. Repeat for other tables as necessary.
9. In the included list on the right, select a table you want to have percentages enabled in the correspondence.
10. The options for the table will be displayed in the bottom right section.
11. **Primary/Secondary Codes:** This should be set to Primary & Secondary if you want all codes to be displayed in the correspondence.
12. Delimiter between codes: Leave as default or pick a delimiter from the menu.
13. **Display Coding Percentages**: check this box to enable percentages to be displayed in correspondence.
14. Click **OK** to save the new template.

To Modify Existing Templates for Percentages:

1. Open the Document Template Manager on a Windows OS computer.
2. Select a Correspondence Category on the left panel.
3. Select an existing template from the ones listed.
4. Go to **Actions > Open Merge Fields** to open the Merge Fields form.
5. Follow steps 6 to 14 above.

When the correspondence is generated by a user, the percentage will appear following the description value in parenthesis.

Example: West \ Arizona (50%)

Percentage Coding in Charts

The Charts dashboard part in GIFTS Online has also been enhanced to be able to reflect percentages when you choose to group on a classification table where percentages are tracked.

To include percentages in a chart:

1. Access the chart's configuration form.

2. For Value Charted –

    • Set **Aggregate to Sum, Average, Min, or Max** (Count cannot be used with percentages.)

    • Set Category to **Request**

    • Set Column to **Grant Amount or Request Amount**

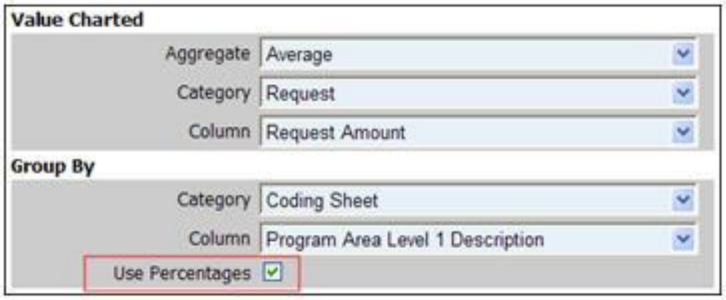
3. For Group By –

    • Set Category to **Coding Sheet**

    • Set Column to the percentage enabled table desired

    • Check the box to **Use Percentages**.

4. Click **OK** to save the configuration and go to your dashboard to see the chart.



If you choose this option, then both primary and secondary classifications will be represented in the chart, and the value for each classification will represent the appropriate % of either the Grant or Request amount.

If you do not choose to enable the option, then the full Request or Grant Amount will be reflected in the "slice" for the classification flagged as the primary.

NOTE: When charting the number of records (rather than some amount), GIFTS Online will chart a record only once by its (or its related Request's) primary code only.

Working with Reviews

Requests can be assigned to staff members or external experts for review. A GIFTS Online record called a Review tracks the Request being reviewed, the person performing the review, dates associated with the Review (such as the due date), and the reviewer's feedback.

NOTE: Internal Reviews (for staff members) and External Reviews (for outside reviewers) are optional GIFTS Online modules; your GIFTS Online system may include either, neither, or both internal and external Reviews. This and the following help topics will note which optional module you need for the topic to be relevant.

The tasks which comprise this review process fall under two responsibilities:

- Assigning and managing Reviews - The staff member responsible for the proposed Request (the "proposal owner") assigns and manages Reviews. This could be a Grants Manager or Program Officer.
- Completing Reviews - If you have been assigned a proposal to review, you can view the Request, enter your feedback, and submit it. External reviewers may also perform this task.

The following is an overview of the review process:

1. Assigning Proposals to Reviewers

First, you as the proposal owner assign one or more reviewers to a proposal.

2. Setting Up Required Review Sequences (Optional)

If you as the proposal owner choose to set one up, a required review sequence sends the proposal to your internal staff reviewers one a time, based on the order of Reviews established in the proposal. If a reviewer accepts a proposal, it is sent on to the next reviewer.

NOTE: Non-required internal Reviews and all external Reviews are sent to different reviewers concurrently.

3. Notifying Reviewers

GIFTS Online automatically sends each reviewer an email notification when it is his or her turn to review the proposal.

4. Reviewing and Approving/Declining Proposals

You as a reviewer then review the proposal. You may be asked to decline a proposal you recommend against, or approve a proposal you review favorably. This is the case only when you as a reviewer complete a required Review.

If this is not the case, the proposal owner can still view and weigh your (and others') feedback when making his or her decision.

Assigning and Managing Reviews

NOTE: This help topic describes features found in the optional Internal and External Reviews modules. If your GIFTS Online system does not include Reviews, you may disregard this information.

Acting as a proposal owner, you will assign and manage Reviews for proposals. The topics below describe how to set up Reviews and review sequences.

Assigning Proposals to Internal Reviewers

Assigning Proposals to External Reviewers

Setting Up Required Review Sequences

Changing the Review Sequence

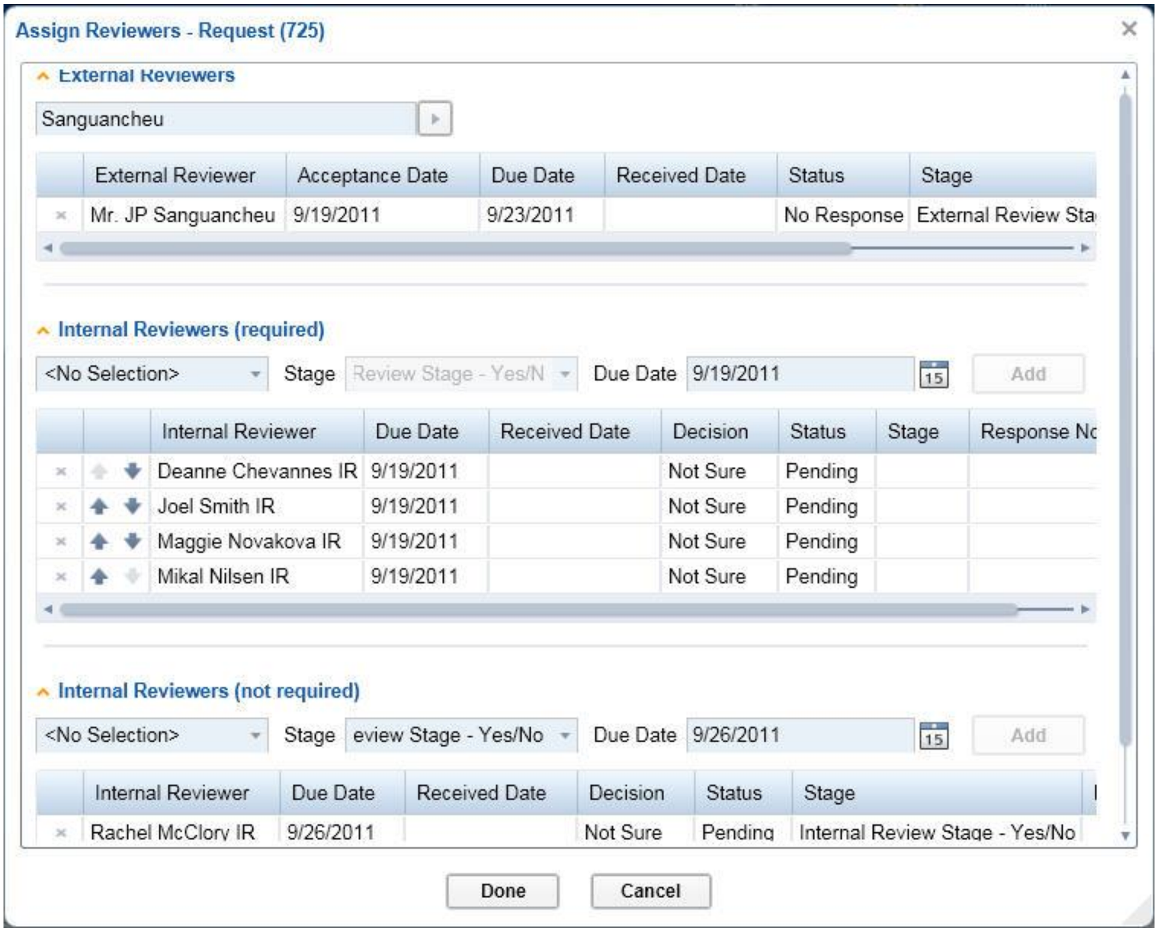
Assigning Proposals to Internal Reviewers

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only *External* Reviews for non-staff reviewers, you may disregard this information.

You can add one or more internal reviewers to a proposal. If you desire (and if the option is available for your organization), you can make reviews required and place them in a specific sequence.

To assign a staff member to a proposal, first search for and find the Request you want to add a Review to and open its Request edit form to start.

1. From the proposal edit form, click **Assign Reviewers** on the Action menu. The Assign Reviewers form appears.



2. Go down to the Internal Reviewers section and use the drop-down menu to select an internal reviewer, enter a Due Date, and then click Add. The reviewer will be added to the list below. Repeat this step for additional reviewers.

3. Click **Done**. The reviewer is added to the proposal, and the proposal appears. To add an additional reviewer, click **Add** and repeat this process.

IMPORTANT: If the Review is not required, or it's the first required Review you've added to the Request, the reviewer will receive email notification immediately.

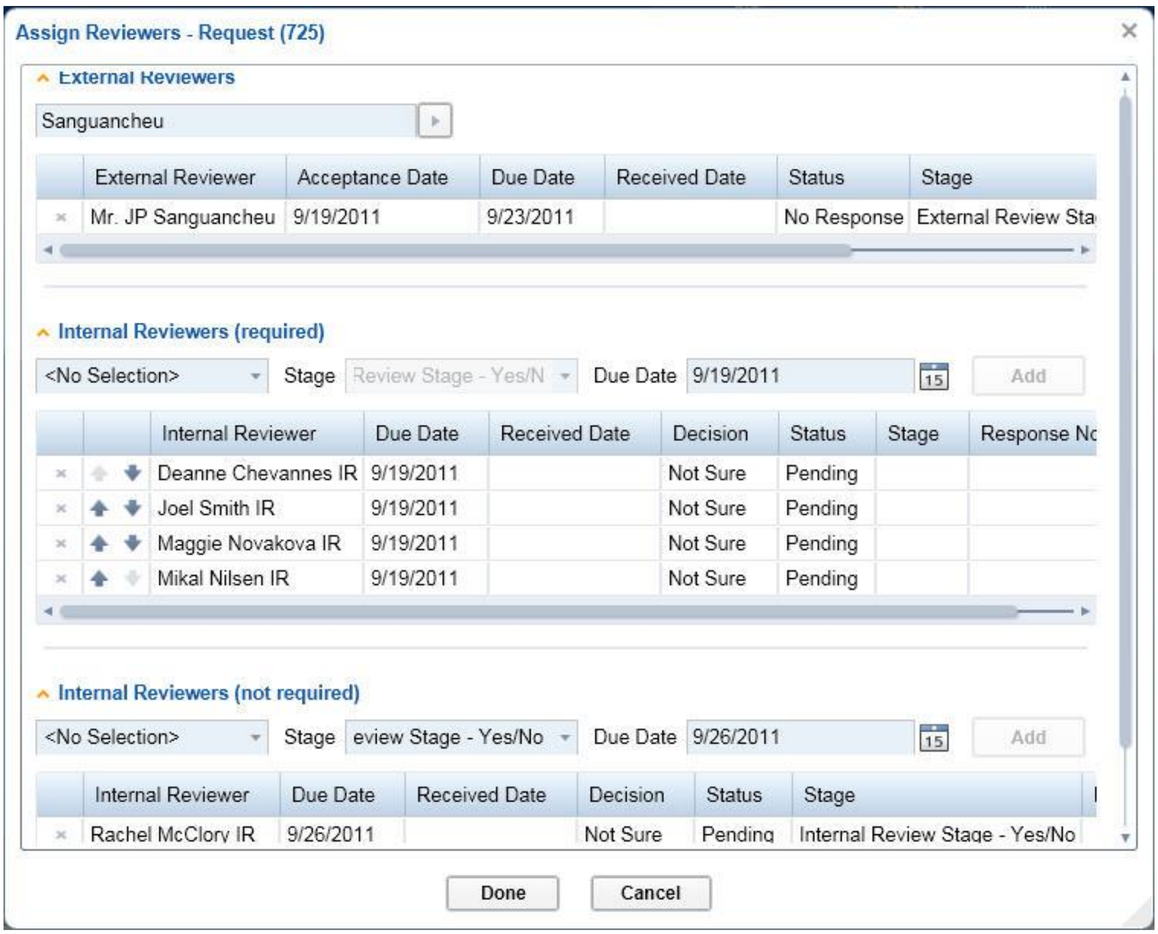
Assigning Proposals to External Reviewers

NOTE: This help topic describes features found in the optional External Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only *Internal* Reviews for staff members, you may disregard this information.

You can add one or more external reviewers to a proposal. To assign a proposal to an outside expert, first search for and find the Request you want to add a Review to and open its Request edit form to start.

To assign a staff member to a proposal, first search for and find the Request you want to add a Review to and open its Request edit form to start.

1. From the proposal edit form, click **Assign Reviewers** on the Action menu. The Assign Reviewers form appears.



2. Go down to the External Reviewers section and enter the last name of the reviewer you seek. Click the arrow button to begin the search.
3. The Select External Reviewer screen will appear. Select a name on the list by double clicking on it. The External Reviewer window will open.
4. On the External Reviewer form, enter an **Acceptance Date** and a **Due Date** then click **Add Reviewer** to go back to the Assign Reviewers form with the new name on top.

NOTE: The fields here are customized for your organization. If you want to make the Review part of a review sequence, select the Required checkbox, if available.

4. Click **Done**. The reviewer is added to the proposal, and the proposal appears. To add an additional reviewer, click **Add** and repeat this process.

Setting Up Required Review Sequences

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only *External* Reviews for non-staff reviewers, you may disregard this information.

What Are Review Sequences?

Required Review sequences allow you to follow your proposal workflow online, gathering feedback and recommendations from staff members one at a time, in the order you want.

NOTE: Review sequences cannot include external reviewers.

- If the first required Review is marked with a "yes", the proposal is then sent to the next required reviewer.
- If anyone at any point in the required review sequence marks his or her Review with a "no," the sequence is suspended and the reviewer will be asked to decline the Request.
- If the proposal gets a "yes" vote from *all* reviewers in the required review sequence, the last reviewer in the sequence will be asked to approve the Request.

Working with Review Sequences

There are two phases to setting up a review sequence:

1. Add two or more Reviews to the proposal, marking all required.

   IMPORTANT: The first Reviewer you add will be notified immediately, and you will not be able to move him or her in the sequence order.

2. If necessary, change the required review sequence. If you added Reviews in the order you want them done, you can skip this step.

Changing the Review Sequence

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only *External* Reviews for non-staff reviewers, you may disregard this information.

After you have set up a review sequence of internal Reviews, you can change that sequence, if necessary.

To change a review sequence, first search for and find the Request you want to add a Review to and open its Request edit form to start.

1. In the Actions menu, click **Assign Reviewers**. The Assign Reviewers form opens.

2. Click the up or down arrow next to the Reviewer you want to move.

Internal Reviewers (required)

<No Selection> Stage Review Stage - Yes/N Due Date 9/19/2011 Add

Internal Reviewer	Due Date	Received Date	Decision	Status	Stage	Response Nc
Deanne Chevannes IR	9/19/2011		Not Sure	Pending		
Joel Smith IR	9/19/2011		Not Sure	Pending		
Maggie Novakova IR	9/19/2011		Not Sure	Pending		
Mikal Nilsen IR	9/19/2011		Not Sure	Pending		

NOTE: Reviews which have already been completed, and the Review currently "in review," cannot be moved.

3. Click **Done**. The review sequence has been changed.

Completing Reviews

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only External Reviews for non-staff reviewers, you may disregard this information.

If you have been set up to serve as a reviewer, newly assigned proposals will appear on your GIFTS Online home page. You can see Reviews you've completed in the past as well.

From the home page you can then review the Request, enter your feedback, and submit your Review.

Review Dashboard Parts

Entering and Submitting Your Feedback

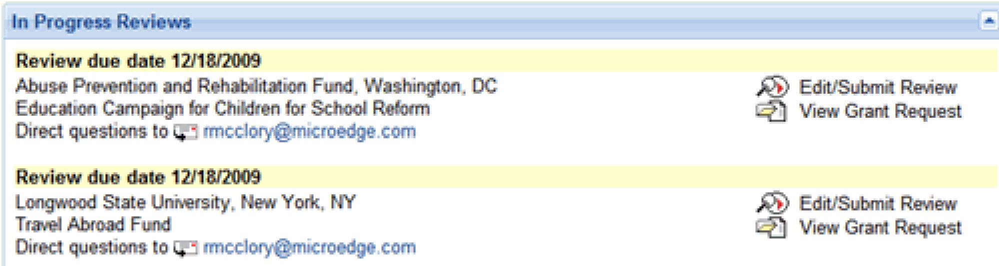
Review Dashboard Parts

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only External Reviews for non-staff reviewers, you may disregard this information.

If you have been set up to perform Reviews in GIFTS Online, you should see these two dashboard parts on your home page.

In Progress Reviews

This dashboard part lists Reviews you have not yet completed . They may be new Reviews, or Reviews you've started but not yet submitted.

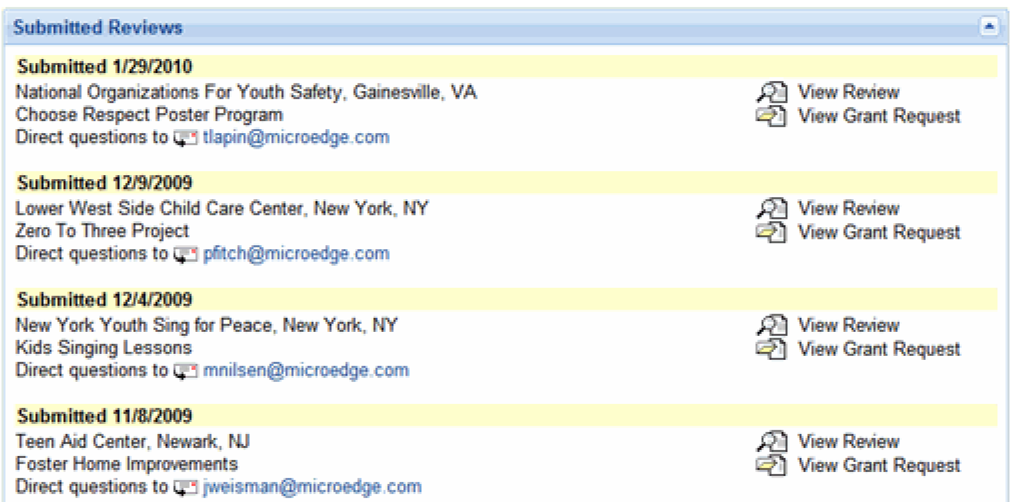


The links to the right of each proposal summary allow you work with Reviews:

- Click **View Grant Request** to open the Request edit form for the proposal. You can read details about the proposal and view attached documents.
- Click **Edit/Submit Review** to enter your feedback on the proposal.

Submitted Reviews

This dashboard part lists Reviews you completed and submitted in the past.



The links to the right of each proposal summary allow you work with Reviews:

- Click **View Grant Request** to open the Request edit form for the proposal. You can read details about the proposal and view attached documents.
- Click **View Review** to see the feedback you provided. Note that you can't change your answers after you've submitted the Review.

Entering and Submitting Your Feedback

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only External Reviews for non-staff reviewers, you may disregard this information.

To fill out your Review, click the **Edit/Submit Review** link in the In Progress Reviews dashboard part. The Edit Review dashboard part opens, containing two sections:

- The first part contains the Proposal Summary, which includes the proposal's Organization, Primary Contact, email address, Project Title, Request Amount, Recommended Amount, among other information.
- The second part contains all of the feedback fields that must be completed by the reviewer in a section labeled Your Review.

To edit and submit a Review:

1. Complete the data entry fields in the Your Review section of the Edit Review page.

   IMPORTANT: The Yes/No field - *if* it appears - is used to indicate whether you feel the Request you are reviewing should be approved. For details on this field, and the potential ramifications of an internal reviewer's selection, please click here.

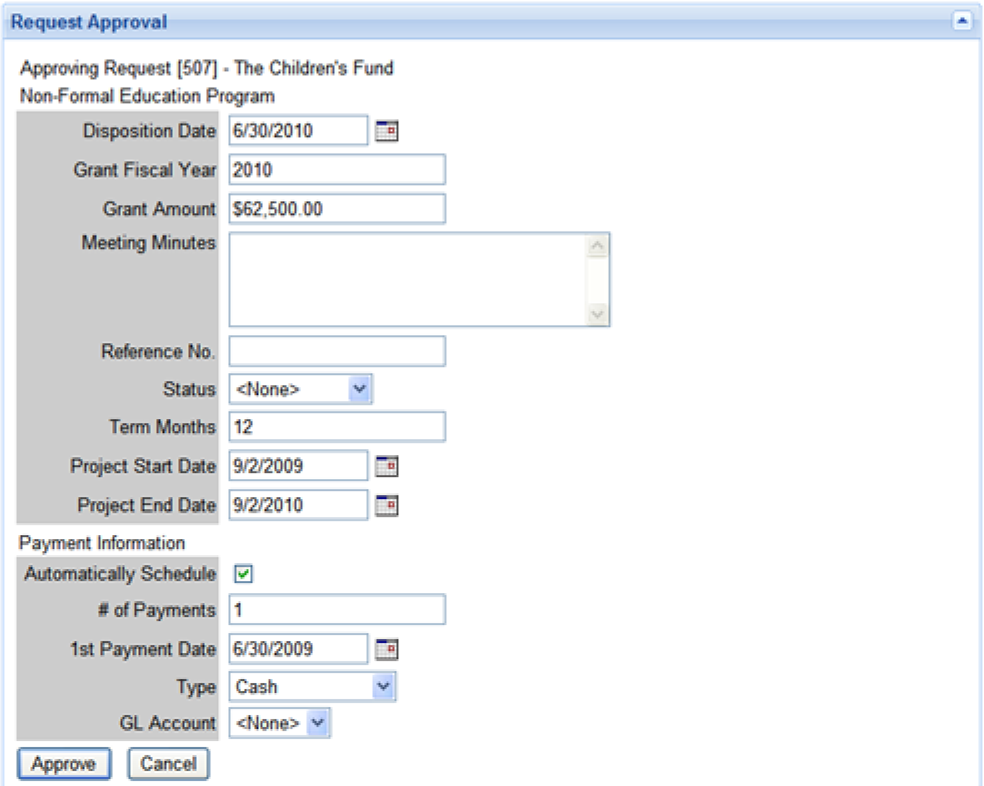
2. Once you have completed the Review by filling in all the feedback fields that appear, click **Submit** to begin the submission review process. A submission confirmation page appears.
   TIP: If you begin your review but are not able to complete it for any reason, you may save the incomplete Review and return to it later. Simply click **Save** to save the Review without submitting it at this time.
3. Check your Review information to make sure it is accurate, and then click **Submit Review**. A submission acknowledgement page appears.
4. Click **Submit Review** a second time to complete the Review submission. You may also click **Edit** to return to the Edit Review page and make additional changes to your Review.
5. Click **Continue** to return to the GIFTS Online home page.

   IMPORTANT: You (or another internal reviewer) may need to approve or decline the Request you have reviewed, depending on your position in the review sequence and your selection in the "Yes/No" feedback field. For details, see Voting Yes or No, Declining a Proposal, and Approving a Proposal. Note that external reviewers are not afforded the chance to approve or decline Requests in any circumstances.

Approving a Proposal

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only External Reviews for non-staff reviewers, you may disregard this information.

When you are the final reviewer in a sequence and you submit a Review with a "Yes" vote (or you are a Grants Manager and click **Approve Proposal** in the proposal's Actions menu), you will need to approve the Request you reviewed. After clicking **Submit Review** on the submission confirmation page (or **Approve Proposal** in the proposal's Actions menu), the Request Approval page appears.



Complete the fields available on the Request Approval dashboard part, and then click **Approve** to complete the approval.

NOTE: If you do not want to approve the Request for any reason, you may click **Cancel** on this page.

Voting Yes or No

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only External Reviews for non-staff reviewers, you may disregard this information.

Your vote in the Yes/No field on the Edit Review page indicates your decision on whether or not the Request should be approved. The following scenarios are possible:

- **You vote “No”**—Once you submit your Review, the review sequence is ended and you are asked to process a Request declination. For details on declining a proposal, please see Declining a Proposal.

  IMPORTANT: If you do not have permission to decline Requests, you will not be able to submit a Review with a “No” vote.

- **You vote "Yes" and you are the last reviewer in the sequence**—Once you submit your Review, you will be asked to process the Request approval. For details on approving a proposal, please see Approving a Proposal.

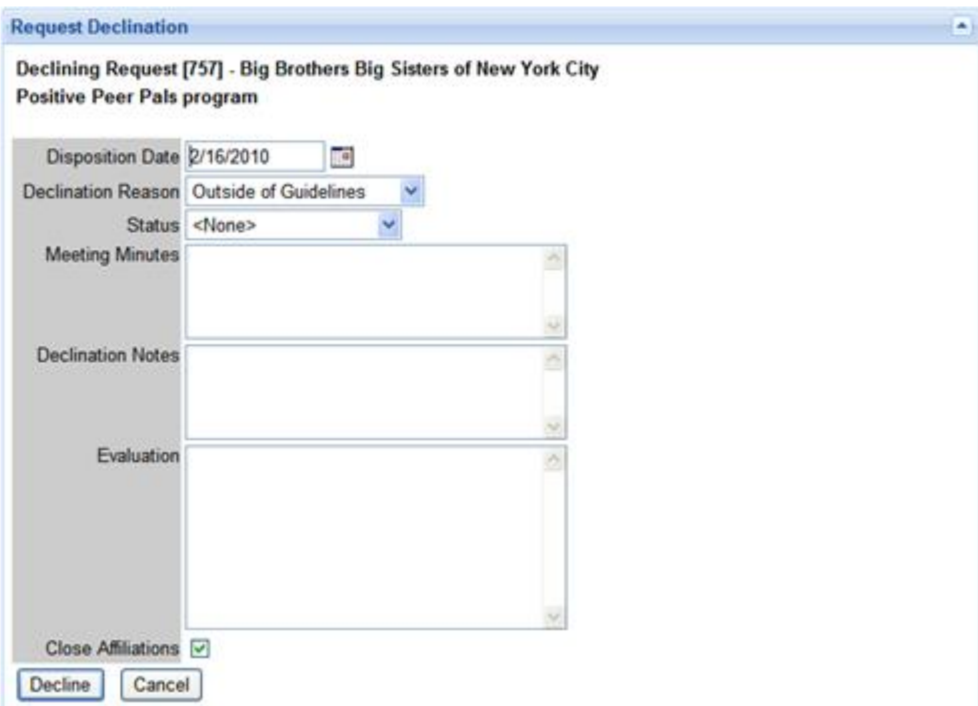
  IMPORTANT: If you do not have permission to approve Requests, you will not be able to submit a final Review with a "Yes" vote. You will only be able to submit your Review once another reviewer has been added to the sequence, either by the proposal owner or by you (if you have the appropriate permissions). For details on how to add another reviewer, please see Assigning Reviewers to Proposals.

- **You vote "Yes" and you are not the last reviewer in the sequence**—Once you submit your Review, the next reviewer in the sequence is notified.

Declining a Proposal

NOTE: This help topic describes features found in the optional Internal Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only External Reviews for non-staff reviewers, you may disregard this information.

If you are a Grants Manager and click **Decline Proposal** in the proposal's Actions menu, the Request Declination page appears.



Complete the fields available on the Request Declination page, and then click **Decline** to complete the declination.

NOTE: If you do not want to decline the Request for any reason, you may click **Cancel** on this page.

Working with External Reviewers

NOTE: This help topic describes features found in the optional External Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only *Internal* Reviews for staff members, you may disregard this information.

External reviewers are non-staff people, often experts in the type of endeavor you're considering funding, who advise grant makers by reviewing specific proposals.

In GIFTS Online, these outside or external reviewers are saved as Contact records. Proposal owners such as Program Officers and Grants Managers may add external reviewers and request their review of a specific proposal.

This section covers the following topics:

Adding an External Reviewer

The External Reviewers' Interface

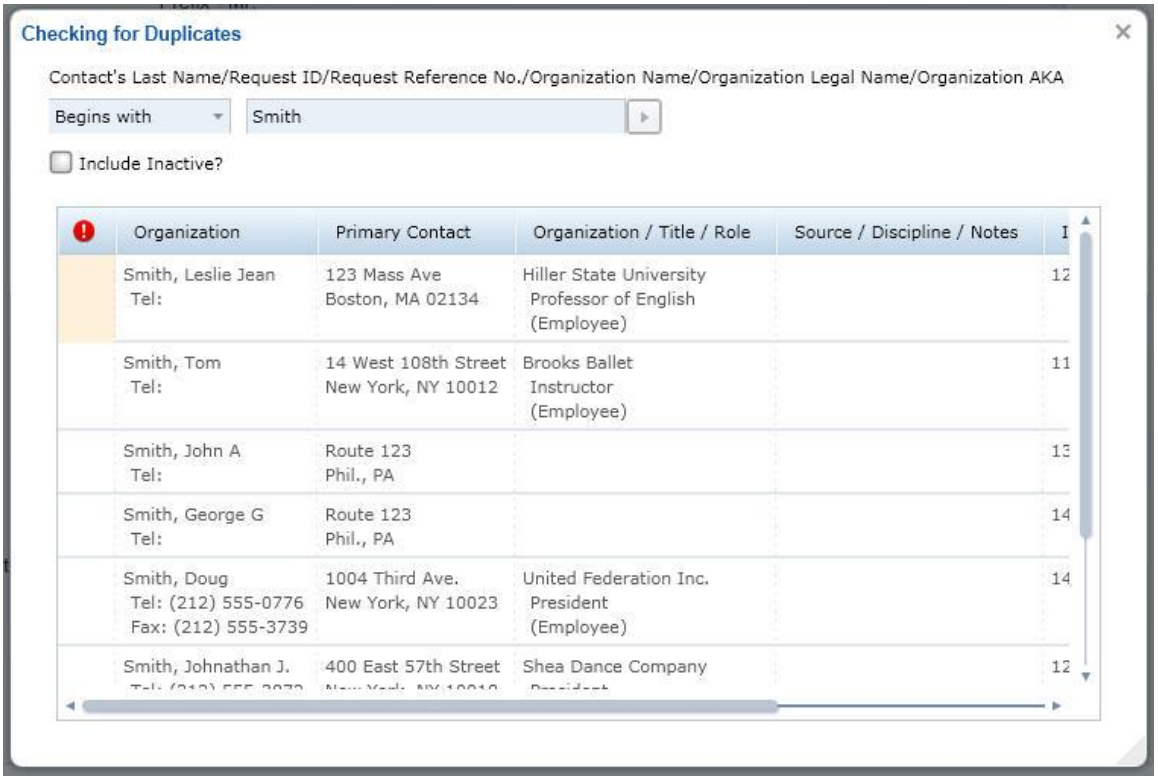
Adding an External Reviewer

NOTE: This help topic describes features found in the optional External Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only *Internal* Reviews for staff members, you may disregard this information.

External reviewers are saved as Contact records in GIFTS Online. Adding an external reviewer means adding a new Contact. If a Contact record for the person already exists, you can edit the record to grant reviewer access.

Grants Managers and Program Officers can add new Contact records; the process begins on the home page.

1. On the homepage , go to **New > Contact** on the Ribbon menu. The Contact (new) edit form opens.
2. Begin entering the new Contact's name in the fields provided. When you tab out of the Last name field, the system will automatically check for any existing contacts with the last name provided and open the Checking for Duplicates window.



If the contact already exists, simply double click on the listed contact to open their edit form.

- If you see the person you want to add already listed, you can double click it to go to his or her Contact edit form.
- If your new contact is not listed, click the X in the upper right corner to close the window and continue filling out the New Contact form.

3. Enter or edit data as needed. Note that when granting a new or existing Contact review access, you must:
   - Select the **External Reviewer Access** check box.
   - Enter a valid email address. Note that this email address must be unique among Contacts' email addresses in your GIFTS Online system.
4. Save the new or updated Contact record.

The next time you add a Review for that Contacts, GIFTS Online will send an email with login information to the Contact; he or she may then log in to GIFTS Online and complete reviews.

The External Reviewers' Interface

NOTE: This help topic describes features found in the optional External Reviews module. If your GIFTS Online system does not include Reviews, or is limited to using only *Internal* Reviews for staff members, you may disregard this information.

After you grant Review access to an outside reviewer, he or she will be able to review proposals using GIFTS Online. Their access is limited to those proposals you've asked they review.

This section describes the interface external reviewers use when they log in to GIFTS Online.

External Reviewer Home Page

When external reviewers log in, they start from the home page, similar in look to other GIFTS Online home pages. The following dashboard parts are available to the reviewers:

Welcome	This dashboard part contains welcoming and/or instructional text for the reviewer. The content is set by MicroEdge to your specifications.
Invited Reviews	The Invited Reviews dashboard part shows a listing of all proposals the Reviewer has been asked to provide feedback on. When you add a Review for an external reviewer, it first appears to the reviewer here. • If s/he clicks the option to accept the invitation, the Review moves to the In Progress Reviews dashboard part. • If s/he clicks the option to decline, the Review status is changed to Will Not Review and the proposal owner receives an email noting the declination. The Review will no longer appear to the external reviewer.
In Progress Reviews	Once a user has agreed to Review a proposal, the Review will move to the In Progress Reviews dashboard part. External reviewers may click View Grant Request to see the Request edit form specific to them (see below). Another link in this dashboard part allows the reviewer to enter and submit his or her feedback.
Submitted Reviews	This dashboard part lists Reviews the reviewer has completed and submitted in the past. From here, external reviewers may open and re-read the proposals or their Reviews.

Request Details for External Reviewers

External reviewers have access to a different Request edit form than other GIFTS Online users. Some details are hidden, and the page doesn't have links allowing the user to drill down to other records.

Working with Payments

What Are Payments?

After you approve a Request for funding, it is important to plan how and when the grant payments are made. Do you want to pay the grant with a single payment, or schedule a series of payments with periodic reviews to ensure that the project is meeting its goals?

In either case you will want a record of the payment that includes the payee organization, the amount paid, the date it was paid, and other information about the payment. The Request's Payment Schedule can help you to manage individual payments and track their progress through your workflow. You can generate the Payment Schedule automatically when you approve the grant. You can also manually create a Payment record for each scheduled payment, either before or after you approve the Request.

When you create a Payment, it has a status of Scheduled—meaning that it is waiting to be paid. When you pay it, you change the Payment Status to Paid and record the Paid Date, check number, and other accounting information.

Working with Payments in GIFTS Online

Whenever you need to edit an existing Payment record, you can access the Payment edit form by either running a search or clicking a link to the Payment elsewhere in GIFTS Online. Then locate the Actions menu and click on the appropriate link.

TIP: Some links to Payment records are indicated by the status (Scheduled, Paid, Contingent, Void, Hold, Refund, or Canceled) of each Payment. On your home page and in search results, you will often be able to click the Payment Amount to open the Payment edit form.

This section contains the following topics:

Adding a Payment

The Payment Detail Page

Payment Available Actions

Paying a Payment

Voiding a Payment

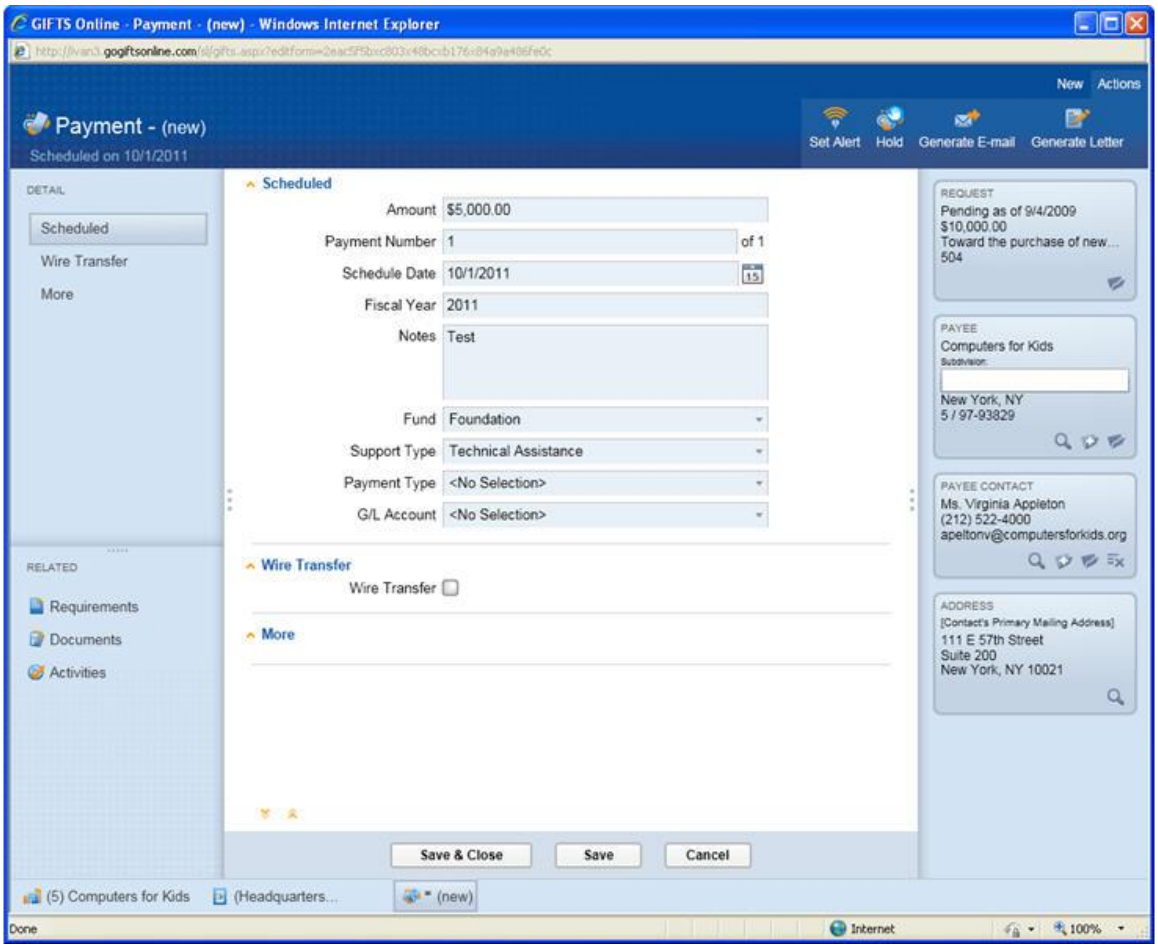
Canceling a Payment

Reissuing a Payment

Adding a Payment

Payments may be added to pending or approved Requests. In GIFTS Online, search for and find the Request you want to add a Payment to and open its Request edit form to start.

1. In the Request's Actions menu, go to **New > Payment**. The Payment Edit Form opens.
2. Enter the relevant Payment data, including **Schedule Date** and **Amount**, which are required.



3. Click **Save & Close**.

When Payments Exceed the Request Balance

A Request's Balance is its amount (Request Amount for pending, Grant Amount for approved) minus the sum of all Payments. If you add a Payment which is greater than its Request's balance, the system will require you to reconcile this difference.

- If the Request is pending, you will be allowed to add a Payment greater than the Request's balance. However, when and if you try to approve the Request, you will be unable to do so:

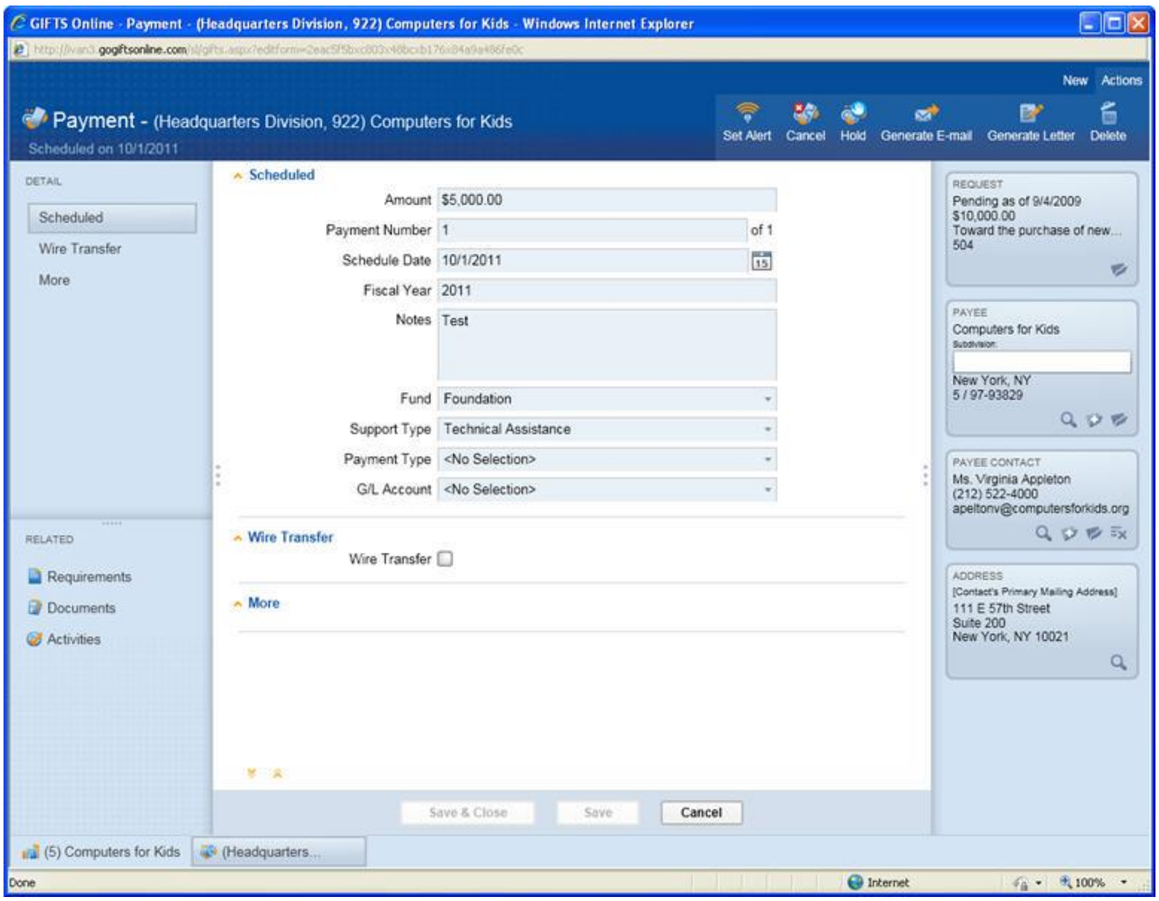
You must either edit the Grant Amount field to at least match the sum of all scheduled Payments - or cancel the approval process and change the Payment Amount(s).

- If the Request is approved, the system asks you to amend the grant - or cancel the new Payment:

The Payment Edit Form

The Payment edit form displays details about a Payment. It is shown when you click a link to the payment anywhere in GIFTS Online.

This overview describes the different dashboard parts seen on the Payment edit form.



Title

Across the top span of the page, the Title dashboard part shows the Scheduled Payment Date.

NOTE: This scheduled Payment shows the date when it's due; a paid Payment would display the paid date, a voided Payment the date on which it was voided, and so on.

Actions menu

This dashboard part lists the actions you may take on the Payment record displayed.

NOTE: The actions listed will change based on the current Status of the Payment. For example, a paid Payment would not show the action to pay; instead, links to voiding or canceling the Payment would be shown.

Related Records

If the Payment had related records such as Requirements, Documents, or Activities, they would be displayed here in the lower left panel.

Payment Information

The main edit form contains the details of the payment.

Primary Related Record Cards

Along the right panel will be listed all the payments related primary records such as the Request, Payee, Payee Contact, and Address.

Payment Available Actions

A combination of the following actions may be taken on the Payment edit form.

Edit Payment Data

Once the Edit form is open, if you have the proper permissions, you can edit the payment data directly in the form's fields. Be sure to **Save** or **Save & Close**.

Change Payee or Payee Contact

To change the Payee or Payee Contact, you must click the **Search** magnifying glass on the Payee or Payee Contact Card.

This displays a search page where you can specify the name of a new Payee or Contact for the selected Payment.

By default, a new Payment will have the same Organization as its Request. In cases when the payee is not the same as the grantee, use this option.

NOTE: If the Organization does not yet exist in GIFTS Online, you must first go to **New > Organization** on the home page to create an Organization record.

Menu Options

The following actions may not appear for all users (depending on your permissions, and whether you use the GIFTS Online Budget module):

New >	
Requirement	Displays a standard Requirement edit form where you can create a new Requirement for the selected Payment. If you want the Payment to be contingent upon the Requirement, enable the Contingency checkbox under the Long Notes field on the Requirement edit form.
Document	Attach a related document to the Payment.
Actions >	
Set Alert	Set an Alert message that displays in an orange bar across the top of the edit form.
Pay	*Scheduled Payments only.* Displays the Pay Payment form where you can complete the fields relevant to paying the selected Payment. For editing any other data fields for a Payment, click **Edit Payment** at the top of the Available Actions list.
Void	*Paid Payments only.* Voiding a paid Payment creates a new Payment record for the *negative* amount. This undoes the paid Payment, but keeps a record and date for both actions. You will be asked whether or not to reissue this Payment during the void. If you choose not to reissue, you will be sent to the Payment edit form to make any necessary changes to the voided Payment. If you choose to reissue, you will be sent to the Reissue Payment page. For details on voiding and reissuing Payments, please see the Voiding a Payment and Reissuing a Payment.
Hold	*Scheduled Payments only.* Click this link to change the Payment's status to Hold. **NOTE:** This prevents you or another user from paying the Payment until the hold is removed.
Activate	*Hold Payments only.*

	Removes the Hold status on a Payment. Click this link to change the Payment's status back to Pending, and update the detail page to reflect the new status.
Cancel	Click here to cancel the Payment. If the Request associated with the Payment is Pending or Approved, you will be asked whether or not to reissue this Payment during the cancellation. • If you choose to reissue, you will be sent to the Reissue Payment page. • If you choose not to reissue, or if the Request is Declined, the Payment is canceled and you are returned to the Payment edit form. **NOTE:** Only Payments that have not been paid may be canceled. If a Payment has been paid, it must be Voided instead.
Reissue	Displays the standard Payment edit form where you can create a new Scheduled Payment record.
Delete	Deletes the Payment. You are prompted for confirmation before the deletion is completed. Be sure you want to delete the Payment, as there is no way to undo the deletion.
Generate Letter	Displays a Generate Letter page where you can create a new letter.
Generate Email	Displays a Generate Email page where you can create a new email.

Paying a Payment

When a grant payment is made in the "real world," you can log in to GIFTS Online and mark the Payment record Paid. It can reflect the Payment information and be removed from reports and queries for open items.

You can pay any Scheduled Payment. You cannot, however, pay Payments with a Status of *Contingent, Canceled, Void, or Hold*. To pay a Contingent or on Hold Payment, you first need to mark the contingency (i.e., the Requirement) done or Activate the hold. If you want to pay a Payment that has been voided or canceled, you must reissue it.

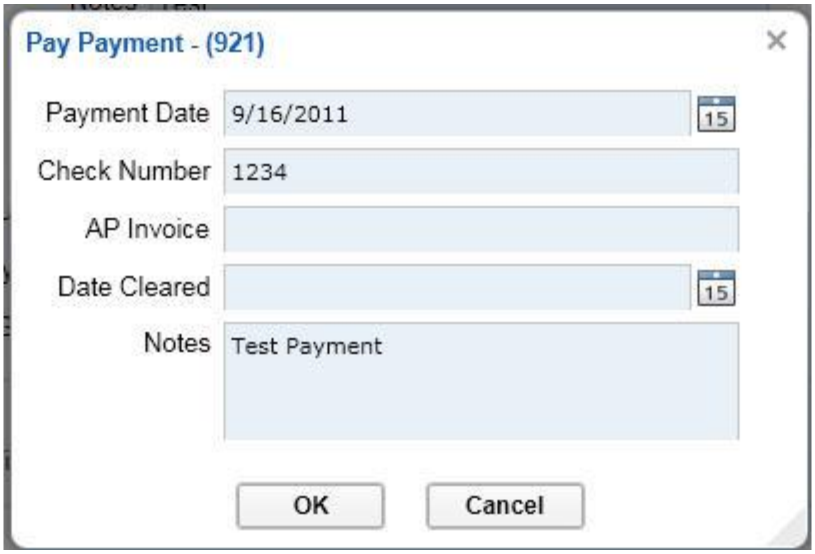
IMPORTANT: Once the Payment is Paid, the **Payment Amount** and **Payment Schedule Date** are locked and cannot be modified. Make sure the information in these fields is accurate before you pay the Payment.

To pay a Payment:

1. Click a link to the Payment anywhere in GIFTS Online to open the Payment edit form.
2. Confirm that the **Amount, Schedule Date**, and **Fiscal Year** are correct.

If they are not correct, edit the Payment and **Save** it before paying it.

3. Click **Pay** on the Actions menu to open the Pay Payment form.



3. Enter the **Payment Date** (required) and other Payment data.
4. Click **OK**. Returning to the Payment edit form, you will notice the title now reflects a Paid Payment Status with the date. On the Edit Form itself, the Amount field is now read only.

NOTE: Budget appropriation is required now if:

- Your GIFTS Online system includes the optional Budget Module;
- There is an open Annual Budget for the Payment Fiscal Year, and;
- Funds from the budget have not been previously appropriated for the Payment.

Voiding a Payment

You might want to void a Payment that is inadvertently marked as Paid, or when a payment check is lost.

Once you void a Payment, you can reissue it or amend the total Grant Amount.

When you click **Void** in the Actions menu on the Payment edit form, you will be asked whether or not the Payment should be reissued. Creating a reissued Payment allows you to inherit the data fields and Requirements from the original Payment without having to reenter them.

If you choose not to reissue the Payment right away, the following will occur:

- A new voided Payment record is created, and a new Activity record is created for the void.
- You are automatically sent to the standard Payment edit form for the voided Payment record. Use the edit form to make any appropriate changes, and then click **Save**.
- All open Requirements associated with the Payment are deleted.

If you choose to reissue the Payment at the same time you are voiding it, the following will occur:

- A new voided Payment record is created, and a new Activity record is created for the void.
- You are automatically sent to the standard Payment edit form to create a new reissued Payment record. Use the edit form to make any appropriate changes, and then click **Save** to create the reissued Payment.
- A new Activity record is created for the reissue, if completed.

Reissuing a Payment

You may reissue a Payment when you initially void or cancel the Payment, or you may choose to do so later. However you initiate the reissue process, you will be taken to the standard Payment edit form to create a reissued Payment record.

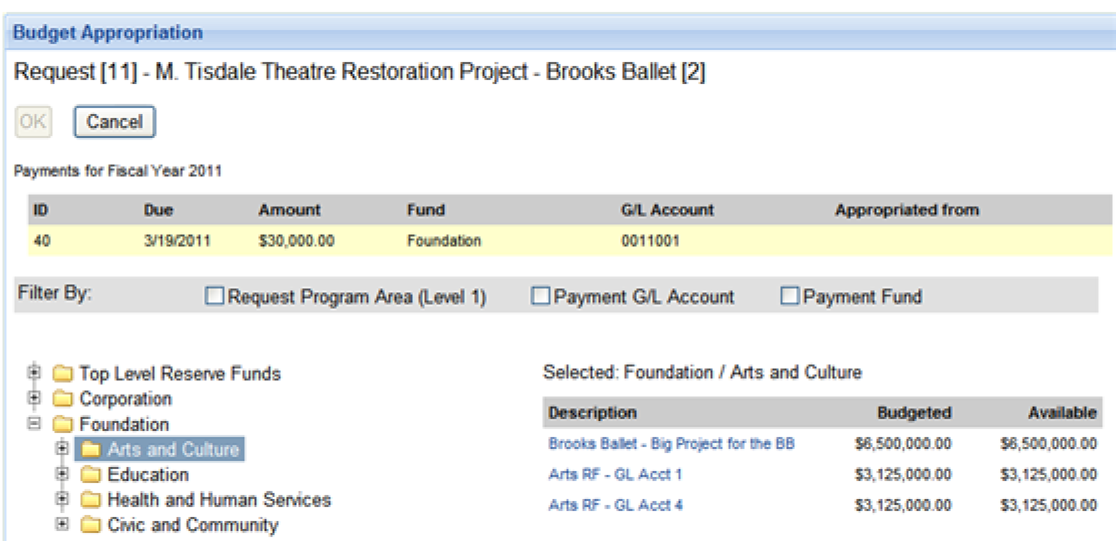
Once you finish making changes and click **Save**, GIFTS Online checks for any open Requirements associated with the original Payment. If any are found, you will be asked whether these Requirements should be transferred to the reissued Payment or deleted.

NOTE: When you finish reissuing a Payment, the original Payment record is updated to reflect the new Payment ID of the reissued Payment. A new Activity record is also created for the reissue.

Appropriating Funds for a Single Payment

NOTE: This help topic describes features included only with the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

While appropriating funds for a payment may be triggered by different actions, each time the Budget Appropriation page looks the same:



Your task is to find the appropriate Reserve Fund or Line Item from which to appropriate funds to cover the Payment. To find your best option, you should understand the different elements of the budget appropriation interface.

Title

The title summarizes the Request/Grant which the Payment is for, showing Request ID and Project Title, then identifying the payee Organization Name and ID.

Payment Summary Table

Below the **OK** and **Cancel** buttons, the Payment we are appropriating funds for is summarized. Key data includes ID, Schedule Date, Amount, Fund, and G/L Account.

The Appropriated from column isn't populated until you pick a Reserve Fund or Line Item; then it is listed.

Filter By:

The page shows Reserve Funds and Line Items from the annual budget with the same Fiscal Year as the Payment. There are many filters here which determine which items are shown. For example, if Authorized Users are in use, a Reserve Fund or Line Item will be listed only if you are authorized to use it. Line Items are only shown if they are linked to the payee Organization.

In the Filter By section, you have the opportunity to apply additional filters, in order to narrow down the list of budget items and find the right one. The filters are applied/removed dynamically: as you select or clear a filter, the list of budget items below updates automatically.

For example, the G/L account for the Payment we're working with is 0011001. if were to select the **Payment G/L Account** check box in the Filter By section, only budget items coded with the same G/L Account would be listed.

Annual Budget Items

Here you select the Reserve Fund or Line Item to appropriate funds from. In the left panel, budget Categories show you the structure of available budget items. To find the right budget item, select a Category. On the right, and Reserve Funds and Line Items matching the filters we've chosen are listed.

To finish budget appropriation:

1. Find and select the budget item you want to appropriate funds from. The item will appear in the Appropriated from column of the Payment summary table.
2. Click **OK**.

The following changes are saved in GIFTS Online:

- If the Payment is Scheduled, Contingent, or Hold, the selected Reserve Fund or Line Item sees its Committed Amount increase by the Payment Amount.
- If the Request is Paid, the budget item's Paid Amount increases by the Payment Amount.
- The available Balance of the budget item is decreased by Payment Amount.
- Payment record is updated to be linked to the budget item from which funds were appropriated.

Budget Transfers While Resolving Payments

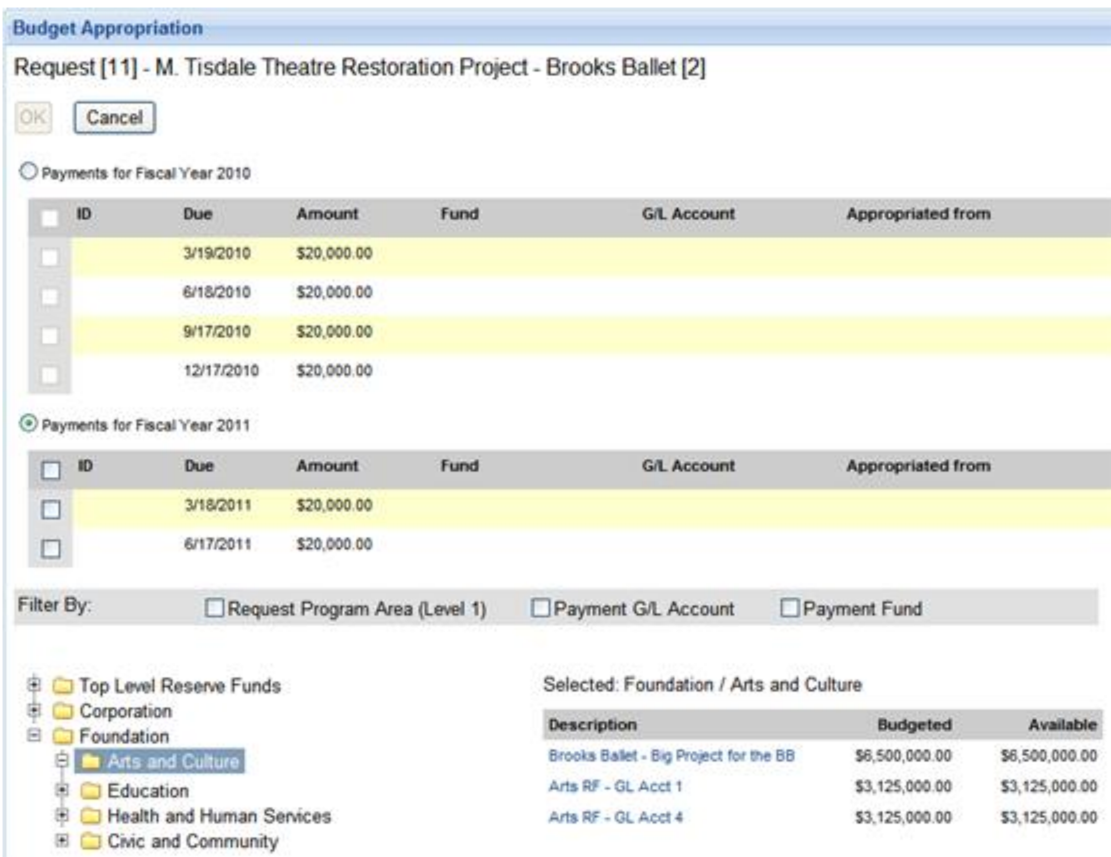
When resolving a Payment against a Line Item, that item may either not have sufficient funds to cover the amount of the Payment or have surplus funds that you'd like to transfer to another Budget item. You can transfer funds as necessary while resolving Payments.

- Click here for information on dealing with Reserve Funds or Line Items with insufficient funds - that is, you've chosen an item with a balance less than the Payment amount.
- Click here for information on dealing with Line Items which have surplus funds after the Payment is covered.

Appropriating Funds for Multiple Payments

NOTE: This help topic describes features included only with the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

If you approve a Request and choose to have Payments automatically scheduled, you may be required to appropriate all Payments first:



Your task is to find the appropriate Reserve Fund or Line Item from which to appropriate funds to cover the Payments. Note you can use different budget items to cover different Payments for the same Grant. In fact, as you can see above, your multiple Payments may fall in two different fiscal years, requiring payments to be covered by funds from two different annual budgets.

Title

The title summarizes the Request/Grant which the Payment is for, showing Request ID and Project Title, then identifying the payee Organization Name and ID.

Payment Summary Tables

Below the **OK** and **Cancel** buttons, the Payments we are appropriating funds for is summarized. Key data includes ID, Schedule Date, Amount, Fund, and G/L Account. The Appropriated from column isn't populated until you pick a Reserve Fund or Line Item; then it is listed.

In cases where two different Annual Budgets are in play, you must select Payments from one year and find budget items for them, then move to the next year, and so on. The Annual Budget for the selected fiscal year will appear below.

After selecting the fiscal year you want to deal with first, you must select which Payments you want to designate Reserve Funds or Line Items for.

Filter By:

The page will show Reserve Funds and Line Items from the selected fiscal year's budget. There are many filters here which determine which items are shown. For example, if Authorized Users are in use, a Reserve Fund or Line Item will be listed only if you are authorized to use it. Line Items are only shown if they are linked to the payee Organization.

In the Filter By section, you have the opportunity to apply additional filters, in order to narrow down the list of budget items and find the right one. The filters are applied/removed dynamically: as you select or clear a filter, the list of budget items below updates automatically.

Annual Budget Items

Here you select the Reserve Fund or Line Item to appropriate funds from. In the left panel, budget Categories show you the structure of available budget items. To find the right budget item, select a Category. On the right, and Reserve Funds and Line Items matching the filters we've chosen are listed.

To finish budget appropriation:

1. Find and select the budget items you want to appropriate funds from for each Payment. The items will appear in the Appropriated from column of the Payment summary table or tables.
2. Click **OK**.

The following changes are saved in GIFTS Online:

- If the Payment is Scheduled, Contingent, or Hold, the selected Reserve Fund or Line Item sees its Committed Amount increase by the Payment Amount.
- If the Request is Paid, the budget item's Paid Amount increases by the Payment Amount.
- The available Balance of the budget item is decreased by Payment Amount.
- Payment record is updated to be linked to the budget item from which funds were appropriated.

Budget Transfers While Resolving Payments

When resolving a Payment against a Line Item, that item may either not have sufficient funds to cover the amount of the Payment or have surplus funds that you'd like to transfer to another Budget item. You can transfer funds as necessary while resolving Payments.

- Click here for information on dealing with Reserve Funds or Line Items with insufficient funds - that is, you've chosen an item with a balance less than the Payment amount.
- Click here for information on dealing with Line Items which have surplus funds after the Payment is covered.

About Appropriating Budget Funds for Payments

NOTE: This help topic describes features included only with the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

Each time you approve a Request or schedule a Payment, GIFTS Online requires you to appropriate funds for the Payment's annual budget.

- Appropriating funds for an unpaid Payment adds the funds to the "Committed" amount tracked in the Budget. (Unpaid Payments may have a Status of Scheduled, Hold, or Contingent.)
- Appropriating funds for a paid Payment adds the funds to the "Paid" amount tracked in the Budget. (Paid Payments may have a status of Paid or Void.)

In either case, the amount of the Payment is subtracted from the available budget balance.

When Payments Need to Have Funds Appropriated

Budget appropriation is required when you:

- Attempt to pay a Payment for which funds have not been appropriated.
- Create a Payment for an approved Request in an open Annual Budget year - including when creating Payments during Request approval.
- Approve a Request with unappropriated Payments during an open Annual Budget year.
- Change the amount of a Payment.
- Reschedule a Payment, changing its Fiscal Year to another which also has an open Annual Budget.

In addition, you can choose to appropriate funds for a Payment created for a pending Request, but it is not required until you want to pay the Payment.

Single or Multiple Payments

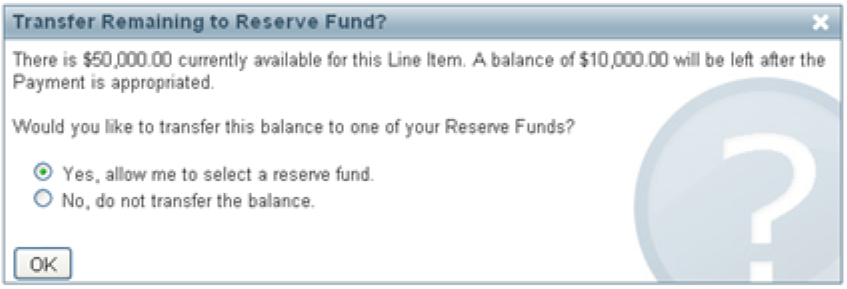
In most cases you will be appropriating funds for a single payment. If you are approving a Request and having GIFTS Online schedule multiple payments for you, you need to appropriate funds for all.

Transferring Funds from a Line Item

NOTE: This help topic describes features included only with the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

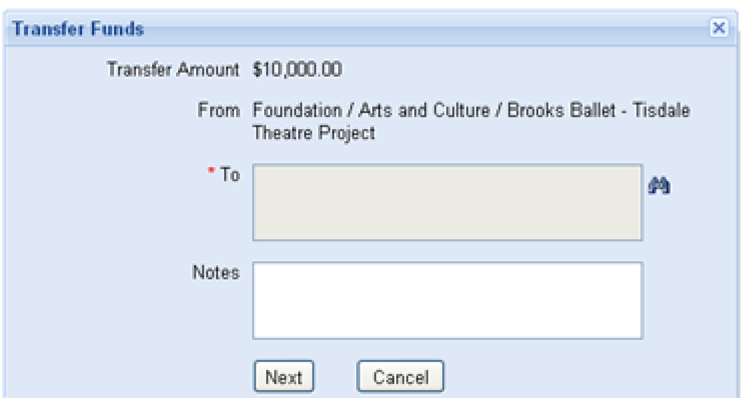
If you choose to appropriate funds for a Payment from a Line Item with a balance greater than the Payment amount, you are offered a chance to transfer the funds to a Reserve Fund.

You can decide to leave the apparent surplus in the Line Item, or transfer the balance to a Reserve Fund.



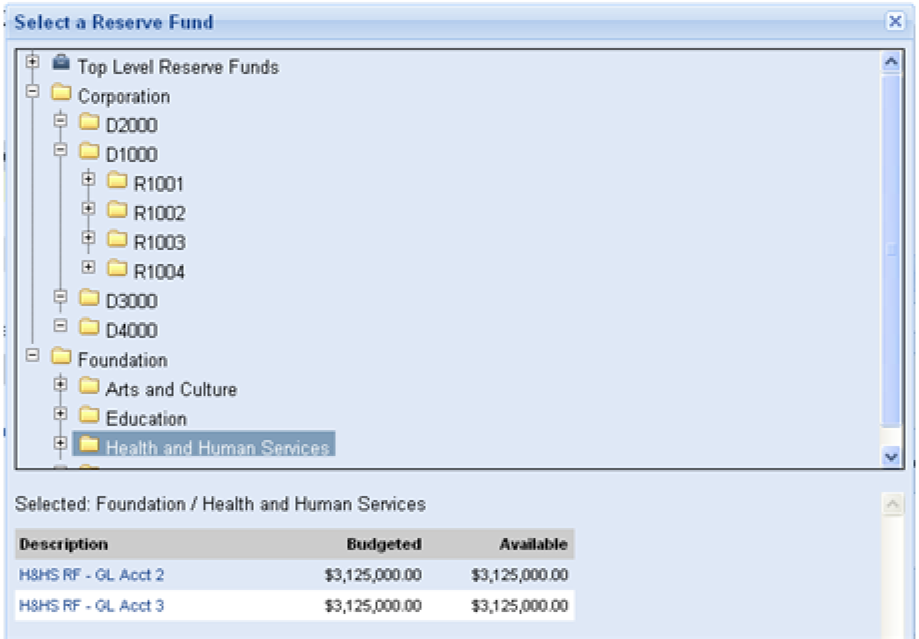
You can either select No and keep the Line Item balance, or use the following procedure to transfer the surplus funds:

1. Select "Yes, allow me to select a reserve fund" and click OK. The Transfer Funds window opens:



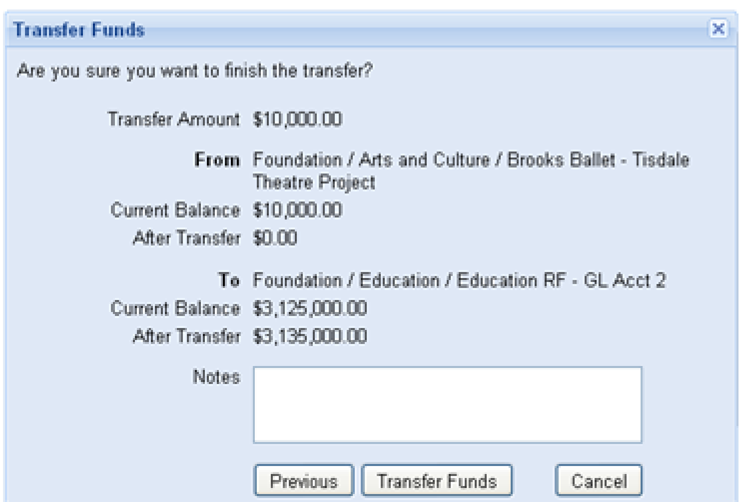
NOTE: The entire surplus amount is the Transfer Amount. You cannot enter a different amount.

2. Click the binoculars to search for the Reserve Fund you want to transfer funds to. The Select a Reserve Fund window opens:



The top panel shows the budget hierarchy. Select a Category and its child Reserve Funds are listed in the lower panel. Click the link for the Reserve Fund there to send funds to it. The Reserve Fund is shown in the To field on the Transfer Funds window.

3. Enter any Notes you want and click Next. The effect of the transfer is summarized and you are asked to confirm:



4. Click **Previous** to go back and make changes, or **Cancel** to cancel. If you want to proceed, click **Transfer Funds**. The Transfer Amount is taken from the Line Item and transferred to the Reserve Fund.

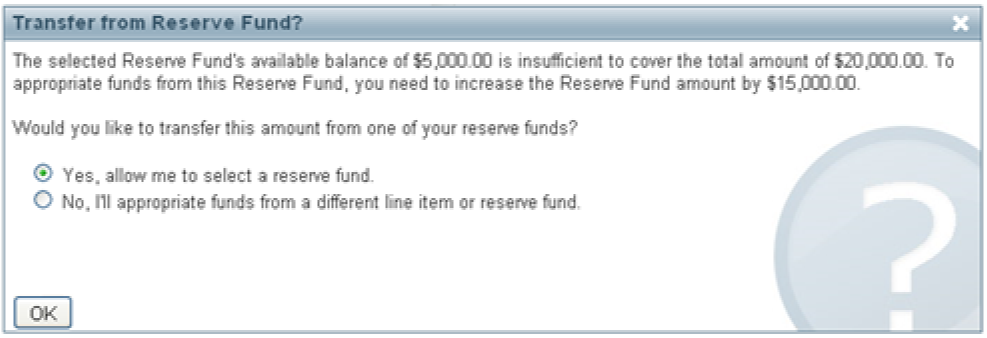
Transferring Funds to a Budget Item

NOTE: This help topic describes features included only with the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

If you choose to appropriate funds for a Payment from a Reserve Fund or Line Item with insufficient funds to handle the amount, you are prompted to transfer the funds needed from a Reserve Fund to the budget item in question.

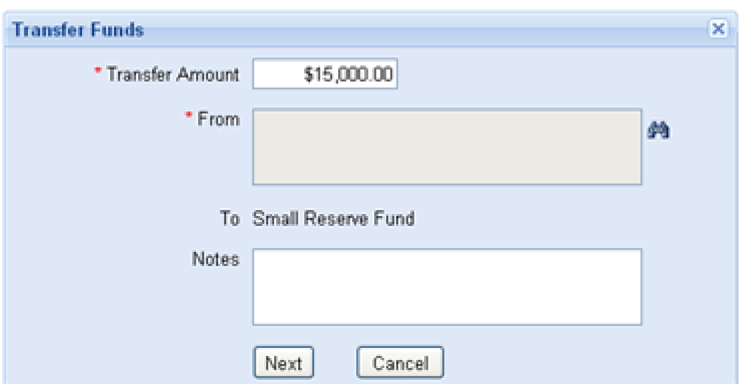
NOTE: If you are appropriating funds from a Reserve Fund which allows a negative balance, you have a third option of letting the fund go negative.

You can decide to try another budget item with a larger balance, or you can transfer funds:



You can either select No and choose another budget item, or use the following procedure to transfer the needed funds:

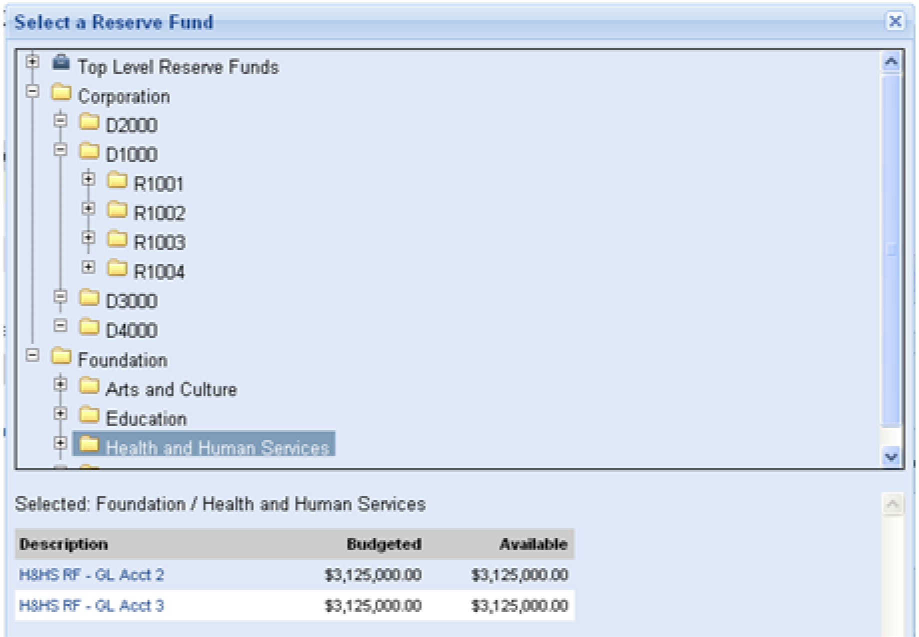
1. Select "Yes, allow me to select a reserve fund" and click OK. The Transfer Funds window opens:



2. Enter the Transfer Amount.

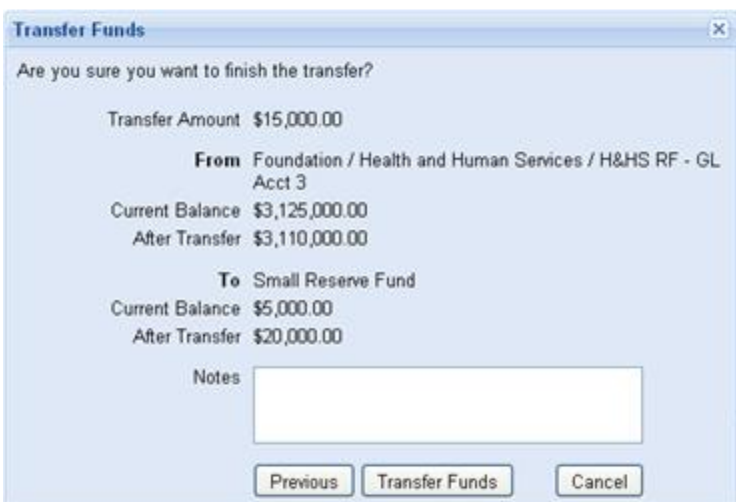
   NOTE: The minimum required to cover the Payment is the default value. You cannot enter a lower amount.

3. Click the binoculars to search for the Reserve Fund you want to transfer funds from. The Select a Reserve Fund window opens:



The top panel shows the budget hierarchy. Select a Category and its child Reserve Funds are listed in the lower panel. Click the link for the Reserve Fund there to take funds from it. The Reserve Fund is shown in the From field on the Transfer Funds window.

4. Enter any Notes you want and click Next. The effect of the transfer is summarized and you are asked to confirm:



5. Click **Previous** to go back and make changes, or **Cancel** to cancel. If you want to proceed, click **Transfer Funds**. The Transfer Amount is taken from the source Reserve Fund and transferred to the Reserve Fund or Line Item you are trying to appropriate funds from.

Canceling a Payment

When you cancel a Payment, the Payment record is not deleted, but its status is changed to Canceled. The difference between cancelling and voiding is that Payments may be cancelled up until the time when they are paid, after which they must be voided.

When you click **Cancel Payment** in the Actions menu on the Payment edit form, if the associated Request has a Declined disposition, the Payment is canceled immediately. Otherwise, you will be asked whether or not the Payment should be reissued. If the Request is Declined or you choose not to reissue the Payment right away, the following will occur:

- The Payment record is updated to reflect a Canceled status, and an Activity record is created for the cancellation.
- All open Requirements associated with the Payment are deleted.

If you choose to reissue the Payment at the same time you are canceling it, the following will occur:

- The Payment record is updated to reflect a Canceled status, and an Activity record is created for the cancellation.
- You are automatically sent to the standard Payment edit form to create a new reissued Payment record. Use the edit form to make any appropriate changes, and then click **Save** to <u>create a new reissued Payment</u>.
- A new Activity record is created for the reissue, if completed.

Working with Contacts

In Contacts, you record the name, address, telephone numbers, and biographical data of all of your contacts.

You can then use Affiliations to link Contacts to as many Requests and Organizations as you wish. In essence, the Affiliations allow you to build a Rolodex™ for each Organization and each Request in your system.

People can also be specified as Contacts for Activities, Requirements, and Payments.

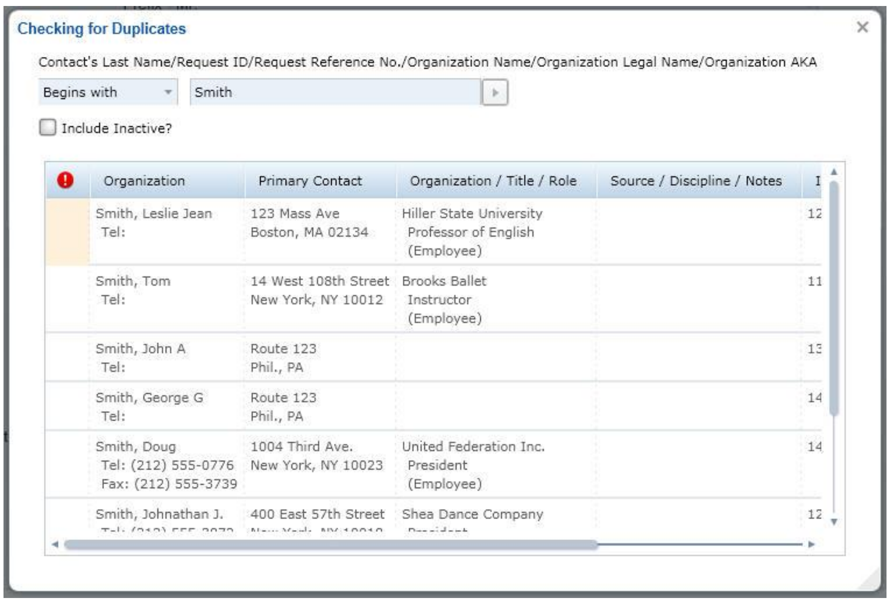
This section contains the following topics:

Adding a Contact

Grants Managers and Program Officers can add a new Contact record; the process begins on the home page.

NOTE: New Contacts may also be created by considering an application submitted by a grant seeker not already in your system.

1. On the homepage , go to **New > Contact** on the Ribbon menu. The Contact (new) edit form opens.
2. Begin entering the new Contact's name in the fields provided. When you tab out of the **Last Name** field, the system will automatically check for any existing contacts with the last name provided and open the Checking for Duplicates window.



If the contact already exists, simply double click on the listed contact to open their edit form.

- If you see the person you want to add already listed, you can double click it to go to his or her Contact edit form.
- If your new contact is not listed, click the X in the upper right corner to close the window and continue filling out the New Contact form.

3. Enter or edit data as needed. Note that when granting a new or existing Contact review access, you must:

   - Select the **External Reviewer Access** check box.
   - Enter a valid email address. Note that this email address must be unique among Contacts' email addresses in your GIFTS Online system.

4. Save the new or updated Contact record.

The Contact Detail Page

The Contact edit form displays details on a Contact and provides an overview of your history with him or her. A Contact's edit form is shown when you click a link to the contact anywhere in GIFTS Online.

This overview describes the different parts of the Contact edit form.

Title

Across the top span of the page, the Title shows the Contact ID Number and full name.

Actions menu

The Actions menu displays the Available Actions you may take on the Contact record displayed.

Detail Categories

These buttons allow you to jump quickly to the various parts of the edit form.

- Contact
- Office Address
- Home Address
- Alternate Address
- Coding
- Biographical
- More

Related Links

These links let you quickly view a list of the related records(if any) for this contact.

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

Contact Available Actions

A combination of the following Available Actions may be included on the Contact edit form.

Edit the Contact Information

You can directly make changes to the Contact's edit form fields.

If you have permission to edit Contact alerts, you can use the Alert section of the edit form to change, add, or remove alert information.

Change Primary Organization

To change the contact's primary organization please see Changing the Primary Organization for a Contact.

Available Menu Options

Depending on the permissions set for your user account, you may have a combination of the following actions available:

New >	
Request	Create a related new Request record.
Organization	Create a related new organization
Requirement	Create a related new Requirement
Review	Create a related new Review
Document	Create a related new Document
Activity	Create a related new Activity
Affiliation	Create a related new Affiliation
Actions >	
Set Alert	Set an Alert Message on this contact record that will appear as an orange message bar directly under the header area.
Generate Email Correspondence	Displays a Generate Email page where you can create a new email.
Generate Letter Correspondence	Displays a Generate Letter page where you can create a new letter.
Delete Contact	Deletes the Contact record. You are prompted for confirmation before the deletion is completed. Be sure you want to delete the Contact, as there is no way to undo the deletion.

Changing the Primary Organization for a Contact

Each Contact has only one Primary Organization, which is usually his or her employer. Most grantmakers use the Primary Organization Affiliation to specify a Contact's employer.

To change a Contact's Primary Organization:

1. Open the Contact's edit form and click the Search magnifying glass on the Primary Organizations Card on the right panel.

2. On the Select Primary Organization search form, enter the name of the new organization and click the arrow button to begin the search. The search results will be displayed below.
3. If the organization you require is listed, double click it to have it set as the new Primary Organization and return to the Contact edit form.

NOTE: If no existing Organization records match your search, you can run another search or create a new Organization.

4. Click **Save**. You are prompted to specify whether you want to change the Contact's telephone and fax numbers.
5. Select **Yes** or **No**, and click **Save**. The Contact updates with the new Primary Organization information.

Duplicate Consolidation

Over time, it is quite common to end up with duplicate records in your database, particularly Organizations and Contacts. These can lead to inaccurate reporting and embarrassing mistakes.

In order to help identify duplicate organizations and contacts, Crystal Report templates were created.

- Duplicate Organizations (by Name)
- Duplicate Contacts (by Last Name)
- Duplicate Contacts (by Social Security Number)

These reports are included in the Reports Library.

Once you have identified the possible duplicates, the option to **Consolidate Duplicates** on the **Actions** menu of Search Results page for both Organizations and Contacts can be used.

To consolidate duplicate Organizations or Contacts, do the following:

1. Perform a **Quick Find** or **Full Search** for Organizations or Contacts which you know are duplicates from the above reports.
2. Select the duplicate Organizations on the search results page.
3. Go to **Actions > Consolidate Duplicates** to open the Consolidate Duplicates form.

The first record selected will be placed in the Valid Record side of the form and all others will be displayed on the right side as Duplicates.

4. To make an Organization on the right side the valid record, click the arrow icon on the top right corner of its card. The current record on the valid side will be moved to the duplicates side.
5. Click the **Consolidate** button.
6. A confirmation message will ask if you wish to delete all duplicate records.
   - **Yes** - moves all related data to the valid record and deletes the duplicates.
   - **No** - moves all the related data to the valid record without deleting the duplicates.
   - **Back** - takes you back to the Consolidate Duplicates form.
7. Click **OK** at the next message to continue.
8. Click **OK** at the success message.

Working with Affiliations

What Are Affiliations?

An Affiliation record details the relationship between a Contact and an Organization or Request. Information describing the affiliation such as the Start Date and End Date of the relationship and a Role that describes the nature of the relationship is also stored in the record.

Records are linked to other records in a number of ways. For example, a Payment is linked to the approved Request from which the paid amount comes. However, a Payment can play only a single "role" for its Request—you don't need another record detailing this relationship.

On the other hand, a single Contact—one person—may play any number of different roles within one or more Organizations, or have a part in any number of different Requests. Each Affiliation record links the Contact to an Organization or Request, while at the same time noting the specific relationship between the two. This allows you to maintain one Contact record per person, while also allowing you to link that person to any number of different Organizations or Requests. Each Affiliation record includes From and To dates, noting the beginning and ending dates of the relationship it records.

There are two types of Affiliations -- Primary Affiliations and Secondary Affiliations. While both types of Affiliations have the same fields, and are accessed and displayed in the same manner, they represent different types of relationships.

Primary Affiliations describe a unique relationship between a Contact and an Organization or Request and are created automatically by the system. These include:

- Organization Primary Contact
- Contact Primary Organization
- Request Primary Contact Affiliation

Secondary Affiliations are manually created by the user to represent a relationship that is not covered by a Primary Affiliation.

EXAMPLE: Nathaniel Smith has a Contact Primary Affiliation to the Model Foundation, but he also serves as a consultant to the UNICEF Foundation. A Secondary Affiliation can be created to describe his consultancy role with the UNICEF Organization.

Affiliations in GIFTS Online

Affiliations can be accessed and edited online using GIFTS Online. You can add additional Affiliations to document relationships between Contacts and Requests or Organizations. In addition, you can create Affiliation correspondence.

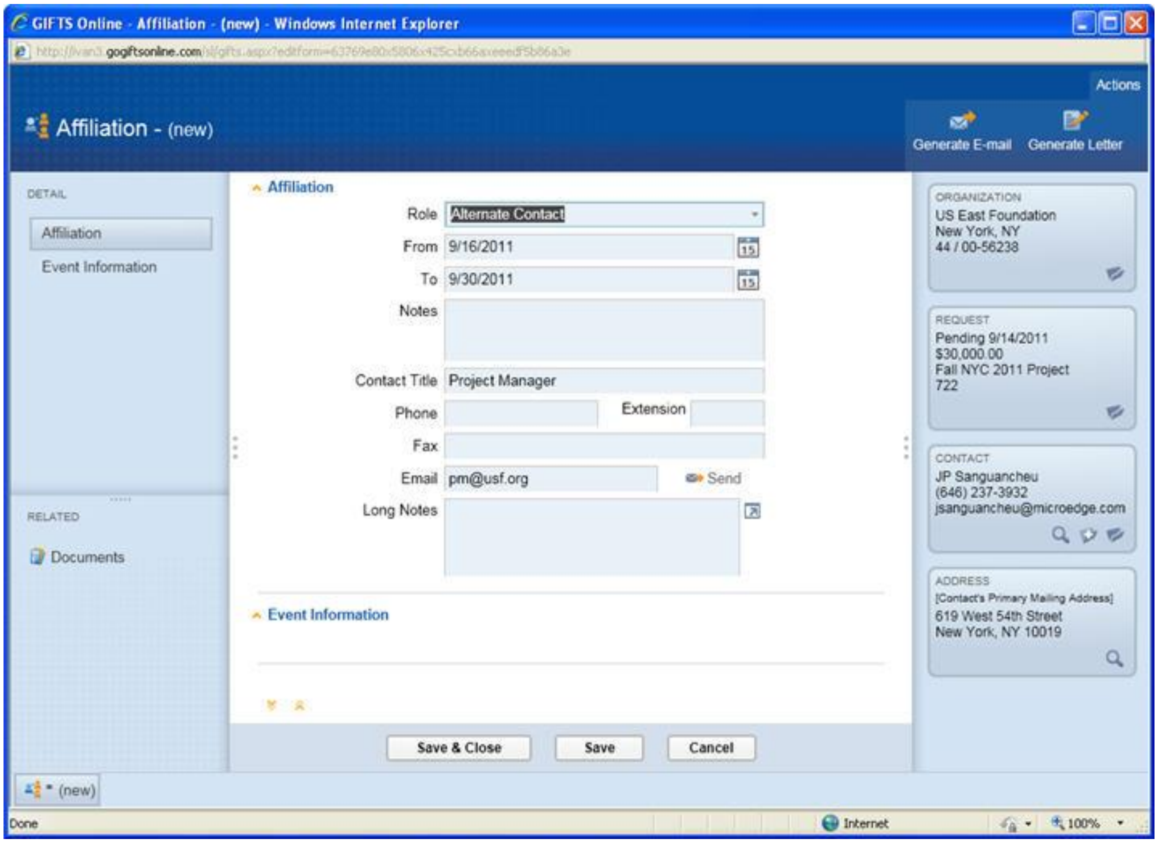
This section contains the following topics:

Affiliation Available Actions

Adding Secondary Affiliations

The Affiliation Edit Form

The Affiliation edit form displays details on the relationship between a Contact and a Request or Organization. An Affiliation's edit form is shown when you click a link to the Affiliation any where in GIFTS Online. Usually this means you clicked on the Role the person plays with an Organization or Request, as shown in this Request edit form Affiliation Contacts dashboard part:



This overview describes the different parts of the Affiliation edit form.

TIP: You can enter a different email address or phone number for someone in each of his or her Affiliations. For example, if a Contact were consulting with an Organization for a three month period, you could enter an Affiliation for those dates, and specify a different email address where to reach your Contact during that time.

Title

Across the top span of the page, the Title area shows the Affiliation ID and branch.

The Status will display one of the following:

- Request Primary Contact Affiliation
- Organization Primary Contact Affiliation
- Contact Primary Organization Affiliation
- Request Affiliation
- Organization Affiliation

Actions menu

The Actions menu displays the Available Actions you may take on the Affiliation record displayed.

Detail Categories

These buttons allow you to jump quickly to the various parts of the edit form.

Related Links

These links let you quickly view a list of the related records(if any) for this contact.

- Documents

Affiliation Available Actions

A combination of the following Available Actions may be included on the Affiliation edit form:

Edit Affiliation	Opens the Edit Affiliation form, where you can edit the Affiliation currently shown on the edit form.
Close Affiliation	Allows you to close an affiliation record from the workspace or related records.
Generate Letter Correspondence	Displays a Generate Letter page where you can create a new letter.
Generate Email Correspondence	Displays a Generate Email page where you can create a new email.
Delete Affiliation	Deletes the Affiliation record. You are prompted for confirmation before the deletion is completed. Be sure you want to delete the Affiliation, as there is no way to cancel the deletion.

Adding Secondary Affiliations

Affiliations in GIFTS Online can be created from the edit form of the Request or Organization to which you want to affiliate a Contact. To create an Affiliation:

1. In the New menu of a Request or Organization edit form, click **Affiliation**. The Search for Contact page appears.

   NOTE: The New button is not displayed until you have searched for an existing Contact.

2. Enter the first few letters of the Contact's last name and click **Search**. The search results appear.
3. To choose a Contact from search results, select it from the list by double clicking it.
4. You are prompted to edit the Affiliation.

   NOTE: If no existing Contact records match your search, you can run another search or create a new Contact record. If you are creating a new Contact record, enter the Contact information and click **Save**. Restart from step 1.

5. Select the Contact's Role, Affiliation term dates, the title of the Contact, and so on.
6. Click **Save** to save the new Affiliation.

Working with Activities and Requirements

What Are Activities?

During your day-to-day work, you need to track various actions and pieces of information like notes from phone conversations and write-ups from site visits. In addition, you may need to know when a certain letter was sent or when material was received from a grantee. Activities help you keep track of these events.

Some Activities are logged automatically—such as when you send a merged letter. Other Activities can be logged in manually as they are needed. 'Activities' are, in a sense, a catch-all category for the recording of several different kinds of events. Each class of activity serves either to audit your actions, or to remind you of appointments and deadlines.

What Are Requirements?

GIFTS Online allows you to track two kinds of Requirements that are due from your grantees as conditions of the grant:

1. **Proposal/Grant Requirements** are attached to a specific grant due as part of the proposal-tracking or grant-tracking process, and usually entered as a schedule, such as a series of progress reports followed by a final report. Some grant makers require site visits or review meetings during the life of a grant. Any required activity that you place on your grantees can be a Grant Requirement.
2. **Payment Requirements** are attached to a specific Payment and—if you make the Payment Contingent upon the Requirement—prevent it from being paid until the Requirement is met. For instance, if you fund challenge grants, a Payment on a challenge grant should not be paid until the Organization has met the challenge.

Activities and Requirements in GIFTS Online

Whenever you need to edit an existing Activity or Requirement record, you should access the record's edit form by either running a search or clicking a link to the Activity or Requirement. Depending on your system settings, you may find Activity and Requirement links on your home page, or on the edit forms for Organizations, Payments, Requests, and Contacts.

TIP: GIFTS Online links to Activity and Requirement records are indicated by the specific type of Activity. You may see links like **Phone Call**, **Office Visit**, or **Final Report**. When the edit form displays, locate the Actions menu and click the appropriate link.

This section contains the following topics:

Requirement Available Actions

Adding a Requirement

To add a new Grant or Payment Requirement:

1. Navigate to the Request or Payment edit form for the record you want to associate the Requirement with.
2. On the New menu, click **Requirement**. The Edit Requirements page opens:
3. Enter the Type and other details about the requirement you're recording here.

   TIP: You can assign the Requirement to a different GIFTS Online user, or enter a Done Date if the Requirement is already completed.

4. Click **Save** to save the new Requirement. You are returned to the edit form where you initiated the action.

Publishing a New Requirement to a Grantee

NOTE: The following requires the optional GIFTS Online Applications and Requirements module.

If you are using online grantee reporting to complete Requirements, you can publish the Requirement to the grantee as you add it.

After clicking **Save**, go to **Actions > Publish to Web**.

If the grantee does not have an online account, the system will ask if you wish to create one.

Otherwise the Requirement will be published to the grantee's account page and an email notification will be sent to the grantee.

Adding an Activity

To add a new To Do Activity:

1. Navigate to the Request, Organization, or Contact edit form for the record you want to associate the Activity with.
2. On the New menu, click **Activity**. The Edit Activity page opens:
3. Enter the Type and other details about the event or activity you're recording here.

   TIP: You can assign the Activity to a different GIFTS Online user, or enter a Done Date if the Activity is past.

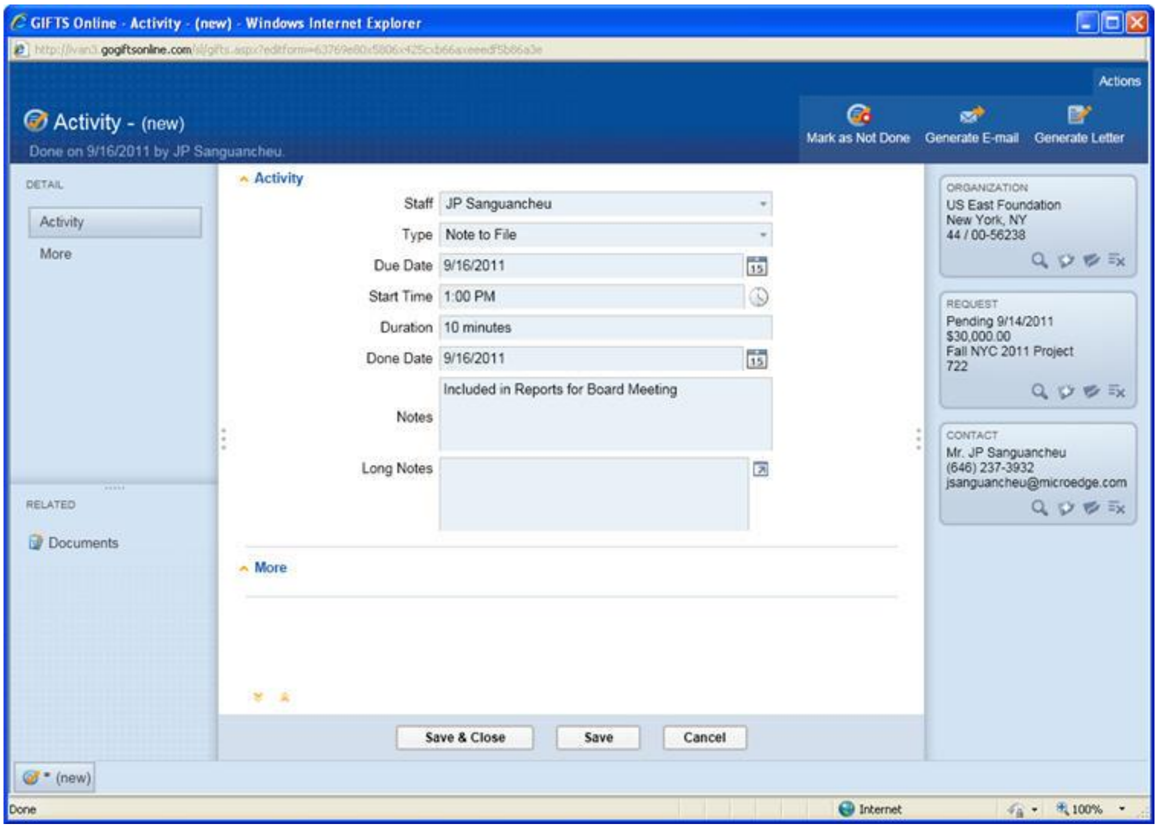
4. Click **Save** to save the new Activity. You are returned to the edit form where you initiated the action.

The Activity and Requirement Detail Pages

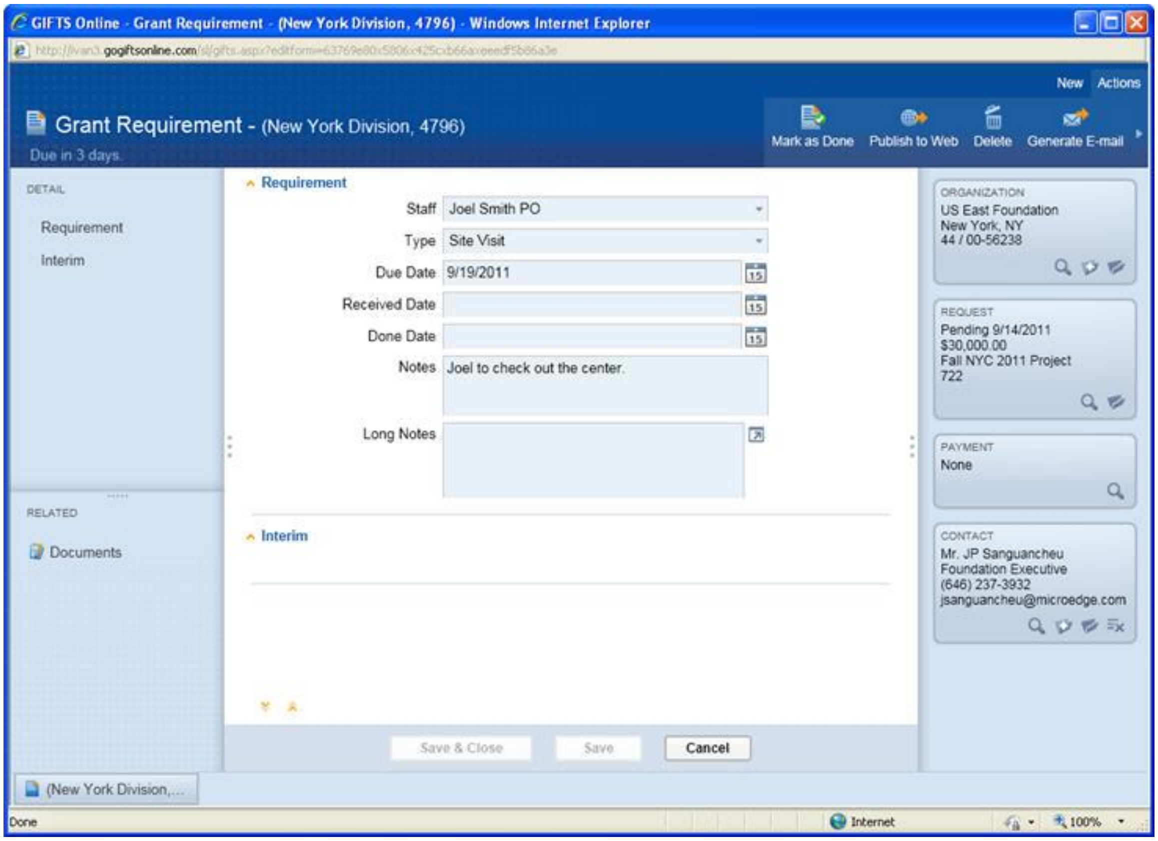
The Activity and Requirement edit forms display information about your Activities and Requirements. An Activity and Requirement edit form is shown when you click a link anywhere in GIFTS Online.

Click the popup links below to see samples of Activity and Requirement edit forms.

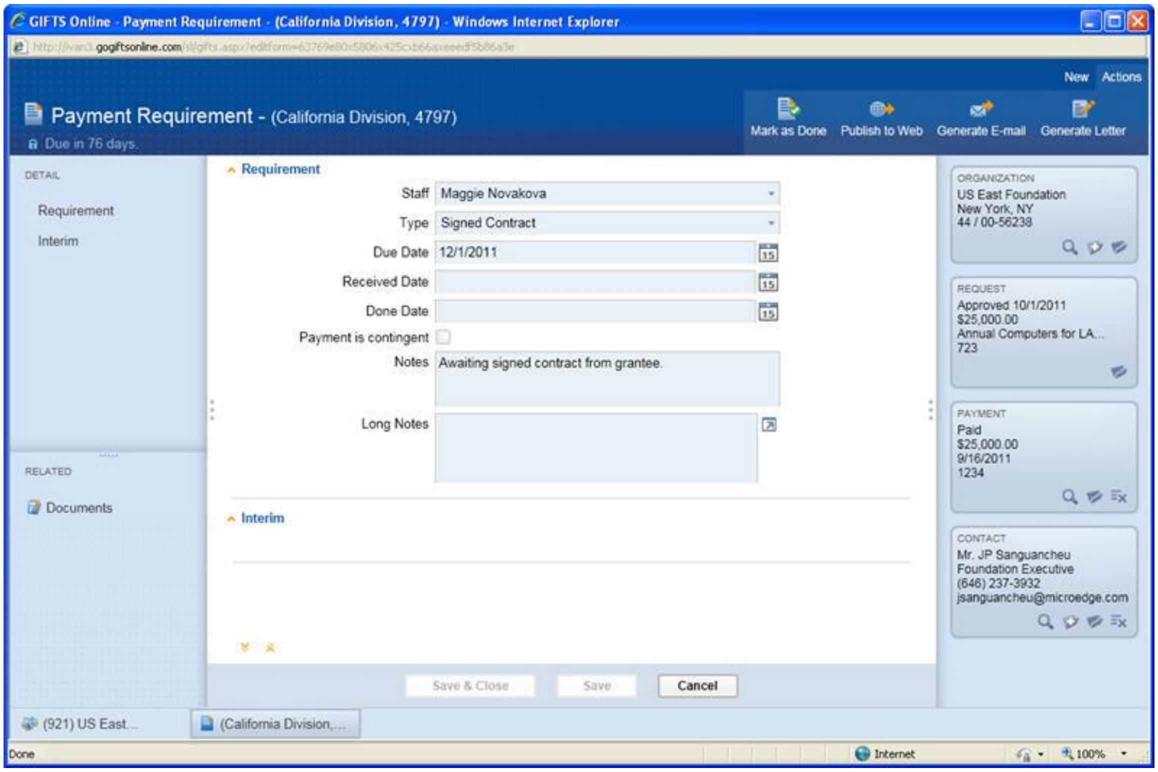
Activity Edit Form



Grant Requirement Form



Payment Requirement Form



Requirement Available Actions

A combination of the following Available Actions may be included on the Requirement edit form:

Delete	On existing requirements, this option deletes the Requirement. You are prompted for confirmation before the deletion is completed. Be sure you want to delete the Requirement, as there is no way to undo the deletion.
Change Contact	Use the Search icon on the Contact Card to open the search form where you can specify the name of a new Contact for the selected Request. If the Contact does not yet exist in GIFTS Online, you can create a Contact record on the homepage from the New menu.
Publish to Web	Once a requirement is saved, it can be posted to the grantee's account webpage to be completed. Click this to posts an online Requirement form which the grantee can then log in, complete, and submit.
Mark as Done	Once the requirement is saved, this option can be used to mark it as done.
Mark as Not Done	Click this to reopen a Requirement already marked as Done.
Generate Letter Correspondence	Displays a Generate Letter page where you can create a new letter.
Generate Email Correspondence	Displays a Generate Email page where you can create a new email.

Activity Available Actions

A combination of the following Available Actions may be included on the Activity edit form:

Delete	On existing activities, this option deletes the Activity. You are prompted for confirmation before the deletion is completed. Be sure you want to delete the Activity, as there is no way to undo the deletion.
Change Contact	Use the Search icon on the Contact Card to open the search form where you can specify the name of a new Contact for the selected Request. If the Contact does not yet exist in GIFTS Online, you can create a Contact record on the homepage from the New menu.
Mark as Done	Once the activity is saved, this option can be used to mark it as done.
Mark as Not Done	Click this to reopen an Activity already marked as Done.
Generate Letter Correspondence	Displays a Generate Letter page where you can create a new letter.
Generate Email Correspondence	Displays a Generate Email page where you can create a new email.

Transfer to Another Branch	**NOTE:** This link is only seen if you have Branch Security, an optional feature; your GIFTS Online system may not use Branch Security. You can transfer certain types of Activities to another branch for future handling. The Activity must not be linked to a Request. **TIP:** Those Activities need to keep the same branch as the related Request. You can transfer them by transferring the Request; all affiliated records will go to the new branch with the Request. Examples of Activities you can transfer are To Do Activities created for Organizations or Contacts, or Document Activities created when you generated letters or emails for Organizations or Contacts.

Automated Email Reminders

The new GIFTS Online Automated Email Reminders feature allows users to do the following:

- **Schedule automated reminders:** You can schedule a reminder to be sent for any GIFTS Online Activity or Requirement type that does not have a Done date or Received date, respectively. For example, you can set up a reminder on Progress Reports to be sent one week prior to the due date and GIFTS Online will automatically send out emails to the recipient/s you select.
- **Send reminders to multiple recipients:** You can select an unlimited number of recipients for your reminders, specifying To, Cc, or Bcc for each. In addition to grantee contacts and staff from your GIFTS Online system, you can manually enter additional email addresses.

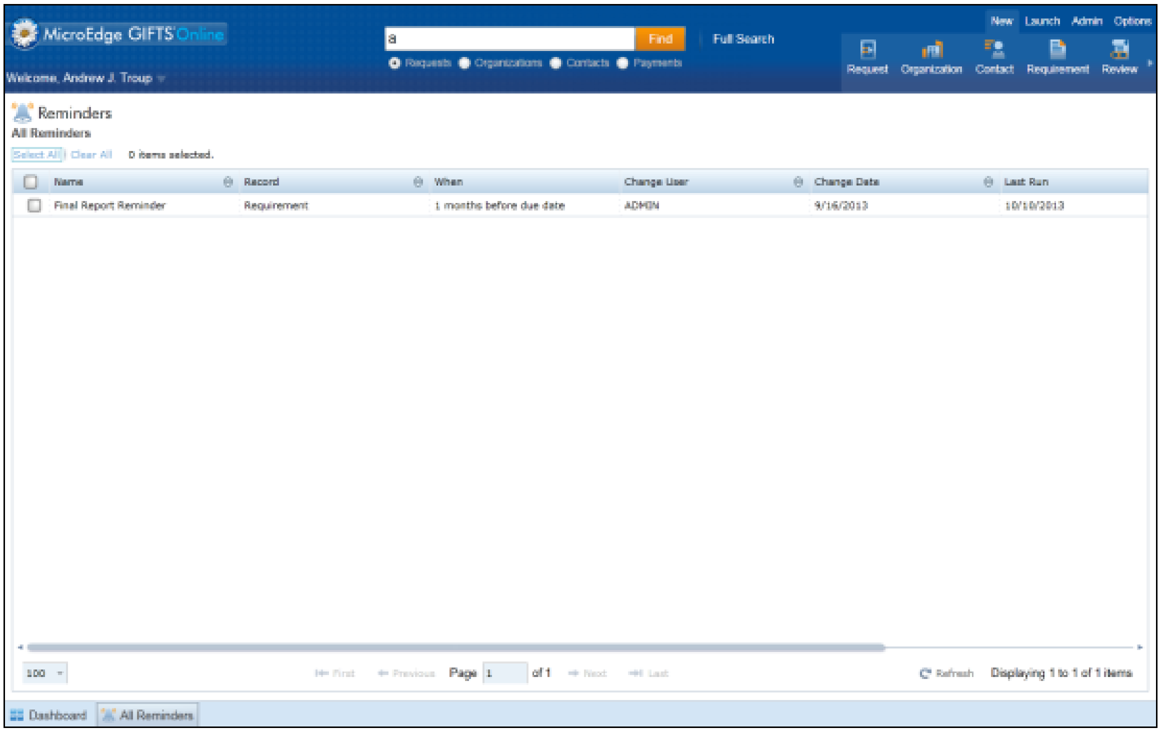
You also have the ability to exclude staff contacts on an individual level.

- **Keep a record of sent reminders:** You can choose to create an Activity for each reminder sent. Activity notes include the recipient names and addresses and also the body text of reminders, providing a full record of all correspondence.

NOTE: Only Grant Managers and Program Officers will have access to the Launch>Reminders and New>Reminder features.

The Main Reminders Page

To access the Reminders tool, go to **Launch>Reminders**.



The following options will be available in the Actions ribbon menu while on this page if a reminder is currently selected:

New>Reminder: Displays the Edit Reminder form with all options blank

Action> Open Reminder: Displays the Edit Reminder form with the selected Reminder's options

Action>Manual Retry: Displays a dialog box which allows a user to manually retry the reminder. Individual reminders can be selected for the retry.

Action>View Last Run: This option presents a grid of the results from the last run date of the selected reminder(s).

The grid will display results of data from Reminders Log Table and be grouped by Reminder.

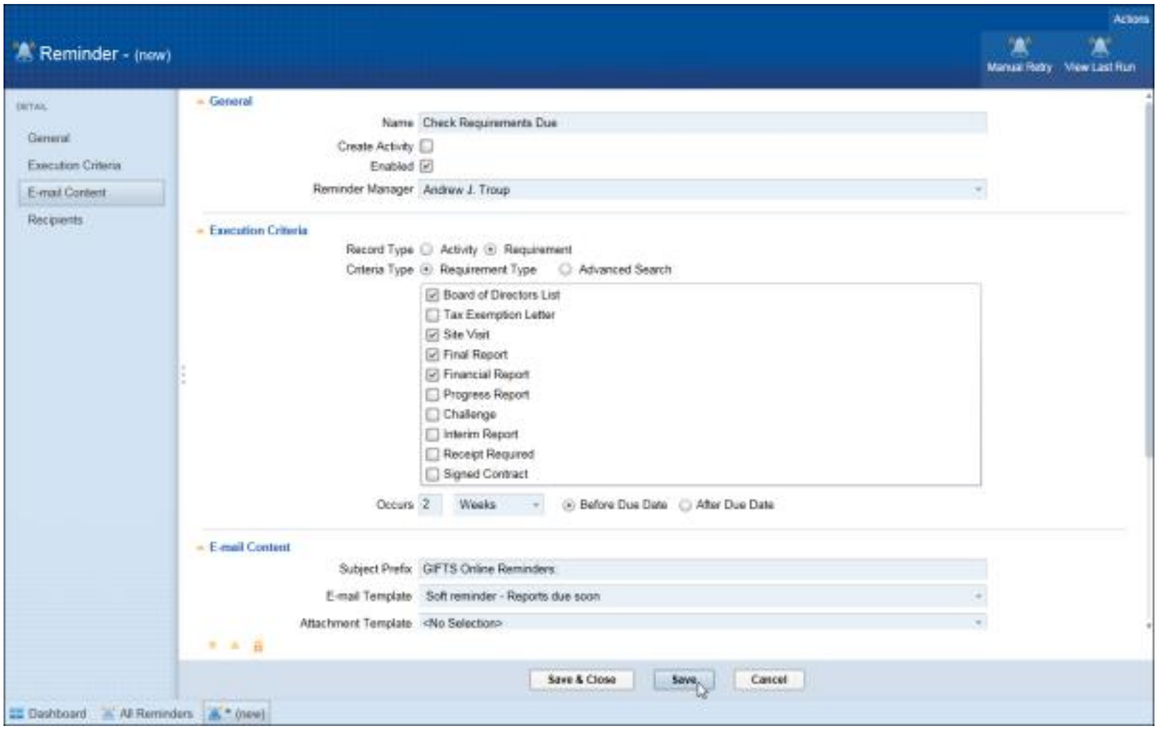
Right clicking on the *Error notes* column allows a user to copy the error messages presented by this View Last Run screen.

Creating a New Reminder

To create a new reminder:

1. **Launch>Reminders**.
2. Go to **New>Reminder**.
3. Fill in the fields as needed.
4. **Save and Close** your new reminder.

NOTE: The options available on the form will vary depending on the Record Type selected.



Once saved, the reminder will be listed on the main Reminders page.

Sections of the Reminders Page

The table below describes the major sections of the Reminders page.

Section	Label	Description
General	Name	Name of reminder
	Create Activity	Defaults to unchecked. If checked, upon generation of a reminder, and activity record is created.
	Is Enabled	Defaults to checked. If checked, reminder is active when generation tool is run. If unchecked, reminder criteria will not be checked.
	Reminder Manager	Required field. Defaults to create user. When a reminder fails, an email notification is sent to this user. User must have an email input in the users table.
Execution Criteria	Record Type	Choices are "Activity" and "Requirement". Depending on selection, different options are shown in the Criteria Type section.
	Criteria Type	Radio button allows selection of either Requirement or Activity Type as search criteria or use of the Advanced Search Criteria. This should be populated with a list of checkboxes labeled with the type of

		activities available for the Record Type selected above. Multiple selections can be chosen.
	Advanced Search Criteria	Radio button allows selection of either Requirement or Activity Type as search criteria or use of the Advanced Search Criteria. A Modify link is available that opens the standard search box for an activity record. Text box shows read only text for the search criteria entered.
	Occurs	Displays label "Occurs", integer box, dropdown box, radio button, label "Before Due Date", radio button, and label "After Due Date" in this order. Integer box allows for positive 1 or 2 digit integers [0-99] Dropdown box allows Days or Weeks as selections Radio buttons allow selection of "Before" or "After"
Email Content	Subject Prefix	Prefix that should be appended to the beginning of the Email Template subject. Default is "GIFTS Online Reminders:"
	Email Template	List of email templates available for the record type chosen.
	Attachment Template	List of printed letter templates available for the record type chosen. The template will be generated and attached to the email.
Recipients	Request Staff Email Option	Dropdown selections are "To:" "CC:" and "BCC". Composed email will send using option selected to the staff member on the related request record.
	Request Secondary Staff Email Option	Dropdown selections are "To:" "CC:" and "BCC". Composed email will send using option selected to the secondary staff member on the related request record.
	Activity Staff Email Option	Depending on record type selected, label displays either Requirement or Activity. Dropdown selections are "To:" "CC:" and "BCC". Composed email will send using option selected to the staff member assigned to the Requirement/Activity
	Request Primary Contact Email Option	Dropdown selections are "To:" "CC:" and "BCC". Composed email will send using option selected to the primary contact record on the related request record.

	Activity Contact Email Option	Depending on record type selected, label displays either Requirement or Activity. Dropdown selections are "To:" "CC:" and "BCC". Composed email will send using option selected to the contact record assigned to the Requirement/Activity
	Payment Contact Email Option	Dropdown selections are "To:" "CC:" and "BCC". Composed email will send using option to the contact record to the related payment record (e.g. payment requirements)
	Additional Recipients	Dropdown selections are "To:" "CC:" and "BCC". Text box allows user to enter any email address. Validation should be done so that it follows the x@x format. An "Add" button will add to the list of emails. Selecting a record in the list allows you to remove it by clicking the "Remove" button. Composed email will send to emails entered in this list.
	Excluded Users	List of staff members appears in a checkbox list. Multiple selections can be chosen. When a staff member is chosen, they will be excluded from the reminder email if they match with the Staff on Request, Secondary Staff on Request, or Staff on Requirement/Activity options.

Reminder Sender Settings

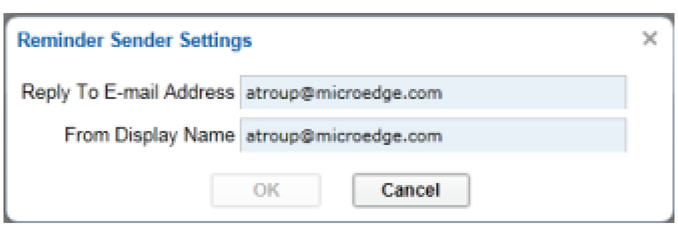
To access Reminder Sender Setting, go to **Admin>Preferences**.

NOTE: This option will only be available to Grant Managers.

A global setting can be set for **From Display Name** and **Reply To Email Address**.

The display name and email address set here will be used as the Sender name and email in all reminder generated emails. Note that when the email is generated, the 'from' email address will actually be mail@grantapplication.com.

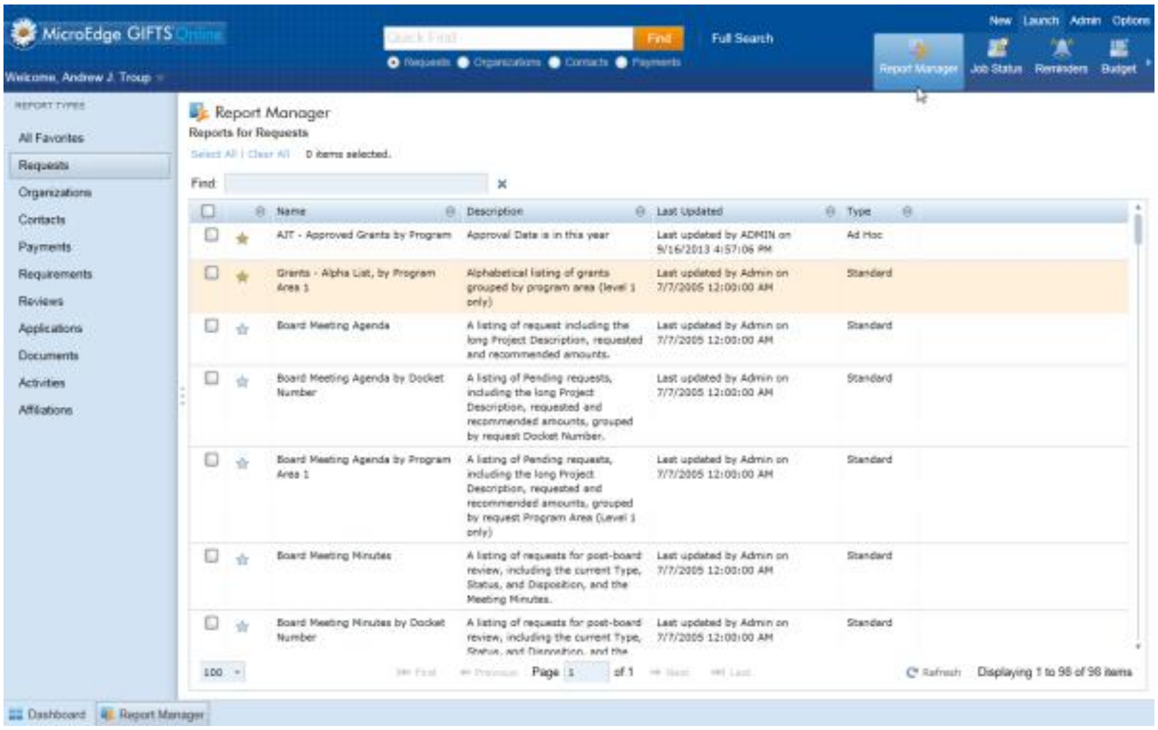
However, if the recipient chooses to 'reply' to the email, the 'from' address in the Reminder Sender Settings will automatically populate into the 'To' field in the reply email.



The Report Manager

The goal of the Report Manager is to unify Standard and Ad Hoc report types into a consistent interface. In order to improve usability, all reports will be generated in tabs within GIFTS Online.

The Report Library will be accessed through the **Reports Manager** button in the **Launch** ribbon menu.



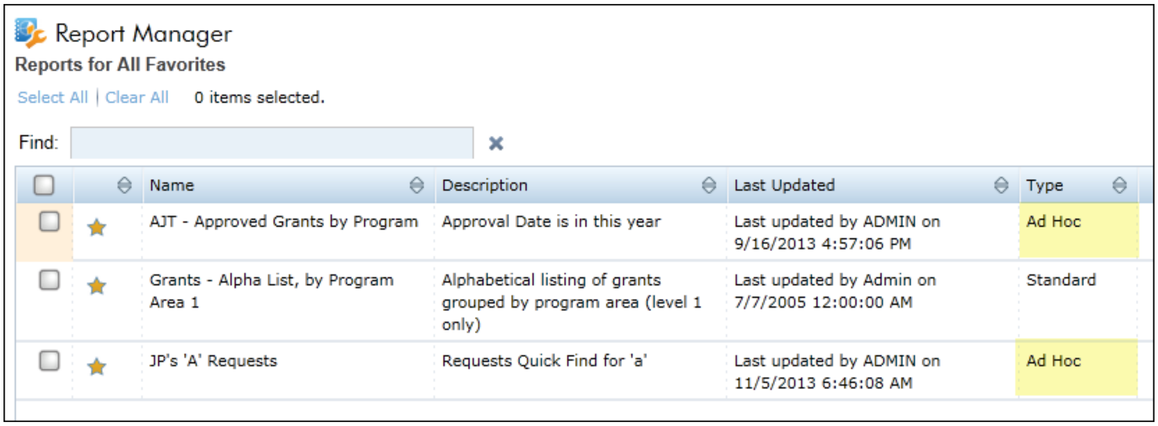
Report Types

The user can switch between different report type lists using the Report Types panel on the left.

An option is also available to show only **All Favorites**.

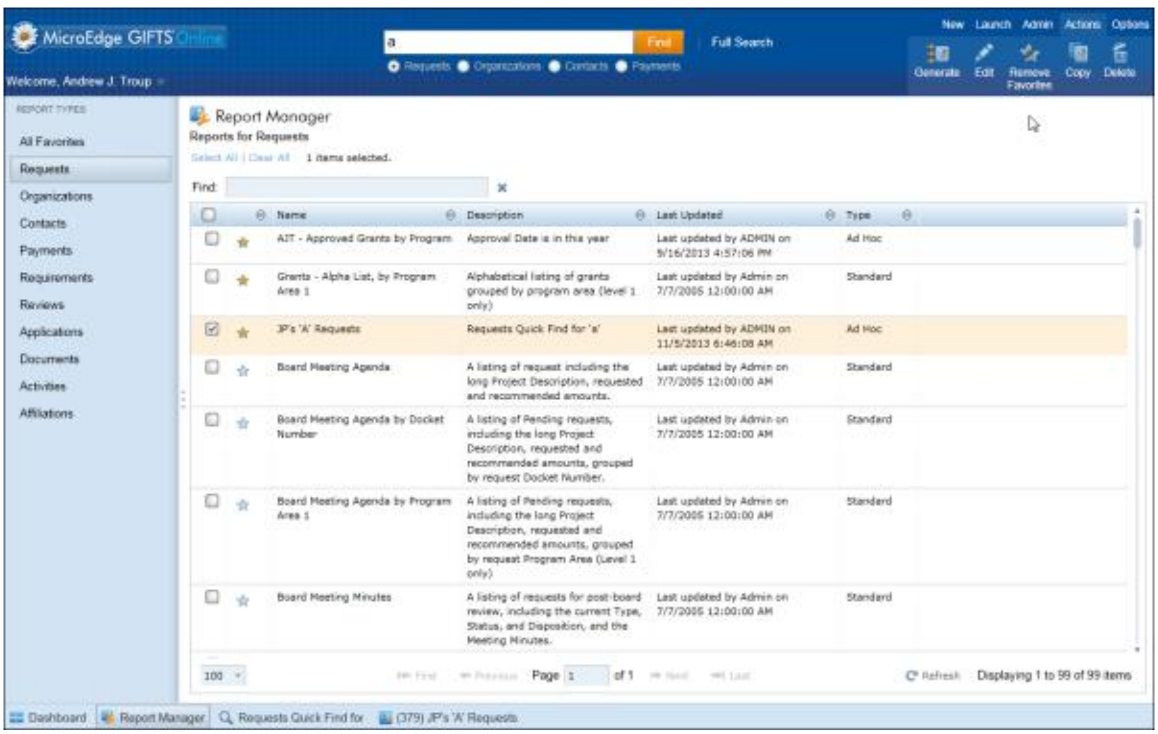
GIFTS Online includes more than 100 **Standard Reports** that have been designed to meet the needs of most grant makers. This manual describes how to run these reports and includes sample reports that you can use to find the GIFTS Online reports that best meet your needs.

In addition, **Ad Hoc Reports** can now be generated and saved to the Report Library for future use. They will be listed in the Report Library as Ad Hoc type instead of Standard in the listing table.



Report Manager Actions

Once a report is selected several Action menu options become available:



Action Menu Option	Description
Generate	Opens the Generate Report form so the user can run the report selected. Two subtitles can be added. The query filter can also be modified by clicking the Modify link.

Edit	Takes you to the Report Designer page where the look of report can be modified. NOTE: Options available will vary by report type.
Add to Favorites	Selecting a report and then clicking this button will make the report a Favorite. The favorite star will turn yellow and the report will be moved to the top of the reports listing with any other existing favorites. The report will also now show if the All Favorites report type is selected.
Remove (from) Favorites	Selecting a report currently flagged as a favorite and then clicking this button will turn off the favorite flag. The report will no longer appear at the top and will go back to its alphabetical spot in the normal list.
Copy	Only available for Ad-Hoc reports. Select a report and click the Copy button to copy the report to be saved as a new report.
Delete	Only available for Ad-Hoc reports. Delete the selected report. Confirmation required.

Finding Reports

Users can enter text into the Find text field, which (when user tabs out of the field) will perform a text search within the current report table and filters all matches.

Search will match strings in Name and Description. Note that there are certain wildcard characters that are supported by the search, as they are in the quick find search. Things like an underscore which will return any results which contain a single character.

Report Table

Classic and Saved Reports for the selected record type will be listed in a scrollable table to the right of record types. The list of columns is as follows:

Column Name	Description	Sorting	Resize
Checkbox	Allows user to select records which will show the 'Actions' in the ribbon menu	No	Yes
Favorites	Reports marked as Favorites will be indicated by a gold star. Regular reports will be indicated by a gray star.	Favorites on top/bottom	Yes
Name	Name of the report	Alphabetical	Yes
Description	Description of the report	Alphabetical	Yes
Last Updated	Displays the Login ID of user who last performed	By Date	Yes

	the update and the date of the update. Format: Last updated by {Login_ID} on {MM/DD/YYYY}		
Type	Shows whether the report is an Ad Hoc or a Standard report	Yes	Yes

Each table row will resize vertically to fully fit the report's Name, Description, and Last Updated fields. Favorite and action icons will be aligned with the row's top line of text.

Resizing Columns

The user will be able to click and drag the separators between all of the columns in the Report Manager table to resize them.

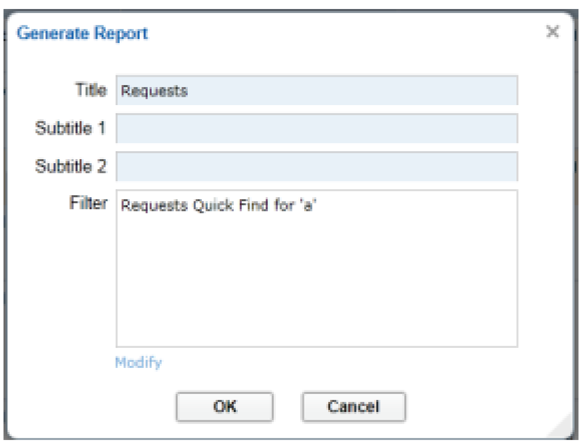
Column Sorting

The user will be able to sort on Favorites, Name, Description, and Last Updated columns.

Sorting will behave similar to Manage Saved Views and Manage Saved Searches. The first click will sort by ascending order and indicated by highlighting the column's up arrow. Clicking on a column sorted by ascending order will change the sort to Descending, which will be indicated by highlighting the column's down arrow. Clicking on a column sorted by Descending order will change the sort order to Ascending.

Generating Reports

Users can generate a report by either clicking the **Generate Report** button for a report or double-clicking on a listed report. This will display a popup allowing the user to set the various options for the report such as Title and Subtitles, as well as review and modify the query Filter.



The Filter Field

Behavior of the Filter will differ depending on whether the report being generated is a Standard report or a saved Ad Hoc report.

Standard Reports

The Filter section will load empty, and users will define additional filters using the Modify link below. These user-defined criteria will be added to the search filter defined within the standard report file, and the combined filter will be used to generate the report. Thus, users will be able to add additional restrictions to the report, but they will not be able to remove existing standard search constraints.

Ad Hoc Reports

The Filter section will load the search filter associated with the report template. The users will then be able to modify or add to these filters using the Modify link below. The final filter in this box will be used to generate the report. Thus, users will have complete freedom to modify the report filters.

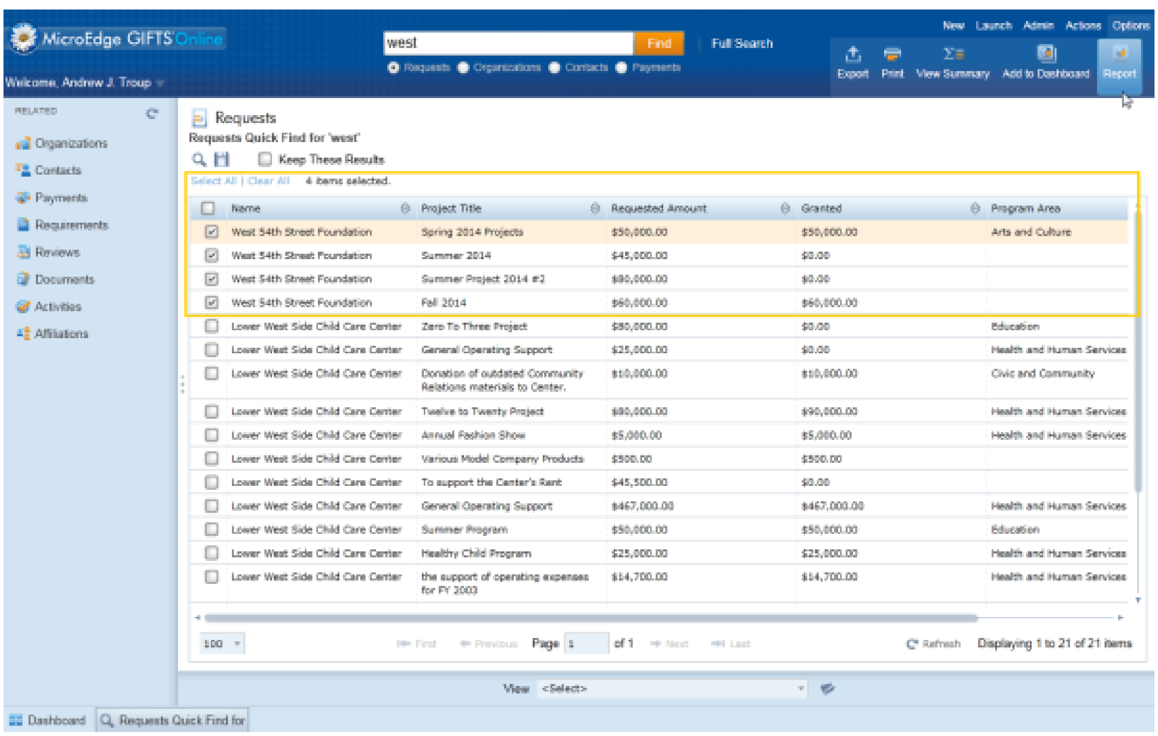
Saved Searches

If a saved search is used for report creation, the filter in the report settings will reflect the saved search filters. The report will be linked to that saved search going forward. If a user updates the filters of the saved search, the filters of the report will update.

However, if a user modifies the filter in the report settings and then saves the report, the filter changes will not alter the original saved search. The link between the original saved search and the report will be broken. From that point forward updates to the saved search will not update the report filters.

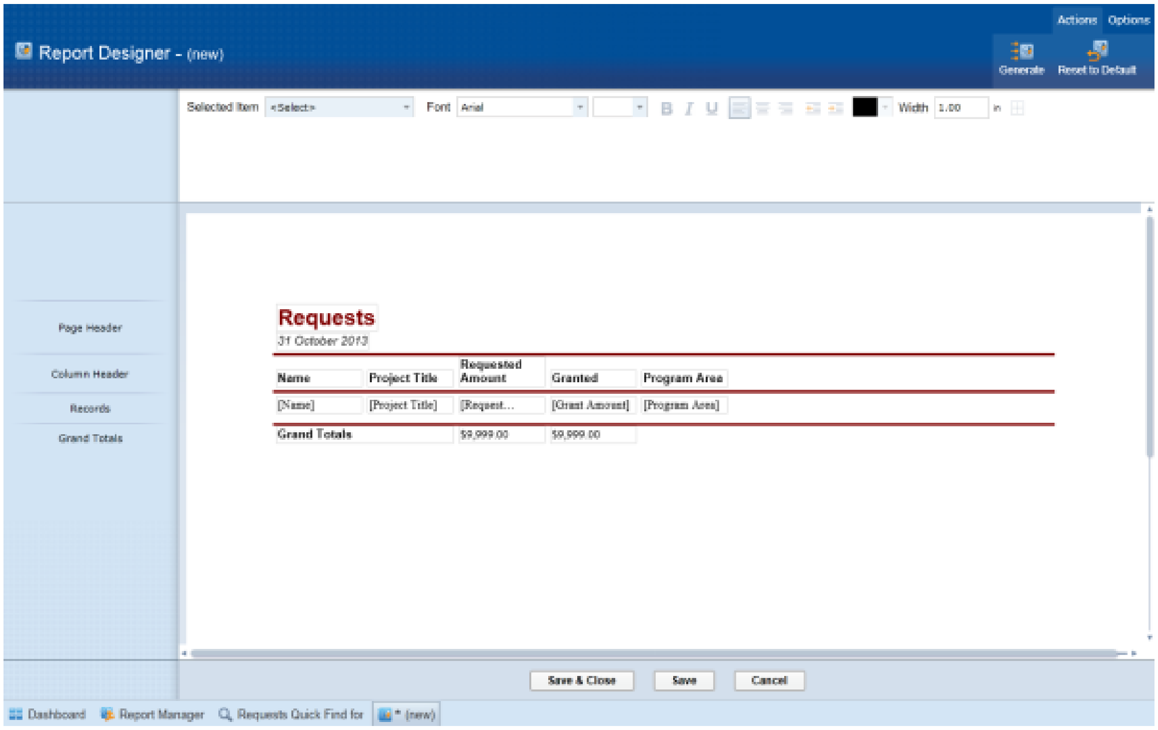
Creating Ad-Hoc Reports

GIFTS Online allows users to create Ad-Hoc reports from any search results and save them to the Reports Library for future use.



Run a search/query, select the records desired, and then go to **Options>Report**.

The Report Designer page will be opened with the default report design displayed.



Users can modify the font style, size, and color of any of the elements in the following sections:

- Page Header
- Column Headers
- Records
- Grand Totals

To select all the elements in a specific section, click the section heading in the left panel.

To select one specific element on the page, simply click on it.

Options available for the element(s) selected will be displayed on top.

Make any modifications desired and then save your report.

Click **Save** to save report. Saved reports can be accessed through the Reports Manager.

If the changes made are unsatisfactory, the user can click the **Actions>Reset to Default** button to revert to the original report settings.

Reporting at a Glance

To access the GIFTS Online Reports Library click **Launch > Report Manager** in the main ribbon menu.

The following are the basic steps for choosing and running a report:

1. Choose a Report

From the list of available reports on your system, choose a report. For example, the "Grants – Alpha List."

2. Specify Search Criteria

In most cases, you want to limit the amount of data included in your report. For example, you might want to show only grants that were approved during the current quarter instead of all the grants in your database.

You can use Quick Find, an Advanced search, or your saved searches to specify the search criteria that limit the data included in the report.

3. For Financial Reports, specify an 'As of' Date

Many financial reports produce information specific to the date in which they are run. For instance, the "Schedule of Appropriations and Payments" reports are used to generate year-end tax reports. To run these reports for the year 2013, you would run them 'as of' December 31, 2013.

4. Edit the Report Title

Each report has a default title that is displayed at the top of the report. You should edit the title to ensure that it properly reflects the search criteria and, if applicable, the 'as of' date you have used to generate the report.

5. Run the Report

The report is displayed in the report viewer. You can print it or export the report data in a variety of data formats.

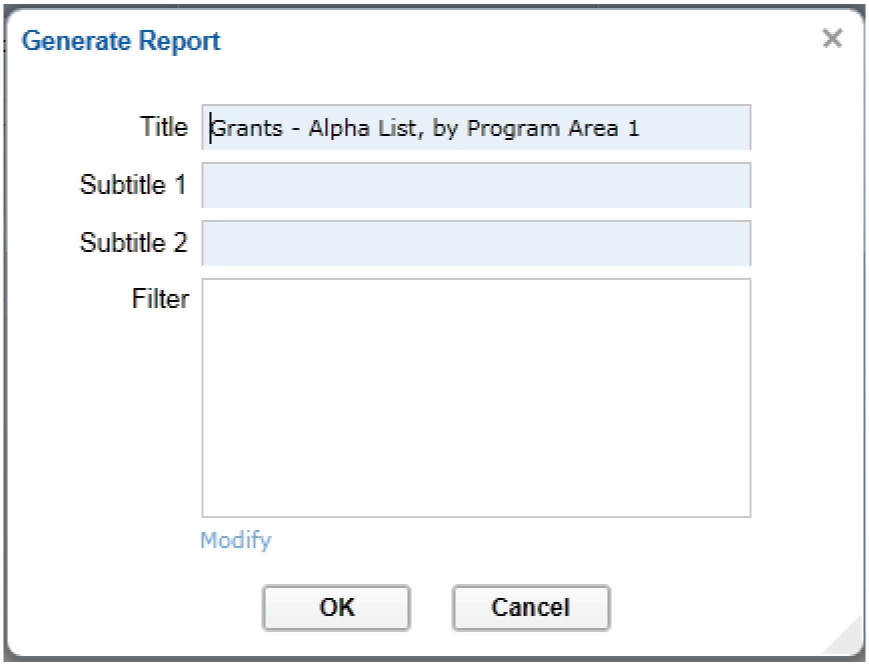
Choosing a Report

The first step in running a report is to choose the report that provides the information you need. You can use the list of reports in "GIFTS Online Standard Reports" section to find the reports that best suit your needs or select an existing Ad Hoc report in the Report Library.

The standard reports are organized into separate Categories, each of which is represented by a button in the REPORT TYPE panel on the left.

NOTE: The reports and report titles in this publication may not necessarily match those on your system. Your site may have been configured to omit the reports that your Organization doesn't use, or other reports may have been added to your library.

To begin running the report selected, go to **Actions>Generate** or double-click on it.



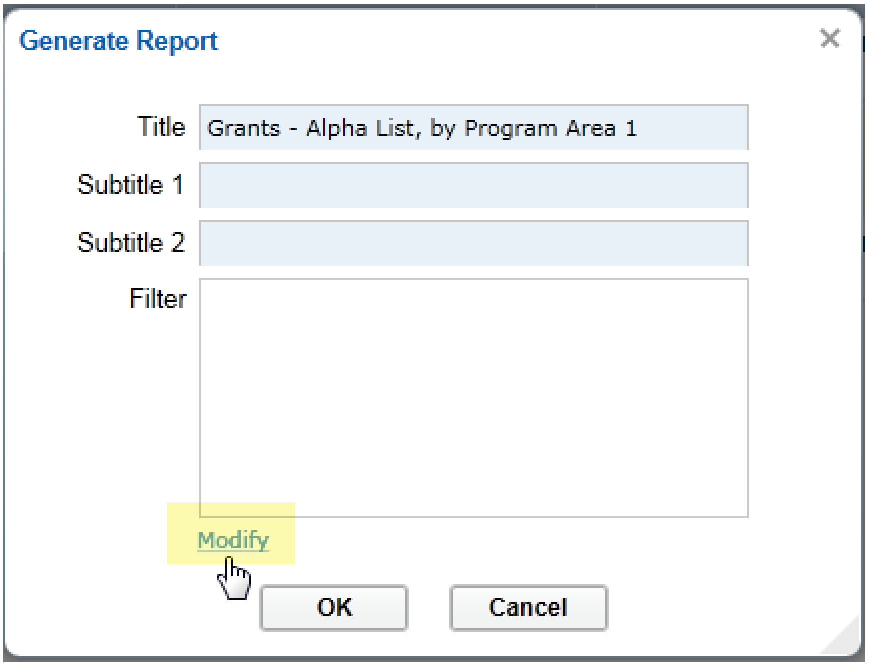
Specifying Filter Criteria

Many report templates have fixed search criteria that select only specific records to include in the report. For instance, the "Alpha List of Grants" report only selects Requests that are Approved. By providing additional search criteria, you can further limit the scope of a report.

The Filter criteria tell GIFTS Online that out of all the records in your database, you only wish to see a specific subset. For instance, only the grants with a Grant Amount greater than $50,000.

NOTE: Some of your reports may have been configured by ME Support to include saved searches. When you select a report, the Search Criteria area will display any Saved Searches or filters which may have already been assigned.

If you do not want to use the search criteria shown, you can choose **Modify** and then click **Reset** in the Full Search window.



About Filter Criteria

To create Filter criteria for reports, you can click the **Modify** link under the Filter section. The principles are the same—the only difference is that instead of choosing the records to be displayed in search results on screen, you're choosing the records to be included in the report.

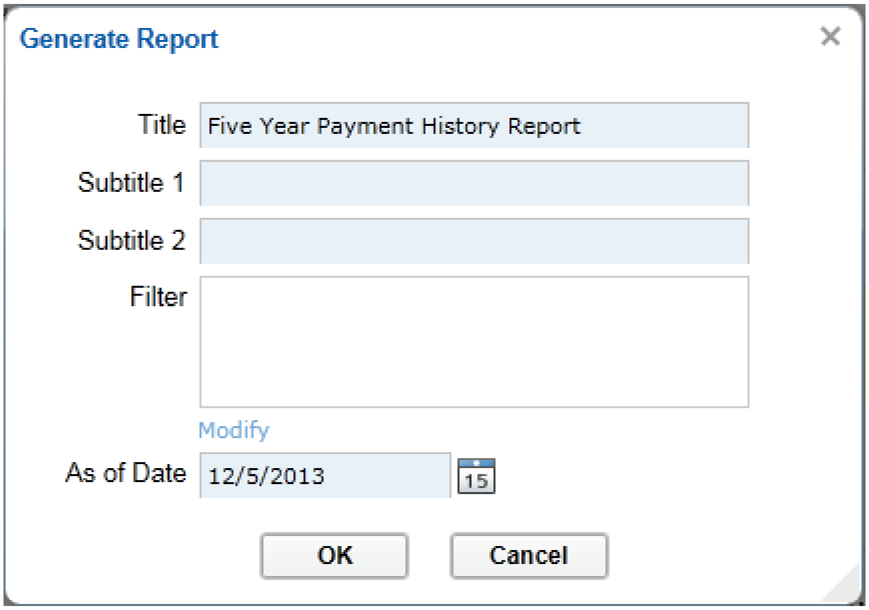
TIP: The search criteria do not modify the format or structure of Standard Reports; they determine which records appear in the report.

If you use branch security, your reports do not include data that you do not have permission to see.

About Financial Reports and Search Criteria

Many Financial reports display a summary of the payment history for your grants. To be accurate, these reports must include the entire history of the grant's payments.

If your search criteria limit the report to payments within a specific date range or within a Fiscal Year—and only part of a grant's payments fall within your search criteria—GIFTS Online includes the grant's entire payment history in the report even if not all of the grant's payments meet your search criteria.



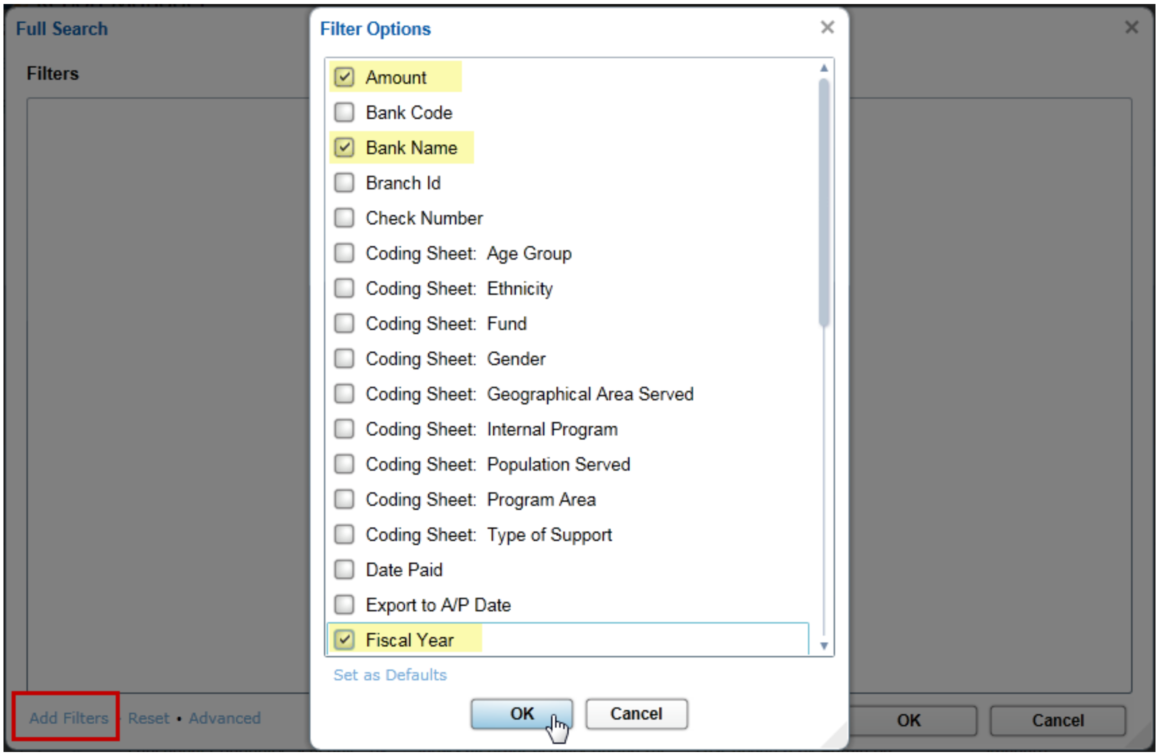
EXAMPLE: The **Five Year Payment History** report shows, for each grant in the report, the Payments made within the last five years. If you use the 2012 Fiscal Year as your search criteria and a grant is included in the report because you made payments on it in 2012, payments made in prior years are also included in the report. Therefore, the payment history is accurate even though not all of the grant's payments were made in the 2012 Fiscal Year.

The following Financial reports, which summarize payment information by grant, are designed to work in this manner; in contrast, reports that list individual payments instead of a grant's payment history only include payments that meet your search criteria.

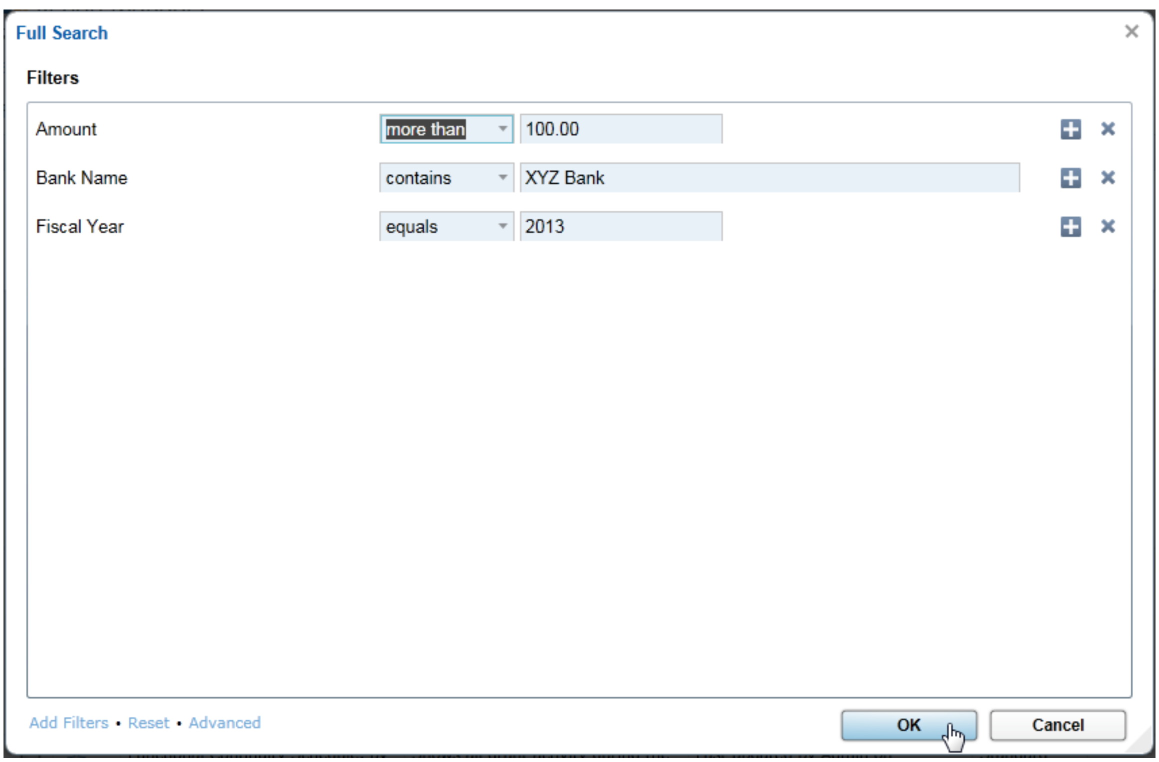
- Cash Flow Analysis
- Five Year Payment History Report
- Grant Commitment Schedule
- Grant Payment Summary
- Grant Planning Worksheet
- Schedule of Appropriations and Payments

Choosing the Search Criteria for a Report

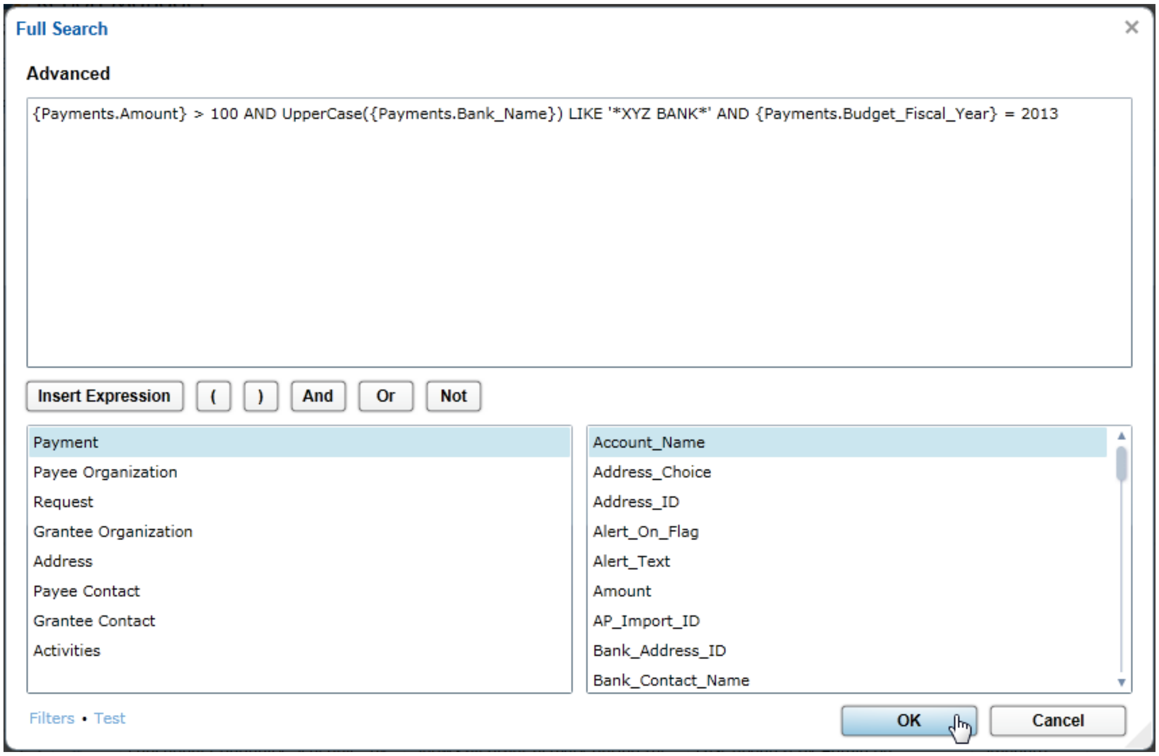
To create or edit the search criteria for a report, click **Modify** below the **Filter** field. The Search form is displayed.



Click **Add Filters** to pull up the basic filters list and select one or more criteria.



Clicking **Advanced** will take you to the Query Builder view to create your filter query.



This view should only be used by users with advanced knowledge of database query building.

For an overview of the Query Builder and Advanced search facilities, please refer to the Full Search section of the GIFTS Online User's Guide.

When you are finished creating your search criteria, click **OK** to return to the Generate Report form.

Note that the Query Builder filters available for each record type are different.

If you select another report in the same Report Library record type, the search criteria you created are not cleared; this allows you to run more than one report without having to re-enter your search criteria. You can clear the search criteria at any time by choosing **Reset** from the Full Search form.

Setting the 'As of' Date for Financial Reports

Many financial reports produce information specific to the date in which they are run. For instance, the "Schedule of Appropriations and Payments" reports present a picture of your financial history for the current year.

In many cases, you may want to produce financial reports of this kind after you have closed out a particular year. For instance, in the first few months of any new year, you may wish to produce reports on last year's giving for the IRS.

For this reason, an 'As of' date setting is available for all of the Standard Financial reports in the Report Library.

When you set 'As of' date to a date other than the current date, your reports are affected in the following ways:

- If the report automatically selects information relevant in the "Current Year," the current year is based on the 'as of ' date, not the current date.
- If the report includes columns for future or past years, or future or past months, these columns are automatically adjusted based on the 'as of' date.
- Reports that include 'Scheduled' Payments include payments that have a Status of Paid, but for which the Payment Date is after the 'as of' date.
- Reports that include 'Paid' and 'Refund' Payments exclude these Payments if their Payment Date is after the 'as of' date.
- Payments for Requests that were approved after the 'as of' date are excluded from the report, regardless of their actual Schedule or Paid dates.
- Payments that were voided after the 'as of' date are reported as being 'Paid.'

The financial reports have been designed to recreate your data based on the 'as of' date, but some data—once it is altered in GIFTS Online—cannot be restored to its past condition; therefore, the results of reports run with the 'as of' date may not completely represent a version of the financial data as of that date. The following data cannot be accurately recovered based on 'as of' date.

- Payments that have been deleted are not reflected.
- Payments for which the amount changed between the 'as of' date and the current date report the current amount, not the previous amount.

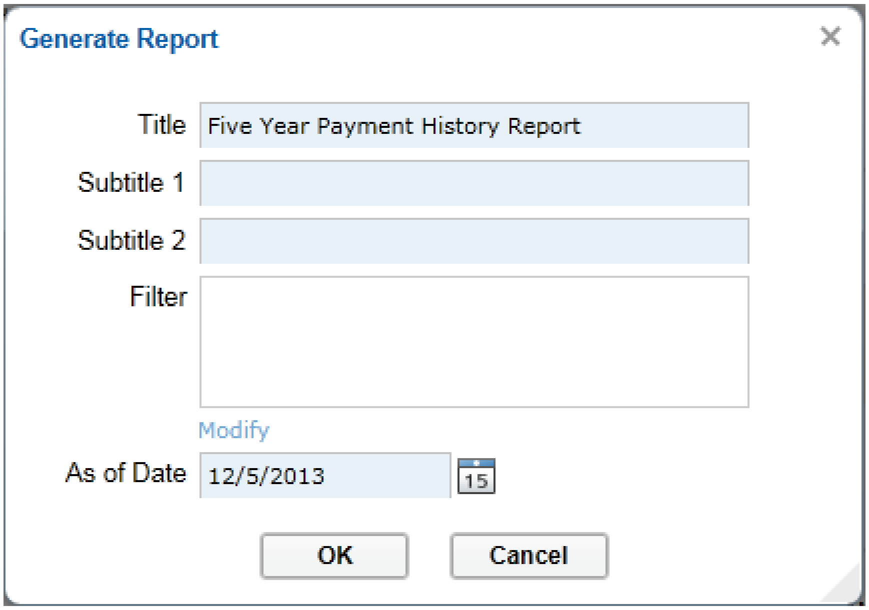
IMPORTANT: Custom reports created by MicroEdge, Ad Hoc Reports, or any third-party report writer may not have been designed to take advantage of the 'As of' date functionality.

Editing the Title of the Report

The GIFTS Online reports have three-line titles: a large heading in bold and two subheadings, as shown in the following sample.

GIFTS Online provides a default Title for the report based on its title in the Report Library, and—if your site is set up to do so—defaults the first subtitle to the search criteria you have chosen.

The Generate Report form allows you to alter the main Title and enter the Subtitles necessary to reflect the search criteria that you use when running the report.

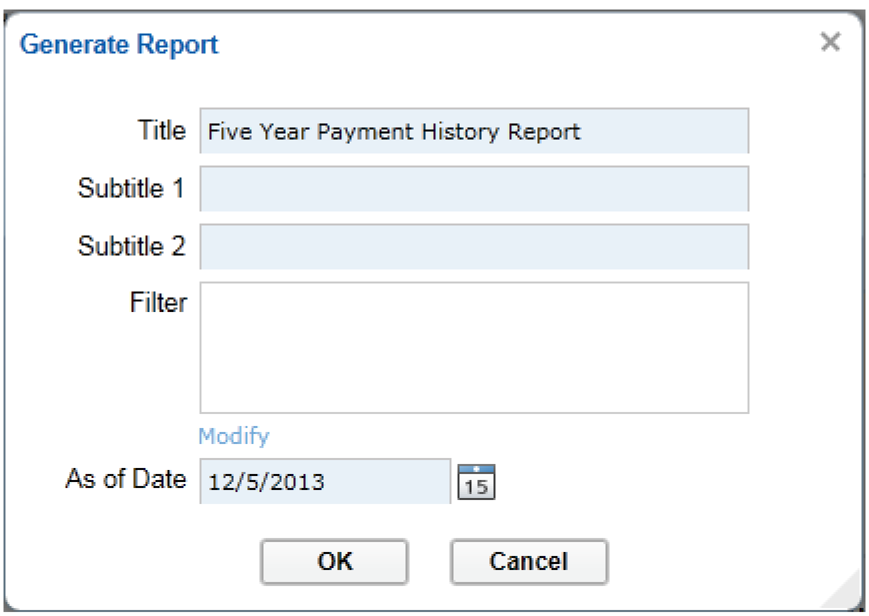


Therefore, anyone who reads the report will know exactly what he or she is looking at.

Running the Report

Before you Begin

Be sure that you have completed the preceding four steps, and that the report title properly reflects your search criteria.



Viewing the Report

To view your report after you have specified the necessary options, click **OK**. The report is generated and displayed in the report viewer.

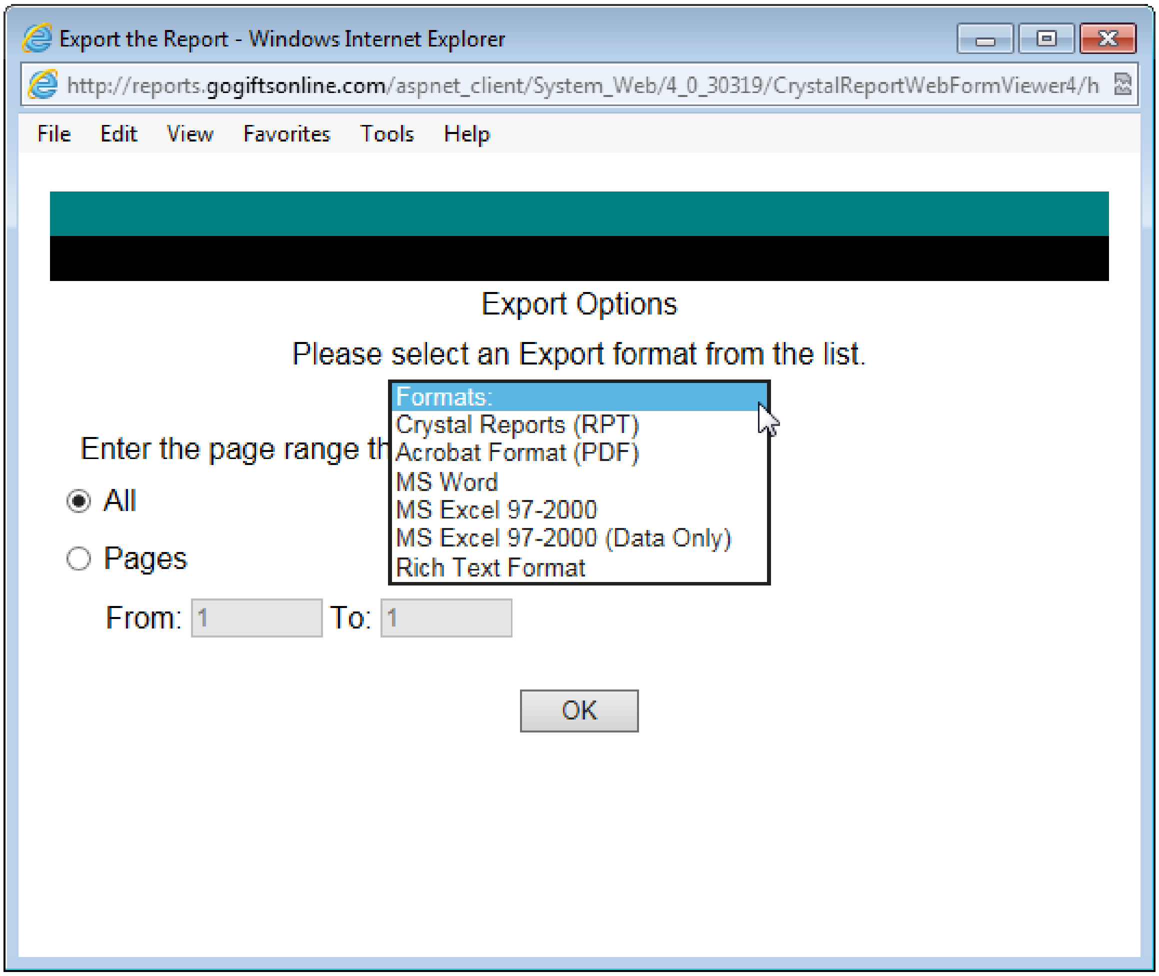
You can use the viewer's toolbar to navigate the report:

Icon/Field Name	Description
Export	Export the report to Crystal Report (RPT), PDF, Word, Excel, or RTF formats.
Print	Print the report.
Show/Hide Group Tree	If the supported by the report.
First	Go to the first page of the report.
Previous	Go to the previous page.
Next	Go to the next page.
Last	Go to the last page of the report.
Pages	Current/Total Pages
Go to	Jump to the specific page entered.
View History	If drill-down is enabled for the report, this will keep track of viewing history and allow you to jump to specific report levels listed.
Find	Use this field to search for a keyword in your report.
Zoom	Set the percentage of the zoom.

Exporting the Report

When the report has finished processing, you can export it to a variety of file formats appropriate for word processors, spreadsheets, Internet browsers, and other applications.

To export a report, click the **Export** button on the report viewer toolbar. You are prompted to choose an export format and a filename for the exported data.



NOTE: Reports that are exported to Microsoft Word® may require extensive reformatting. If this is the case, consider exporting your report to another format, such as Microsoft Excel, that may retain more of the formatting that you need.

Time Saving Tips

Use the following GIFTS Online features to make reporting fast and easy:

Save Your Searches

If you frequently use the same search criteria for your reports, don't forget to save your searches for later use. You can then easily attach a Saved Search to a standard report.

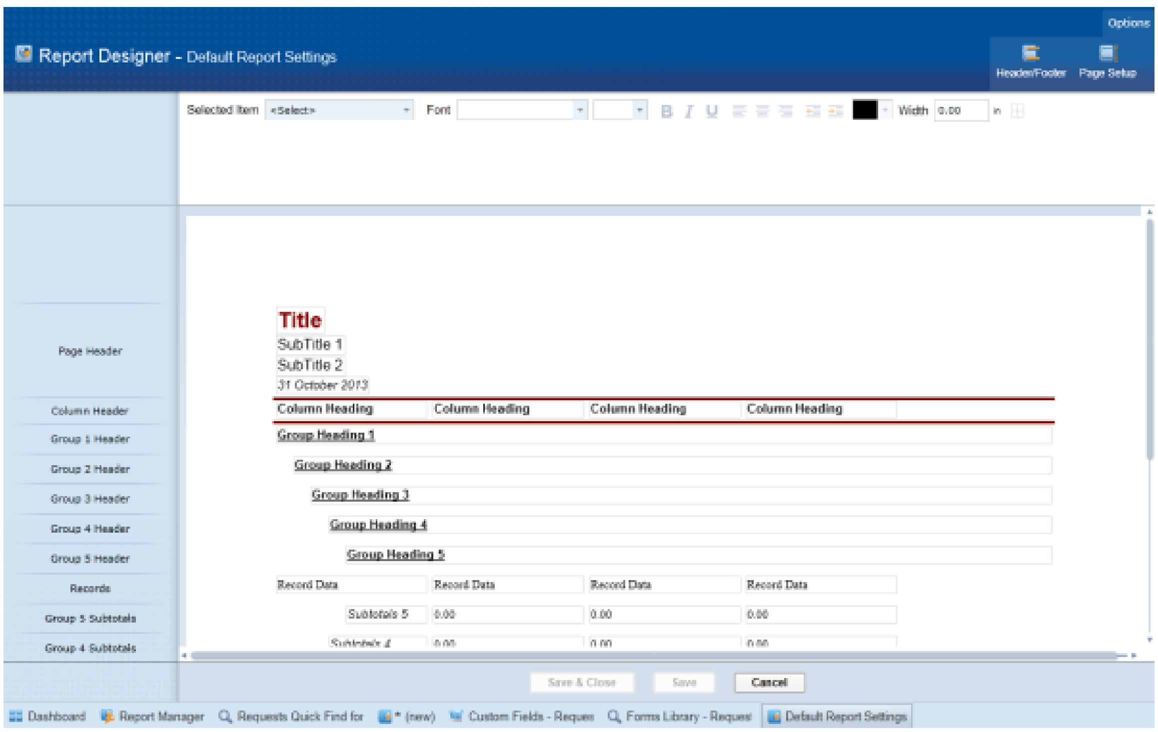
Attach Saved Searches

If you always run a report with the same Saved Search, add an Ad Hoc report to your library that has the saved search attached to it. Then, you won't have to choose the saved search when you run the report.

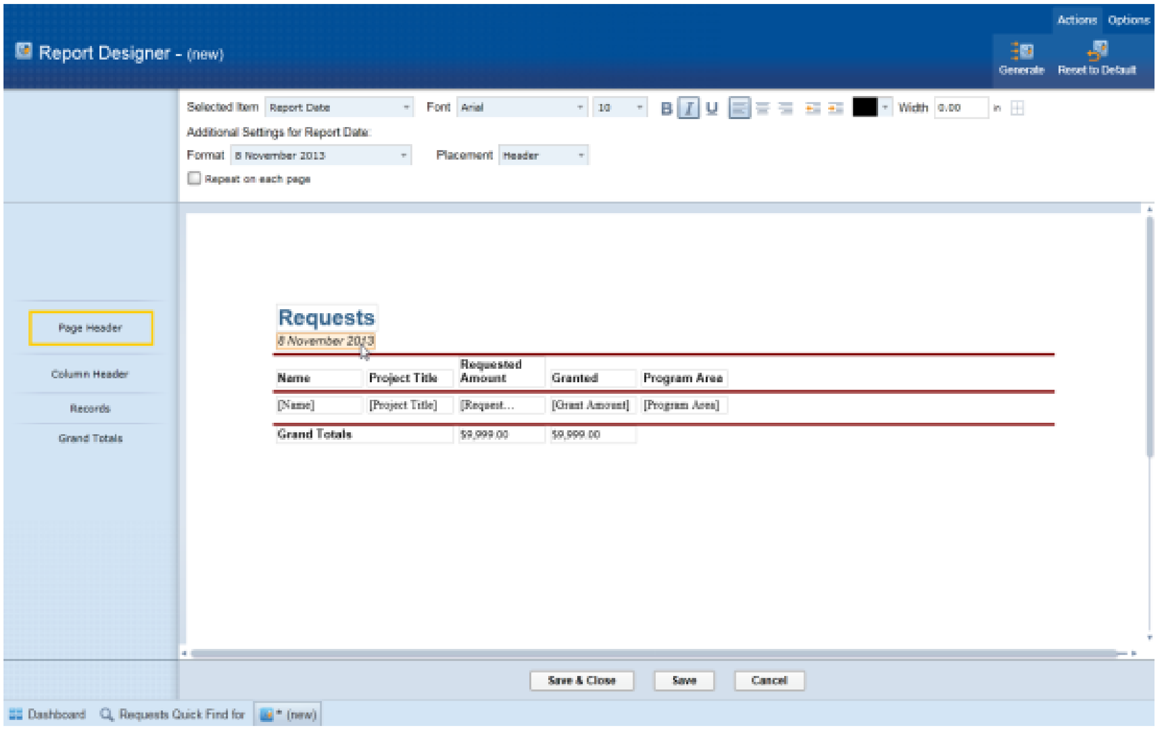
Default Report Settings

To modify the default report settings, to go **Admin>Report Settings**.

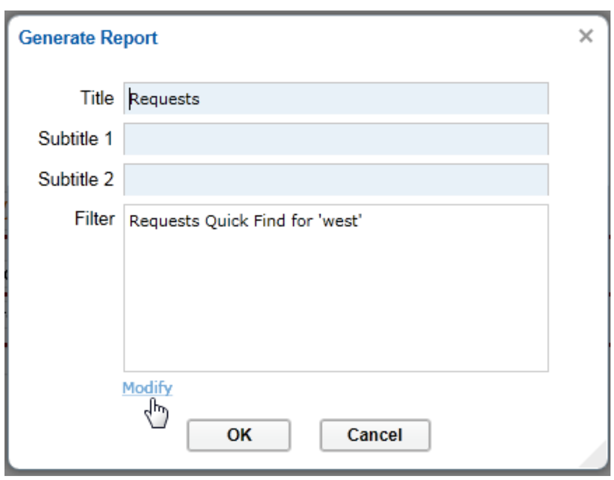
This page displays the default look of all Ad-Hoc reports. When a user clicks the Reset to Default action after modifying a report, the report will revert to the settings shown here.



In the example below, the page header title color has been changed to blue and the date text has been selected for modification.



The menu options available on this page are discussed below:

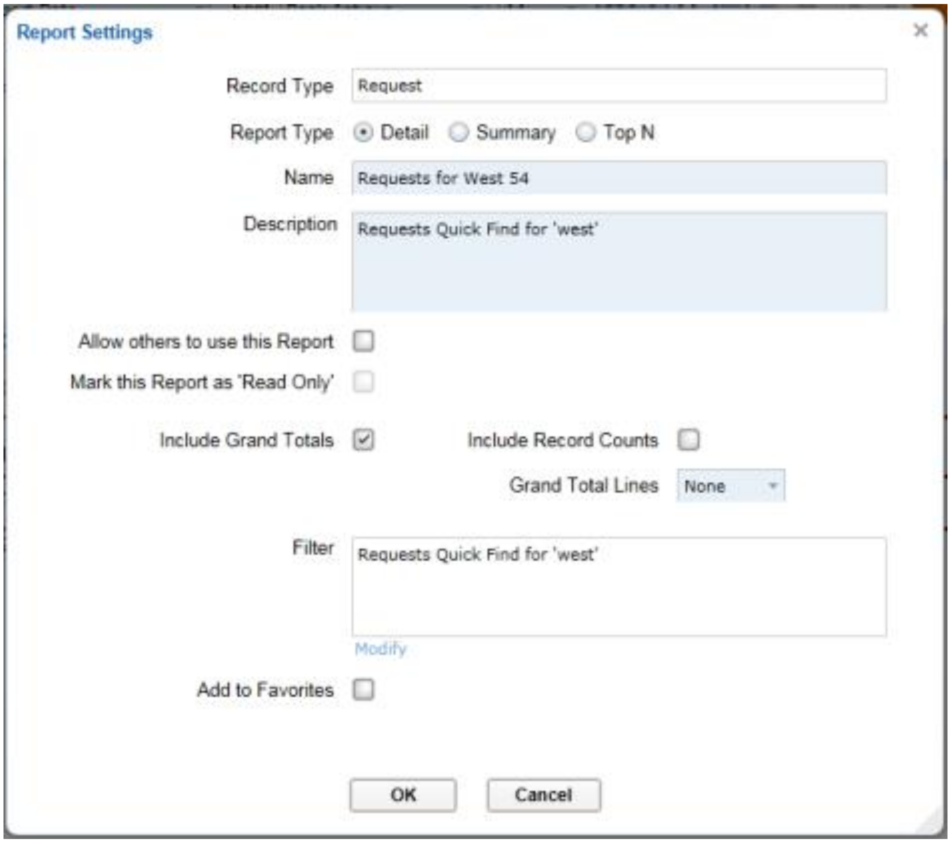
Actions Menu	
Generate	To run your report, click the **Generate** button from the Actions menu. The Generate Report form will pop up with options to modify the title, add subtitles, and/or modify the Filter if desired. Click **OK** to run your report. 
Reset to Default	Click this button to reset changes made to the form back to default.
Delete	Only available for saved Ad-Hoc reports.

The Options Menu

The actions available on the Options menu are discussed below:

Settings

The Report Settings popup contains options to set the Report Type, Name, Description, sharing, read-only status, set the Grand Total and Record Count inclusions, modify the report's Filter and set the 'Add to Favorites' setting.

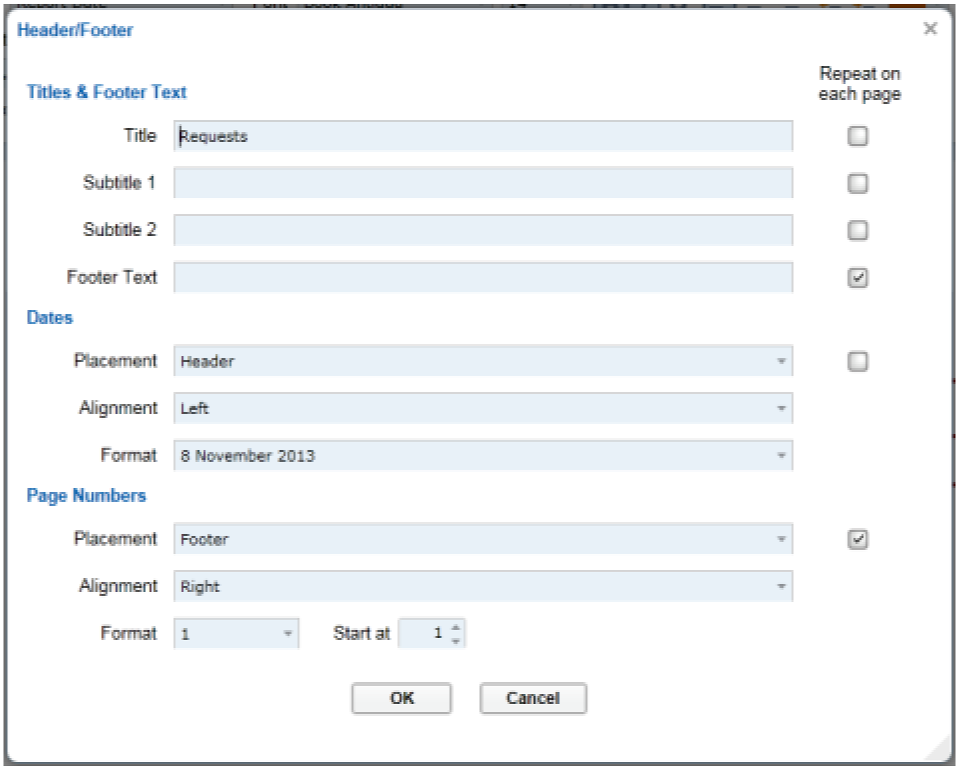


Header/Footer

The Header & Footer popup allows users to set values that will display in the header and footer of the report.

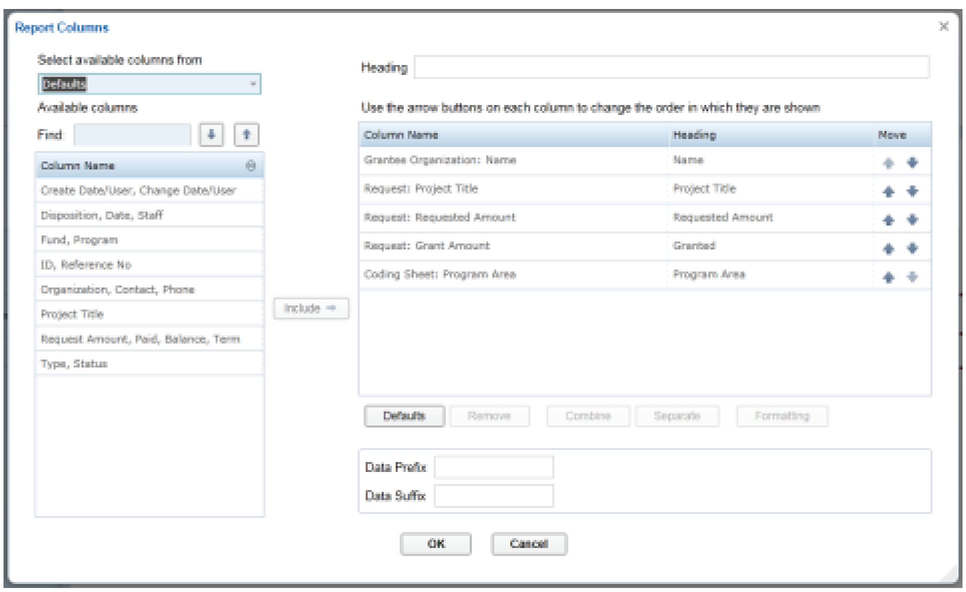
Each element has a checkbox option to have the value repeat on each page.

Note that some of these settings such as the 'repeat on each page' and the date and page number Alignment and Formats can also be set in the main report designer page but are repeated here as they also affect the header and footer. The settings that are set in one place are reflected in the other.



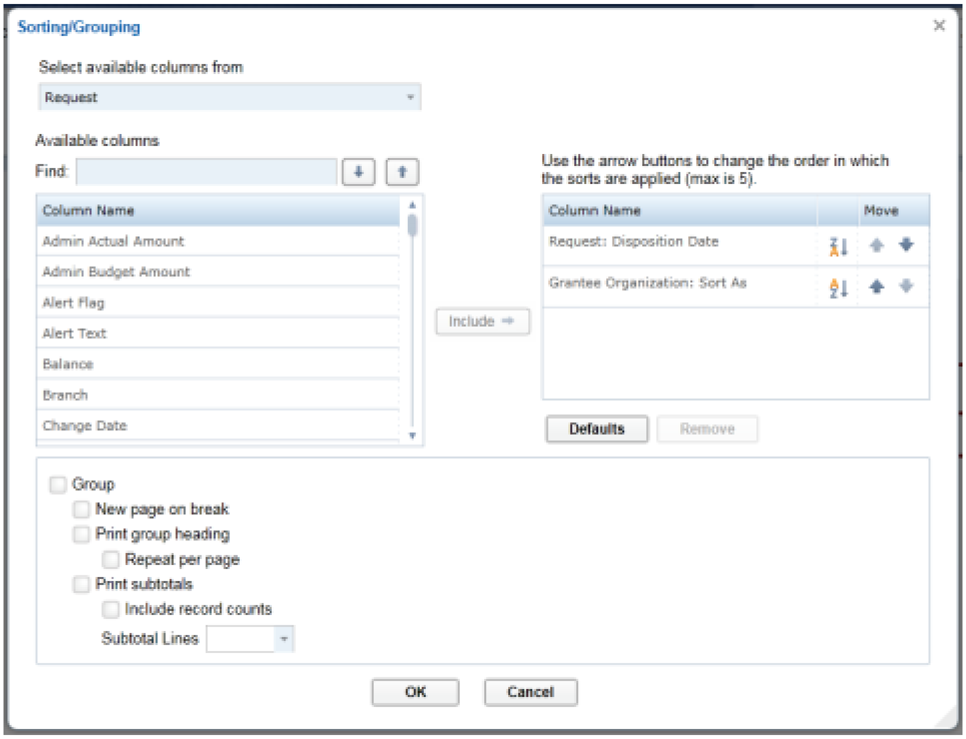
Columns

The Report Columns popup allows users to modify column selection and order, as well as set special column formatting options.



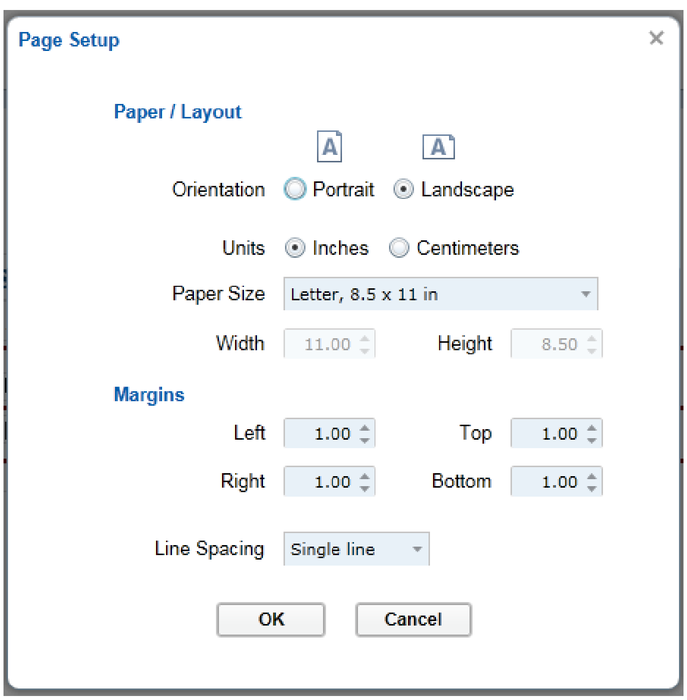
Sorting/Grouping

This popup allows the user to modify sorting and grouping options for the report. The functionality of this popup varies based on the selected Report Type.



Page Setup

This popup allows the user to modify page settings. These changes will be reflected in the interactive report designer. The default values come from the Report Settings.



About GIFTS Online Standard Reports

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

GIFTS Online includes two types of reports:

Standard Reports — More than 100 pre-built standard reports designed to meet the needs of most grant making organizations are installed with your system. These reports have been designed to complement the functionality of GIFTS Online in a way that is beneficial to the largest number of users. Standard reports answer common queries, some of which are general in nature and some of which are more specific.

EXAMPLE: The "Alphabetical List of Grants" report lists grants in alphabetical order to answer the query "Which projects have we funded?" When you run this report, you can further define it to answer a more specific query, such as "Which projects have we funded in Arts and Culture?" You can choose the specific data you wish to see for all reports.

Custom Reports — If you need help customizing specific reports or creating new reports, you can retain MicroEdge to accomplish this. The cost of this service varies depending on the level of complexity of the required reports. For more information, please contact ME Support.

In order for you to make the best use of your data, it is helpful to have a thorough understanding of the available standard reports and how the data you enter is reflected in these reports. Reviewing the sample reports may provide you with ideas about using areas of GIFTS Online that you haven't yet explored. It will also allow you to determine what types of custom reports you may want to request ME Support to create for your site in the future.

How to Use the Sample Standard Reports

The sample Standard reports in this document are divided into the categories in which they appear in the GIFTS Online Reports Library. You can browse through the list of reports to find the ones that meet your needs.

Each sample report includes information about the fixed criteria that apply to the report and, if the report belongs to a series, the available variations of the report. Series and fixed criteria are described in the following sections.

About Series of Reports

For many reports, there are several variations that comprise a series of reports. For example, the 'Declinations - Alpha List' series of reports includes the following reports:

- Declinations - Alpha List
- Declinations - Alpha List by Fund
- Declinations - Alpha List by Geographical Area 1
- Declinations - Alpha List, by Program Area 1
- Declinations - Alpha List by Reason
- Declinations - Alpha List by Staff
- Declinations - Alpha List by Type

These reports include identical information; the only difference is the way in which the records are grouped. For report series, this document includes one variation of the report as an example and lists the other variations in the series.

About Report Names

The report names in this document are the names shipped with the GIFTS Online product; the names in your system may be different if you have requested ME Support to edit them.

ME Support can help you to add and remove reports from GIFTS Online, so not all of the reports in this document may be available. If you would like to use a report and cannot find it in your system, please contact ME Support.

About Fixed Criteria

Many reports have been designed to include only specific information. For example, the 'Declinations - Alpha List' reports only include Requests with a Disposition of Declined. Pending Requests and Approved Requests are not included in the report.

These fixed criteria always apply to the report, regardless of the search criteria that you choose when you run the report. If a report has fixed criteria, they are noted in the sample report.

About Saved Search Criteria

You can customize the standard reports by attaching saved searches. On the Generate Report form, simply click the **Modify** link and then click **Saved Searches** to view a list of available saved searches.

The standard reports library includes an "Alpha List of Grantee Organizations" report that lists all Organizations in the GIFTS Online database that have received funding. By attaching a saved search for Organizations coded as 'Arts & Culture' to this report, you can create an "Alpha List of Arts Grantees" report.

NOTE: These customized reports cannot be saved for future use in GIFTS Online.

How Records are Sorted

Unless otherwise noted, all reports sort records alphabetically by Organization Sort as Name.

Currency and Date Formats

The currency and date formatting of the reports is determined by Regional Settings Control Panel of Microsoft Windows. The sample reports in this document were produced on a system with the Regional Settings set to "English (United States)."

NOTE: GIFTS Online does not currently support multi-currency.

About Report Categories

In order to provide the most intuitive access to reports, the standard reports are divided into Record types. You should note that not all categories will be available to all users, as some depend on your system configuration.

Some report Categories will have no reports defined for them in the Report Listing. Affiliations, Documents, and Reviews, for instance, have no reports available because they contain no standard reports.

Any combination of the following categories may be available from your Run Reports form:

Category	Description
Activities	To-do and scheduling reports.
Affiliations	**No standard reports.** Custom Affiliation reports can be created by ME Support per your request. Custom Affiliation reports can provide details about your contacts' relationships with various organizations and grant requests.
Applications	For Online Applications module users only. Used to access reports regarding Online Applications, Requirements, and Quiz results.
Contacts	Detailed information about your contacts, and special reports for printing comprehensive lists of contacts for projects or organizations.
Documents	**No standard reports.** Custom reports can be created by ME Support per your request.
Organizations	Organization reports are designed to provide information on the organizations in your database. These reports are useful for displaying address, tax status, and other details about Organizations. Since organizations are attached to the funding requests they have made, information about an Organization's funding history is also available on several Organization reports.
Payments	A variety of ways to look at your financial data. Most reports detail Payment information that you can use to review your financial history or plan future commitments.
Requests	Reports about the requests for funding in your system. Some reports display detailed information on each Request, while others summarize Request information in meaningful ways. Request reports include information on grants, declinations, and proposals—though many Request reports are designed to include only specific information. For instance, the 'Declinations by Reason' report only lists Requests that have been

	Declined.
Requirements	Reports on requirements due from grantee organizations.

About Fixed Criteria

Many reports have been designed to include only specific information. For example, the 'Declinations - Alpha List' reports only include Requests with a Disposition of Declined. Pending Requests and Approved Requests are not included in the report.

These fixed criteria always apply to the report, regardless of the search criteria that you choose when you run the report. If a report has fixed criteria, they are noted in the sample report.

Activity Reports Listing

The following standard Activity reports are included in GIFTS Online:

Report Name	Description
Activities Verification Report	A report showing all of the Activities for each request, including audit trail information such as who created, last changed, and marked the activity as complete.
To Do Completed by Date **To Do Completed by Staff**	A list of completed To Do Activities, sorted by the done date. **Fixed Criteria:** Activities with a Class of To Do and a Status of Done.
To Do Listing by Staff **To Do Listing by Date**	A list of all outstanding To Do Activities for specific staff members, including pertinent information on related Requests. **Fixed Criteria:** Activities with a Class of To Do and a Status of Scheduled.

Applications Reports Listing

NOTE: Online Applications module must be configured on your GIFTS Online site to access these reports.

There are several reports are available for Online Applications.

Many of the reports are available in two varieties, Detailed or Summary.

Detailed Reports:
These reports list the details of each application/requirement grouped by application 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.

The following standard Applications reports are included in GIFTS Online:

Report Name	Description
Eligibility Quiz	Report to view responses from all eligibility quizzes, or only those quizzes for specific application forms.
In-Progress Applications	These reports include all of the following types of applications: • Any application started but unfinished by online applicants • Applications specifically saved by the user (by clicking the Save & Finish Later button) • Applications left unfinished by users who simply left your site without saving **NOTE:** In certain cases, these unfinished applications are saved by the system for a certain length of time before being purged.
In-Progress Requirements	These reports include requirements that have been accessed by the applicant but have not been submitted.
Outstanding Requirements	These reports include requirements that have not been accessed or submitted by the applicant.
Submitted Applications	These reports include applications that have been completed and submitted by the applicant.
Submitted Requirements	These reports include requirements that have been filled out and submitted by the applicant.

Contacts Reports Listing

The following standard Contact reports are included in GIFTS Online:

Report Name	Description
Contact Labels 5160	Mailing Labels addressed to the contact at their Primary Organization formatted for Avery #5160 labels.
Contact Labels 5162	Mailing Labels addressed to the contact at their Primary Organization formatted for Avery #5162 labels.
Contact Phone Book Report	A simple listing of Contacts by last name, with telephone, fax, and e-mail information for each Contact.
Contacts - Alpha List	An alphabetical list of Contacts by name, including full address information
Duplicate Contacts by Last Name **Duplicate Contacts by Zip Code**	A report that shows Contacts with the same last name, to help identify duplicates for data cleanup.

Organization Reports Listing

The following standard Organization reports are included in GIFTS Online:

Report Name	Description
Alpha List of Grantee Organizations	An alphabetical listing of all organizations associated with grants, including the total amount granted to the organization and the grant year span.
Alpha List of Organizations	An alphabetical listing of all organizations, including Request information
Duplicate Organizations (by Name)	Identifies duplicate organization entries to assist with data cleanup. Only organizations with the exact same name are included.

Organization Mailing Labels #5160	This report prints mailing labels for Avery's #5160 label template to the Primary Contact of each Organization at the Organization's mailing address. Two versions of this report are available: one sorts the labels by the author's last name and the other by the Organization's postal code
Organization Mailing Labels #5162	This report prints mailing labels for Avery's #5162 label template to the Primary Contact of each Organization at the Organization's mailing address. Two versions of this report are available: one sorts the labels by the author's last name and the other by the Organization's postal code
Organization Profile Report **Organization Profile Report (with Graph)**	A summary sheet for each organization, displaying their address and background information, and both the detail and summary information of their funding history as entered in the Requests file.
Simple Organization Listing	A simple list of all organizations in your GIFTS Online database, with no request information included.
Top 20 Organizations by Total Grant Amount	This report lists the organizations receiving the top 20 highest cumulative grant amounts within the search criteria specified.
Top 20 Organizations by Total Number of Grants	This report lists the organizations receiving the top 20 highest number of cumulative awards within the search criteria specified.

Payments/Financial Reports Listing

The following standard Payments/Financial reports are included in GIFTS Online:

Report Name	Description
Cash Flow Analysis **Cash Flow Analysis by Program Area**	A listing of Scheduled Payments for the next six months, including the Organization Name, total amount granted, and remaining balance at the end of six months. **Fixed Criteria:** Payments for Requests that have any outstanding Payments.
Check Request Report by Fund	A listing of Scheduled Payments, including the legal name and address of the payee Organization, for the purpose of providing information for cutting checks. Grouped by Payment Fund. **Fixed Criteria:** Payments with a Status of Scheduled.
Contingent Payments by Staff **Contingent Payments by**	A listing of payments with a Status of Contingent, grouped by the Staff person assigned to the contingency. The type of contingency, due date, and notes are included.

Date	**Fixed Criteria:** Payments with a Status of Contingent.
Current Year Paid and Future Commitments **Current Year Paid and Future Commitments - by Program Area**	A listing of payments with a Status of Contingent, grouped by the Staff person assigned to the contingency. The type of contingency, due date, and notes are included. **Fixed Criteria:** Payments with a Status of Contingent.
Deferred Payments	A listing payments with a Status of "deferred" (payments which have been placed on Hold). **Fixed Criteria:** Payments with a Status of Hold.
Five Year Payment History Report **Five Year Payment History Report by Program Area**	A summary report per organization, showing the total amount paid to that organization in each of the last five years, including the current year. **Fixed Criteria:** Payments with a Status of Paid, Refund, or Void.
Grant Amendment Report	Provides detailed information on all of the amendments for each grant, and includes both the Original Grant Amount and the Current Grant Amount. **Fixed Criteria:** Approved Requests that have amended Grant Amounts.
Grant Commitments Schedule	A summary of payment information by Request, for those Requests with any outstanding payments. Information shown includes the grant amount, the amount paid in the current year and prior years, payments scheduled in the next three years, and any remaining balance. **Fixed Criteria:** Payments for Requests with an unpaid balance.
Grant Commitments Schedule (6 years) **Grant Commitments Schedule (6 Years) by Program Area**	Shows payments scheduled in the next six years, including the total of any payments remaining after that time. **Fixed Criteria:** Payments for Requests with an unpaid balance.
Grant Payment Confirmation by Staff	A list of Payments with a Status of Scheduled, Contingent, or Hold, grouped by the staff member associated with the Request, and including information on any Requirements due for the Payment or Request. **Fixed Criteria:** Payments with a Status of Scheduled, Contingent, or Hold, and Requirements with a Schedule Date in the current year.

Grant Payment Summary **Grant Payment Summary - by Payee**	A comprehensive summary of Payment information for Approved Requests, including the total number of Payments, the amount granted, the amount scheduled (payments with a Status of Scheduled, Hold, or Contingent), paid, and any unscheduled balance. It also includes the Payment Schedule Date and amount of the next payment due. The "by Payee" variation summarizes the data by the payee Organization instead of the grantee. Since grants that include Payments to more than one payee are listed more than once (one listing per payee), this report does not include totals for the Grant Amounts and Grant Balances. **Fixed Criteria:** Payments for Approved Requests.
Grant Planning Worksheet **Grant Planning Worksheet by Grant Fund** **Grant Planning Worksheet by Program Area**	For year-end planning, this report displays in worksheet format the giving for the current year, any commitments for the next year, a space to write in the proposed amount for next year, per organization. **Fixed Criteria:** Organizations with Requests Approved in the current Fiscal Year, payments Paid in the current Fiscal Year, or Payments Scheduled for the coming Fiscal Year.
In-Kind Payments Made **In-Kind Payments Made by Payment Fund Donor** **In-Kind Payments Made by Program Area**	A report of paid payments including fields specific to in-kind payments: fair market value, tax value, book value, and in-kind notes. Payments are grouped and subtotaled by the Payment Fund Donor. **Fixed Criteria:** Payments with a Status of Paid or Void.
Payment Status Summary - by Payment Fund **Payment Status Summary - by Program Area** **Payment Status Summary - by Year**	A summary of all payments entered in GIFTS Online, totaled by their respective Payment Status. Includes columns for the total amount scheduled, and then breaks this out by Paid, Scheduled, Hold, Contingent Payments.
Payments Due Schedule, by Grantee Organization **Payments Due Schedule, by Month** **Payments Due Schedule, by Payment Fund** **Payments Due Schedule, by**	A listing of outstanding Payments, including the Grant Amount, Project Description and Reference Number, the Payment Due Date and Amount, and the Payment Fund. If the Payment has a Status of Contingent or Hold, a column displays this information, along with notes entered for the Payment. **Fixed Criteria:** Payments with a Status of Scheduled, Hold, or Contingent.

Payment Support Type **Payments Due Schedule, by Program Area 1** **Payments Due Schedule, by Payment Area 1 & 2**	
Payments Made - by Month **Payments Made - by Grantee Organization** **Payments Made - by Payment Fund** **Payments Made - by Payment Support Type** **Payments Made - by Program Area 1** **Payments Made - by Program Area 1 & 2** **Payments Made - by State**	A listing of payments which have been marked as paid in the system, including the payment date and check number, if available. **Fixed Criteria:** Payments with a Status of Paid, Refund, or Void.
Payments Made - Charitable vs. Non Charitable Deductions	For those organizations that capture "Quid Pro Quo" information, this report lists the deductible and non-deductible amounts as entered for each payment. Also included is the check number and the payment date. **Fixed Criteria:** Payments with a Status of Paid or Void.
Payments Made - OBRA Report	This report shows whether or not a receipt is required on each Payment, and the Schedule Date and Done Date of the receipt. The full name and address of the payee Contact is included for easy follow-up. The report also includes the deductible and non-deductible amount for each Payment and the Organization's tax status. **Fixed Criteria:** Payments with a Status of Paid or Void, and Requirements associated with Payments that have been specified as "Receipt Required."
Payment Reconciliation Report	Lists Payments by status, and then by Check Number, including the payee's legal name, the Payment Fund, the Payment Type, and Paid Date. **Fixed Criteria:** Payments with a Status of Paid, Refund, or Void.
Schedule of Appropriations and Payments	This is a new version of the old Schedule of Appropriations and Payments.

Schedule of Appropriations and Payments, by Program Area	For Approved Requests, this report lists the balance as of the beginning of the current Fiscal Year, any money newly allocated in the current Fiscal Year (which will include grants made in the current year), the amount paid in the current Fiscal Year, and the amount outstanding for the current Fiscal Year. **Fixed Criteria:** Approved Requests with an unpaid balance or for which appropriations were made during the Fiscal Year.
Schedule of Appropriations and Payments (OLD) **Schedule of Appropriations and Payments, by Program Area** **Schedule of Appropriations and Payments showing Population Served**	For Approved Requests, this report lists the balance as of the beginning of the current Fiscal Year, any money newly allocated in the current Fiscal Year (which will include grants made in the current year), the amount paid in the current Fiscal Year, and the amount outstanding for the current Fiscal Year. **Fixed Criteria:** Approved Requests with an unpaid balance or for which appropriations were made during the Fiscal Year.
Summary of Paid Payments - by Geo. Area 1 **Summary of Paid Payments - by Payment Fund** **Summary of Paid Payments - by Payment Type** **Summary of Paid Payments - by Payment Support Type** **Summary of Paid Payments - by Prog. Area** **Summary of Paid Payments - by Staff**	A summary of payments paid, including number of items and percentages. **Fixed Criteria:** Payments with a Status of Paid, Refund, or Void.
Top 20 Payments by Payment Amount	The largest 20 Payments in the search criteria provided, in descending order by amount. **Fixed Criteria:** Payments for Approved Requests.

Request Reports Listing

The following standard Request reports are included in GIFTS Online:

Report Name	Description
Board Meeting Agenda **Board Meeting Agenda by Docket Number** **Board Meeting Agenda by Program Area 1**	Organization name, long project description, requested amount and recommended amount, designed for an agenda for a Board Meeting.
Board Meeting Minutes **Board Meeting Minutes by Docket Number** **Board Meeting Minutes by Program Area 1**	Requests with their current Disposition and Status, showing the action taken by the board.
Contact Affiliations by Request	A list of Requests, grouped by Organization, that shows the affiliated Contacts for each Request.
Data Entry Edit Report by Organization **Data Entry Edit Report by Date**	A comprehensive summary of individual Requests, including all classifications, for data entry verification.
Declinations - Alpha List **Declinations - Alpha List (Portrait)** **Declinations - Alpha List by Fund** **Declinations - Alpha List by Geographical Area 1** **Declinations - Alpha List by Internal Program** **Declinations - Alpha List by Program Area 1** **Declinations - Alpha List by Staff** **Declinations - Alpha List by Grant Type**	A detailed listing of Declined requests, including the reason for declination and the staff person assigned. The “Portrait” variation of this report is printed with the Portrait paper orientation; all other variations are Landscape reports. **Fixed Criteria:** Requests with a Disposition of Declined.

Declinations - Alpha List by Fund (including Request Amount) **Declinations - Alpha List by Program Area (including Request Amount)**	A detailed listing of Declined requests, including subtotals of the amount requested. **Fixed Criteria:** Requests with a Disposition of Declined.
Declinations - Summary by Reason	A summary of declinations by the reason declined, including totals for each reason and the corresponding percentage of the total, both for the number of declines and the amount requested. **Fixed Criteria:** Requests with a Disposition of Declined.
Foundation Center Export Report	A data export for the Foundation Center. Please contact MicroEdge Technical Support for detailed information.
Grant Profile Report	A summary of a single grant, including payment and grant amendment information. **Fixed Criteria:** Requests with a Disposition of Approved.
Grant Summary - by Fund **Grant Summary - by Geographical Area** **Grant Summary - by Grant Type** **Grant Summary - by Program Area 1** **Grant Summary - by Program Areas 1 and 2** **Grant Summary - by Program Areas 1, 2 and 3** **Grant Summary - by Support Type** **Grant Summary - by Staff**	A summary of approved requests showing the total amount granted and the percentage of the total for each item. **Fixed Criteria:** Requests with a Disposition of Approved.
Grant Summary - Granted and Paid by Program Area	For each Program Area, this report shows the total amount granted and the amount and percentage of Payments made for that Program Area. **Fixed Criteria:** Requests with a Disposition of Approved.
Grants - Alpha List **Grants - Alpha List by Fund** **Grants - Alpha List by Geo.**	Alphabetical listing of grants, including Reference Number, amount granted, and amount paid. Grants are listed in alphabetical order by organization name.

Area Level 1 **Grants - Alpha List by Geo. Area Levels 1 to 5** **Grants - Alpha List by Grant Type** **Grants - Alpha List by Internal Program** **Grants - Alpha List by Population Served** **Grants - Alpha List by Program Area 1** **Grants - Alpha List by Program Area 1 & 2** **Grants - Alpha List by Program Area 1, 2, & 3** **Grants - Alpha List by Program Areas 1 through 5** **Grants - Alpha List by Primary Contact** **Grants - Alpha List by Staff** **Grants - Alpha List by Support Type**	**Fixed Criteria:** Requests with a Disposition of Approved.
Grants - Alpha List (Portrait)	Same as the Alpha List of Grants report, but with the paper orientation designed to print portrait rather than landscape. **Fixed Criteria:** Requests with a Disposition of Approved.
Grants - Alpha List, by Geographic Area Served including Secondary Codes **Grants - Alpha List, by Program Area Served including Secondary Codes**	Alpha list of grants, grouped by all levels of the Geographic Area Served or Program Area table. These reports include both primary and secondary coding, so that one grant may appear several times (once for each code). Thus, the totals in this report may not reflect the actual amount granted. **Fixed Criteria:** Requests with a Disposition of Approved, and which have been assigned a classification in the table on which the report groups.
Grants - Chronological List **Grants - Chron. List by Fund** **Grants - Chron. List by Geographical Area 1** **Grants - Chron. List by Grant**	Listing of grants, including Reference Number, amount granted, and amount paid. Grants are listed in date order by Grant Date. **Fixed Criteria:** Requests with a Disposition of Approved.

Type **Grants - Chron. List by Program Area 1** **Grants - Chron. List by Program Area 1 and 2** **Grants - Chron. List by Program Area 1, 2, & 3** **Grants - Chron. List by Staff** **Grants - Chron. List by Support Type**	
Grants - Detail List by Staff	A listing of all grants grouped by Staff member.
Incomplete Proposals **Incomplete Proposals by Date**	A listing of Pending items which are marked as incomplete, including the current Status of the Request and the Complete/Incomplete Notes. **Fixed Criteria:** Requests with a Disposition of Pending that are also marked as 'incomplete' on their Request record.
Proposals - Alpha List **Proposals - Alpha List, by Staff** **Proposals - Alpha List, by Fund** **Proposals - Alpha List, by Geographical Area 1** **Proposals - Alpha List, by Grant Request Type** **Proposals - Alpha List, by Internal Program** **Proposals - Alpha List, by Program Area 1** **Proposals - Alpha List, by Program Areas 1 and 2** **Proposals - Alpha List, by Primary Contact** **Proposals - Alpha List, by Status**	A listing of Pending items, including Project Title, Request and Recommended Amounts, Request Type and Status. **Fixed Criteria:** Requests with a Disposition of Pending.
Proposals - Alpha List (Portrait)	Same as the Alpha List of Proposals report, but with the paper

	orientation designed to print portrait rather than landscape. **Fixed Criteria:** Requests with a Disposition of Pending.
Proposals - Complete/Incomplete	A listing of Pending items, including Project Title, Request Date, and Staff, and whether the Request is complete, along with any relevant notes. **Fixed Criteria:** Requests with a Disposition of Pending.
Recommendations by Organization	This report shows the approved amount for the previous year, and the approved amount for the current year per organization, and the Project Description (Long). **Fixed Criteria:** Requests for Organizations that have at least one Pending Request in the current calendar year.
Renewable Grants	Lists basic grant information about grants that have been flagged as renewable. **Fixed Criteria:** Approved Requests that have been flagged as renewable.
Repeat Grants	For each Organization with repeat grants, this report shows the granted and paid figures for the current and previous calendar years. **Fixed Criteria:** Organizations that have received grants in both the current year and the previous year.
Request History by Organization	The Request History by Organization report is very similar to the Organization Profile report listed in the Organization report library. The key difference is, the Request History by Organization report is sensitive to Request criteria.
Request Labels (All Affiliated Contacts)	**This series of reports prints mailing labels to all affiliated Contacts for each Request included in the report. The Organization's mailing address is used.**
Request Labels (Primary Contact)	**This series of reports prints mailing labels to the Primary Contact of each Request included in the report. The Organization's mailing address is used.**
Request Statistics	A report showing statistical information such as the total number of Approved, Pending, and Declined Requests and the minimum, maximum and average grant amounts.
Requests by Sponsor	A list of Requests, grouped by the Contact identified as the "Sponsor" of each Request. Includes the Disposition, Grant Amount, and Paid Amount of each Request.

	Fixed Criteria: Requests that have an affiliated Contact with the Role of "Sponsor."
Status of Requests Received by Staff, Including Sponsor **Status of Requests Received by Staff**	A comprehensive listing of Requests grouped by staff, including the contact designated as the Sponsor (using the system-defined "Sponsor" Contact Role)
Summary of Requests by Type, Disposition, and Status	A summary of Requests grouped by Type, Disposition, and then Status; includes subtotals of the requested and granted amounts for each Request.
Tax Status Verification	Shows tax status information for organizations associated with Requests, and displays a warning message for organizations with no tax status on file. *Includes:* Organizations associated with Requests.
Top 20 Grants by Grant Amount	The largest 20 grants in the search criteria provided, listed in descending order by grant amount.

Requirement Reports Listing

The following standard Requirements reports are included in GIFTS Online:

Report Name	
Pending Proposal Checklist	A report listing the requirements due on Pending Requests only. The Project Title, Request Date and the Meeting Date are included for each Request. **Fixed Criteria:** Requirements associated with Requests with a Disposition of Pending.
Requirements Completed - by Staff **Requirements Completed - by Date** **Requirements Completed - by Organization** **Requirements Completed - by Program Area**	A list of completed Requirements, grouped by the staff member assigned to the Requirement. **Fixed Criteria:** Requirements with a Status of Done.

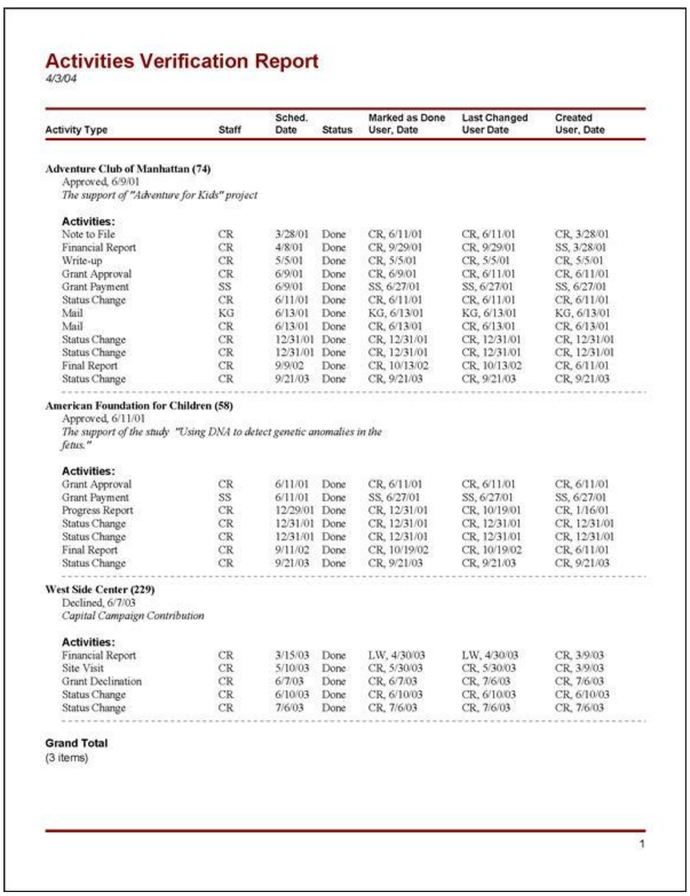
Requirements Due by Date **Requirements Due by Organization** **Requirements Due by Staff** **Requirements Due by Program Area**	A chronological list of Requirements with a Status of Scheduled. **Fixed Criteria:** Requirements with a Status of Scheduled.
Requirements Received by Date	A chronological list of Requirements that have been marked as received from the grantee, but have not yet been marked as done. **Fixed Criteria:** Requirements with a status of Received.

About Activity Reports

This chapter describes the standard Activities reports included with GIFTS Online.

Activities Verification Report

A report showing all of the Activities for each Request, including audit trail information such as who created the Activity, who last modified it, and who marked the Activity as complete.



Activities Verification Report
4/3/04

Activity Type	Staff	Sched. Date	Status	Marked as Done User, Date	Last Changed User Date	Created User, Date
Adventure Club of Manhattan (74)						
Approved, 6/9/01						
The support of "Adventure for Kids" project						
Activities:						
Note to File	CR	3/28/01	Done	CR, 6/11/01	CR, 6/11/01	CR, 3/28/01
Financial Report	CR	4/8/01	Done	CR, 9/29/01	CR, 9/29/01	SS, 3/28/01
Write-up	CR	5/5/01	Done	CR, 5/5/01	CR, 5/5/01	CR, 5/5/01
Grant Approval	CR	6/9/01	Done	CR, 6/9/01	CR, 6/11/01	CR, 6/11/01
Grant Payment	SS	6/9/01	Done	SS, 6/27/01	SS, 6/27/01	SS, 6/27/01
Status Change	CR	6/11/01	Done	CR, 6/11/01	CR, 6/11/01	CR, 6/11/01
Mail	KG	6/13/01	Done	KG, 6/13/01	KG, 6/13/01	KG, 6/13/01
Mail	CR	6/13/01	Done	CR, 6/13/01	CR, 6/13/01	CR, 6/13/01
Status Change	CR	12/31/01	Done	CR, 12/31/01	CR, 12/31/01	CR, 12/31/01
Status Change	CR	12/31/01	Done	CR, 12/31/01	CR, 12/31/01	CR, 12/31/01
Final Report	CR	9/9/02	Done	CR, 10/13/02	CR, 10/13/02	CR, 6/11/01
Status Change	CR	9/21/03	Done	CR, 9/21/03	CR, 9/21/03	CR, 9/21/03
American Foundation for Children (58)						
Approved, 6/11/01						
The support of the study "Using DNA to detect genetic anomalies in the fetus."						
Activities:						
Grant Approval	CR	6/11/01	Done	CR, 6/11/01	CR, 6/11/01	CR, 6/11/01
Grant Payment	SS	6/11/01	Done	SS, 6/27/01	SS, 6/27/01	SS, 6/27/01
Progress Report	CR	12/29/01	Done	CR, 12/31/01	CR, 10/19/01	CR, 1/16/01
Status Change	CR	12/31/01	Done	CR, 12/31/01	CR, 12/31/01	CR, 12/31/01
Status Change	CR	12/31/01	Done	CR, 12/31/01	CR, 12/31/01	CR, 12/31/01
Final Report	CR	9/11/02	Done	CR, 10/19/02	CR, 10/19/02	CR, 6/11/01
Status Change	CR	9/21/03	Done	CR, 9/21/03	CR, 9/21/03	CR, 9/21/03
West Side Center (229)						
Declined, 6/7/03						
Capital Campaign Contribution						
Activities:						
Financial Report	CR	3/15/03	Done	LW, 4/30/03	LW, 4/30/03	CR, 3/9/03
Site Visit	CR	5/10/03	Done	CR, 5/30/03	CR, 5/30/03	CR, 3/9/03
Grant Declination	CR	6/7/03	Done	CR, 6/7/03	CR, 7/6/03	CR, 7/6/03
Status Change	CR	6/10/03	Done	CR, 6/10/03	CR, 6/10/03	CR, 6/10/03
Status Change	CR	7/6/03	Done	CR, 7/6/03	CR, 7/6/03	CR, 7/6/03

Grand Total
(3 items)

1

To-Do Completed

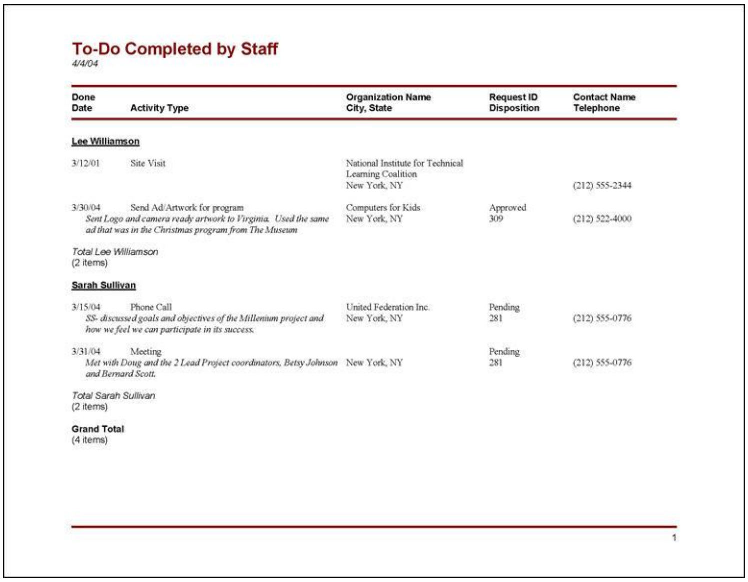
list of completed To Do Activities, sorted by their Done Date.

Variations:

- by Date
- by Staff

Fixed Criteria:

Activities with a Class of To Do and a Status of Done.



To-Do Completed by Staff
4/4/04

Done Date	Activity Type	Organization Name City, State	Request ID Disposition	Contact Name Telephone
Lee Williamson				
3/12/01	Site Visit	National Institute for Technical Learning Coalition New York, NY		(212) 555-2344
3/30/04	Send Ad/Artwork for program *Sent Logo and camera ready artwork to Virginia. Used the same ad that was in the Christmas program from The Museum*	Computers for Kids New York, NY	Approved 309	(212) 522-4000
Total Lee Williamson (2 items)				
Sarah Sullivan				
3/15/04	Phone Call *SS- discussed goals and objectives of the Millenium project and how we feel we can participate in its success.*	United Federation Inc. New York, NY	Pending 281	(212) 555-0776
3/31/04	Meeting *Met with Doug and the 2 Lead Project coordinators, Betsy Johnson and Bernard Scott.*	New York, NY	Pending 281	(212) 555-0776
Total Sarah Sullivan (2 items)				
Grand Total (4 items)				

1

To-Do Listing

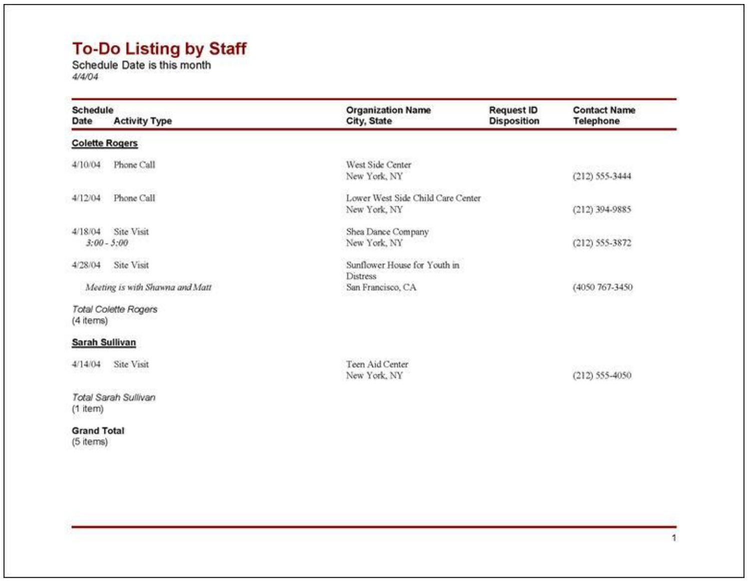
A list of all outstanding To Do Activities for specific staff members, including pertinent information on related Requests.

Variations:

- by Date
- by Staff

Fixed Criteria:

Activities with a Class of To Do and a Status of Scheduled.



To-Do Listing by Staff
Schedule Date is this month
4/4/04

Schedule Date	Activity Type	Organization Name City, State	Request ID Disposition	Contact Name Telephone
Colette Rogers				
4/10/04	Phone Call	West Side Center New York, NY		(212) 555-3444
4/12/04	Phone Call	Lower West Side Child Care Center New York, NY		(212) 394-9885
4/18/04	Site Visit *3:00 - 5:00*	Shea Dance Company New York, NY		(212) 555-3872
4/28/04	Site Visit *Meeting is with Shawna and Matt*	Sunflower House for Youth in Distress San Francisco, CA		(4050 767-3450
Total Colette Rogers (4 items)				
Sarah Sullivan				
4/14/04	Site Visit	Teen Aid Center New York, NY		(212) 555-4050
Total Sarah Sullivan (1 item)				
Grand Total (5 items)				

1

Online Application Reports

NOTE: You must have the Online Applications module configured on your site to access these reports.

There are several reports are available for Online Applications. 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 Eligibility Quiz report.

Many of the reports are available in two varieties, Detailed or Summary.

Detailed Reports:
These reports list the details of each application/requirement grouped by application form. They include form name, organization, email, project title, submit/create date, ID number, number of attachments, and total attachment size.

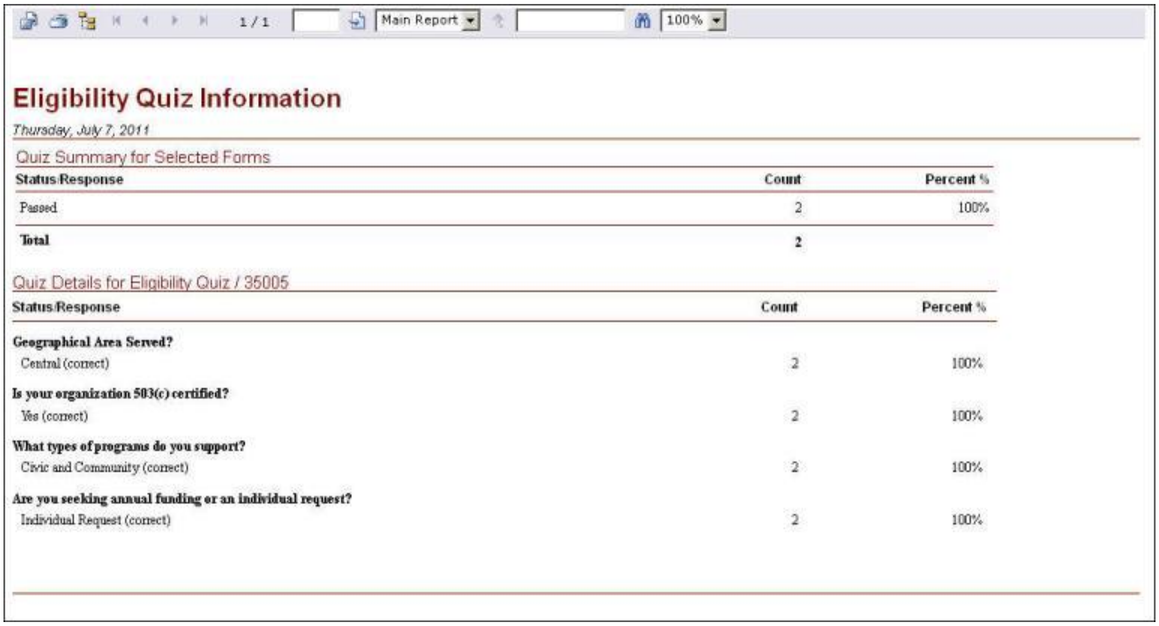
Summary Reports:
These reports list only the Form, Stage, Number of Applications/Requirements, Number of Attachments, and Total Attachments Size.

Eligibility Quiz Information

You can run a report to view responses from all eligibility quizzes, or only those quizzes for specific application forms.

Fixed Criteria

- Date Range
- Application forms to report on



1 / 1 Main Report 100%

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%

In Progress Applications

These reports include all of the following types of applications:

- Any application started but unfinished by online applicants
- Applications specifically saved by the user (by clicking the **Save & Finish Later** button)
- Applications left unfinished by users who simply left your site without saving

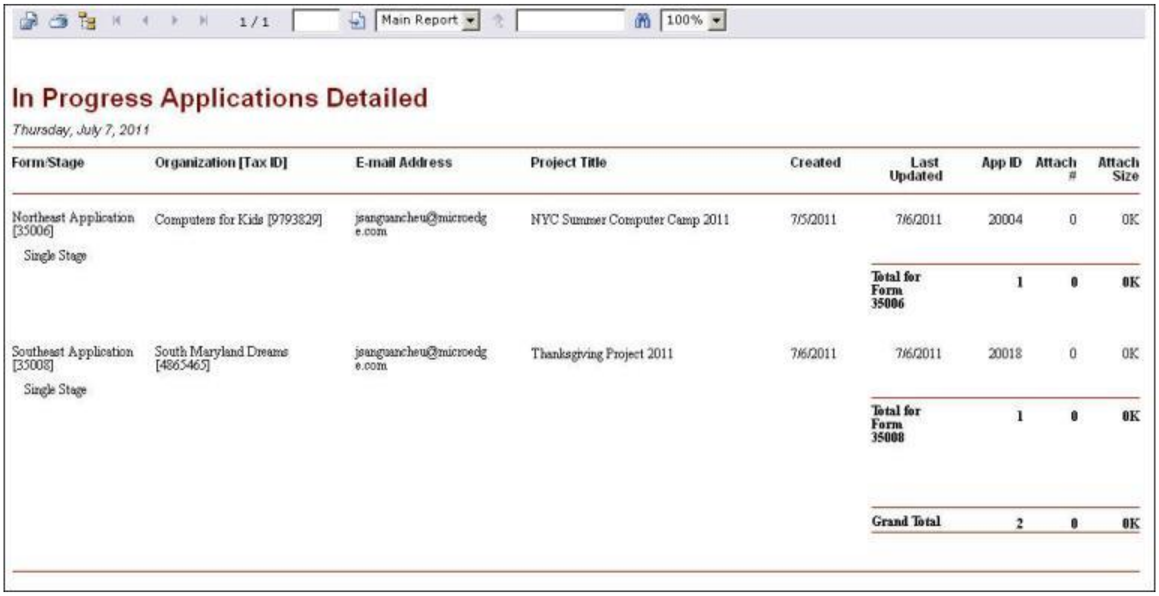
NOTE: In certain cases, these unfinished applications are saved by the system for a certain length of time before being purged.

Fixed Criteria

- Date Range
- Application forms to report on

Variations

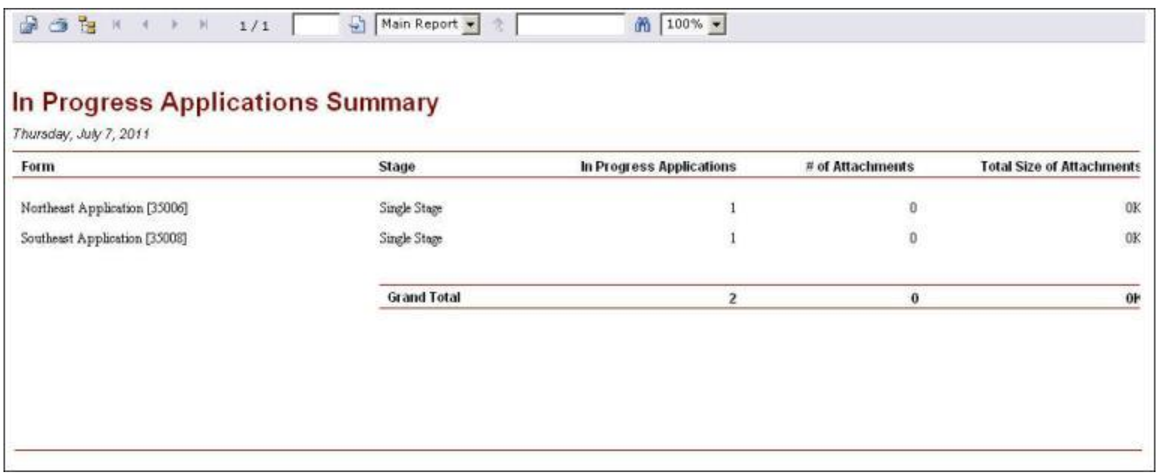
- Detailed
- Summary



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



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

In Progress Requirements

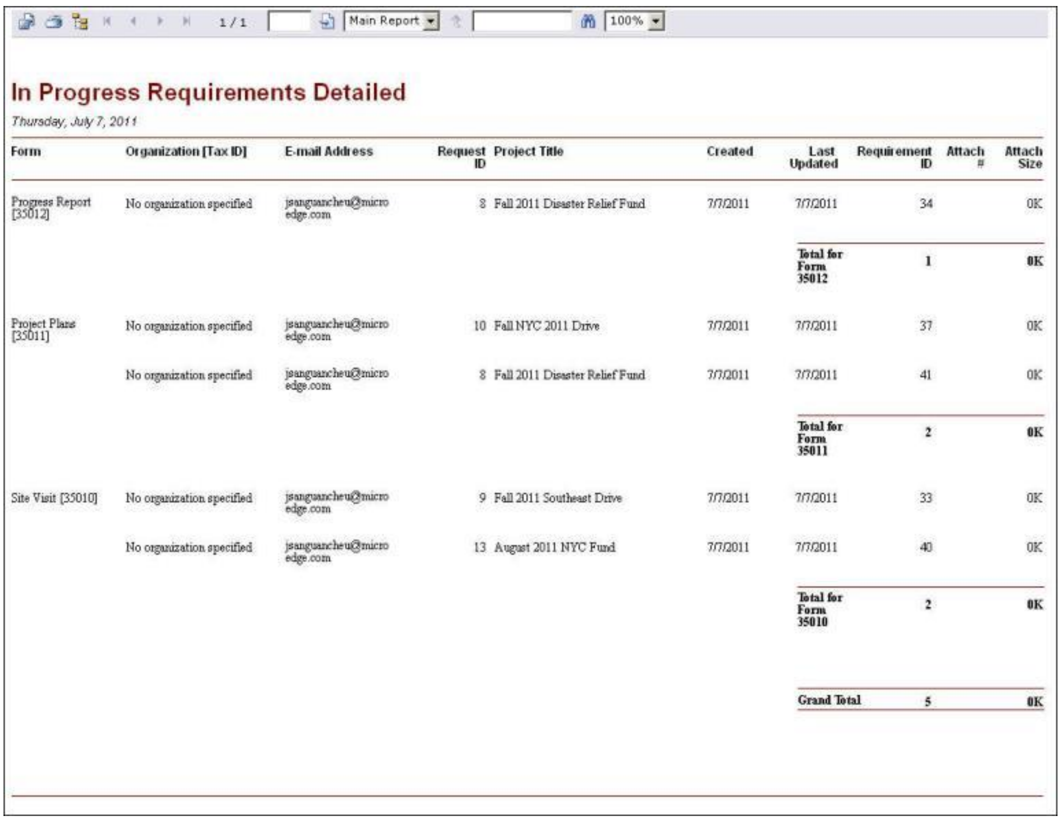
These reports include requirements that have been accessed by the applicant but have not been submitted.

Fixed Criteria

- Date Range
- Application forms to report on

Variations

- Detailed
- Summary

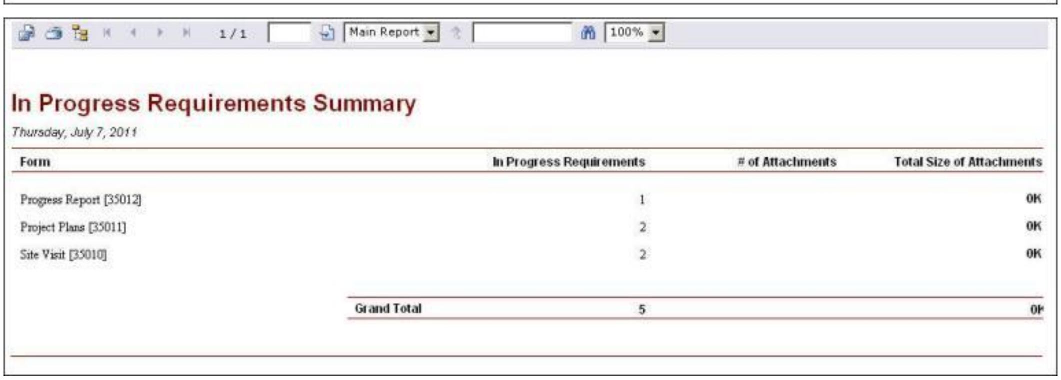


Main Report 1 / 1 100%

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**



Main Report 1 / 1 100%

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

Outstanding Requirements

These reports include requirements that have not been accessed or submitted by the applicant.

Fixed Criteria

- Date Range
- Application forms to report on

Variations

- Detailed
- Summary

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**

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**

Submitted Applications

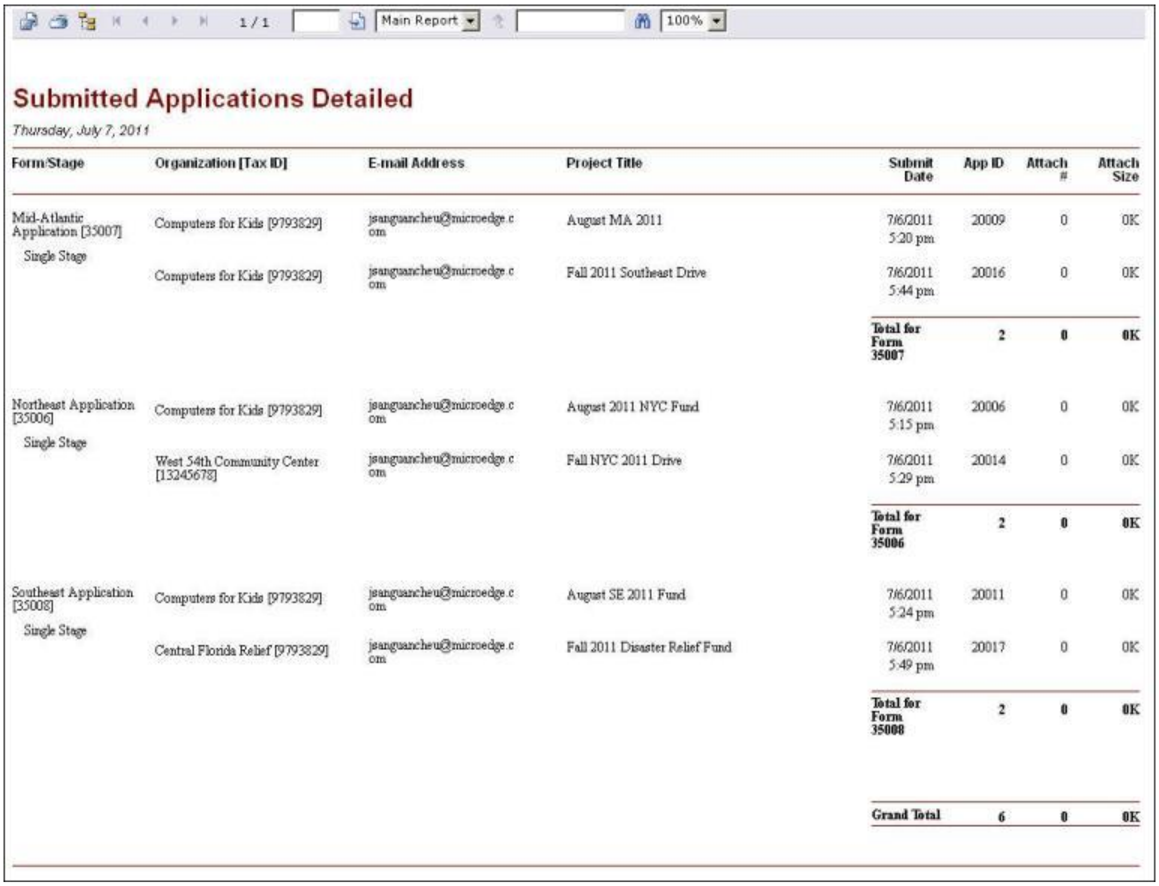
These reports include applications that have been completed and submitted by the applicant.

Fixed Criteria

- Date Range
- Application forms to report on

Variations

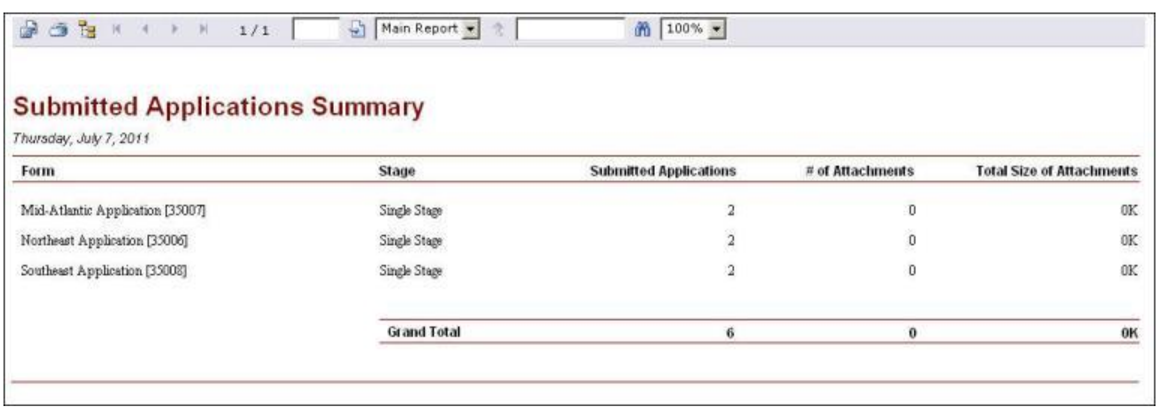
- Detailed
- Summary



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] Single Stage	Computers for Kids [9793829]	jsanguancheu@microedge.com	August MA 2011	7/6/2011 5:20 pm	20009	0	0K
	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] Single Stage	Computers for Kids [9793829]	jsanguancheu@microedge.com	August 2011 NYC Fund	7/6/2011 5:15 pm	20006	0	0K
	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] Single Stage	Computers for Kids [9793829]	jsanguancheu@microedge.com	August SE 2011 Fund	7/6/2011 5:24 pm	20011	0	0K
	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**



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**

Submitted Requirements

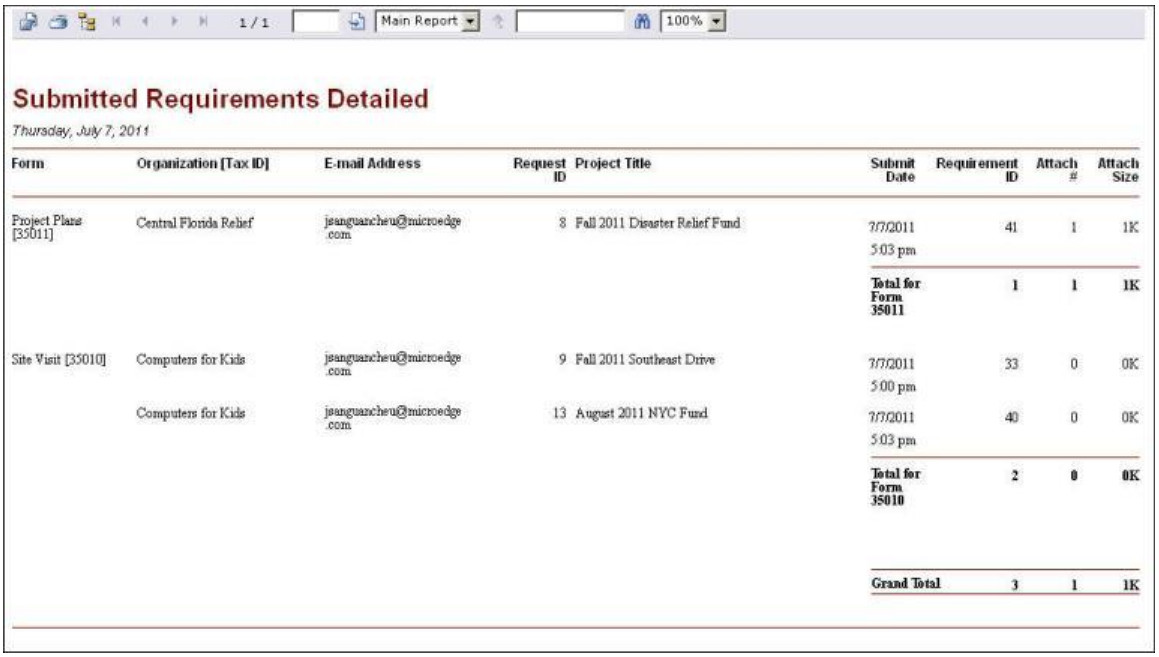
These reports include requirements that have been filled out and submitted by the applicant.

Fixed Criteria

- Date Range
- Application forms to report on

Variations

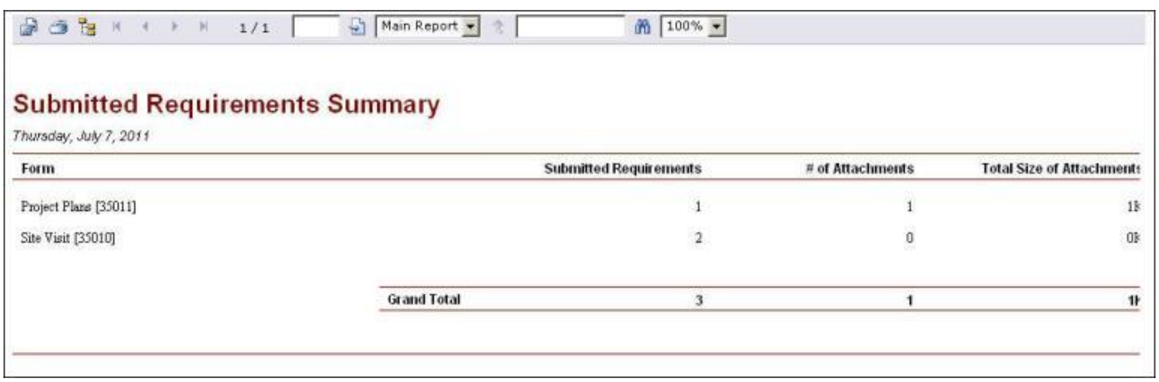
- Detailed
- Summary



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**



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**

About Contact Reports

This chapter describes the standard Contact reports included with GIFTS Online.

Contact Labels 5160

Mailing Labels addressed to the contact at their Primary Organization formatted for Avery #5160 labels.

Variations

A version of this report groups by Zip Code.

Ms. Carol Albright Teen Aid Center 534 Broadway New York, NY 10016	Mr. Tom Alexander 294 Chestnut Street Wayne, NJ 07470	Dr. Tom Alexander Model Foundation 612 N. Eyeland Avenue New York, NY 10024
Mr. David Anderson California Children's Theatre 2234 South St. Suite 913 San Francisco, CA 98078	Ms. Rose Anderson Model Foundation 612 N. Eyeland Avenue New York, NY 10024	Ms. Kim Andrews 612 N. Eyeland Avenue New York, NY 10019
Ms. Virginia Appleton Computers for Kids 111 E 57th Street Suite 200 New York, NY 10021	Ms. Janet Austin East Side Learning Center 14 East 83rd Street Suite 10 New York, NY 10024	Mr. Raymond C. Austin Computers for Kids 111 E 57th Street Suite 200 New York, NY 10021

Contact Labels 5162

Mailing Labels addressed to the contact at their Primary Organization formatted for Avery #5162 labels.

Variations

A version of this report groups by Zip Code.

Ms. Carol Albright Teen Aid Center 534 Broadway New York, NY 10016	Mr. Tom Alexander 294 Chestnut Street Wayne, NJ 07470
Dr. Tom Alexander Model Foundation 612 N. Eyeland Avenue New York, NY 10024	Mr. David Anderson California Children's Theatre 2234 South St. Suite 913 San Francisco, CA 98078
Ms. Rose Anderson Model Foundation 612 N. Eyeland Avenue New York, NY 10024	Ms. Kim Andrews 612 N. Eyeland Avenue New York, NY 10019

Contact Phone Book Report

A simple listing of Contacts by last name, with telephone, fax and e-mail information for each Contact.

Contact Phone Book Report

Mailing List is 'Newsletter', 'Holiday Cards' or 'Annual Reports'

4/3/00

Contact Name	Primary Organization	Primary Telephone	Primary Fax	Email Address
Albright, Carol	Teen Aid Center	(212) 555-4050	(212) 555-4000	albrightcarol@teenaidcenter.org
Anderson, David	California Children's Theatre	(405) 555-5544		anderson@cct.org
Appleton, Virginia	Computers for Kids	(212) 522-4000	(212) 522-3945	appletonv@cfk.org
Austin, Janet	East Side Learning Center	(212) 555-3444		austin_j@eastsidelearning.org
Brennan, Elaine	East Side Learning Center			elaine@eastsidelearning.org
Clayton, John	The Children's Fund	(202) 432-5000	(202) 432-5010	
Heilman, Anthony	Arlington School of Dentistry	(203) 771-1265	(203) 771-1233	heilmananthony@arlington.org
Henderson, Sarah	Model Foundation	(212) 555-2344		sarah.he@model.org
Laden, Elizabeth	Abuse Prevention and Rehabilitation Fund	(202) 555-2343	(202) 555-2300	ladene@abuseprevention.org
Moore, David	Lower West Side Child Care Center	(212) 394-9885	(212) 394-9888	moored@lwsccc.org
Neff, Margaret	Brooklyn Ballet	(212) 555-3874	(212) 555-3457	neffm@bklynballet.org
Reynolds, Michael	Hiller State University	617-335-1432		mreynolds@hillerstate.edu
Roberts, Charles	The Children's Fund	(202) 432-5000	(202) 432-5010	robertsc@tcf.org
White, Ronald	Hiller State University	(617) 555-3847		rwhite@hillerstate.edu

Grand Total
(14 items)

1

Contacts - Alpha List

An alphabetical list of Contacts by name, including full address information.

Contacts - Alpha List

Mailing List is 'Annual Reports'

4/3/00

Contact Name / Primary Organization and Office Address	Telephone(s)	Notes
Albright, Carol Teen Aid Center 534 Broadway New York, NY 10016	Office: (212) 555-4050 Fax: (212) 555-4000	Carol works M,W, F only
Appleton, Virginia Computers for Kids 111 E 57th Street Suite 200 New York, NY 10021	Office: (212) 522-4000 Fax: (212) 522-3945	
Brennan, Elaine East Side Learning Center 14 East 83rd Street Suite 10 New York, NY 10024	Office: Fax:	
Clayton, John The Children's Fund 3400 Wisconsin Ave. N. W. Washington, DC 20016	Office: (202) 432-5000 Fax: (202) 432-5010	
Laden, Elizabeth Abuse Prevention and Rehabilitation Fund 440 Third Street Washington, DC 20001	Office: (202) 555-2343 Fax: (202) 555-2300	Ms. Laden has a hearing impairment which makes it difficult to communicate via Telephone. USE E-MAIL for Best results.
Neff, Margaret Brooklyn Ballet 14 West 108th Street New York, NY 10012	Office: (212) 555-3874 Fax: (212) 555-3457	
Reynolds, Michael Hiller State University 785 42nd Street 2nd Floor Boston, MA 14325	Office: 617-335-1432 Fax: 617-555-0999	
Roberts, Charles The Children's Fund 3400 Wisconsin Ave. N. W. Washington, DC 20016	Office: (202) 432-5000 x 5452 Fax: (202) 432-5010	

Duplicate Contacts

A report that shows Contacts with the same last name, to help identify duplicates for data cleanup

Variations:

- by Last Name
- by Zip Code

Fixed Criteria:

Contacts with the same last name.

Duplicate Contacts (by Last Name)

4/3/00

Contact Full Name	Contact Primary Address	Telephone Number Fax Number	Contact ID
SMITH			
Smith, Mr. Doug	1004 Third Ave. New York, NY 10023	(212) 555-0776 (212) 555-3739	14

Affiliations:	Role	Disposition	Date	Granted	Project Title (Truncated)
United Federation Inc.	Primary Contact				
United Federation Inc.	Employee				
United Federation Inc.	Primary Contact	Approved	3/20/96	$25,500.00	The Support for Anti-drug Media Campa
United Federation Inc.	Primary Contact	Approved	3/7/96	$1,200.00	The Annual Benefit
United Federation Inc.	Primary Contact	Declined	5/29/97	$0.00	The annual support for the organization
United Federation Inc.	Primary Contact	Approved	6/9/98	$25,000.00	General Operating Support
United Federation Inc.	Primary Contact	Approved	12/7/99	$25,000.00	The "Food for Thought" Program
United Federation Inc.	Primary Contact	Approved	12/7/99	$10,000.00	Parks and Rec of Rockland County
United Federation Inc.	Primary Contact	Pending	1/20/00	$0.00	Millenium Project

Contact Full Name	Contact Primary Address	Telephone Number Fax Number	Contact ID
Smith, Mr. Johnathan J.	400 East 57th Street New York, NY 10018	(212) 555-3872 (212) 555-3849	12

Affiliations:	Role	Disposition	Date	Granted	Project Title (Truncated)
Shea Dance Company	Primary Contact				
Shea Dance Company	Employee				
Shea Dance Company	Matching Gifts C				
Shea Dance Company	Primary Contact	Approved	3/7/96	$2,400.00	The Sponsorship for "Gala 96- 14th Ann
Shea Dance Company	Primary Contact	Approved	12/8/97	$4,500.00	The 1997 "Dance Dynasty" program
Shea Dance Company	Primary Contact	Approved	6/9/98	$5,000.00	The 1998 "Dance Fever" program
Shea Dance Company	Primary Contact	Approved	3/31/98	$5,900.00	1st Quarter Matching Gifts, 1998
Shea Dance Company	Primary Contact	Approved	6/7/99	$5,250.00	The 1999 Annual Banquet
Shea Dance Company	Primary Contact	Approved	12/21/99	$7,000.00	3rd Quater MG - 1999
Shea Dance Company	Primary Contact	Approved	4/3/00	$5,250.00	The 2000 Annual Banquet
Shea Dance Company	Primary Contact	Pending	2/14/00	$0.00	Tots on Stage

1

About Organization Reports

This chapter describes the standard Organization reports included with GIFTS Online.

Alpha List of Grantee Organizations

An alphabetical listing of Organizations that are associated with grants (Approved Requests). The report includes the total amount granted by the Organization and the grant year span.

Fixed Criteria:

Organizations that have Approved Requests.

Alpha List of Grantee Organizations

3/22/00

Organization Name	Grant Year Span	Number of Grants	Total Amount	Tax Status Type
Adventure Club of Manhattan New York, NY	1996 - 1999	5	$42,100.00	501c(3) Community
American Foundation for Children New York, NY	1996 - 1999	16	$269,325.00	501c(3) Community
Arlington School of Dentistry Los Angeles, CA	1996 - 1999	16	$231,220.00	Education
The Children's Fund Washington, DC	1996 - 1999	16	$171,650.00	501c(3) Health & Welfare
Kids With AIDS Research Center New York, NY	1996 - 1999	5	$263,600.00	501c(3) Health & Welfare
Lower West Side Child Care Center New York, NY	1996 - 1999	4	$119,500.00	501c(3) Health & Welfare
National Institute for Technical Learning Coalition New York, NY	1996 - 1999	5	$246,800.00	501c(3) Education
Ryan School of Medicine Los Angeles, CA	1996 - 1999	11	$480,600.00	501c(3) Education
Shea Dance Company New York, NY	1996 - 1999	8	$32,550.00	501c(3) Arts & Culture
Teen Aid Center New York, NY	1996 - 1999	9	$117,100.00	501c(3) Health & Welfare
United Federation Inc. New York, NY	1996 - 1999	5	$86,700.00	501c(3) Community
University of America Los Angeles, CA	1996 - 1999	9	$139,050.00	509a(1) Education
West Side Center New York, NY	1996 - 1999	4	$41,975.00	501c(3) Community
		Grand Total (13 items)	$2,242,170.00	

1

Alpha List of Organizations

An alphabetical listing of Organizations that are associated with Requests of any Disposition. The report includes the total amount granted by the Organization and the grant year span.

Alpha List of Organizations

3/22/00

Organization Name	Request Year Span	Number of Requests	Total Granted	Tax Status Type
Adventure Club of Manhattan New York, NY	1996 - 1999	6	$42,100.00	501c(3) Community
American Foundation for Children New York, NY	1996 - 2000	21	$321,825.00	501c(3) Community
Arlington School of Dentistry Los Angeles, CA	1996 - 2000	19	$235,340.00	Education
The Children's Fund Washington, DC	1996 - 2000	21	$197,900.00	501c(3) Health & Welfare
Kids With AIDS Research Center New York, NY	1996 - 1999	7	$263,600.00	501c(3) Health & Welfare
Lower West Side Child Care Center New York, NY	1996 - 1999	5	$119,500.00	501c(3) Health & Welfare
National Institute for Technical Learning Coalition New York, NY	1996 - 1999	6	$246,800.00	501c(3) Education
Ryan School of Medicine Los Angeles, CA	1996 - 2000	14	$635,100.00	501c(3) Education
Shea Dance Company New York, NY	1996 - 2000	10	$37,800.00	501c(3) Arts & Culture
Teen Aid Center New York, NY	1996 - 1999	10	$117,100.00	501c(3) Health & Welfare
United Federation Inc. New York, NY	1996 - 2000	7	$86,700.00	501c(3) Community
University of America Los Angeles, CA	1996 - 1999	10	$139,050.00	509a(1) Education
West Side Center New York, NY	1996 - 1999	6	$41,975.00	501c(3) Community
		Grand Total	$2,484,790.00	

1

Duplicate Organizations (by Name)

This diagnostic report identifies Organizations with the exact same name, and should be run without any selection criteria so that all duplicates will be listed.

Duplicate Organizations (by Name)

4/3/00

Legal Name	Primary Address	Telephone Number Fax Number	Organization ID
EAST SIDE LEARNING CENTER			
East Side Learning Center	14 East 83rd Street Suite 10 New York, NY		23

Requests:	Disposition	Date	Granted	Project Title (Truncated)
5	Approved	3/7/96	$2,500.00	The Support for the "Fall Formal Gala"

Legal Name	Primary Address	Telephone Number Fax Number	Organization ID
East Side Learning Center	14 East 83rd Street Suite 10 New York, NY 10024	(212) 555-3444	6

Requests:	Disposition	Date	Granted	Project Title (Truncated)
37	Approved	6/3/96	$2,000.00	Donation of used computers
54	Approved	12/27/96	$120,000.00	The School to Work Transition Program
119	Declined	3/11/97	$0.00	The sponsorship for the "Fall Formal" event
101	Approved	12/8/97	$10,000.00	The support for general operating expenses
149	Declined	1/19/98	$0.00	The support of the "Fall Festival" Celebration
199	Declined	6/8/98	$0.00	Support for Janet's 50th birthday celebration
209	Declined	6/8/98	$0.00	Toward Early Childhood Development Program
132	Approved	6/9/98	$15,000.00	support for general operating expenses
243	Approved	3/29/99	$4,000.00	Used Computers
303	Pending	2/3/00	$15,750.00	Support for general operating expenses
278	Pending	2/10/00	$0.00	New Books, New Horizons

1

Organization Labels 5160

This report prints mailing labels for Avery's #5160 label template to the Primary Contact of each Organization at the Organization's mailing address. Two versions of this report are available: one sorts the labels by the author's last name and the other by the Organization's postal code.

Mr. Ronald Younge Kids With AIDS Research Center 345 1st Avenue New York, NY 10016	Mr. Lawrence Johnson Longwood State University 1204 Avenue of the Americas Suite 300 New York, NY 10019	Mr. David Moore Lower West Side Child Care Center 118 West 18th Street New York, NY 10014
Ms. Sarah Florentine Model Foundation 612 N. Eyeland Avenue New York, NY 10024	Ms. Joanne Collins The National Children's Project 629 West 58th Street New York, NY 10019	Mr. Oscar B. Syrius National Institute for Technical Learning 612 N. Eyeland Avenue Suite 1009 New York, NY 10019

Organization Labels 5162

This report prints mailing labels for Avery's #5162 label template to the Primary Contact of each Organization at the Organization's mailing address.Two versions of this report are available: one sorts the labels by the author's last name and the other by the Organization's postal code.

Mr. Oscar B. Syrius National Institute for Technical Learning Coalition 612 N. Eyeland Avenue Suite 1009 New York, NY 10019	Mr. Jack K. Ryan Ryan School of Medicine 142 Pennington Ave. Olin Hall Los Angeles, CA 34253
Mr. Johnathan J. Smith Shea Dance Company 400 East 57th Street New York, NY 10018	Ms. Shawna Dawn Sunflower House for Youth in Distress 34 Palmetto Drive San Francisco, CA 98073

Organization Profile Report

The Organization Profile (with Graph) report generates a summary sheet for each Organization that includes the Organization's address, background and both detailed and summary information about its funding history

Variations:

- with Graph

Organization Profile (with Graph)

3/22/00

Sunflower House for Youth in Distress

ADDRESS
Sunflower House for Youth in Distress
34 Palmetto Drive
San Francisco, CA 98073

CONTACT
Shawna Dawn, Executive Director
(4050 767-3450

BACKGROUND

The Sunflower House is a social service agency which has served the Bay area for over 5 years. The center started as a food pantry and soup kitchen but has since devoted more of its resources towards the support and rehabilitation of our homeless children.

The center provides shelter, food and education to teenagers and youths who have made the street their home. Their goal is to re-unite the youths with family members whenever the situation permits it.

Organization Type: Health & Welfare/Agency

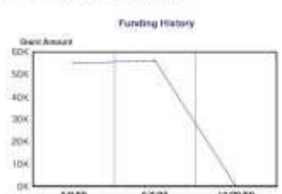
Disposition Date and Disposition	Requested/ Granted	Paid to Date/ Balance	Fund
6/9/98 Approved *General Operating Support*	$55,000.00	$55,000.00 $0.00	Foundation
6/8/99 Approved *General Operating Support*	$56,100.00	$56,100.00 $0.00	Foundation
10/29/99 Declined *To Support the Buldout for a New Gymnasium*	$45,000.00	$0.00 $0.00	Foundation

Sunflower House for Youth in Distress Summary

Span: 1998 - 1999

Total Amount: $ 111,100.00
Total Grants: 2

Amount Declined: $ 45,000.00
Total Declined: 1



1

Simple Organization Listing

A list of all Organizations in GIFTS Online. This report includes the Organization Name, Primary Contact, address, and tax status information. No Request information is included.

Simple Organization Listing

4/6/00

Organization Name Primary Contact	Address	Tax Status Organization Type
Adventure Club of Manhattan Ms. Adrienne Vittori	800 West 103th Street New York, NY 10021	501c(3) Civic & Community
Brooklyn Ballet Ms. Margaret Neff	14 West 108th Street New York, NY 10012	501c(3) Arts & Culture
Computers for Kids Ms. Virginia Appleton	111 E 57th Street Suite 200 New York, NY 10021	501c(3) Civic & Community
East Side Learning Center Ms. Janet Austin	14 East 83rd Street Suite 10 New York, NY 10024	501c(3) Civic & Community
Kids With AIDS Research Center Mr. Ronald Younge	345 1st Avenue New York, NY 10016	501c(3) Health & Human Services
Longwood State University Mr. Lawrence Johnson	1204 Avenue of the Americas Suite 300 New York, NY 10019	509a(1) Education
Lower West Side Child Care Center Mr. David Moore	118 West 18th Street New York, NY 10014	501c(3) Health & Human Services
Model Foundation Ms. Sarah Florentine	612 N. Eyeland Avenue New York, NY 10024	
The National Children's Project Ms. Joanne Collins	629 West 58th Street New York, NY 10019	501c(3) Civic & Community
National Institute for Technical Learning Coalition Mr. Oscar B. Syrius	612 N. Eyeland Avenue Suite 1009 New York, NY 10019	501c(3) Education
Shea Dance Company Mr. Johnathan J. Smith	400 East 57th Street New York, NY 10018	501c(3) Arts & Culture
Teen Aid Center Mr. George Notingham	534 Broadway New York, NY 10016	501c(3) Health & Human Services
United Federation Inc. Mr. Doug Smith	1004 Third Ave. New York, NY 10023	501c(3) Civic & Community
West Side Center Ms. Kathleen Crispen	11 West End Ave. New York, NY 10011	501c(3) Civic & Community

Grand Total
(14 items)

1

Top 20 Organizations by Total Grant Amount

A list of Organizations in GIFTS Online with the 20 highest cumulative Grant Amounts. As with all reports, keep in mind that your search criteria also determine which Organizations—and which grants—are included in the report.

Top 20 Organizations by Total Grant Amount

4/6/00

Total Amount Awarded	Organization Name City, State	Grant Year Span	Number of Grants	Most Recent Award Date	Most Recent Award Amount
$ 1,100,900.00	**Ryan School of Medicine** Los Angeles, CA	1996 - 2000	13	4/4/00	$900.00
$ 692,480.00	**The National Children's Project** New York, NY	1996 - 2000	7	3/15/00	$28,560.00
$ 663,900.00	**Hiller State University** Boston, MA	1996 - 2000	18	4/4/00	$200.00
$ 611,100.00	**Sunflower House for Youth in Distress** San Francisco, CA	1996 - 1999	3	6/8/99	$56,100.00
$ 498,600.00	**Kids With AIDS Research Center** New York, NY	1996 - 1999	5	12/21/99	$3,000.00
$ 481,220.00	**Arlington School of Dentistry** Los Angeles, CA	1996 - 2000	17	3/15/00	$50,000.00
$ 421,800.00	**National Institute for Technical Learning Coalition** New York, NY	1996 - 1999	5	12/21/99	$50,000.00
$ 392,100.00	**Abuse Prevention and Rehabilitation Fund** Washington, DC	1996 - 2000	11	3/15/00	$66,300.00
$ 386,625.00	**American Foundation for Children** New York, NY	1996 - 2000	19	4/4/00	$2,000.00
$ 228,100.00	**The Children's Fund** Washington, DC	1996 - 2000	18	2/17/00	$26,250.00
$ 192,200.00	**Brooklyn Ballet** New York, NY	1996 - 2000	24	4/4/00	$800.00
$ 168,450.00	**Longwood State University** New York, NY	1996 - 1999	10	6/30/99	$47,250.00
$ 151,000.00	**East Side Learning Center** New York, NY	1996 - 1999	5	3/29/99	$4,000.00
$ 139,050.00	**University of America** Los Angeles, CA	1996 - 1999	9	12/7/99	$100,000.00
$ 138,300.00	**Computers for Kids** New York, NY	1996 - 2000	14	4/4/00	$100.00

1

Top 20 Organizations by Total Number of Grants

A list of Organizations in GIFTS Online with the 20 highest number of Approved Requests. As with all reports, keep in mind that your selection criteria also determine which Organizations—and which grants—are included in the report.

Top 20 Organizations by Number of Grants

10/19/2012

Number of Grants	Organization Name City, State	Total Amount Awarded	Grant Year Span	Most Recent Award Date	Most Recent Award Amount
58	**ghdhdfhBrooks Ballet Test** New York, NY	$468,388.00	1996 - 2012	2/13/2012	$1,500.00
48	**American Foundation for Children** New York, NY	$1,114,110.00	1996 - 2007	6/29/2007	$200.00
38	**Girl Scouts of America** Youngstown, CA	$201,253.00	1996 - 2008	2/26/2008	$2,500.00
35	**Hiller State University** Boston, MA	$860,950.00	1996 - 2006	8/18/2006	$10,000.00
31	**Shea Dance Company** New York, NY	$151,710.00	1996 - 2008	6/30/2008	$25,000.00
30	**The Children's Fund** Washington, DC	$923,250.00	1996 - 2006	3/16/2006	$100,000.00
29	**University of America** Los Angeles, CA	$915,800.00	1996 - 2007	3/31/2007	$3,400.00
28	**Ryan School of Medicine** Bronx, CA	$867,201.00	1996 - 2007	3/31/2007	$1,800.00
26	**Computers for Kids** New York, NY	$212,400.00	1996 - 2006	6/13/2006	$4,000.00
24	**Arlington School of Dentistry** Los Angeles, CA	$469,540.00	1996 - 2007	5/9/2007	$150,000.00
23	**Teen Aid Center** Newark, NJ	$222,250.00	1996 - 2011	9/6/2011	$1,000.00
22	**East Side Learning Center** New York, NY	$331,730.00	1996 - 2007	12/17/2007	$5,000.00
18	**California Children's Theatre** San Francisco, CA	$172,018.00	1996 - 2004	2/27/2004	$5,000.00
16	**Longwood State University** New York, NY	$227,204.00	1996 - 2003	6/30/2003	$954.00
15	**Sunflower House for Youth in Distress** San Francisco, CA	$1,022,730.00	1996 - 2008	6/30/2008	$100,000.00
13	**United Federation Inc.** New York, NY	$1,274,500.00	1996 - 2007	12/5/2007	$1,200.00

About Payment / Financial Reports

This chapter describes the standard Payments and Financial reports included with GIFTS Online.

Cash Flow Analysis

A listing of Payments due for each Request that has Payments due, including the Organization name, total amount granted, and the remaining balance at the end of six months.

Variations:

- by Program Area

Fixed Criteria:

Payments for Requests that have any outstanding Payments.

Cash Flow Analysis

1/6/2012

Payee Organization Project Title, Grant Amount	Sched. Before January	Due January	Due February	Due March	Due April	Due May	Due June	Sched. after June
Abuse Prevention and Rehabilitation Fund *Children Refuge from Abusive Homes* $350,000.00	$175,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Abuse Prevention and Rehabilitation Fund *Training Program for Social Workers* $20,000.00	$10,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Children International *Housing Program for Impoverished Families* $770,000.00	$385,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Children International *Adopt-A-Dream program support* $10,000.00	$10,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
East Side Learning Center *Donation of 10 Used Computers* $5,000.00	$5,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Fundación Brasil de Niños *test* *mutli* *line* *this is a long project title* $599.49	$99.49	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Girl Scouts of America *Donation of Used Computers* $2,500.00	$2,500.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

1

Check Request Report by Fund

A list of Scheduled Payments, including the legal name and address of the payee Organization, for the purpose of providing information for cutting checks. Grouped by Payment Fund. If no legal name is on file for the payee, its Organization Name is shown.

Fixed Criteria:

Payments with a Status of Scheduled.

Check Requests Report - By Fund

Schedule Date is this month

4/1/00

Check Payable to Comments	Request ID Ref No.	Grant Amount	Payment Number	Schedule Date	Payment Amount
<u>Corporation</u>					
Brooklyn Ballet 14 West 108th Street New York, NY 10012	301	$5,250.00	1	4/5/00	$5,250.00
California Children's Theatre 2234 South St. Suite 913 San Francisco, CA 98078	306	$10,609.00	1	4/14/00	$10,609.00
				Total Corporation (2 items)	$15,859.00
<u>Foundation</u>					
Abuse Prevention and Rehabilitation Fund 440 Third Street Washington, DC 20001	308	$66,300.00	1	4/14/00	$22,100.00
Arlington School of Dentistry 122 South Ave. Arlington Hall Los Angeles, CA 34253	275	$50,000.00	1	4/12/00	$12,500.00
National Institute for Technical Learning Coalition 612 N. Eyeland Avenue Suite 1009 New York, NY 10019	294	$50,000.00	1	4/5/00	$20,000.00
				Total Foundation (3 items)	$54,600.00

Contingent Payments

A listing of Payments with a Status of Contingent, grouped by the Staff person assigned to the contingency or the contingency date. The type of contingency, due date, and notes are included.

Variations:

- by Date
- by Staff

Fixed Criteria:

Payments with a Status of Contingent.

Contingent Payments - by Staff

4/3/00

Payee Organization Project Title	Schedule Date	Payment Amount	Sch. Date Notes	Requirement Information Type
Colette Rogers				
Computers for Kids *For the Purchase of Graphics Software and Scanner Equipment*	1/7/00	$12,500.00	1/7/00	Progress Report
National Institute for Technical Learning Coalition *Y2K Educational Outreach*	4/5/00	$20,000.00	4/5/00 *NITLC is required to Raise $250,000 in order for payments to be released*	Challenge
	Total Colette Rogers (2 items)	$32,500.00		
Kelly Goldberg				
Ryan School of Medicine *Charles S. Godin Scholarship program*	5/19/00	$50,000.00	5/19/00 *Progress report must include student GPA. Any Student with a GPA under 2.5 must be sent probation letter*	Progress Report
	Total Kelly Goldberg (1 item)	$50,000.00		
Lee Williamson				
Arlington School of Dentistry *The Support for the Restoration of the School of Dentistry Library*	6/7/00	$25,000.00	6/7/00	Progress Report
	Total Lee Williamson (1 item)	$25,000.00		
	Grand Total (4 items)	$107,500.00		

1

Current Year Paid and Future Commitments

Comprehensive report including the Organization's legal name, the total amount paid on the grant to date, future commitments by year for the next three years, and the remaining balance. If no legal name is on file for an Organization, it's Organization Name is shown.

Variations:

- by Program Area

Fixed Criteria:

Approved Requests with a balance or a Payment Paid within the current Fiscal Year.

Current Year Paid and Future Commitments

5/15/00

Organization Grant Total and Term (in Months) Request ID/Ref. Num.	Grant Total	Paid Prior Years	Paid YTD	Scheduled Payments 2000	2001	2002	Remaining Balance
1999							
Arlington School of Dentistry Los Angeles, CA Awarded $50,000 over 24 months *The Support for the Restoration of the School of Dentistry Library* 237	$50,000.00	$25,000.00	$0.00	$25,000.00	$0.00	$0.00	$0.00
Total 1999 (1 item)	$50,000.00	$25,000.00	$0.00	$25,000.00	$0.00	$0.00	$0.00
2000							
American Foundation for Children New York, NY Awarded $52,500 over 12 months *Endowment Campaign* 300	$52,500.00	$0.00	$25,000.00	$27,500.00	$0.00	$0.00	$0.00
Arlington School of Dentistry Los Angeles, CA Awarded $50,000 over 12 months *Funding for new instruments* 275	$50,000.00	$0.00	$0.00	$12,500.00	$12,500.00	$12,500.00	$12,500.00
Total 2000 (2 items)	$102,500.00	$0.00	$25,000.00	$40,000.00	$12,500.00	$12,500.00	$12,500.00
Grand Total (3 items)	$152,500.00	$25,000.00	$25,000.00	$65,000.00	$12,500.00	$12,500.00	$12,500.00

1

Deferred Payments

A listing of Payments with a Status of Hold, including the payee Organization, Grant Amount, Request ID and/or Reference Number, Payment Amount, and any notes for the Payment.

Fixed Criteria:

Payments with a Status of Hold.

Deferred Payments

4/1/00

Due Date	Payee Organization	Grant Amount	Request ID Ref. No.	Payment Amount	Notes
2/3/00	**Ryan School of Medicine**	$154,500.00	307	$54,500.00	Payment on hold due to recent change in personnel
4/5/00	**Brooklyn Ballet**	$5,250.00	301	$5,250.00	Payment on hold to prevent movement to A/P Module. Await Approval from Mr. Humphries.
4/14/00	**Abuse Prevention and Rehabilitation Fund**	$66,300.00	308	$22,100.00	Per Colette
5/5/00	**National Institute for Technical Learning Coalition**	$50,000.00	294	$30,000.00	Payment is on Hold until NITLC meets Challenge
			Grand Total (4 items)	$111,850.00	

1

Five Year Payment History Report

A summary report per Organization, showing the total amount paid to that Organization in each of the last five years, including the current year.

Variations:

- by Program Area

Fixed Criteria:

Payments with a Status of Paid, Refund, or Void.

Five Year Payment History Report

4/3/00

Payee Organization	Paid 1996	Paid 1997	Paid 1998	Paid 1999	Paid 2000
Arlington School of Dentistry	$45,800.00	$86,200.00	$41,100.00	$33,120.00	$0.00
Brooklyn Ballet	$18,000.00	$113,900.00	$13,800.00	$39,250.00	$1,000.00
California Children's Theatre	$12,500.00	$10,000.00	$93,300.00	$4,500.00	$0.00
Hiller State University	$34,800.00	$35,800.00	$36,000.00	$57,100.00	$500,000.00
Longwood State University	$28,700.00	$32,000.00	$49,500.00	$11,000.00	$0.00
National Institute for Technical Learning Coalition	$15,000.00	$56,800.00	$62,500.00	$62,500.00	$0.00
Ryan School of Medicine	$35,500.00	$125,000.00	$158,200.00	$160,500.00	$1,400.00
Shea Dance Company	$2,400.00	$7,000.00	$10,900.00	$12,250.00	$5,250.00
University of America	$13,000.00	$10,900.00	$5,000.00	$10,150.00	$100,000.00
Grand Total	$205,700.00	$477,600.00	$470,300.00	$390,370.00	$607,650.00

1

Grant Amendment Report

Provides detailed information on all of the amendments for each grant, and includes both the Original Grant Amount and the Current Grant Amount.

Fixed Criteria:

Grants that have been amended.

Grant Amendment Report
5/15/00

Organization Name Project Title, Request ID	Grant Amount Original	Current	Start Date End Date	Done Date Done User	Amendment Amount	Amendment Notes
Abuse Prevention and Rehabilitation Fund *Children's Retreat*	$10,000.00	$12,000.00	12/31/99-12/31/00			
				3/24/00 ADMIN	$2,000.00	Grant Amount was increased by 2,000 (from 10,000 to 12,000).
Computers for Kids *For the Purchase of Graphics Software and Scanner Equipment*	$25,000.00	$25,000.00	3/10/99-3/10/00			
				9/7/99 CR	$0.00	Grant Start date changed from '12/7/1999' to '9/7/1999'. Grant End date changed from '12/7/2000' to '9/7/2000'.
				9/21/99 CR	$0.00	Grant Start date changed from '9/7/1999' to '3/10/1999'. Grant End date changed from '9/7/2000' to '3/10/2000'.
United Federation Inc. *The Support for Anti-drug Media Campaign*	$12,500.00	$25,500.00	3/20/96-3/20/97			
				10/21/96 ADMIN	$13,000.00	Grant Amount was increased by $13,000.00 (from $12,500.00 to $25,500.00). The campaign has expanded nationwide and the project required additional funding. Approved by Co-Chairperson.
Grand Total (3 items)	$47,500.00	$62,500.00			$15,000.00	

1

Grant Commitment Schedule

A summary of Payment information by Request, for those Requests with any outstanding Payments. Information shown includes the grant amount, the amount paid in the current year and prior years, Payments scheduled in the next three years, and any remaining balance.

Fixed Criteria:

Requests with an unpaid balance.

Grant Commitments Schedule

4/6/00

Organization Request ID/Ref. Num.	Grant Total	Paid Prior Years	Paid YTD	Scheduled Payments 2000	 2001	 2002	Remaining Balance
1999							
Arlington School of Dentistry 237	$50,000.00	$25,000.00	$0.00	$25,000.00	$0.00	$0.00	$0.00
National Institute for Technical Learning Coalition 294	$50,000.00	$0.00	$0.00	$50,000.00	$0.00	$0.00	$0.00
Total 1999 (2 items)	$100,000.00	$25,000.00	$0.00	$75,000.00	$0.00	$0.00	$0.00
2000							
American Foundation for Children 300	$52,500.00	$0.00	$25,000.00	$27,500.00	$0.00	$0.00	$0.00
Arlington School of Dentistry 275	$50,000.00	$0.00	$0.00	$12,500.00	$12,500.00	$12,500.00	$12,500.00
The National Children's Project 310	$28,560.00	$0.00	$0.00	$28,560.00	$0.00	$0.00	$0.00
Total 2000 (3 items)	$131,060.00	$0.00	$25,000.00	$68,560.00	$12,500.00	$12,500.00	$12,500.00
Grand Total (5 items)	$231,060.00	$25,000.00	$25,000.00	$143,560.00	$12,500.00	$12,500.00	$12,500.00

1

Grant Commitments Schedule (6 Years)

Shows Payments scheduled for the next six years, including the total of any Payments remaining after that time.

Variations:

by Program Area

Fixed Criteria:

Requests with an unpaid balance.

Grant Commitment Schedule (6 years)
4/6/00

Organization Grant Amount	Total Paid	Scheduled Payments 2000	2001	2002	2003	2004	2005	Remaining Balance
American Foundation for Children $ 52,500.00 *Endowment Campaign*	$25,000.00	$27,500.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Arlington School of Dentistry $ 50,000.00 *The Support for the Restoration of the School of Dentistry Library*	$25,000.00	$25,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Arlington School of Dentistry $ 50,000.00 *Funding for new instruments*	$0.00	$12,500.00	$12,500.00	$12,500.00	$12,500.00	$0.00	$0.00	$0.00
The National Children's Project $ 28,560.00 *To help sponsor "The Children of the World" Conference*	$0.00	$28,560.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
National Institute for Technical Learning Coalition $ 50,000.00 *Y2K Educational Outreach*	$0.00	$50,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Grand Total (5 items)	$50,000.00	$143,560.00	$12,500.00	$12,500.00	$12,500.00	$0.00	$0.00	$0.00

1

Grant Confirmation by Staff

A list of Payments with a Status of Scheduled, Contingent or Hold, grouped by staff member, and including information on any requirements due for the current year, on the specific Payment or the grant in general.

Fixed Criteria:

Payments with a Status of Scheduled, Contingent or Hold, and Requirements with a Scheduled Date in the current year.

Grant Payment Confirmation by Staff

4/3/00

Payee Organization / Project Title	Approved Amount	Project Start	Project End	Payment Amount	Schedule Date	Payment Status
Colette Rogers						
Arlington School of Dentistry / *Funding for new instruments*	$50,000.00	6/30/00	6/30/01	$12,500.00	4/12/00	Scheduled

Requirements Due Schedule

Type	Due Date	Date Rec'd	Notes
Progress Report	12/29/00		

Payee Organization / Project Title	Approved Amount	Project Start	Project End	Payment Amount	Schedule Date	Payment Status
California Children's Theatre / *The "2000 Career Fair"*	$10,609.00	3/15/00	3/15/01	$10,609.00	4/14/00	Scheduled

Requirements Due Schedule

Type	Due Date	Date Rec'd	Notes
Progress Report	9/15/00		

Payee Organization / Project Title	Approved Amount	Project Start	Project End	Payment Amount	Schedule Date	Payment Status
National Institute for Technical Learning Coalition / *Y2K Educational Outreach*	$50,000.00	12/21/99	12/21/00	$20,000.00	4/5/00	Contingent

Requirements Due Schedule

Type	Due Date	Date Rec'd	Notes
Challenge	4/5/00		NITLC is required to Raise $250,000 in order for payments to be released

Total Colette Rogers (3 items) $43,109.00

Payee Organization / Project Title	Approved Amount	Project Start	Project End	Payment Amount	Schedule Date	Payment Status
Kelly Goldberg						
Ryan School of Medicine / *Charles S. Godin Scholarship program*	$154,500.00	3/24/00	3/24/01	$29,500.00	4/19/00	Scheduled

Requirements Due Schedule

Type	Due Date	Date Rec'd	Notes
Site Visit	2/2/00	2/2/00	Completed Successfully
Progress Report	5/19/00		Progress report must include student GPA. Any Student with a GPA under 2.5 must be sent probation letter
Progress Report	9/25/00		

1

Grant Payment Summary

A comprehensive summary of Payment information for Approved Requests, including the total number of Payments, the amount granted, the amount scheduled (including held and contingent Payments), the amount paid, and any unscheduled balance. It also includes the next Payment's Schedule Date and the amount of the next Payment due.

Variations:

- by Payee

NOTE: The "by Payee" variation of this report lists grants by the payee Organization instead of the grantee. Grants with Payments to more than one payee are listed more than once (once per each payee), so the Grant Amount and Balance Amount totals are not included.

Fixed Criteria:

Scheduled, Contingent and Hold Payments for Approved Requests.

Grant Payment Summary
5/23/00

Grantee Organization Project Title, Payee(s)	Request ID Ref. No.	Granted Amount	# of Pmts	Payments Paid	Payments Remaining	Balance Unscheduled	Next Pmt Sch. Date	Next Pmt Amount
Kids With AIDS Research Center *Camp Hope Summer Program*	164	$235,000.00	2	$235,000.00	$0.00	$0.00		
Kids With AIDS Research Center *2nd Quarter Volunteer Gifts, 1998*	188	$300.00	1	$300.00	$0.00	$0.00		
Kids With AIDS Research Center *4th Quarter Volunteer Gifts, 1998*	194	$300.00	1	$300.00	$0.00	$0.00		
Teen Aid Center *The support of the "When Saying No Doesn't Work" project*	104	$23,500.00	1	$23,500.00	$0.00	$0.00		
Teen Aid Center *4th Quarter Volunteer Gifts, 1997*	111	$200.00	1	$200.00	$0.00	$0.00		
Teen Aid Center *The Aids Awareness Project*	146	$35,000.00	1	$35,000.00	$0.00	$0.00		
Teen Aid Center *1st Quarter Volunteer Gifts, 1999*	261	$300.00	1	$300.00	$0.00	$0.00		
Teen Aid Center *General Operating Support*	274	$35,700.00	2	$0.00	$35,700.00	$0.00	5/30/00	$15,700.00
Teen Aid Center *3rd Quarter Volunteer Gifts, 1997*	97	$200.00	1	$200.00	$0.00	$0.00		
	Grand Total (9 items)	$330,500.00		$294,800.00	$35,700.00	$0.00		

1

Grant Planning Worksheet

For year-end planning, this report displays in worksheet format the giving for the current year, any commitments for the next year and a space to write in the proposed amount for next year, per organization.

Variations:

- by Grant Fund
- by Program Area

Fixed Criteria:

Organizations with Requests Approved in the current year, Payments Paid in the current year or Payments Scheduled for the coming year.

Grant Planning Worksheet
4/6/00

Grantee Organization City, State	Granted 2000	Paid 2000	Scheduled 2001	Plan 2001
Abuse Prevention and Rehabilitation Fund Washington, DC *Children's Retreat*	$0.00	$10,000.00	$0.00	
American Foundation for Children New York, NY *Endowment Campaign*	$52,500.00	$25,000.00	$0.00	
Arlington School of Dentistry Los Angeles, CA *Funding for new instruments*	$50,000.00	$0.00	$12,500.00	
Brooklyn Ballet New York, NY *Snowflake Ball*	$0.00	$1,000.00	$0.00	
Brooklyn Ballet New York, NY *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	$5,250.00	$0.00	$0.00	
California Children's Theatre San Francisco, CA *The "2000 Career Fair"*	$10,609.00	$0.00	$0.00	
The Children's Fund Washington, DC *"The 1999 Annual Conference"*	$26,250.00	$26,250.00	$0.00	
Computers for Kids New York, NY *The sponsorship of their Annual Benefit Dinner*	$15,300.00	$0.00	$0.00	

1

In-Kind Payments Made

A report of paid payments including fields specific to in-kind payments: fair market value, tax value, book value and in-kind notes. Note that the report does not automatically exclude Payments without in-kind giving information. You can use search criteria, such as the Payment Type or Support Type, to restrict the report to your in-kind Payments.

Variations:

- by Payment Fund Donor
- by Program Area

Fixed Criteria:

Payments with a Status of Paid or Void.

In-Kind Payments Made

Type is 'In-kind'
4/6/00

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Fair Market Value	Tax Value	Book Value	In-Kind Description
American Foundation for Children *The donation of computers* $ 300.00	147	6/9/98	$300.00	$0.00	$200.00	1 - 386 computer
Brooklyn Ballet *Donation of Electronic Goods* $ 7,000.00	245	6/11/99	$7,000.00	$0.00	$4,000.00	
East Side Learning Center *Donation of used computers* $ 2,000.00	37	6/3/96	$2,000.00	$0.00	$1,500.00	3 pentium computers with Monitors and One HP laserjet II Printer
East Side Learning Center *Used Computers* $ 4,000.00	243	3/26/99	$4,000.00	$1,000.00	$2,400.00	4 computers with monitors that were 3 Years old. Pentium 60
Teen Aid Center *The donation of office furniture for a building expansion project* $ 1,200.00	78	6/27/97	$1,200.00	$240.00	$1,000.00	3 Chairs, 1 desk and a computer cart. 80% depreciated.
West Side Center *The donation of new computers in their expanded facility* $ 25,000.00	263	12/22/99	$25,000.00	$10,000.00	$12,000.00	
		Grand Total (6 items)	$39,500.00	$11,240.00	$21,100.00	

1

Payment Reconciliation Report

Lists Payments by Status and then by Check Number. Includes the payee's legal name, the Grant Amount, Payment Fund, Payment Type, and Paid Date. If no legal name is on file for the payee, it's Organization Name is shown.

Fixed Criteria:

Payments with a Status of Paid, Refund, or Void

Payments Reconciliation Report

5/23/00

Check Number	Check Payable to:	Grant Amount	Payment Date	Payment Amount	Payment Fund / *Payment Type*	Request ID Ref. No.
Paid						
1403	Lower West Side Child Care Center	$50,000.00	5/15/00	$50,000.00	Foundation *Charitable Contribution*	293
1404	University of America	$100,000.00	5/15/00	$100,000.00	Foundation *Charitable Contribution*	296
1405	Adventure Club of Manhattan	$10,000.00	5/15/00	$10,000.00	Foundation *Charitable Contribution*	298
1406	United Federation Inc.	$10,039.21	5/15/00	$10,039.21	*Charitable Contribution*	295
1407	The National Children's Project	$250,000.00	5/15/00	$250,000.00	Foundation *Charitable Contribution*	297
2346	West Side Center	$25,000.00	12/22/99	$25,000.00	Foundation *Charitable Contribution*	263
2347	Hiller State University	$7,500.00	12/22/99	$7,500.00		288
2348	Shea Dance Company	$7,000.00	12/22/99	$7,000.00		285
2349	Brooklyn Ballet	$2,000.00	12/22/99	$2,000.00		286
2350	California Children's Theatre	$4,500.00	12/22/99	$4,500.00		287
			Total Paid (10 items)	$466,039.21		
Void						
2345	Ryan School of Medicine	$1,400.00	12/22/99	$0.00		284
			Total Void	$0.00		

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Payment Status Summary

A summary of all Payments entered in GIFTS Online, totaled by their respective Payment Status. Includes columns for the total amount scheduled, and then breaks this out by Paid, Refund, Canceled, Voided, Scheduled, Hold and Contingent Payments.

Variations:

- by Fiscal Year
- by Payment Fund
- by Program Area 1

Payment Status Summary - by Program Area

5/23/00

Program Area	Total Payment Amount	Paid Payments	Refunds	Cancelled Payments	Voided Payments	Payments Oustanding	Payments on Hold	Contingent Payments	Total Paid	Total Outstanding
No Code Specified	26,600.00	26,600.00	0.00	0.00	0.00	0.00	0.00	0.00	26,600.00	0.00
Arts and Culture	250,300.00	250,300.00	0.00	0.00	0.00	0.00	0.00	0.00	250,300.00	0.00
Civic and Community	1,278,342.21	1,278,342.21	0.00	0.00	-12,500.00	0.00	0.00	12,500.00	1,278,342.21	12,500.00
Education	2,141,620.00	2,066,620.00	0.00	0.00	0.00	50,000.00	0.00	25,000.00	2,066,620.00	75,000.00
Health and Human Services	933,760.00	898,060.00	0.00	0.00	0.00	35,700.00	0.00	0.00	898,060.00	35,700.00
Grand Total	4,630,622.21	4,519,922.21	0.00	0.00	-12,500.00	85,700.00	0.00	37,500.00	4,519,922.21	123,200.00

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Payments Due Schedule

A listing of outstanding Payments, including the Grant Amount, Project Description, Reference Number, Schedule Date, Payment Amount, and the Payment Fund. If the Payment Status is Contingent or Hold, a separate column displays this information along with any Payment notes.

Variations:

- by Grantee Organization
- by Month
- by Payment Fund
- by Payment Support Type
- by Program Area 1
- by Program Area 1 and 2

Two versions of this report include Payment local/other currency amounts, for those engaged in international grant-giving:

- Payments Due Schedule, including Other Currencies
- Payments Due Schedule - by Country, including Other Currencies

Fixed Criteria:

Payments with a Status of Scheduled, Hold, or Contingent. (Includes Payments for Approved Requests only.)

Payments Due Schedule, by Program Area 1

Schedule Date is this month
4/3/00

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount	Notes
Arts and Culture				
Brooklyn Ballet *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event* $ 5,250.00	301	4/5/00	$5,250.00	*Hold* Payment on hold to prevent movement to A/P Module. Await Approval from Mr. Humphries.
California Children's Theatre *The "2000 Career Fair"* $ 10,609.00	306	4/14/00	$10,609.00	
		Total Arts and Culture (2 items)	$15,859.00	
Education				
Arlington School of Dentistry *Funding for new instruments* $ 50,000.00	275	4/12/00	$12,500.00	
National Institute for Technical Learning Coalition *Y2K Educational Outreach* $ 50,000.00	294	4/5/00	$20,000.00	*Contingent*
Ryan School of Medicine *Charles S. Godin Scholarship program* $ 154,500.00	307	4/19/00	$29,500.00	
		Total Education (3 items)	$62,000.00	
		Grand Total (5 items)	$77,859.00	

Payments Made

A listing of Payments that have been marked as Paid; includes the Payment Date and Check Number, if available.

Variations:

- by Month
- by Grantee Organization
- by Payment Fund
- by Payment Support Type
- by Program Area 1
- by Program Area 1 and 2
- by State

Two versions of this report include Payment local/other currency amounts, for those engaged in international grant-giving:

- Payments Made, including Other Currencies
- Payments Made - by Country, including Other Currencies

Fixed Criteria:

Payments with a Status of Paid, Refund, or Void.

Payments Made - By Month

Fund/Donor is 'Corporation' AND Paid Date was in last quarter

4/6/00

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
<u>January, 2000</u>					
Brooklyn Ballet *Snowflake Ball* $ 1,000.00	290	1/31/00	$1,000.00	Corporation	1236
		Total January, 2000 (1 item)	$1,000.00		
<u>February, 2000</u>					
The Children's Fund *"The 1999 Annual Conference"* $ 26,250.00	302	2/28/00	$26,250.00	Corporation	1244
		Total February, 2000 (1 item)	$26,250.00		
<u>March, 2000</u>					
Teen Aid Center *Counseling program for school violence victims* $ 3,500.00	312	3/22/00	$3,500.00	Corporation	1266
United Federation Inc. *Parks and Rec of Rockland County* $ 10,000.00	295	3/16/00	$10,000.00	Corporation	1256
		Total March, 2000 (2 items)	$13,500.00		
		Grand Total	$40,750.00		

Payments Made - Charitable vs. Non Charitable Deductions

If your organization tracks "quid pro quo" information for Payments, this report lists the deductible and non-deductible amounts entered for each Payment. Also includes the Check Number and Payment Date.

Fixed Criteria:

Payments with a Status of Paid or Void.

Payments Made - Charitable Vs. Non Charitable Deduction
Dinners & Events
4/3/00

Payee Organization Project Title	Paid Date Check #	Deduct Amount	Non Deduct Amount	Payment Amount
Arlington School of Dentistry *To sponsor the "Annual Leadership Award Dinner"*	1/19/98 0012411	$3,000.00	$1,000.00	$4,000.00
Brooklyn Ballet *The sponsorship of a table for the "Flights of Fantasy" Gala*	1/19/98 0012385	$3,500.00	$1,500.00	$5,000.00
California Children's Theatre *The Annual "Leadership Awards" Dinner*	3/21/96 0010123	$2,000.00	$500.00	$2,500.00
The Children's Fund *The sponsorship of the "98 Annual Conference"*	1/19/98 0012387	$17,000.00	$8,000.00	$25,000.00
East Side Learning Center *The Support for the "Fall Formal Gala"*	3/21/96 0010131	$2,000.00	$500.00	$2,500.00
Shea Dance Company *The Sponsorship for "Gala 96- 14th Annual Fundraiser"*	3/21/96 0010166	$1,900.00	$500.00	$2,400.00
Shea Dance Company *The 1999 Annual Banquet*	6/11/99 00110	$4,000.00	$1,250.00	$5,250.00
United Federation Inc. *The Annual Benefit*	3/21/96 0010169	$900.00	$300.00	$1,200.00
University of America *To sponsor a table for the 1998 "Citizen of the Year Dinner"*	1/19/98 0012419	$4,000.00	$1,000.00	$5,000.00
	Grand Total (9 items)	$38,300.00	$14,550.00	$52,850.00

Payments Made - OBRA

This report shows whether or not a receipt is required on each Payment, and the Schedule Date and Done Date of the receipt. The full name and address of the payee Contact is included for easy follow-up. The report also includes the deductible and non-deductible amount for each Payment and the Organization's tax status.

Fixed Criteria:

Payments with a Status of Paid or Void, and "Receipt Required" Activities associated with these Payments.

Payments Made - OBRA Report

4/3/00

Payee Organization Request Primary Contact Project Title	Staff	Amount Check # Paid Date	Deduct Amount	Non Deduct Amount	Tax Status	Receipt Sched. Date	Receipt Rec. Date
Arlington School of Dentistry Rayce, Anita 122 South Ave. Arlington Hall Los Angeles, CA 34253 *To sponsor the "Annual Leadership Award Dinner"*	Colette Rogers	$4,000.00 0012411 9/8/98	$3,000.00	$1,000.00		10/8/98	11/12/98
Arlington School of Dentistry Rayce, Anita 122 South Ave. Arlington Hall Los Angeles, CA 34253 *To sponsor the "Annual Leadership Award Dinner"*	Kelly Goldberg	$4,120.00 7/7/99	$4,040.00	$80.00		7/7/99	7/21/99
Brooklyn Ballet Neff, Margaret 14 West 108th Street New York, NY 10012 *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	Lee Williamson	$5,250.00 00113 6/11/99	$5,000.00	$250.00	501c(3)	6/11/99	6/9/99
Shea Dance Company Smith, Johnathan J. 400 East 57th Street New York, NY 10018 *The 1999 Annual Banquet*	Lee Williamson	$5,250.00 00110 6/11/99	$4,000.00	$1,250.00	501c(3)	6/11/99	6/11/99
	Grand Total (4 items)	$18,620.00	$16,040.00	$2,580.00			

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Schedule of Appropriations and Payments

This version of the Schedule of Appropriations and Payments report is also sometimes called the IRS 990 report. The previous version of the report is still available.

This current version of the Schedule of Appropriations and Payments report offers the following improvements and changes:

- The report runs much faster now.

  Previously, clients with large databases often found that the Schedule of Appropriations and Payments report could take several hours to run. This newer report significantly reduces report run time.

- Calculation methods have been changed to provide more accurate reporting.

  If you are going to be running or reading the new Schedule of Appropriations and Payments report, you need to understand the calculations that went into the data within it. For details, please see "About the Report Data" below.

- The report uses a new report control, ActiveReports.

  Other standard reports are generated using Crystal Reports. This new report uses a new reporting control, ActiveReports from Data Dynamics, Ltd. This reporting tool is also used for ad hoc reporting.

About the Report Data

In order to understand the data found in the new Schedule of Appropriations and Payments report, you should understand the calculations used in each column of the report:

Column	Contents
Recipient and/or Purpose	This column draws from a number of GIFTS Online fields to provide data about the grantee Organization and the Request for which Payments were made: • First is the Legal Name of the grantee Organization. (If the Legal Name is blank, the Organization Name is used.) This is followed by the grantee Organization's Address, City, State, Zip code, and Country. • Information about the grant follows: the approved Request's Project Title, Grant Amount, and Fiscal Year.
Tax Status	The Tax Status of the grantee Organization.
Beginning Balance	This column shows the unpaid balance of the approved Request at the beginning of the "current" fiscal year (based on the "as of" date). It is calculated as follows: • If the Request was approved during the current fiscal year, the beginning balance is zero ($0.00). (The grant amount will be included in the next column, Newly Allocated.) • If the Request was approved before the "current" fiscal year, the beginning

	balance is the original grant amount plus the amount of any grant amendments made before the current fiscal year minus the total amount of any Payments made before the current fiscal year. (The total amount of any grant amendments made during the current fiscal year will be included in the Amended column (see below).)
Newly Allocated	If the Request was approved during the current fiscal year, the original grant amount is shown here. Otherwise, the Newly Allocated amount is zero ($0.00).
Amended	The sum of the amounts of all grant amendments made during the current fiscal year. If the Request had no grant amendments made during the current fiscal year, the Amended amount is zero ($0.00).
Amount Paid	The sum of the amounts of all paid, refunded, and voided Payments that meet the following criteria: • The Fiscal Year of the Payment is the current fiscal year. • The Payment Date falls before the report's "as of" date.
Ending Balance	The Beginning Balance plus the Newly Allocated amount plus the Amended column amount minus the Amount Paid.
Population Served	The Population Served indicated in the Request Coding Sheet. If no Population Served code is included, the column is blank. **NOTE:** This column appears only if you run the Schedule of Appropriations and Payments Showing Population Served version of the report.

Running the Report

When you run this report, setting the "as of" date is key to reporting data correctly. When you set "as of" date to a date other than the current date, your report is affected in the following ways:

- When the report selects information relevant in the "current year," the current year is based on the "as of" date, not the current date.
- To be included in the report, the Request must have been approved on or before the "as of" date during the "current" fiscal year.
- For the report to consider a Payment paid (rather than scheduled), the Payment Date must be on or before the "as of" date.
- Report calculations that consider void and refunded Payments exclude these voids and refunds if their Payment Dates are after the "as of" date.

This report has been designed to recreate your data based on the "as of" date, but some data—once it is altered in GIFTS Online—cannot be restored to its past condition; therefore, the results of reports run with the "as of" date may not completely represent a version of the financial data as of that date. The following data cannot be accurately recovered based on "as of" date.

- Payments that have been deleted are not reflected.
- Payments for which the amount changed between the "as of" date and the current date report the current amount, not the previous amount.

Which Grants Are Included in the Report?

Only Requests that were approved on or before the "as of" are included in the report. In addition, those Requests are included only if they also meet at least one of the following criteria:

- The approval date (i.e., the Disposition Date of the approved Request) falls within the current year. (Note that the "current year" is the fiscal year within which the "as of" date falls.)
- The Request was amended in the current year. (That is, it is associated with at least one Grant Amendment Activity with a Done Date within the current year.)
- The Request has at least one Payment within the current year. (That is, the Request has at least one Payment with a status other than Canceled with a Budget Fiscal Year within the current year.)
- The Request still had some unpaid balance at the beginning of the current fiscal year.

As noted in the report instructions, you can further refine these criteria by selecting or creating a Payments search before running the report.

The cumulative effect of these criteria is to find only those approved Requests (grants) that saw decreases (i.e., payments) or increases (i.e., original grants and/or grant amendments) in their balances during a given fiscal year. The report then calculates the amounts of these payments and appropriations.

To view your report after you have specified the necessary options, choose File ‰ Run Report from the Report Library menu. The report is generated and displayed in the Active Report Viewer:

Variations:

- Population Served
- Program Area 1

The new Schedule of Appropriations and Payments report, uses ActiveReports from Data Dynamics, not Crystal Reports, to render your results. The navigation options in ActiveReports are a little different.

Schedule of Appropriations and Payments (OLD)

You can use the Schedule of Appropriations and Payments reports to generate your IRS 990 reports. These reports show your commitments at the beginning of the year, the amount appropriated during the course of the year, the amount paid during the year, and your outstanding commitments at the end of the year.

About the Report Data

The report includes the following information for grants within a given year.

Column	Description
Recipient	The legal name and address of the recipient Organization, the Project Title of the grant, the total Grant Amount, and the grant's Fiscal Year. (In GIFTS Online, a grant's Fiscal Year is based on the date on which it was Approved.) If no legal name is on file for the Organization, it's Organization Name is shown.
Tax Status	The tax status of the recipient, as indicated on the Tax Status tab of its Organization record.
Beginning Balance	The amount that you have committed to pay for the grant as of the beginning of the year. For grants made in previous years, this is the remaining balance. For grants made during the current year, this amount is always zero.
Newly Allocated	The amount appropriated to the grant during the current year. If the grant was approved in the current year, this value is the total grant amount.
Amended	If the grant was amended during the current year, this value reflects the amount of the amendment.
Amount Paid	The amount paid during the current year. Note that this amount is calculated based on the Fiscal Year specified in the grant's payments, not on the Scheduled Date or Paid Date of the Payments. **NOTE:** If you "pre-pay" grants when you have extra funds in your budget at the end of a year, be careful to ensure that the Fiscal Year indicated in the Payment record properly reflects the year in which you wish to report it to the IRS. If you pay a Payment that was scheduled for February 2012 in December 2011 because you have available funds, this report reflects the Fiscal Year assigned to the Payment, not the Paid Date.
Ending Balance	The remaining commitments for this grant, including Payments scheduled in future years and Payments scheduled for the current year that have not been paid.

Running the Report

When you run this report, you should set the 'as of' date of the report to the end of the year on which you wish to report. If you want, for example, to generate a report for your 2010 IRS reporting, set the 'as of' date to December 31, 2010. Thus, the report generates data for 2010—even if you are running the report while you prepare your taxes in April 2011.

You should always set the 'as of' date to December 31 of the year on which you want to report. The 'as of' date ensures that the report reflects only what you have done up to that date. With an 'as of' date of 12/31/10, Payments that your organization paid in 2011 would be shown as outstanding in the report because they were outstanding as of 12/31/10.

Which Grants are Included in the Report?

The report includes grants that have an open balance or for which appropriations were made during the year. Specifically, the report includes:

- Grants that are approved or amended within the year.
- Grants with Payments that have been scheduled or paid within the year. (Reminder: the reported date of the Payment is based on the Payment's Fiscal Year, not its Paid Date.)
- Grants with a balance as of the beginning or end of the year. Only grants with Scheduled Payments are included.

NOTE: The report uses Payment data to make its calculations. If a grant does not have any Payments, it is not included in the report—even if it has an open balance within the year.

Note that future grants are not included. If you run the report 'as of' December 31, 2000, grants approved in 2001 or later are not included

Variations:

- by Population Served
- by Program Area

Fixed Criteria:

Requests that have an unpaid balance or for which appropriations were made during the year.

Schedule of Appropriations and Payments

Fiscal Year 2000

12/31/00

Recipient and/or Purpose	Tax Status	Beginning Balance 2000	Newly Allocated 2000	Amended 2000	Amount Paid 2000	Ending Balance 2000
Adventure Club of Manhattan 800 West 103th Street New York, NY 10021 *Extreme Sport Marathon* $ 10,000.00 1999	501c(3)	$10,000.00	$0.00	$0.00	$20,000.00	($10,000.00)
Lower West Side Child Care Center 118 West 18th Street New York, NY 10014 *Summer School Program* $ 50,000.00 1999	501c(3)	$50,000.00	$0.00	$0.00	$100,000.00	($50,000.00)
The National Children's Project 629 West 58th Street New York, NY 10019 *Funding for new daycare center* $ 250,000.00 1999	501c(3)	$250,000.00	$0.00	$0.00	$750,000.00	($500,000.00)
Ryan School of Medicine 142 Pennington Ave. Olin Hall Los Angeles, CA 34253 *3rd Quater MG - 1999* $ 1,400.00 1999	501c(3)	$1,400.00	$0.00	$0.00	$1,400.00	$0.00

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Summary of Paid Payments

A summary of Payments that have been marked as Paid, including number of items and percentages.

Variations:

- by Geographical Area 1
- by Payment Fund
- by Payment Type
- by Payment Support Type
- by Program Area 1
- by Staff

Fixed Criteria:

Payments with a Status of Paid, Refund, or Void.

Summary of Paid Payments - by Program Area

Paid Date was in last year

12/31/00

Program Area 1	Payment Count	% of Total Count	Payment Amount	% of Total Amount
Arts and Culture	4	11.11 %	$42,500.00	5.03%
Civic and Community	11	30.56 %	$140,428.00	16.61%
Education	11	30.56 %	$334,720.00	39.59%
Health and Human Services	10	27.78 %	$327,860.00	38.78%
Grand Total	36	100.00 %	$845,508.00	100.00%

Top 20 Payments by Payment Amount

The largest 20 Payments in the search criteria provided, in descending order by Payment Amount.

Fixed Criteria:

Payments for Approved Requests.

Top 20 Payments by Payment Amount

12/31/00

Payment Amount	Payee Organization Project Title, Grant Amount	Status Schedule/Paid Date	Payment Fund Payment Type
$ 154,500.00	**Ryan School of Medicine** *The support of the "Charles S. Godin" Scholarship program* $ 154,500.00	Paid 6/11/99	Foundation Charitable Contribution
$ 117,500.00	**Kids With AIDS Research Center** *Camp Hope Summer Program* $ 235,000.00	Paid 6/11/99	Foundation Charitable Contribution
$ 62,500.00	**National Institute for Technical Learning Coalition** *"Building Bridges" Program* $ 125,000.00	Paid 6/24/99	Foundation Charitable Contribution
$ 56,100.00	**Sunflower House for Youth in Distress** *General Operating Support* $ 56,100.00	Paid 6/11/99	Foundation Charitable Contribution
$ 52,500.00	**American Foundation for Children** *Endowment Campaign* $ 52,500.00	Paid 6/11/99	Foundation Charitable Contribution
$ 47,500.00	**The Children's Fund** *General Operating Support* $ 47,500.00	Paid 6/11/99	Foundation Charitable Contribution
$ 35,700.00	**Hiller State University** *The university scholarship fund for post graduate studies* $ 35,700.00	Paid 6/11/99	Foundation Charitable Contribution
$ 35,700.00	**Teen Aid Center** *General Operating Support* $ 35,700.00	Paid 12/30/99	Foundation
$ 28,560.00	**The National Children's Project** *To help sponsor "The Children of the World" Conference* $ 28,560.00	Paid 9/21/99	Corporation Charitable Contribution
$ 25,000.00	**Brooklyn Ballet** *For General Operating Support* $ 25,000.00	Paid 6/11/99	Foundation Charitable Contribution
$ 25,000.00	**Arlington School of Dentistry** *The Support for the Restoration of the School of Dentistry Library* $ 50,000.00	Paid 6/11/99	Foundation Charitable Contribution

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About Request Reports

This chapter describes the standard Request reports included with GIFTS Online.

Board Meeting Agenda

You can use this report to generate an agenda for a Board meeting. For each Request, the report includes the Organization Name, Long Project Description, Requested Amount, and Recommended Amount.

To limit the contents of this report to the agenda for your meeting, you can use the Meeting Date or other date fields as your search criteria.

Variations:

- by Docket Number
- by Program Area

Board Meeting Agenda

Meeting Date is in next quarter

3/23/00

Organization Project Description (Long)	Request Date	Requested Amount	Recommended Amount	Staff
American Foundation for Children The American Foundation for Children's "After school program" dedicated its resources towards the education and supervision of children for working parents before and after school The program includes a story-time session and computer access to children ages 5-11.	2/5/00	$25,000.00	$25,000.00	Terry Brown
East Side Learning Center In response to the School to Work Act of 1998, The East Side Learning Center has embarked on the creation of a specialized program to assist individuals in making and implementing informed educational and occupational choices.	2/10/00	$10,000.00	$10,000.00	Sarah Sullivan
Longwood State University The nature of the study is to assess current methods of medical care and to evaluate the benefit of adding holistic approaches to the more conservative allopathic methods. The study uses clinical reviews of trials of acupuncture and discusses the complexities of research design in formulating hypothesis based on these standard methods of evaluation. The challenge is to design conditions that more closely mimic the application of acupuncture in clinical practice, as individualized treatment informed by its own diagnostic traditions.	2/1/00	$500,000.00	$500,000.00	Colette Rogers
	Grand Total (3 items)	$535,000.00	$535,000.00	

Board Meeting Minutes

You can use this report to review minutes from a Board meeting. For each Request, the report includes the Organization Name, Project Title, Recommended Amount, the amount awarded, and Meeting Minutes.

To limit the contents of this report to the agenda for your meeting, you can use the Meeting Date or other date fields as the search criteria.

Variations:

- by Docket Number
- by Program Area 1

Board Meeting Minutes by Program Area 1

Meeting Date is this month

3/31/00

Organization Project Title	Recommended Amount	Awarded	Disposition	Status/ Reason	Meeting Minutes
Arts and Culture					
Shea Dance Company *The 2000 Annual Banquet*	$5,250.00	$5,250.00	Approved	Tables to be filled	Marsha is responsibe for filling this table
Total Arts and Culture (1 items)	$5,250.00	$5,250.00			
Community					
Girl Scouts of America *Supporting funding for new uniforms*	$10,000.00	$0.00	Declined	Outside of Guidelines	Mr. Humphries requested that we call Joyce and explain why we cannot support her with the purchase of new uniforms in addition to sending the standard Decline letter.
Total Community (1 items)	$10,000.00	$0.00			
Education					
Arlington School of Dentistry *Funding for new instruments*	$250,000.00	$250,000.00	Approved	Active Grant	Board Voted Unanimously 9-0 in favor of the program officer recommendation.
Total Education (1 items)	$250,000.00	$250,000.00			
Grand Total (3 items)	$265,250.00	$255,250.00			

Contact Affiliations by Request

A list of Requests, grouped by Organization, that shows the affiliated Contacts for each Request.

Contact Affiliations by Request

For Organizations in California
2000 Calendar Year Only
5/19/00

Primary Organization Grant Amount	Disposition Date	Request ID Reference No.	Affiliated Contacts Name	 Role	 Notes
Arlington School of Dentistry *Funding for new instruments*	Pending 4/4/00	275	Anita Rayce	Primary Contact	
Arlington School of Dentistry *To sponsor the "Annual Leadership Award Dinner"*	Pending 2/3/00	305	Anita Rayce	Primary Contact	
California Children's Theatre *Building materials for sets*	Pending 3/1/00	277	Tom Alexander David Anderson Jane Levi	Sponsor Primary Contact Technical Advisor	
California Children's Theatre *The "2000 Career Fair"*	Pending 2/3/00	306	David Anderson	Primary Contact	
California Children's Theatre	Declined 5/16/00	319	David Anderson	Primary Contact	

Grand Total - 5 item(s)

1

Data Entry Report

This report displays basic information about each, and is intended to help you review and verify the accuracy of your data entry.

Variations:

- by Organization
- by Date

Data Entry Edit Report by Request Date

1/6/2012

Request Information

Organization:	Kids With AIDS Research Center	**Disposition:**	Approved
Request Date:	3/7/1997	**Request Type:**	Cash Grants
Request ID:	1	**Request Status:**	Closed Grant
Request Amount:	$25,000.00	**Awarded/Paid:**	$25,000.00 / $25,000.00
Staff:	Pamela Fitch		
Project Title:	A Fellowship Grant		

Coding Information:

Age Group	
Ethnicity	
Fund	Foundation
Gender	
Geographical Area Served	Northeast
Internal Program	
Population Served	
Program Area	Education/Higher Ed/Research
Test table	
Type of Support	Research

Organization:	United Federation Inc.	**Disposition:**	Approved
Request Date:	3/7/1997	**Request Type:**	Cash Grants
Request ID:	10	**Request Status:**	Closed Grant
Request Amount:	$12,500.00	**Awarded/Paid:**	$25,500.00 / $25,500.00
Staff:	Rachel McClory		
Project Title:	The Support for Anti-drug Media Campaign		

Coding Information:

Age Group	
Ethnicity	
Fund	Foundation
Gender	
Geographical Area Served	Northeast
Internal Program	
Population Served	
Program Area	Health and Human Services/Health & Wellness/General & Rehabilitative
Test table	
Type of Support	Program Support

1

Declinations - Alpha List

A detailed listing of Declined Requests that includes the applicant name, Project Title, Primary Contact, the Declination Reason, and the staff person assigned to the Request.

Variations:

- by Fund
- by Geographical Area 1
- by Grant Type
- by Internal Program
- by Program Area 1
- by Staff

Fixed Criteria:

Requests with a Disposition of Declined.

Declinations - Alpha Listing, by Grant Type

3/31/00

Organization Project Title	Primary Contact	Reason Staff	Decline Date
<u>Cash Grants</u>			
Abuse Prevention and Rehabilitation Fund Washington, DC *To support the program lecture series; "1999 An Informative Approach to an Unapproachable Subject, Domestic Violence in America"*	Laden, Elizabeth	Limited Resources Lee Williamson	11/30/99
The Children's Fund Washington, DC *To Sponsor a Summer Science Camp*	Roberts, Charles	Limited Resources Kelly Goldberg	12/21/99
Kids With AIDS Research Center New York, NY *The printing and distribution costs of media material*	Younge, Ronald	Limited Resources Colette Rogers	11/30/99
Sunflower House for Youth in Distress San Francisco, CA *To Support the Buldout for a New Gymnasium*	Dawn, Shawna	Limited Resources Kelly Goldberg	10/29/99
Total Cash Grants (4 items)			
<u>Dinners and Events</u>			
California Children's Theater San Francisco, CA *The "1999 Career Fair"*	Anderson, David	Limited Resources Kelly Goldberg	12/21/99
Total Dinners and Events (1 item)			
Grand Total (5 items)			

Declinations - Alpha List (including Request Amount)

A detailed listing of Declined Requests that includes the applicant name, Project Title, Primary Contact, the Declination Reason, Request Amount, and the staff person assigned to the Request.

Variations:

- by Fund
- by Program Area 1

Fixed Criteria:

Requests with a Disposition of Declined.

Declinations - Alpha List by Fund (including Request Amount)

3/31/00

Organization Project Title	Primary Contact	Reason Staff	Request Amount	Decline Date
Corporation				
California Children's Theater San Francisco, CA *The "1999 Career Fair"*	Anderson, David	Limited Resources Kelly Goldberg	$10,609.00	12/21/99
		Total Corporation (1 item)	$10,609.00	
Foundation				
Abuse Prevention and Rehabilitation Fund Washington, DC *To support the program lecture series; "1999 An Informative Approach to an Unapproachable Subject, Domestic Violence in America"*	Laden, Elizabeth	Limited Resources Lee Williamson	$15,000.00	11/30/99
The Children's Fund Washington, DC *To Sponsor a Summer Science Camp*	Roberts, Charles	Limited Resources Kelly Goldberg	$15,450.00	12/21/99
Kids With AIDS Research Center New York, NY *The printing and distribution costs of media material*	Younge, Ronald	Limited Resources Colette Rogers	$15,000.00	11/30/99
Sunflower House for Youth in Distress San Francisco, CA *To Support the Buldout for a New Gymnasium*	Dawn, Shawna	Limited Resources Kelly Goldberg	$45,000.00	10/29/99
		Total Foundation (4 items)	$90,450.00	
		Grand Total (5 items)	$101,059.00	

Declinations - Summary by Reason

A summary of declinations grouped by their Declination Reason. For each reason, the report lists the number of declinations, the percent of the total declination count, as well as the total and percentage of the requested amounts.

Fixed Criteria:

Requests with a Disposition of Declined.

Declinations - Summary by Reason

3/31/00

Declination Reason	Request Count	% of Total Count	Request Amount	% of Total Amount
Limited Resources	26	48.15 %	$1,235,450.00	78.21%
No Funding to Individuals	13	24.07 %	$201,100.00	12.73%
Outside of Guidelines	7	12.96 %	$66,450.00	4.21%
Outside Operating Area	8	14.81 %	$76,609.00	4.85%
Grand Total	54	100.00 %	$1,579,609.00	100.00%

Foundation Center Export Report

You can use this report to export your grants information to an electronic file for submission to the Foundation Center.

NOTE: An updated version of this export known as **hGrant Reporting** can be enabled by contacting MicroEdge Services. **services@microedge.com**. For more information, please refer to the *hGrant Reporting* section.

What Data is Exported to the Foundation Center?

This report is formatted according to the center's requirements, and includes the following information about each grant (Approved Request) included in the report. For each grant, the following information is exported about the grantee Organization:

Organization Name	Organization A.K.A. Name
Organization Mailing Address	
(Note: This includes Street Address, City, State, and Postal Code. Country is included	Organization telephone number

if Organization is located outside of the U.S.)	
Organization Type	Organization Tax ID
Organization WWW Address	

The following information is exported about each grant:

Request Project Title	Request ID
Grant Fiscal Year	Grant Amount
Grant Term (in months)	Whether or not the grant is renewable
The Department or Division of the grantee Organization to which the grant was made (as indicated in the Subdivision field of the grant's Request record).	Payee Organizations

In addition, the export includes all levels from each of the following classifications on the Request's Coding Sheet:

Program Area	Population Served
Geographic Area Served	Type of Support
Gender	Age
Ethnicity	

To Run the Foundation Center Export Report

To create an export file for the Foundation Center:

1. Go to **Launch > Reports**.
2. Click on **Requests**.
3. Choose the **Foundation Center Export Report**.
4. If necessary, specify the grants you wish to include in the export using the **New Search** or **Select Search** buttons.
5. Click the **Run** selected report icon. The report is generated and displayed using the Crystal Reports viewer. Please note that since this file is intended for export, it is not formatted for printing.
6. When the report has finished processing, click the **Export Report** button on the Crystal Reports viewer toolbar located at the top of the report. You are prompted to choose a file format and destination for the export.
7. Choose '**Tab Separated Text** (TTX)' as the format, and '**Disk file**' as the destination. Click **O**K. You are prompted to provide the file name and location for the export file.
8. Enter the file name and location, and click **Save**. The export file is saved, and you can transmit it to the Foundation Center.

Grant Profile Report

A profile of a grant that includes coding, payment, grant amendment, and requirements information.

Fixed Criteria:

Requests with a Disposition of Approved.

Grant Profile Report

3/31/00

Grantee:	Arlington School of Dentistry	**Req. ID:**	237
Department:	School Library	**Ref. No:**	99-F237
Contact:	Anita Rayce - Associate Professor		
Project Title:	The Support for the Restoration of the School of Dentistry Library		
Meeting Date:	6/7/99	**Grant Date:**	6/7/99
Grant Amount:	$ 60,000.00	**Tax Status:**	501c(3)
Total Paid:	$ 25,000.00	**Last Verified On:**	3/5/95
Grant Term:	24 months		

Project Desc: This library restoration project is scheduled to be completed by June 2000. It was originally scheduled for completion in January, but due to inclement weather the start date has had to be pushed back to July, 1999.

The library that is being restored was built in 1965. Although it served the school well to date a recent earthquake has destroyed a portion of the facility making it unsafe for use.

Although the school does have another library for the students to use this project remains important not only for the historic preservation of the building but also to allow the dental students access to a library designed specifically for their use.

Staff: Lee Williamson

Type: Cash Grants
Status: Active Grant

Coding:		
	Age Group	Adults
	Fund	Foundation
	Geographical Area Served	Northwest
	Model Foundation Rating	B
	Program Area	Education\Adult/Continuing Education\Restoration & Buildings
	Type of Support	Capital/Renovation

Amendments: 10/22/99 Grant Amount was increased by 10,000 (from 50,000 to 60,000). Board approved increase due to Construction delay.

Payments:			
	6/11/99	$ 25,000.00	Paid
	6/7/00	$ 35,000.00	Contingent

Reports:			
	3/6/00	Progress Report	Received
	6/7/00	Progress Report	Not Received
	7/2/01	Final Report	Not Received

Grant Summary

A summary of Approved Requests showing the total amount granted for each item.

Variations:

- by Fund
- by Geographical Area
- by Grant Type
- by Population Served
- by Program Area 1
- by Program Areas 1 and 2
- by Program Areas 1, 2, and 3
- by Staff
- by Support Type

Fixed Criteria:

Requests with a Disposition of Approved.

Grant Summary - By Program Area 1 and 2

3/31/00

Program Area	Grant Count	Grant Amount
Arts and Culture		
No Code Specified	15	$53,150.00
Media Communications	2	$25,300.00
Performing Arts	16	$184,400.00
Visual Arts	3	$2,200.00
Total Arts and Culture	36	$265,050.00
Community		
Civil Rights/Civil Liberties	4	$281,378.00
Community Issues/Events	26	$262,900.00
Economic Development	6	$450,100.00
Public Affairs/Society Benefit	2	$7,150.00
Total Community	38	$1,001,528.00
Education		
Adult/Continuing Education	7	$495,200.00
College/University	29	$1,383,100.00
Elementary & Secondary Education	7	$215,800.00
Total Education	43	$2,094,100.00
Health & Welfare		
Emergency Medical Services	3	$87,900.00
General & Rehabilitative	4	$54,560.00
Public Health & Wellness Education	7	$170,400.00
Support Services	5	$62,900.00
Total Health & Welfare	19	$375,760.00
Other		
No Code Specified	2	$8,500.00
Total Other	2	$8,500.00
Grand Total	138	$3,744,938.00

1

Grant Summary - Granted and Paid by Program Area

For each Program Area, this report shows the total amount granted and the amount of Payments made for that Program Area. The Payment data included in this report is based upon the Requests that meet the search criteria that you use when running the report.

Fixed Criteria:

Requests with a Disposition of Approved.

Grant Summary - Granted and Paid by Program Area

Criteria = Approval Date was in last year

4/6/00

Program Area	Grant Amount	Payment Paid
Arts and Culture (6 items - 12.77% of total count)	$46,000.00	$43,500.00
Civic and Community (16 items - 34.04% of total count)	$435,928.00	$413,428.00
Education (16 items - 34.04% of total count)	$1,045,870.00	$923,620.00
Health and Human Services (9 items - 19.15% of total count)	$221,610.00	$195,360.00
Grand Total (47 items)	$1,749,408.00	$1,575,908.00

Grants - Alpha List

An alphabetical listing (by grantee Organization name) of grants, including their reference numbers, project description, grant amount, amount paid to-date, and grant date.

Variations:

- by Fiscal Year
- by Fund
- by Geographical Area 1
- by Geographical Areas 1 to 5
- by Grant Type
- by Internal Program
- by Population Served
- by Primary Contact
- by Program Area 1
- by Program Area 1 & 2

- by Program Area 1, 2, & 3
- by Program Areas 1 to 5
- by Staff
- by Support Type

Fixed Criteria:

Requests with a Disposition of Approved.

Grants - Alpha List, by Geographic Area 1

3/31/00

Organization Project Description	Grant Amount	Paid To Date	Type Status	Grant Date
Northeast				
Hiller State University Boston, MA *2nd Quarter Matching Gifts, 1999*	$9,000.00	$9,000.00	Matching Gifts	6/30/99
Longwood State University New York, NY *In support of the "Healing with Laughter" lecture series*	$47,250.00	$47,250.00	Cash Grants *Closed Grant*	6/30/99
Total Northeast (2 items)	$56,250.00	$56,250.00		
Southwest				
Arlington School of Dentistry Los Angeles, CA *To sponsor the "Annual Leadership Award Dinner"*	$4,120.00	$4,120.00	Dinners and Events *Attended*	7/6/99
Ryan School of Medicine Los Angeles, CA *2nd Quarter Matching Gifts, 1999*	$6,000.00	$6,000.00	Matching Gifts	6/30/99
Total Southwest (2 items)	$10,120.00	$10,120.00		
Grand Total (4 items)	$66,370.00	$66,370.00		

1

Grants - Alpha List (Portrait)

An alphabetical listing (by grantee Organization name) of grants, including their reference numbers, project description, grant amount, amount paid to-date, and grant date.

Fixed Criteria:

Requests with a Disposition of Approved.

Grants - Alpha List (Portrait)

3/31/00

Organization Project Description	Request ID Ref. No.	Grant Amount	Paid To Date	Type Status	Grant Date
American Foundation for Children New York, NY *The Donation of a vehicle equipment with a wheelchair access ramp.*	249	$23,000.00	$23,000.00	In-Kind *Services Completed*	6/10/99
Arlington School of Dentistry Los Angeles, CA *To sponsor the "Annual Leadership Award Dinner"*	216	$4,120.00	$4,120.00	Dinners and Events *Attended*	7/6/99
Brooklyn Ballet New York, NY *Donation of Electronic Goods*	245	$7,000.00	$7,000.00	In-Kind *Services Completed*	6/10/99
The Children's Fund Washington, DC *sponsorship of the "The 1999 Annual Conference"*	271	$26,250.00	$0.00	Cash Grants *Active Grant*	6/30/99
Hiller State University Boston, MA *2nd Quarter Matching Gifts, 1999*	258	$9,000.00	$9,000.00	Matching Gifts	6/30/99
Longwood State University New York, NY *2nd Quarter Matching Gifts, 1999*	259	$6,500.00	$6,500.00	Matching Gifts	6/30/99
Longwood State University New York, NY *In support of the "Healing with Laughter" lecture series*	268	$47,250.00	$47,250.00	Cash Grants *Closed Grant*	6/30/99
Lower West Side Child Care Center New York, NY *To support the renovation project for the centers roof*	251	$2,000.00	$2,000.00	Cash Grants *Active Grant*	6/10/99
Ryan School of Medicine Los Angeles, CA *2nd Quarter Matching Gifts, 1999*	257	$6,000.00	$6,000.00	Matching Gifts	6/30/99
University of America Los Angeles, CA *To support The University of America "Big Brothers/Big Sisters" Chapter*	250	$5,000.00	$5,000.00	Cash Grants *Active Grant*	6/10/99
University of America Los Angeles, CA *To sponsor a table for the 1999 "Citizen of the Year Dinner"*	269	$5,150.00	$0.00	Cash Grants *Active Grant*	6/16/99
	Grand Total (11 items)	$141,270.00	$109,870.00		

1

Grants - Alpha List including Secondary Codes

The "Program Area Served with Secondary Codes" and "Geographical Area Served with Secondary Codes" variations of the "Grants - Alpha List" report include both primary and secondary coding for all levels of the Program Area or Geographical Area Served table.

A grant may be listed in the report several times—once for each code. Note that since reports may be listed more than once, the totals in this report may not reflect the actual amount granted.

Variations:

- by Geographical Area Served
- by Program Area Served

Fixed Criteria:

Requests with a Disposition of Approved and which have classifications in the tables on which the report groups.

Grants - Alpha List, by Geographical Area Served including Secondary Codes
4/6/00

Organization Project Description	Grant Amount	Paid To Date	Type Status	Grant Date
Northeast				
Boston				
The National Children's Project New York, NY *To help sponsor "The Children of the World" Conference*	$28,560.00	$0.00	Cash Grants *Active Grant*	3/15/00
Total Boston (1 item)	$28,560.00	$0.00		
New York				
American Foundation for Children New York, NY *Endowment Campaign*	$52,500.00	$25,000.00	Cash Grants *Active Grant*	4/3/00
The National Children's Project New York, NY *To help sponsor "The Children of the World" Conference*	$28,560.00	$0.00	Cash Grants *Active Grant*	3/15/00
Total New York (2 items)	$81,060.00	$25,000.00		
Washington				
The National Children's Project New York, NY *To help sponsor "The Children of the World" Conference*	$28,560.00	$0.00	Cash Grants *Active Grant*	3/15/00
Total Washington (1 item)	$28,560.00	$0.00		

1

Grants - Chronological List

A chronological listing of grants, including their reference numbers, Project Description, Grant Amount, amount paid to-date, and grant date.

Variations:

- by Fund
- by Geographical Area 1
- by Grant Type
- by Program Area 1
- by Program Area 1 & 2
- by Program Area 1, 2, & 3
- by Staff
- by Support Type

Fixed Criteria:

Requests with a Disposition of Approved.

Grants - Chronological Listing, by Program Area 1
4/3/00

Grant Date	Organization Project Description	Grant Amount	Paid To Date	Type Status
Education				
6/30/99	**Hiller State University** Boston, MA *2nd Quarter Matching Gifts, 1999*	$9,000.00	$9,000.00	Matching Gifts
6/30/99	**Longwood State University** New York, NY *In support of the "Healing with Laughter" lecture series*	$47,250.00	$47,250.00	Cash Grants *Closed Grant*
6/30/99	**Ryan School of Medicine** Los Angeles, CA *2nd Quarter Matching Gifts, 1999*	$6,000.00	$6,000.00	Matching Gifts
7/6/99	**Arlington School of Dentistry** Los Angeles, CA *To sponsor the "Annual Leadership Award Dinner"*	$4,120.00	$4,120.00	Dinners and Events *Attended*
	Total Education (4 items)	$66,370.00	$66,370.00	
Health & Welfare				
6/30/99	**The Children's Fund** Washington, DC *sponsorship of the "The 1999 Annual Conference"*	$26,250.00	$0.00	Cash Grants *Active Grant*
	Total Health & Welfare (1 item)	$26,250.00	$0.00	
	Grand Total (5 items)	$92,620.00	$66,370.00	

1

Grants - Detail List by Staff

Provides a detailed listing of grants by staff member.

Fixed Criteria:

Requests with a Disposition of Approved.

1 / 1+ Main Report 100%

Grants Detail, by Staff

10/19/2012

Organization Project Title & Reference Number	Grant Type Status	Project Dates Start - End	Grant Amount	Paid Amount	Balance
No Code Specified					
American Foundation for Children *The Support for the "St. Patrick's Day" Ball*	Dinners and Events	3/7/2001 - 4/7/2001	$15,000.00	$15,000.00	$0.00
East Side Learning Center *Table Purchased at "Fall Formal Gala"*	Dinners and Events	9/26/2001 - 9/26/2002	$2,500.00	$2,500.00	$0.00
United Federation Inc. *The Annual Benefit*	Dinners and Events	3/7/2001 - 3/7/2002	$2,100.00	$2,100.00	$0.00
		Total No Code Specified (3 items)	$19,600.00	$19,600.00	$0.00
Admin					
Adventure Club of Manhattan *Extreme Sport Marathon*	Cash Grants	12/21/1999 - 12/21/2000	$10,000.00	$10,000.00	$0.00
Adventure Club of Manhattan *3Q 2000 - Volunteer Gifts*	Volunteer Gifts	10/13/2000 - 10/13/2001	$200.00	$200.00	$0.00
American Foundation for Children *1Q - Matching Gifts 2000*	Matching Gifts	6/16/2000 - 6/16/2001	$500.00	$500.00	$0.00
American Foundation for Children *2Q 2000 - Volunteer Gifts*	Volunteer Gifts	7/11/2000 - 7/11/2001	$300.00	$300.00	$0.00
American Foundation for Children *2Q 2000 - Matching Gifts*	Matching Gifts	7/11/2000 - 7/11/2001	$1,000.00	$1,000.00	$0.00
American Foundation for Children *3Q 2000 - Matching Gifts*	Matching Gifts	10/13/2000 - 10/13/2001	$200.00	$200.00	$0.00
American Foundation for Children *Support for new Hospital Wing*	Cash Grants *Active Grant*	6/30/2006 - 6/30/2007	$5,000.00	$2,500.00	$2,500.00
American Foundation for Children *1st Quarter 2006 Volunteer Grants*	Volunteer Gifts	3/31/2006 - 3/31/2007	$100.00	$100.00	$0.00
American Foundation for Children *4th Quarter 2006 Volunteer Grants*	Volunteer Gifts	12/31/2006 - 12/31/2007	$400.00	$400.00	$0.00
Arlington School of Dentistry *MG - 1st QTR 2003*	Matching Gifts	4/1/2003 - 4/1/2004	$4,200.00	$4,200.00	$0.00

1

Incomplete Proposals

A list of Pending Requests that have been marked as 'incomplete.' Includes the grantee Organization Name, Project Description, Request Date, Staff member, Requested Amount, Status, and any notes regarding the reason that the Request has been marked as incomplete.

Variations:

- by Date

Fixed Criteria:

Requests with a Disposition of Pending that are also marked as 'incomplete' on their Request record.

Incomplete Proposals
4/3/00

Organization Project Description	Request Date Staff	Requested Amount	Status Complete Notes
American Foundation for Children *After school program at local libraries*	2/5/00 Terry Brown	$25,000.00	Initial Review *Missing total project Budget*
Brooklyn Ballet *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	2/3/00 Colette Rogers	$5,250.00	Invited *Requested more information about the Deductable vs Non-deductable portion of this dinner.*
East Side Learning Center *New Books, New Horizons*	2/10/00 Sarah Sullivan	$10,000.00	Initial Review *Missing Audited Financial Statement, List of Active Board Members and Total Project Budget.*
Shea Dance Company *Tots on Stage*	2/14/00 Kelly Goldberg	$10,000.00	Staff Review *Missing list of other project funders.*
	Grand Total (4 items)	$50,250.00	

Proposals - Alpha List

A listing of Pending Requests that includes the Project Title, Request Amount, Recommended Amount, Staff member, Request Type, and Request Status for each proposal.

Variations:

- by Fund
- by Geographical Area 1
- by Grant Request Type
- by Internal Program
- by Program Area 1
- by Program Area 1 & 2
- by Primary Contact
- by Staff
- by Status

Fixed Criteria:

Requests with a Disposition of Pending.

Proposals - Alpha List, by Fund

4/6/00

Organization Project Title	Request Date Staff	Requested Amount	Recommended Amount	Type Status
Corporation				
Shea Dance Company New York, NY *Tots on Stage*	2/14/00 Terry Brown	$10,000.00	$10,000.00	Cash Grants *Considered for Board*
	Total Corporation (1 item)	$10,000.00	$10,000.00	
Foundation				
Brooklyn Ballet New York, NY *2000 Fall season*	3/13/00 Colette Rogers	$24,000.00	$20,000.00	Cash Grants
California Children's Theatre San Francisco, CA *Building materials for sets*	3/1/00 Kelly Goldberg	$2,500.00	$2,500.00	Cash Grants *Initial Review*
East Side Learning Center New York, NY *New Books, New Horizons*	2/10/00 Kelly Goldberg	$10,000.00	$10,000.00	Cash Grants *Initial Review*
	Total Foundation (3 items)	$36,500.00	$32,500.00	
	Grand Total (4 items)	$46,500.00	$42,500.00	

1

Proposals - Alpha List (Portrait)

An alphabetical listing (by grantee Organization name) of Pending Requests that includes the Project Title, Request Amount, Recommended Amount, Staff member, Request Type, and Request Status for each proposal.

Fixed Criteria:

Requests with a Disposition of Pending.

Proposals - Alpha List (Portrait)

Request Date is in this year

4/6/00

Organization Project Title	Request Date Staff	Requested Amount	Recommended Amount	Type Status
Adventure Club of Manhattan New York, NY *Extreme Sport Marathon*	2/9/00 Colette Rogers	$10,000.00	$10,000.00	Cash Grants *Initial Review*
Brooklyn Ballet New York, NY *2000 Fall season*	3/13/00 Colette Rogers	$24,000.00	$20,000.00	Cash Grants
California Children's Theatre San Francisco, CA *Building materials for sets*	3/1/00 Kelly Goldberg	$2,500.00	$2,500.00	Cash Grants *Initial Review*
East Side Learning Center New York, NY *New Books, New Horizons*	2/10/00 Kelly Goldberg	$10,000.00	$10,000.00	Cash Grants *Initial Review*
Longwood State University New York, NY *Funding for sports complex renovation*	2/1/00 Lee Williamson	$500,000.00	$500,000.00	Cash Grants *Considered for Board*
Lower West Side Child Care Center New York, NY *Summer School Program*	4/4/00 Kelly Goldberg	$50,000.00	$45,000.00	Cash Grants
Shea Dance Company New York, NY *Tots on Stage*	2/14/00 Terry Brown	$10,000.00	$10,000.00	Cash Grants *Considered for Board*
United Federation Inc. New York, NY *Millenium Project*	1/20/00 Sarah Sullivan	$150,000.00	$150,000.00	Cash Grants *Considered for Board*
	Grand Total (8 items)	$756,500.00	$747,500.00	

1

Proposals - Complete/Incomplete

An alphabetical listing (by grantee Organization name) of Pending Requests that includes the Project Title, Requested Amount, Request Date, Staff member, and an indication of whether the Request is complete, including any relevant notes.

Fixed Criteria:

Requests with a Disposition of Pending.

Proposals - Complete/Incomplete

4/3/00

Organization Project Description	Request Date Staff	Requested Amount	Complete? Notes
American Foundation for Children *After school program at local libraries*	2/5/00 Terry Brown	$25,000.00	No *Missing total project Budget*
Brooklyn Ballet *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	2/3/00 Colette Rogers	$5,250.00	No *Requested more information about the Deductable vs Non-deductable portion of this dinner.*
California Children's Theater *Building materials for sets*	3/1/00 Lee Williamson	$2,500.00	Yes
East Side Learning Center *New Books, New Horizons*	2/10/00 Sarah Sullivan	$10,000.00	No *Missing Audited Financial Statement, List of Active Board Members and Total Project Budget.*
Longwood State University *holistic medicine study*	2/1/00 Colette Rogers	$500,000.00	Yes
Shea Dance Company *Tots on Stage*	2/14/00 Kelly Goldberg	$10,000.00	No *Missing list of other project funders.*
	Grand Total (6 items)	$552,750.00	

Recommendations by Organization

By Organization, this report shows the total amount granted in the previous year and the total recommended amount for the current year. It also includes the Long Project Description of the latest Request.

Fixed Criteria:

This report includes Organizations that have at least one Pending Request in the current calendar year.

Recommendations by Organization

4/3/00

Name of Organization	1999 Granted	2000 Recommended	2000 Project Description (Long)
American Foundation for Children	$75,500.00	$80,000.00	The AFC "After school program" dedicated its resources towards the education and supervision of children for working parents before and after school. The program includes a story-time session and computer access to children ages 5-11.
California Children's Theater	$7,000.00	$12,500.00	The "2000 Career Fair" introduces High school students to active members of the theater both in Hollywood and on Broadway. Students get to ask questions directly about life in the theater. Over 150 industry professionals are scheduled to make an appearance this year including Kevin Bacon, Bill Cosby, Sandy Duncan, Julia Roberts, and Matthew Perry. The event is scheduled for Saturday, September 09, 2000.
The Children's Fund	$73,950.00	$26,250.00	
Computers for Kids	$40,300.00	$8,000.00	To provide 10 computers, 4 Printers along with support for consulting services for internet integration. The foundation computer supplier has reviewed their purchase request and has agreed to provide the necessary equipment at a discounted rate.
East Side Learning Center	$4,000.00	$10,000.00	In response to the School to Work Act of 1998, The ESLC has embarked on the creation of a specialized program to assist individuals in making and implementing informed educational and occupational choices.
Longwood State University	$58,250.00	$500,000.00	The nature of the study is to assess current methods of medical care and to evaluate the benefit of adding holistic approaches to the more conservative allopathic methods. The study uses clinical reviews of trials of acupuncture and discusses the complexities of research design in formulating hypothesis based on these standard methods of evaluation.

Renewable Grants

A listing of renewable grants, by each grant's renewal date, that includes the renewal date (the date on which the grant is eligible for renewal), grantee Organization, Project Description, Request ID or Reference Number, Grant Amount, Type, Status, and Grant Date.

Fixed Criteria:

This report includes Approved Requests that have been flagged as renewable.

Renewable Grants
4/3/00

Renewal Date	Organization Project Description	Request ID Ref. No.	Grant Amount	Type Status	Grant Date
1/6/00	**Ryan School of Medicine** Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	219	$154,500.00	Cash Grants *Active Grant*	6/8/99
1/19/00	**Hiller State University** Boston, MA *The university scholarship fund for post graduate studies*	225	$35,700.00	Cash Grants *Active Grant*	6/7/99
6/15/00	**Girl Scouts of America** Youngstown, CA *Assistance towards general operating costs*	224	$12,878.00	Cash Grants *Active Grant*	6/8/99
9/14/00	**The National Children's Project** New York, NY *To help sponsor "The Children of the World" Conference*	273	$28,560.00	Dinners and Events *Attended*	9/21/99
11/15/00	**Brooklyn Ballet** New York, NY *Snowflake Ball*	290	$1,000.00	Cash Grants *Active Grant*	12/7/99
11/15/00	**Hiller State University** Boston, MA *Undergraduate scholarship program*	291	$500,000.00	Cash Grants *Active Grant*	12/7/99
11/15/00	**University of America** Los Angeles, CA *Graduate Sudies Program*	296	$100,000.00	Cash Grants *Active Grant*	12/7/99
		Grand Total (7 items)	$832,638.00		

1

Repeat Grants

An alphabetical listing of Organizations that have received grants both the current and the previous calendar year. Includes the Organization name and the total granted and paid figures for the previous and current calendar year.

Fixed Criteria:

This report includes Organizations that received grants in both the previous and current calendar years.

Repeat Grants

4/3/00

Organization City, State	1999 Granted	1999 Paid	2000 Granted	2000 Paid
American Foundation for Children New York, NY	$75,500.00	$75,500.00	$52,500.00	$25,000.00
The Children's Fund Washington, DC	$73,950.00	$62,700.00	$26,250.00	$0.00
Lower West Side Child Care Center New York, NY	$52,000.00	$2,000.00	$2,500.00	$52,500.00
Ryan School of Medicine Los Angeles, CA	$161,900.00	$160,500.00	$154,500.00	$1,400.00
Shea Dance Company New York, NY	$12,250.00	$12,250.00	$5,250.00	$5,250.00
Teen Aid Center New York, NY	$36,000.00	$36,000.00	$3,500.00	$3,500.00
West Side Center New York, NY	$25,000.00	$25,000.00	$3,000.00	$3,000.00
Grand Total (7 items)	$436,600.00	$870,708.00	$247,500.00	$964,650.00

Request History by Organization

The Request History by Organization report is similar to the Organization Profile report. It's the same except for one key difference: The Request History by Organization report is sensitive to Request criteria. For example, the report below was limited to matching and volunteer gifts.

Request History by Organization

6/21/2001

Abuse Prevention and Rehabilitation Fund

Abuse Prevention and Rehabilitation Fund
440 Third Street
Washington, DC 20001

Elizabeth Laden, Program Director
(202) 555-2343

TYPE: **Health & Human Services**

BACKGROUND:

The Abuse Prevention and Rehabilitation Fund is a national organization which provides support for programs which promote rehabilitation and education of domestic abuse victims.

Many of their programs focus on the development and evaluation of projects aimed at fostering the family's ethical, social and nurturing development.

Disposition Date and Disposition	Requested/ Granted	Paid to Date/ Balance	Fund
12/30/1997 Approved *4th Quarter Matching Gifts, 1997*	$100.00	$100.00 $0.00	Foundation
6/29/1998 Approved *2nd Quarter Matching Gifts, 1998*	$2,300.00	$2,300.00 $0.00	Foundation
9/28/1998 Approved *3rd Quarter Volunteer Gifts, 1998*	$300.00	$300.00 $0.00	Corporation
9/30/1998 Approved *3rd Quarter Matching Gifts, 1998*	$4,000.00	$4,000.00 $0.00	Foundation
12/30/1998 Approved *4th Quarter Volunteer Gifts, 1998*	$200.00	$200.00 $0.00	Corporation
7/11/2000 Approved *2Q 2000 - Matching Gifts*	$1,500.00	$1,500.00 $0.00	

Abuse Prevention and Rehabilitation Fund Summary

Span:	1997 - 2000	**Amount Declined:**	$0.00
Total Amount:	$8,400.00	**Total Declined:**	0
Total Grants:	6		

1

Request Labels - All Affiliated Contacts

This series of reports prints mailing labels to all affiliated Contacts for each Request included in the report. The Organization's mailing address is used.

Variations

Versions of this report sort the labels either by the Contact's last name or the Postal Code in the address, and print labels for the following Avery templates:

- 5160
- 5162

Ms. Joanne Collins The National Children's Project 629 West 58th Street New York, NY 10019	Mr. Lawrence Johnson Longwood State University 1204 Avenue of the Americas Suite 300 New York, NY 10019	Mr. Patrick O'Neill The National Children's Project 629 West 58th Street New York, NY 10019
Mr. Oscar B. Syrius National Institute for Technical Learning 612 N. Eyeland Avenue Suite 1009 New York, NY 10019	Ms. Virginia Appleton Computers for Kids 111 E 57th Street Suite 200 New York, NY 10021	Mr. Raymond C. Austin Computers for Kids 111 E 57th Street Suite 200 New York, NY 10021
Mr. Doug Smith United Federation Inc. 1004 Third Ave. New York, NY 10023	Mr. Stanley Cohen Hiller State University 785 42nd Street 2nd Floor Boston, MA 14325	Professor Edward Riley Ph.D. Hiller State University 785 42nd Street 2nd Floor Boston, MA 14325
Mr. John Clayton The Children's Fund 3400 Wisconsin Avenue N. W. Washington, DC 20016	Mr. Charles Roberts The Children's Fund 3400 Wisconsin Avenue N. W. Washington, DC 20016	Dr. Anita Rayce M.D. Arlington School of Dentistry 122 South Ave. Arlington Hall Los Angeles, CA 34253

Request Labels - Primary Contact

This series of reports prints mailing labels to the Primary Contact of each Request included in the report. The Organization's mailing address is used.

Variations

Versions of this report sort the labels either by the Contact's last name or the Postal Code in the address, and print labels for the following Avery templates:

- 5160
- 5162

Ms. Kathleen Crispen West Side Center 11 West End Ave. New York, NY 10011	Ms. Margaret Neff Brooklyn Ballet 14 West 108th Street New York, NY 10012
Mr. David Moore Lower West Side Child Care Center 118 West 18th Street New York, NY 10014	Mr. George Notingham Teen Aid Center 534 Broadway New York, NY 10016
Ms. Joanne Collins The National Children's Project 629 West 58th Street New York, NY 10019	Mr. Lawrence Johnson Longwood State University 1204 Avenue of the Americas Suite 300 New York, NY 10019

Request Statistics

This report includes the following statistics for the Requests included in the report: total, minimum, maximum, and average Grant Amount; the total number of Approved, Declined, and Pending Requests; and the percentage of Requests that are Approved, Declined, and Pending.

Request Statistics

4/3/00

Total Grant Amount:	$ 4,971,733.00
Maximum Grant Amount:	$ 500,000.00
Minimum Grant Amount:	$ 100.00
Average Grant Amount:	$ 16,910.66
Total Number of Grants:	224
Percentage of Requests Approved:	76.19%
Total Number of Declines:	53
Percentage of Requests Declined:	18.03%
Total Number of Pending:	17
Percentage of Requests Pending:	5.78%

1

Requests by Sponsor

A list of Requests, grouped by the Contact identified as the "Sponsor" of each Request. Includes the Disposition, Grant Amount, and Paid Amount of each Request.

Fixed Criteria:

Requests that have an affiliated Contact with the Role of "Sponsor."

Requests by Sponsor
4/3/00

Primary Organization Project Title	Disposition and Date	Grant Amount	Paid Amount
Terry Brown			
Sunflower House for Youth in Distress San Francisco, CA *General Operating Support*	Approved 6/8/99	$56,100.00	$56,100.00
	Total Terry Brown (1 item)	$56,100.00	$56,100.00
Mortimer Humphries			
Brooklyn Ballet New York, NY *For General Operating Support*	Approved 6/7/99	$25,000.00	$25,000.00
National Institute for Technical Learning Coalition New York, NY *Y2K Educational Outreach*	12/21/99	$50,000.00	$0.00
	Total Mortimer Humphries (2 items)	$75,000.00	$25,000.00
	Grand Total (3 items)	$131,100.00	$81,100.00

Status of Requests Received

A comprehensive list of Requests grouped by the Staff member to which they are assigned.

Variations:

- by Staff
- by Staff including Sponsor

Status of Requests Received by Staff, including Sponsor

Requests from February 2000

5/23/00

Request Date and Amount	Organization Project Title	Disposition and Date	Type Status	Grant Amount	Payment Paid	Sponsor
Kelly Goldberg						
2/14/00 $10,000.00	**Shea Dance Company** Tots on Stage	Pending	Cash Grants	$0.00	$0.00	Jones, Janet
2/3/00 $5,250.00	**Shea Dance Company** The 2000 Annual Banquet	Pending	Cash Grants *Budgeted Line Item*	$5,250.00	$0.00	
$15,250.00			*Total for Kelly Goldberg* (2 items)	$5,250.00	$0.00	
Sarah Sullivan						
2/3/00 $66,300.00	**Abuse Prevention and Rehabilitation Fund** The continued support for the center's Strategic Action Plan for abuse prevention programs	Pending	Cash Grants *Budgeted Line Item*	$66,300.00	$0.00	Hollingsworth, Lamar
2/3/00 $28,560.00	**The National Children's Project** To help sponsor "The Children of the World" Conference	Pending	Cash Grants *Budgeted Line Item*	$28,560.00	$0.00	
$94,860.00			*Total for Sarah Sullivan* (2 items)	$94,860.00	$0.00	
$110,110.00			**Grand Total** (4 items)	$100,110.00	$0.00	

Summary of Requests by Type, Disposition, and Status

A summary of Requests grouped by their Request Type, Disposition, and Request Status, including subtotals of the Requested Amount and Grant Amount for each group.

Summary of Requests by Type, Disposition and Status

4/6/00

Type, Disposition, and Status	Request Amount	Grant Amount
Cash Grants		
Approved		
Active Grant (30 items)	$1,545,938.00	$1,295,938.00
Closed Grant (66 items)	$2,603,125.00	$2,616,125.00
Total Approved (96 items)	$4,149,063.00	$3,912,063.00
Declined		
Board Declined (7 items)	$235,000.00	$0.00
Immediate Declination (17 items)	$220,150.00	$0.00
Staff Declined (23 items)	$1,082,000.00	$0.00
Total Declined (47 items)	$1,537,150.00	$0.00
Pending		
Budgeted Line Item (2 items)	$19,870.00	$19,870.00
Considered for Board (6 items)	$697,000.00	$0.00
Initial Review (3 items)	$22,500.00	$0.00
Total Pending (11 items)	$739,370.00	$19,870.00
Total Cash Grants (154 items)	$6,425,583.00	$3,931,933.00
Dinners and Events		
Approved		
Accepted (11 items)	$68,100.00	$68,100.00
Attended (2 items)	$19,420.00	$19,420.00
Invited (1 items)	$28,560.00	$28,560.00
Tables to be filled (1 items)	$26,250.00	$26,250.00
Tickets Donated (1 items)	$15,300.00	$15,300.00
Total Approved (16 items)	$157,630.00	$157,630.00
Declined		
Declined (2 items)	$6,000.00	$0.00
Total Declined (2 items)	$6,000.00	$0.00
Total Dinners and Events (18 items)	$163,630.00	$157,630.00
Grand Total (172 items)	$6,589,213.00	$4,089,563.00

Tax Status Verification

Shows tax status information for charitable Organizations that are associated with Requests. If no tax status is on file, "Tax status not on file!" is shown in the Tax Status and Date column of the report.

Fixed Criteria:

Organizations that are flagged as Charitable and associated with Requests.

Tax Status Verification

4/3/00

Organization Project Title	Request ID Reference No.	Type, Disposition and Status	Requested/ Granted	Tax ID Reg. Date	Tax Status and Date	Next Verify Date
American Foundation for Children New York, NY *Endowment Campaign*	300	Cash Grants Approved Active Grant	$52,500.00		501c(3) 7/1/65	3/6/02
The Children's Fund Washington, DC *The sponsorship of the "The 1999 Annual Conference"*	302	Dinners and Events Approved Tables to be filled	$26,250.00	10-000647 4/29/78	501c(3) 9/1/92	1/3/01
Lower West Side Child Care Center New York, NY *After school program*	313	Cash Grants Approved Active Grant	$2,500.00	65-895742	501c(3) 12/6/95	
Ryan School of Medicine Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	307	Cash Grants Approved Active Grant	$154,500.00	12-486932	501c(6) 2/2/91	
Shea Dance Company New York, NY *The 2000 Annual Banquet*	304	Cash Grants Approved Active Grant	$5,250.00	57-200193	501c(3) 2/22/84	2/1/01
Teen Aid Center New York, NY *Counseling program for school violence victims*	312	Cash Grants Approved Active Grant	$3,500.00	13-584568	501c(3) 1/15/88	1/3/01
West Side Center New York, NY *Computer lab update*	311	Cash Grants Approved Active Grant	$3,000.00	34-958344	501c(3) 1/1/89	9/1/00
		Grand Total (7 items)	$247,500.00			

Top 20 Grants by Grant Amount

Lists the top 20 grants, according to their Grant Amount, in descending Grant Amount value. As with all reports, keep in mind that your search criteria also determine which grants are included in this report.

Top 20 Grants by Grant Amount

4/3/00

Grant Amount	Organization Project Description	Grant Date	Paid To Date
$ 500,000.00	**Hiller State University** Boston, MA *Undergraduate scholarship program*	12/7/99	$500,000.00
$ 250,000.00	**The National Children's Project** New York, NY *Funding for new daycare center*	12/21/99	$250,000.00
$ 250,000.00	**Sunflower House for Youth in Distress** San Francisco, CA *The construction of a new halfway house for pregnant teens*	6/3/96	$250,000.00
$ 235,000.00	**Kids With AIDS Research Center** New York, NY *Camp Hope Summer Program*	6/9/98	$235,000.00
$ 154,500.00	**Ryan School of Medicine** Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	6/8/99	$154,500.00
$ 154,500.00	**Ryan School of Medicine** Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	3/24/00	$0.00
$ 150,000.00	**Ryan School of Medicine** Los Angeles, CA *The establishment of the "Charles S. Godin" Scholarship program*	6/9/98	$150,000.00
$ 150,000.00	**The National Children's Project** New York, NY *The "Children of the next Millenium" project*	3/21/96	$150,000.00
$ 125,000.00	**National Institute for Technical Learning Coalition** New York, NY *"Building Bridges" Program*	6/9/98	$125,000.00
$ 125,000.00	**Ryan School of Medicine** Los Angeles, CA *The expansion of the child abuse treatment program.*	6/11/97	$125,000.00
$ 120,000.00	**East Side Learning Center** New York, NY *The School to Work Transition Program*	12/27/96	$120,000.00
$ 100,000.00	**University of America** Los Angeles, CA *Graduate Sudies Program*	12/7/99	$100,000.00

1

About Requirements Reports

This chapter describes the standard Requirement reports included with GIFTS Online.

Pending Proposal Checklist

A report listing the Requirements due on Pending Requests. The Project Title, Request Date and the Meeting Date are included for each Request.

Fixed Criteria

Requirements associated with Requests with a Disposition of Pending.

Pending Proposal Checklist

4/4/04

Organization Name Project Title	Request Date	Meeting Date	Request ID Ref. No.
Adventure Club of Manhattan *Extreme Sport Marathon*	2/9/04		298.01

Due	Done	Requirement Type	Staff	Notes
2/11/04	2/4/04	Audited Fin'l Statement	Colette Rogers	
2/11/04	2/18/04	Audited Fin'l Statement	Colette Rogers	Financial statement they sent reflected 2001-02 year. CR spoke with Adrienne about this on 2/18/04 and everything is OK.
2/11/04	2/4/04	List of Board Members	Colette Rogers	
2/11/04	2/4/04	List of Other Funders	Colette Rogers	
2/11/04		Organization Operating Budget	Colette Rogers	Sent E-mail reminder on 3/31/04
2/11/04	2/4/04	Project Budget	Colette Rogers	

Organization Name Project Title	Request Date	Meeting Date	Request ID Ref. No.
Brooklyn Ballet *2004 Fall season*	3/13/04		314

Due	Done	Requirement Type	Staff	Notes
3/20/04	3/20/04	Audited Fin'l Statement	Colette Rogers	
3/20/04	3/20/04	List of Board Members	Colette Rogers	
3/20/04		List of Other Funders	Colette Rogers	
3/20/04		Organization Operating Budget	Colette Rogers	
3/20/04	3/20/04	Project Budget	Colette Rogers	Not Needed for GOS grants

Organization Name Project Title	Request Date	Meeting Date	Request ID Ref. No.
The Children's Fund *General Operating Support*	2/2/04		233.01

Due	Done	Requirement Type	Staff	Notes
2/9/04	2/2/04	Audited Fin'l Statement	Lee Williamson	
2/9/04	2/2/04	List of Board Members	Lee Williamson	
2/9/04		List of Other Funders	Lee Williamson	
2/9/04	3/22/04	Organization Operating Budget	Lee Williamson	
2/9/04	2/2/04	Project Budget	Lee Williamson	

Organization Name Project Title	Request Date	Meeting Date	Request ID Ref. No.
Lower West Side Child Care Center *Summer School Program*	4/4/04		293.01

Due	Done	Requirement Type	Staff	Notes
4/11/04		Audited Fin'l Statement	Kelly Goldberg	
4/11/04		List of Board Members	Kelly Goldberg	
4/11/04		List of Other Funders	Kelly Goldberg	
4/11/04		Organization Operating Budget	Kelly Goldberg	
4/11/04		Project Budget	Kelly Goldberg	

Grand Total (4 items)

1

Requirements Completed

Produces a list of completed Requirements.

Variations:

- by Date
- by Organization
- by Program Area
- by Staff

Fixed Criteria:

Requirements with a status of Done.

Requirements Completed - By Date

Done Date is on or after 2/10/2004

4/4/04

Received Date	Organization Name / Project Title	Requirement Received	Payment Requirement	Notes
2/18/04	**Adventure Club of Manhattan** *Extreme Sport Marathon*	Audited Fin'l Statement	No	Financial statement they sent reflected 2001-02 year. CR spoke with Adrienne about this on 2/18/04 and everything is OK.
3/17/04	**National Institute for Technical Learning Coalition** *WWW Educational Outreach*	Challenge	Yes	NITLC is required to Raise $250,000 in order for payments to be released
3/20/04	**Brooklyn Ballet** *2004 Fall season*	Project Budget	No	Not Needed for GOS grants
3/20/04		List of Board Members	No	
3/20/04		Audited Fin'l Statement	No	
3/22/04	**The Children's Fund** *General Operating Support*	Organization Operating Budget	No	
4/3/04	**Ryan School of Medicine** *Charles S. Godin Scholarship program*	Progress Report	Yes	Progress report must include student GPA. Any Student with a GPA under 2.5 must be sent probation letter

Grand Total (7 items)

1

Requirements Due

A chronological list of Requirements with a Status of Scheduled.

Variations:

- by Date
- by Organization
- by Program Area
- by Staff

Fixed Criteria:

Requirements with a status of Scheduled.

Requirements Due - By Staff
4/4/04

Organization Name Project Title	Requirement Due	Due Date	Payment Requirement	Notes
Lee Williamson				
Arlington School of Dentistry *The Support for the Restoration of the School of Dentistry Library*	Progress Repor	6/7/04	Yes	
The Children's Fund *General Operating Support*	List of Other Funders	2/9/04	No	LW - 3/15/04 Left message that we cannot review application until this information is received
Total Lee Williamson (2 items)				
Sarah Sullivan				
Brooklyn Ballet *Snowflake Ball*	Progress Report	3/31/04	No	
The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event	Progress Report	9/15/04	No	
	Progress Report	9/15/04	No	
Total Sarah Sullivan (3 items)				
Grand Total (5 items)				

1

Requirements Received by Date

A chronological list of Requirements that have been marked as received from the grantee, but have not yet been marked as done.

Fixed Criteria:

Requirements with a status of Received.

About hGrant Reporting

The optional hGrant reporting tool allows GIFTS Online customers the ability to participate in the Foundation Center's Grantsfire project.

What is hGrant?

hGrant was developed as part of the Grantsfire project to help foundations:

• Publish their grants information to the Web so it is easier for nonprofits to find grant information

• Access timely information about what projects and areas of focus are being funded in the nonprofit sector, and

• Create an online vehicle that will enable them to be more transparent about their grant making

Publishing using hGrant allows third-party software to read grants information and aggregate it on a central database.

Grant feeds published by any foundation using the Foundation Center's hGrant Reporting program are available to the public, for free, at www.glasspockets.org, the Center's online portal that champions transparency in the philanthropic sector.

To find out more about the Foundation Center's Grantsfire project and consider joining go to: http://foundationcenter.org/grantmakers/hgrant.html.

For more information, contact hgrant@foundationcenter.org.

Enabling the hGrant Feature

To enable the hGrant feature, you must email a request to MicroEdge at services@microedge.com.

Configuring Classification Codes

For compatibility with Foundation Center's hGrant format, your geographical code levels must be arranged in a specific way as shown below. If your levels are not currently set up this way they can be changed using the Admin > Classifications tool.

NOTE: Country is taken from the Organization Country on the Request.

Geographical Area Served		
Level	**Description Name**	**Example**
1	Intra Country Region	Northeast US, Northern Canada etc.
2	State or Province	New York
3	County	Kings County

4	City	Brooklyn
5	Neighborhood	Park Slope

hGrant Report Requirements

The following conditions are required to run the hGrant Report:

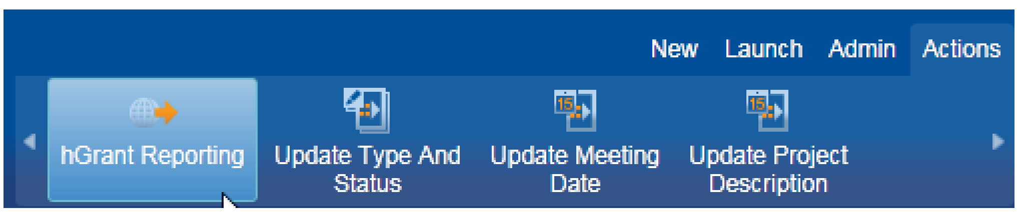
- The hGrant Report XML can only be generated for Approved grants.
- There are required fields specified by hGrant.
    - **City** and **State** in both the grantor organization and grantee organization
    - **Project Description** in the Request
    - **Grant Amount** in the Request

Running the hGrant Report

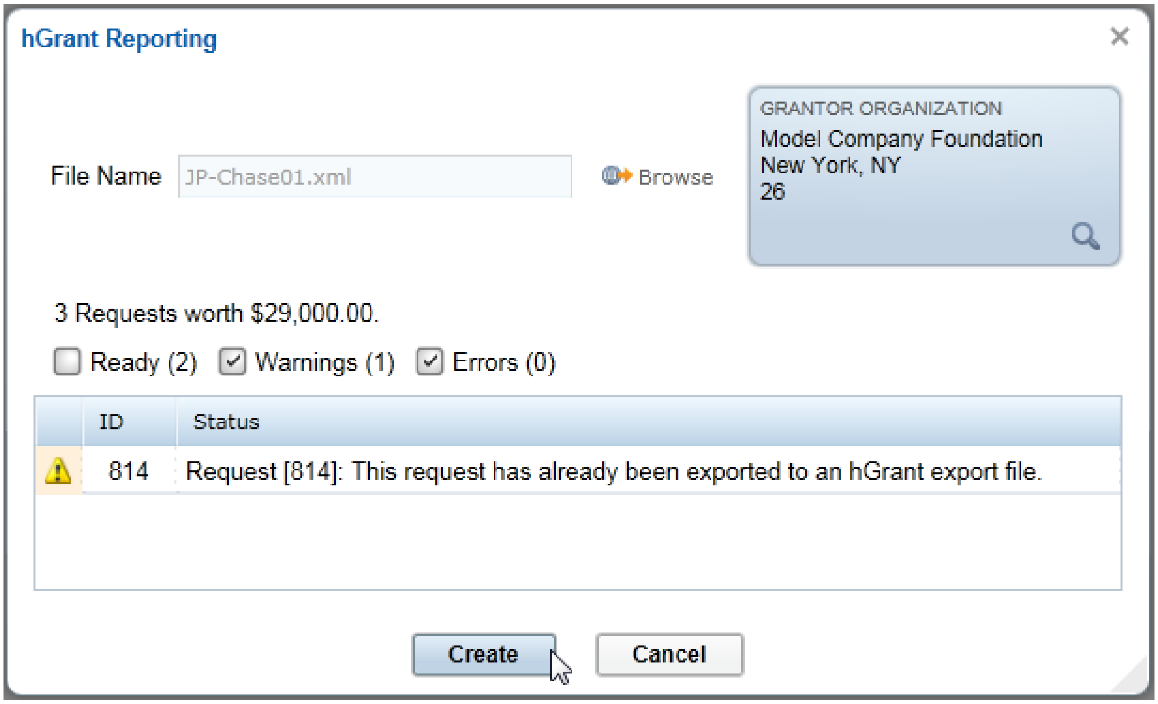
Accessing the hGrant Report

NOTE: If this feature is enabled, the menu option will only be visible to Grant Managers and Administrators.

This new functionality will be access through the Actions menu with a new option named hGrant Reporting on Request search result pages and Related Requests lists.



When you select one or more Requests in the search results and then select **Actions > hGrant Report**, the following form opens:



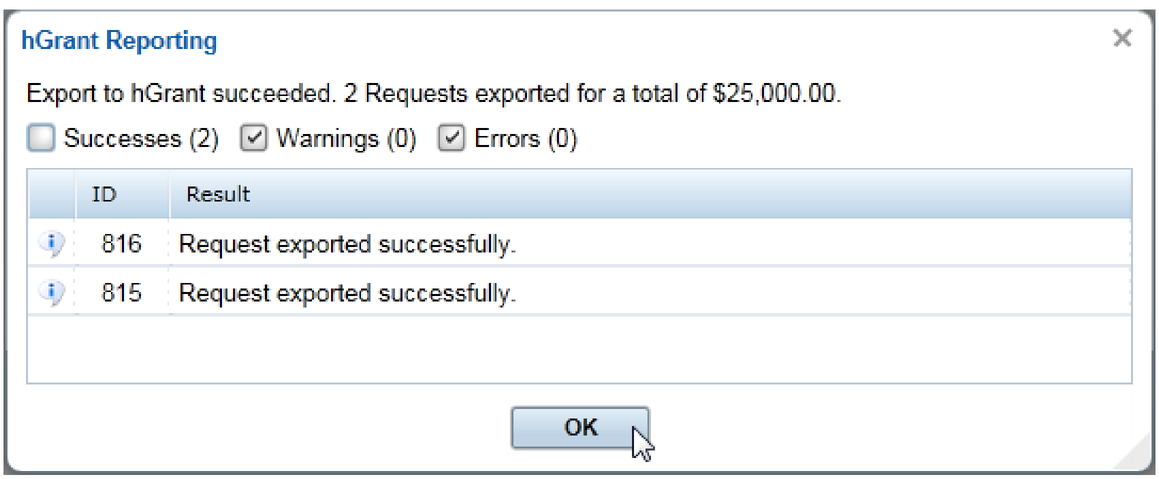
Field Name	Description
File Name	**[Required]** This file will contain the hGrant data and will be uploaded to the hGrant site. Click the **Browse** button to open a Windows browse form in order to specify: • The location you wish to save the XML file • The name of the new XML file **NOTE:** The location of the file must be on your local workstation or network. These files cannot be stored on the GIFTS Online servers. The system will create an XML file with the name and location indicated. If a file with the same name is found in that location, you are prompted to confirm overwrite or cancel. The generated XML file can then be uploaded to Foundation Center to make the information public.
Grantor Organization Card	A grantor organization must be defined for inclusion in the vCard* block of the XML file. For this reason, you should create an Organization record for your organization. If multiple entities are involved, multiple Organization records should be created so the options will be available when the hGrant Report is run. Clicking the magnifying glass lookup icon will open an hGrant Organization

	search form allowing you to find other organizations in your database to assign as the Grantor. **NOTE:** *vCard is a file format standard for electronic business cards. vCards are often attached to e-mail messages, but can be exchanged in other ways, such as on the World Wide Web or instant messaging. They can contain name and address information, phone numbers, e-mail addresses, URLs, logos, photographs, and audio clips.
Number of Requests and Total Amount	Below the File Name will be displayed the number of Requests selected and the total grants amount.
Process Monitor	The process monitor area serves to list any 'pre-processing' warnings or errors. After creating the XML file, this area will list all successful exports with the Request ID and the status of Exported.
Create	Click this button to create the XML file containing the selected Request data. This button will be disabled if: No File Name is entered The Grantor Organization is not set The Process Monitor shows errors that must be addressed
Cancel	Closes the hGrant Reporting form without creating the XML file.

Successful XML Creation

Once a File Name is entered and a Grantor Organization is set, if there are now errors listed, you can click **Create** to generate the XML hGrant file.

The Process Monitor will look similar to the sample below:



Activity History

For every hGrant Reporting export, one activity record will be created.

Note that Organization, Contact, Request, and Payment will be blank because this activity record represents the entire batch.

If a particular request is re-exported, the Export_ID will be replaced with the new Activity.ID. For that request, the Export_ID will only reference the latest export. Reference to the old Activity.ID is lost.

Setting Up News and Social Media Feeds for hGrant

If your organization has established News and Social Media sites or an RSS feed available for sending out updates and alerts to subscribers, they can be entered in www.glasspockets.org when you set up your foundation profile.

RSS feeds:

http://

Does the foundation use RSS feeds to send alerts and updates about its work?

Potential applicants or other people involved in charity can then subscribe by accessing the Foundation Transparency 2.0 list and clicking on your appropriate link.

Foundation Name	Total Assets	Total Giving	Fiscal Year	Transparency Tools
The West 54th Street Foundation	$490,877,291	$245,800,350	12/31/10	RSS Feed Knowledge Center RSS Grants Feed

NOTE: MicroEdge does not provide support for the updating of your social media pages, RSS feeds, or similar features. Please contact your internal IT department or glasspockets.org

About Batch Updates

In GIFTS Online, batch update processes are available from both the Search Results page and from the Related List grid.

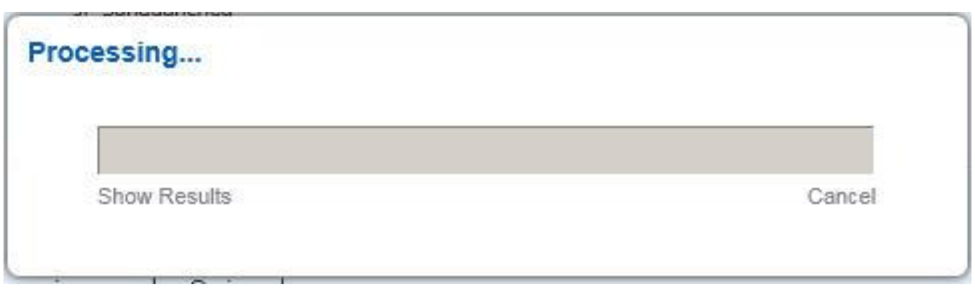
This allows you to check/select multiple records on the list and perform the same action on them.

There are several actions currently available in GIFTS Online:

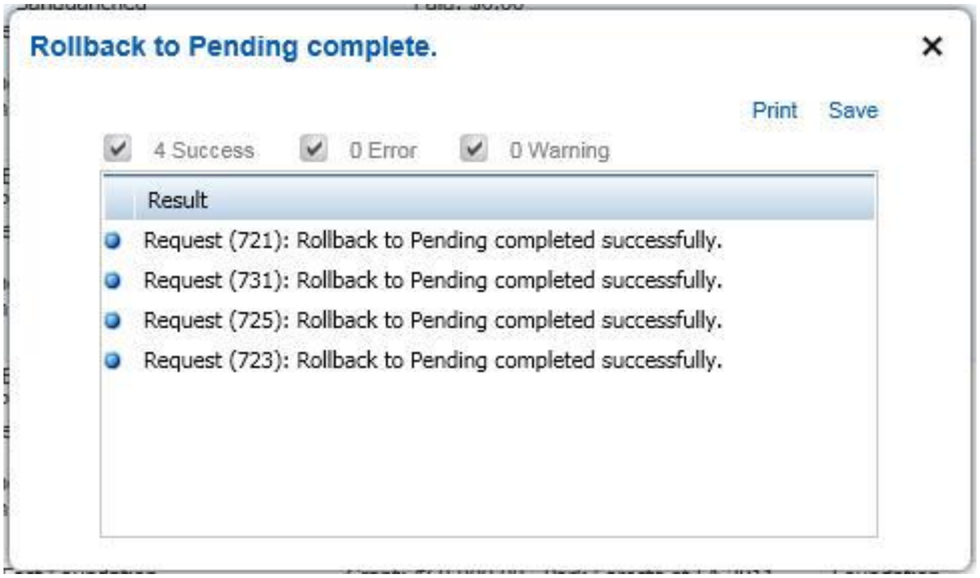
Record Type	Action
Organization	Update Coding Sheet
Contact	Update Coding Sheet
Request	Update Coding Sheet
Request	Update Request Type/Status
Request	Update Meeting Date
Request	Update Staff Assignments
Request	Update Project Assignments
Payments	Update Codes

Processing Batches

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

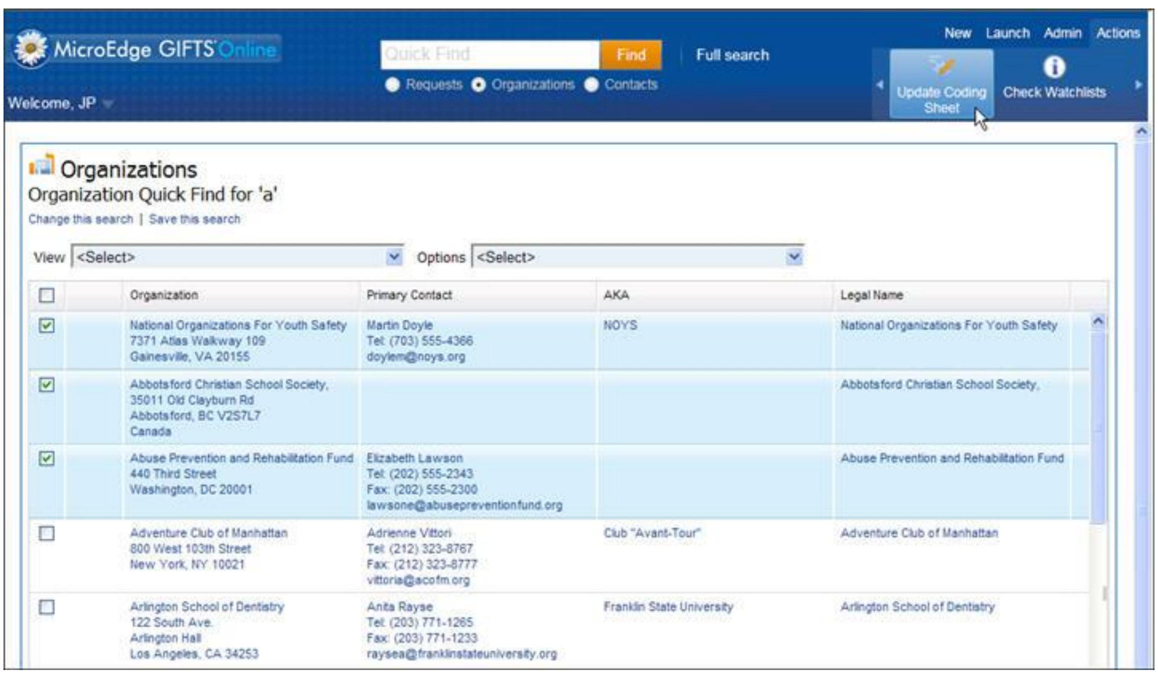


The process monitor displays the type and ID of each record, followed by a message in the log. The process monitor will have **Print** and **Save** options.



Batch Update for Organizations

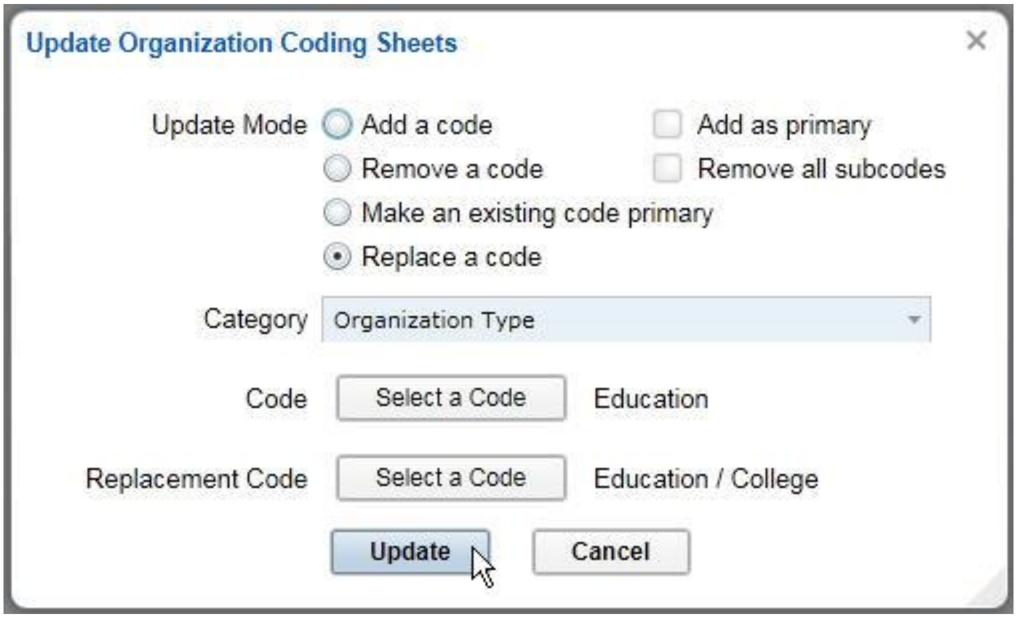
From the Organizations search results page the **Actions** menu allows you to **Update Coding Sheet.**



To perform this action:

1. Do a **Quick Find** or **Full search** for Organizations.
2. Select more than one organization record from the search results page.
3. Go to **Actions > Update Coding Sheet**. (You may need to slide the menu over to see the option.)

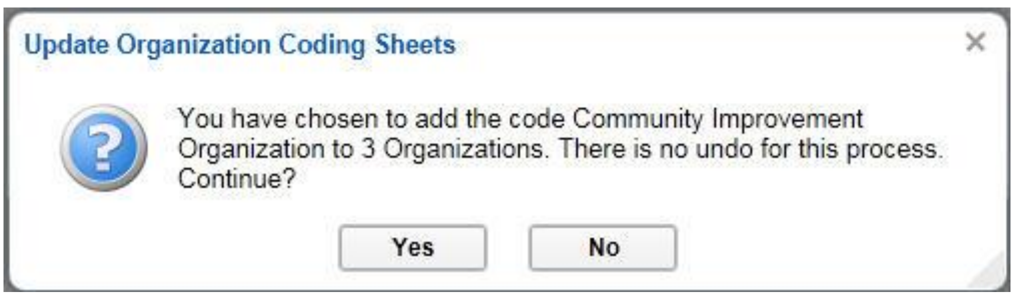
4. Make changes to the Update Organization Coding Sheets form as necessary. (See table below for description of options.)



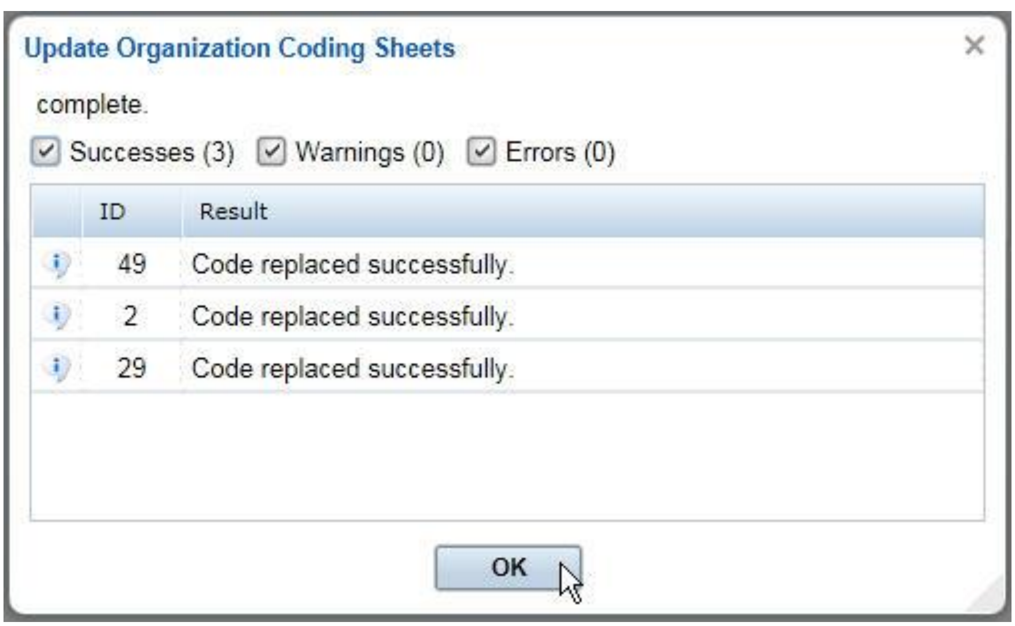
Option	Description
Update Mode	**Required.** The user must choose one of the following options. • **Add a code** – this will add the selected code to any other codes already specified. When this radio button is selected, the associated "Add as primary" option will be enabled (default unchecked.) • **Remove a code** – this will remove the value from the Coding Sheet. When this radio button is selected, the associated "Remove all subcodes" option will be enabled (default unchecked.) • **Make an existing code primary** – this will take the selected value and set the Primary flag to true, while changing the primary flag to false for the value that is currently the primary • **Replace a code** – when this option is selected, the user will supply both a current code, and another code to replace it with. Clicking this radio button also makes visible the Replacement Code prompt. • **Add as primary** - adds the selected code value as the primary. Only enabled if **Add a code** is selected. • **Remove all subcodes** - removes all subcodes leaving only the primary code value. Only enabled is **Remove a code** is selected.

Category	Required. The Coding Sheet category to be addressed. Includes all of the Categories defined for the record type being updated. The value chosen here will determine the options available in the Code and Replace Code drop-downs.
Code	Select the desired value(s) in the chosen Category by clicking the **Select a Code** button. If the mode is Add, inactive codes are excluded. Otherwise, inactive codes are included, and the descriptions of the inactive codes are followed by" (inactive)".

5. Click **Update** to begin processing the update to the Organization records you selected.
6. You will be prompted with a confirmation message. Click **Yes** to continue or **No** to cancel.



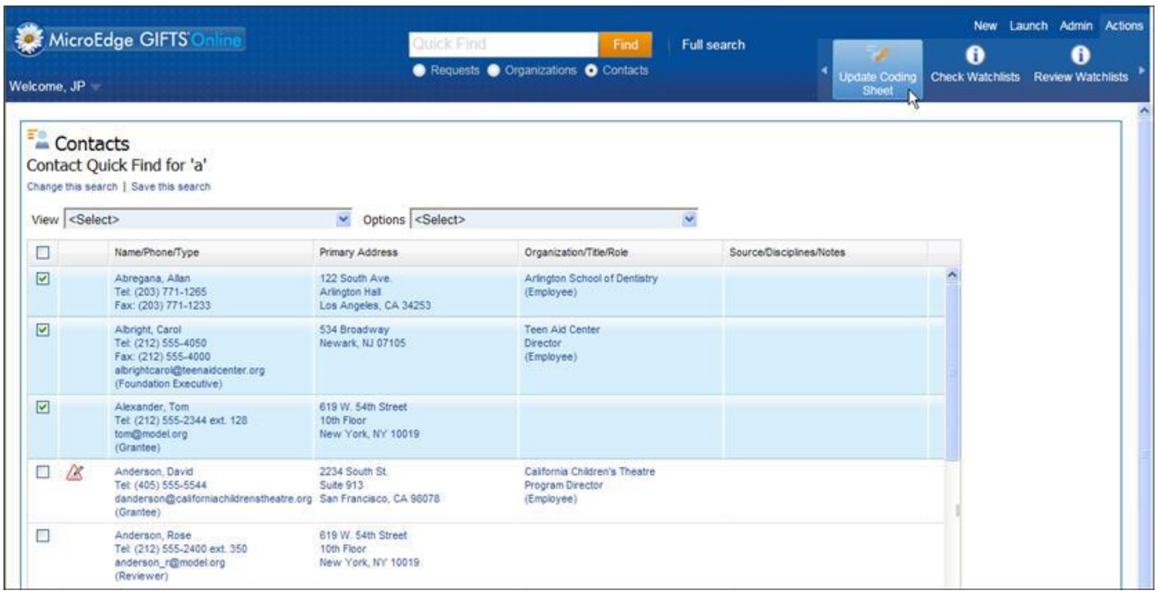
7. Once complete, the progress monitor will display the number of Successes, Warnings, and Errors along with the ID of each record and a short result message. Click **OK** to return to the search results page.



Batch Update for Contacts

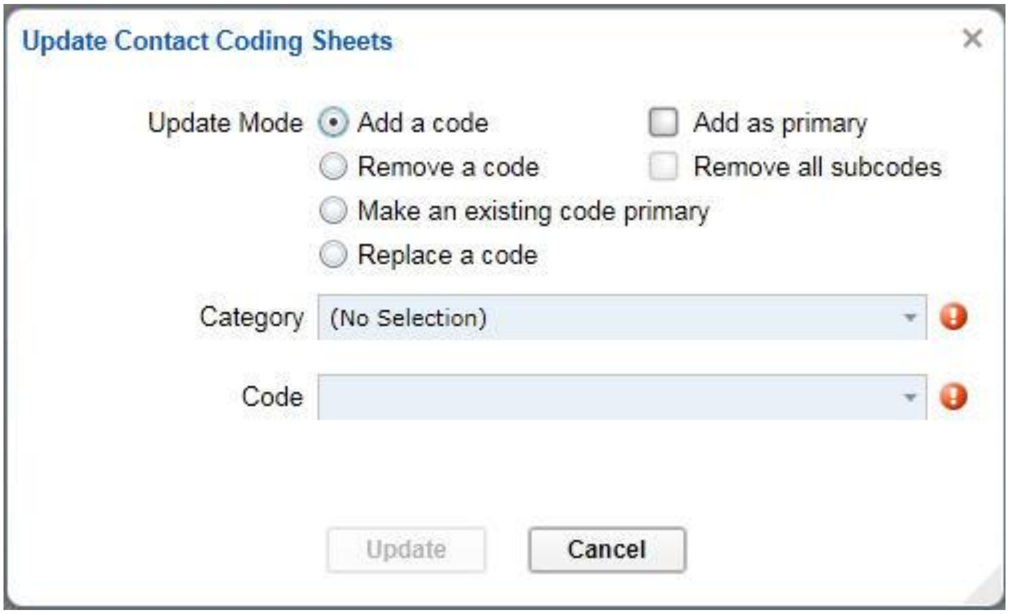
NOTE: A custom code table must be assigned to the Contact edit form before this option can be utilized. By default the Contact edit form does not have any table assigned to the Coding section.

From the Contacts search results page or Related List grid the **Actions** menu allows you to **Update Coding Sheet.**



To perform this action:

1. Do a **Quick Find** or **Full search** for Contacts or display a Related list of Contacts.
2. Select more than one Contact record from the list.
3. Go to **Actions > Update Coding Sheet**. (You may need to slide the menu over to see the option.)
4. Make changes to the Update Contacts Coding Sheets form as necessary. (See table below for description of options.)



Option	Description
Update Mode	**Required.** The user must choose one of the following options. • **Add a code** – this will add the selected code to any other codes already specified. When this radio button is selected, the associated "Add as primary" option will be enabled (default unchecked.) • **Remove a code** – this will remove the value from the Coding Sheet. When this radio button is selected, the associated "Remove all subcodes" option will be enabled (default unchecked.) • **Make an existing code primary** – this will take the selected value and set the Primary flag to true, while changing the primary flag to false for the value that is currently the primary • **Replace a code** – when this option is selected, the user will supply both a current code, and another code to replace it with. Clicking this radio button also makes visible the Replacement Code prompt. • **Add as primary** - adds the selected code value as the primary. Only enabled if **Add a code** is selected. • **Remove all subcodes** - removes all subcodes leaving only the primary code value. Only enabled is **Remove a code** is selected.
Category	Required. The Coding Sheet category to be addressed. Includes all of the Categories defined for the record type being updated. The value chosen here will determine the options available in the Code and Replace Code drop-downs.

Code	Select the desired value(s) in the chosen Category by clicking the **Select a Code** button. If the mode is Add, inactive codes are excluded. Otherwise, inactive codes are included, and the descriptions of the inactive codes are followed by" (inactive)".

5. Click **Update** to begin processing the update to the Contact records you selected.
6. You will be prompted with a confirmation message. Click **Yes** to continue or **No** to cancel.
7. Once complete, the progress monitor will display the number of Successes, Warnings, and Errors along with the ID of each record and a short result message. Click **OK** to return to the search results page.

Batch Updates for Requests

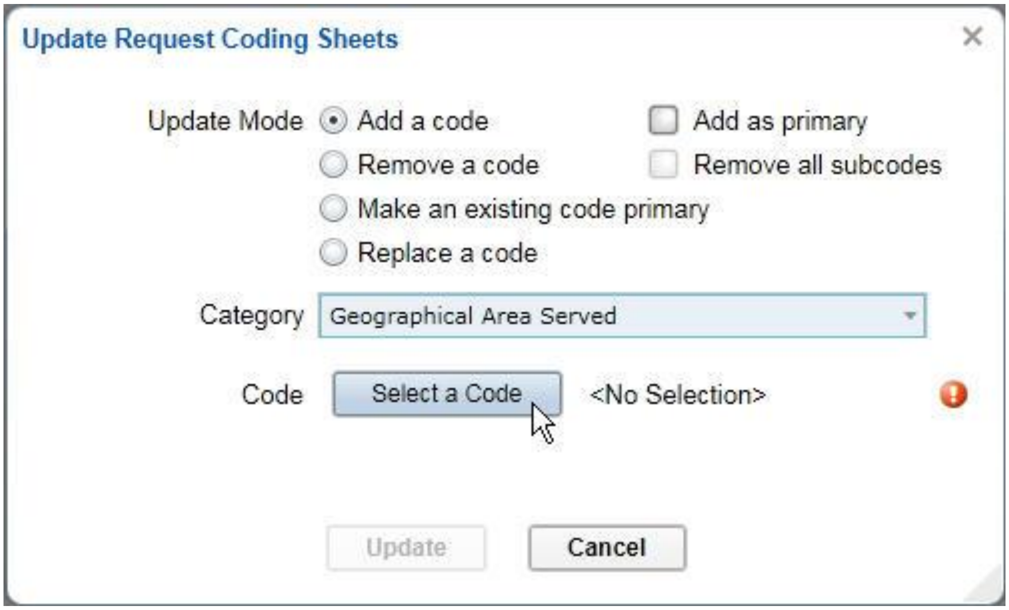
From the Requests search results page or Related links grid the **Actions** menu allows for the following batch updates:

- Update Coding Sheet
- Update Request Type/Status
- Update Meeting Date
- Update Staff
- Update Project Description

Update Coding Sheet

To perform a batch Request Coding Sheet Update:

1. Do a **Quick Find** or **Full search** for Requests or display a Related list of Requests.
2. Select more than one Request record from the list.
3. Go to **Actions > Update Coding Sheet**. (You may need to slide the menu over to see the option.)
4. Make changes to the Update Request Coding Sheets form as necessary. (See table below for description of options.)



Option	Description
Update Mode	**Required.** The user must choose one of the following options. • **Add a code** – this will add the selected code to any other codes already specified. When this radio button is selected, the associated "Add as primary" option will be enabled (default unchecked.) • **Remove a code** – this will remove the value from the Coding Sheet. When this radio button is selected, the associated "Remove all subcodes" option will be enabled (default unchecked.) • **Make an existing code primary** – this will take the selected value and set the Primary flag to true, while changing the primary flag to false for the value that is currently the primary • **Replace a code** – when this option is selected, the user will supply both a current code, and another code to replace it with. Clicking this radio button also makes visible the Replacement Code prompt. • **Add as primary** - adds the selected code value as the primary. Only enabled if **Add a code** is selected. • **Remove all subcodes** - removes all subcodes leaving only the primary code value. Only enabled is **Remove a code** is selected.
Category	Required. The Coding Sheet category to be addressed. Includes all of the Categories defined for the record type being updated. The value chosen here will determine the options available in the Code and Replace Code drop-downs.

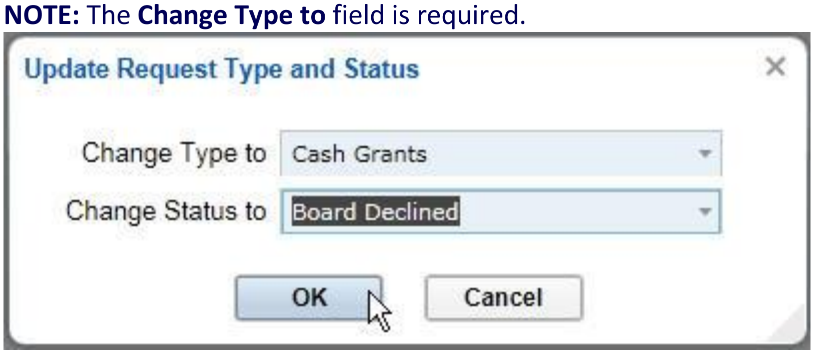
Code	Select the desired value(s) in the chosen Category by clicking the **Select a Code** button. If the mode is Add, inactive codes are excluded. Otherwise, inactive codes are included, and the descriptions of the inactive codes are followed by" (inactive)".

5. Click **Update** to begin processing the update to the Contact records you selected.
6. You will be prompted with a confirmation message. Click **Yes** to continue or **No** to cancel.
7. Once complete, the progress monitor will display the number of Successes, Warnings, and Errors along with the ID of each record and a short result message. Click **OK** to return to the search results page.

Update Request Type/Status

To perform a batch Request Type/Status Update:

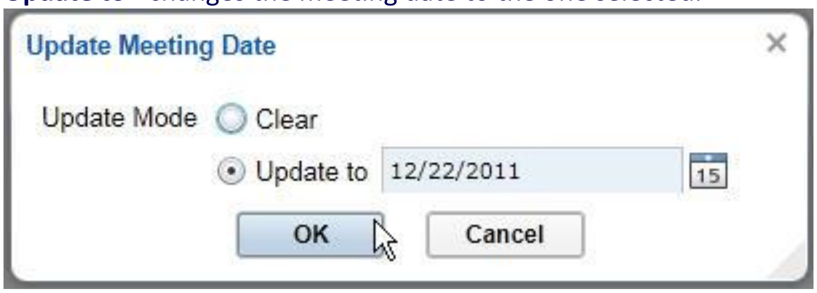
1. Do a **Quick Find** or **Full search** for Requests or display a Related list of Requests.
2. Select more than one Request record from the list.
3. Go to **Actions > Update Type and Status**. (You may need to slide the menu over to see the option.)
4. Make changes to the Update Request Type and Status form as necessary.
   NOTE: The **Change Type to** field is required.



5. Click **OK** to continue.
6. You will be prompted with a confirmation message. Click **Yes** to continue or **No** to cancel.
7. Once complete, the progress monitor will display the number of Successes, Warnings, and Errors along with the ID of each record and a short result message. Click **OK** to return to the search results page.

Update Meeting Date

To perform a batch Meeting Date Update:

1. Do a **Quick Find** or **Full search** for Requests or display a Related list of Requests.
2. Select more than one Request record from the list.
3. Go to **Actions > Update Meeting Date**. (You may need to slide the menu over to see the option.)
4. Make changes to the Update Request Meeting Date form as necessary.
   Clear - Removes the current meeting date.
   Update to - changes the meeting date to the one selected.
   

5. Click **Update** to continue.
6. You will be prompted with a confirmation message. Click **Yes** to continue or **No** to cancel.
7. Once complete, the progress monitor will display the number of Successes, Warnings, and Errors along with the ID of each record and a short result message. Click **OK** to return to the search results page.

Update Staff Assignment

To perform a batch Request Staff Assignment Update:

1. Do a **Quick Find** or **Full search** for Requests or display a Related list of Requests.
2. Select more than one Request record from the list.
3. Go to **Actions > Update Staff Assignment**. (You may need to slide the menu over to see the option.)
4. Make changes to the Update Staff Assignments form as necessary.
   Change Staff to - Select a new staff member to assign the records to.
   Update Activities/Requirements:
   Open - select this option to update Open related Activities and Requirements of the staff change. You can specify to update records that are Overdue, Due, or Both.
   Closed - Select this option to only update closed Activities and Requirements with the new staff change.

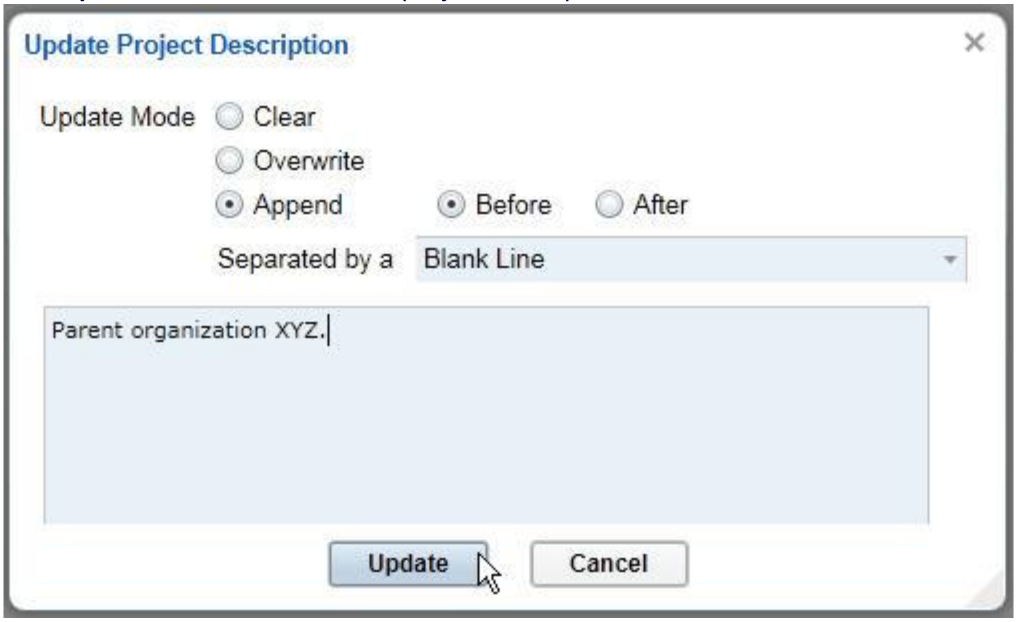
5. Click **Update** to continue.
6. You will be prompted with a confirmation message. Click **Yes** to continue or **No** to cancel.
7. Once complete, the progress monitor will display the number of Successes, Warnings, and Errors along with the ID of each record and a short result message. Click **OK** to return to the search results page.

Update Project Description

To perform a batch Request Project Description Update:

1. Do a **Quick Find** or **Full search** for Requests or display a Related list of Requests.
2. Select more than one Request record from the list.
3. Go to **Actions > Update Project Description**. (You may need to slide the menu over to see the option.)
4. Make changes to the Update Project Description form as necessary.
   Clear - to clear the project description on all records.
   Overwrite - to replace the current project description with the new content.
   Append - to add the new content either Before or After the current description.
   Separated by a - Only enabled if Append is selected. Allows you to select how to separate the old from the new content. (blank Line, Carriage Return, Space, or Tab)

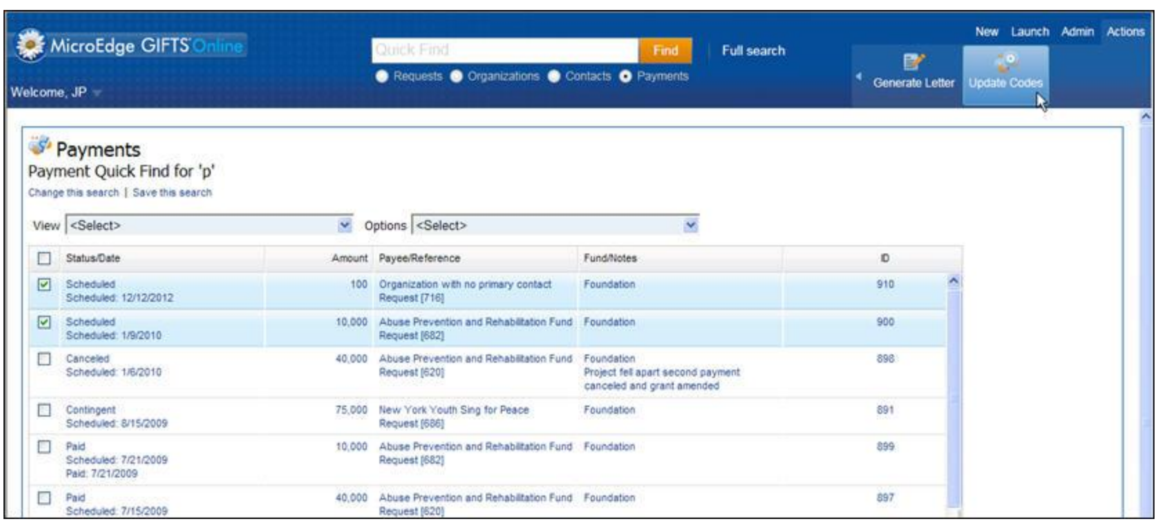
Description field - Enter the new project description information here.



5. Click **Update** to continue.
6. You will be prompted with a confirmation message. Click **Yes** to continue or **No** to cancel.
7. Once complete, the progress monitor will display the number of Successes, Warnings, and Errors along with the ID of each record and a short result message. Click **OK** to return to the search results page.

Batch Updates for Payments

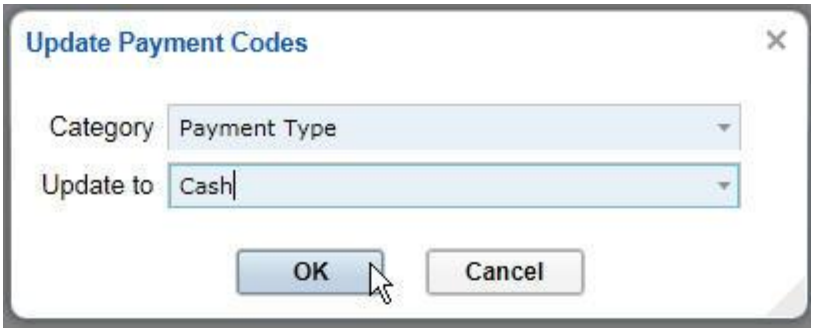
From the Payments search results page or Related List grid the **Actions** menu allows you to **Update Codes.**



To perform a batch Payment Codes Update:

1. Do a **Quick Find** or **Full search** for Payments or display a Related list of Payments.

2. Select more than one Payment record from the list.
3. Go to **Actions > Update Codes**. (You may need to slide the menu over to see the option.)
4. Make changes to the Update Payment Codes form as necessary. (See table below for description of options.)



Option	Description
Category	Required. The Coding Sheet category to be addressed. Includes all of the Categories defined for the record type being updated. The value chosen here will determine the options available in the **Update to** drop-down.
Update to	Select the desired value(s) in the chosen Category by using the drop-down menu.

5. Click **OK** to begin processing the update to the Contact records you selected.
6. You will be prompted with a confirmation message. Click **Yes** to continue or **No** to cancel.
7. Once complete, the progress monitor will display the number of Successes, Warnings, and Errors along with the ID of each record and a short result message. Click **OK** to return to the search results page.

Percentage Coding in Batch Updates

The following rules to functionality apply to GIFTS Online Batch Updates to support percentage codes.

Add Code

When a code is added, the following rules apply:

- If a code is added as a secondary code, it will be set at 0%.
- If a code is added as a primary code, the following will apply:
    - If there are no existing codes, it will default to 100% with full Request/Grant amount.
    - If a primary code already exists at 100%, the new primary code will be set to 100% with full Request/Grant amount. The old primary code will be set to 0%.
    - If the request has an existing code at less than 100%, the new primary code will be added at 0% and the user will need to adjust the value manually.

Remove a Code

When a code is removed, the following rules will apply:

- If the code is secondary, its allocation will be added to the primary code.
- If the code is primary, its allocation will be added to whichever code becomes the primary.

Make a Code Primary

When a secondary code is made primary, the following rules apply:

- If the existing primary code is allocated at 100%, the new code will be set to 100% and the old one will be set to 0%.
- If the existing primary code is not set at 100%, only the primary flag will change and the percentages will remain the same.

Replacing a Code

When a code is replaced, the allocation amount of the new code will be the same as the one it replaced.

Managing Documents

Through GIFTS Online, you can view and edit documents associated with Organization, Request, Contact, and Affiliation records.

Documents are displayed in Organization, Request, Contact, and Affiliation edit forms.

This section contains the following topics:

About Documents

This topic covers basic elements of understanding how to work with documents in GIFTS Online.

Documents in GIFTS Online

Documents found in GIFTS Online can originate three different ways:

- From online grant seekers and grantees attaching files to grant applications and online report forms.
- From users at your organization generating emails, letters, and write-ups which they save to the system.
- From users uploading external documents to attach to Requests or Organizations already in the system.

Once in the system, however, they can all be viewed, edited, replaced, and deleted the same way.

Documents and Document Activities

When discussing documents in GIFTS Online, it's helpful to keep in mind that each "document" is really comprised of two elements:

- The document file itself - an MS Word file of a letter you generated, or a PDF submitted by an online applicant.
- The Document Activity - an GIFTS Online record which captures information *about* the document file. For example, the date it was created, or the name of the document's author.

Working with documents in GIFTS Online means working with both documents (the files) and Document Activities.

Related Documents

A link to related Documents is found on the edit forms for Organizations, Requests, and Contacts.

The Document edit form contains the following information:

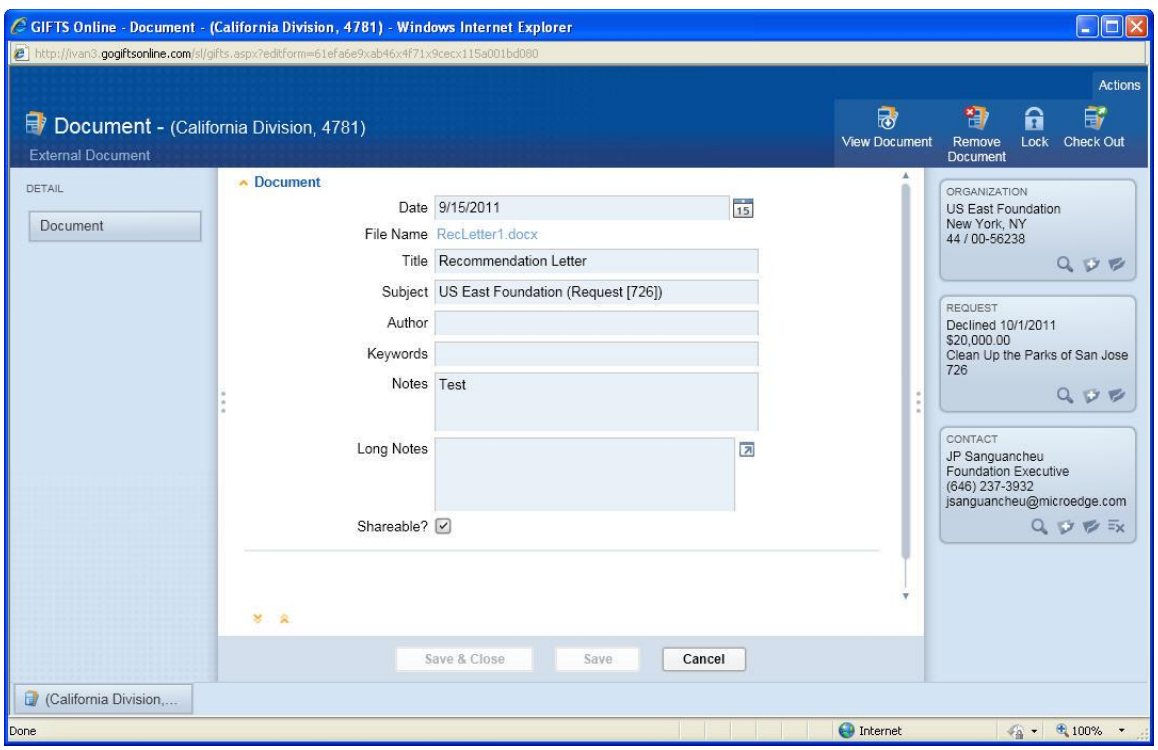
- **What/When:** Where the document originated from.
- **Title/Subject:** The document title and related record ID.
- **Author:** The document author, if one has been provided.
- **Reference:** Displays related Contact information.
- **File Name/Notes:** Displays any notes entered and the filename.
- **Status:** Checked In, Checked Out, etc.
- **Audit:** Information regarding who created or modified it.

You can also use the three filters on top to narrow down the list by **Type, Title, or Keywords.**

Viewing Documents

You can view documents affiliated with Organizations, Requests, or Contacts by going to the desired record's edit form and then clicking on the related Documents link. Once the list of documents is displayed, you can double click on the desired document to open its edit form.

Click the filename to open the file for viewing.



NOTE: You can also find a document by searching for it through the related Activities link.

NOTE: You can save a local copy of the file once it is open, but your changes will *not* be reflected in the copy in GIFTS Online. Click here for information on making and saving changes in an online document.

To view a file, you must have software capable of opening the file type on your computer. For example, you can only view a PDF if you have Adobe Reader installed.

You can still view documents even if another user has it checked out. However, you cannot see that user's changes until he or she checks the document back in.

Editing and Replacing Documents

Whether a document was submitted by a grantee, uploaded by you or another user, or generated as a letter or write-up, you can make changes by editing or, if need be, replacing the file.

Whether you can edit a document directly in GIFTS Online depends on meeting both of the following criteria:

- The document is a Microsoft Office file - e.g., Word, Excel, PowerPoint.
- You are using Internet Explorer 9 or later.

Otherwise, to make changes, you have to save a copy locally, then upload it as a replacement.

Editing Microsoft Office Documents with Internet Explorer

If you are using Internet Explorer as your GIFTS Online web browser, you can edit a Microsoft Office document by doing the following:

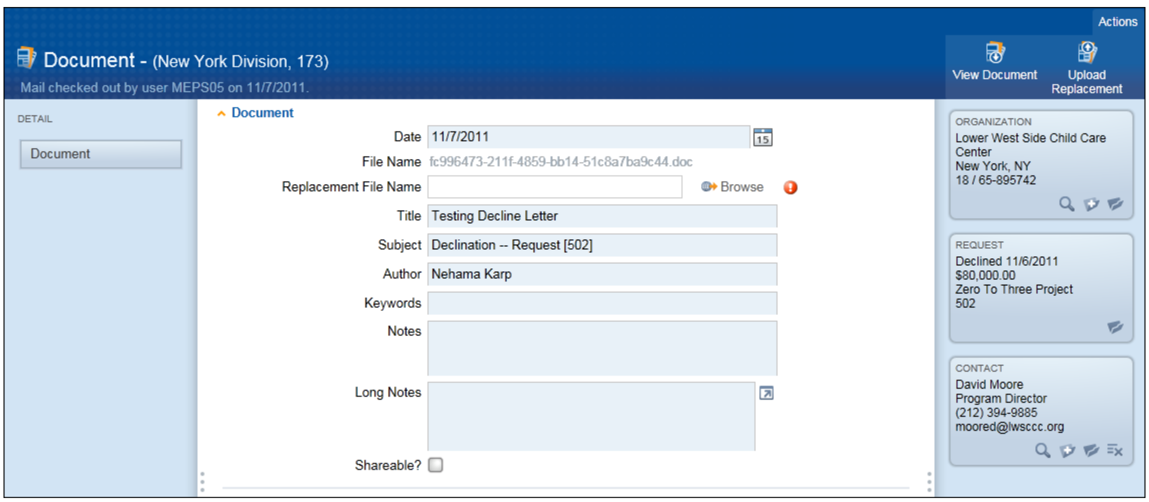
1. Navigate to the Request, Organization, or Contact edit form and click the related Documents link.
2. In the Action column, click **Check Out**. The document is checked out. The Status column will alert other users who checked the file out and when. Those users can view the document as it was when checked out.
3. Click **Edit Document**. The document opens.
4. Edit the document as necessary, and then save and close it.
5. From the Document dashboard part, click **Check In**.

IMPORTANT: Your changes cannot be viewed by other users until you check it back in.

Replacing Non-Microsoft Office Documents, or Any Document Using Firefox/Safari

If you are using a non-IE web browser, or you are working with a non-Office document, like a PDF, you cannot edit the file directly. You can download a local copy and then upload any changes as a replacement.

1. In the Action column of the Document dashboard part, click **View Document**, then click **Save**. Choose a location for the document copy and click **Save**.
2. Launch the appropriate application and open the document copy that you just saved.
3. Edit the document as necessary.
4. Save the edited document locally, and then return to GIFTS Online.
5. In the Action column of the Document dashboard part, click **Upload Replacement**. The Edit Document Activity dashboard part appears.



6. Click **Browse** and locate the edited document.
7. Select the edited document and click **Open**. The document path appears in the field next to the Browse button.
8. Enter any other information in the other Document Activity fields, and then click **Save**. The Document Activity page appears.

NOTE: Click here for more information about working with Document Activities.

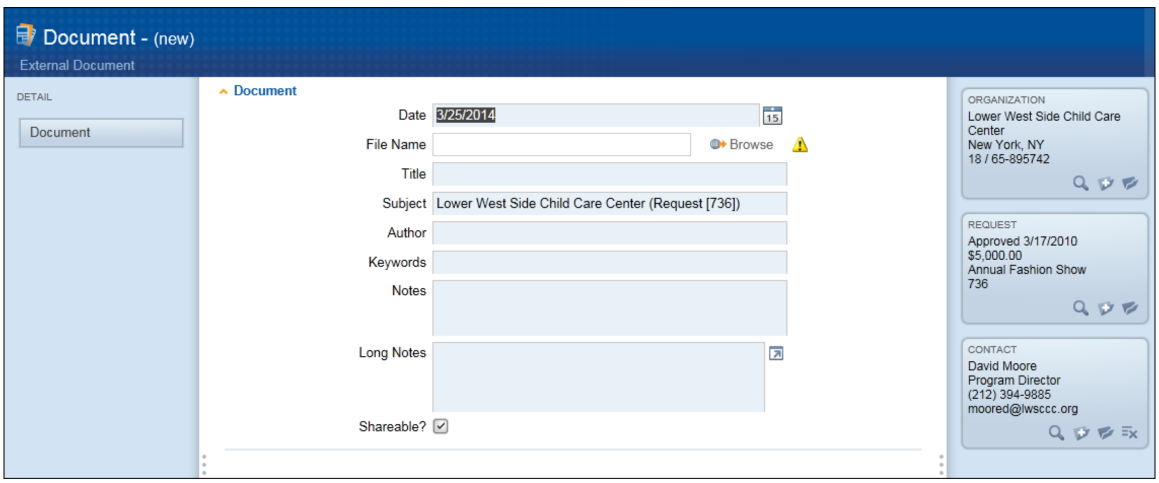
Uploading External Documents

You can attach an external document file to an Organization or Request record in GIFTS Online.

For example, suppose after receiving an online application from a grant-seeking organization, you call them to ask they send an Excel spreadsheet detailing their annual budget for next year. They send it to you as an email attachment. You can upload and link that document to their Organization record, or to the Request record for the proposal.

To upload a document and link it to an Organization or Request:

1. Go the Organization or Request edit form for the record to which you want to attach the file.
2. In the **New** menu, click **Document**.
3. In the Document - New form, fill in the fields as needed.



4. Click **Browse** and locate the document.
5. Select the document and click **Open**. The document's file name appears in the field next to the **Browse** button.
6. Enter any other information in the other Document Activity fields, and then click **Save & Close**. The Document Activity page appears.

NOTE: Click here for more information about working with Document Activities.

Working with Document Activities

A Document Activity captures data *about* a document in GIFTS Online. The Document Activity can be accessed by searching Documents in the Full Search Query Builder. You can also access the Document Activity by clicking the date link in the related Documents list for Organizations, Requests, and Contacts.

Document Activity Detail Page

Title

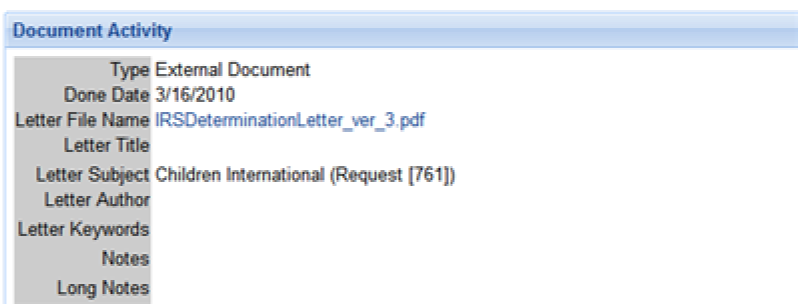
Across the top span of the page, the Title dashboard part shows the Title and file name of the document.

Actions menu

Available actions are detailed below.

Document Activity

This contains all the data about the document file.



Actions menu

The following Available Actions may be included on the Document Activity edit form:

Edit Activity	Displays a standard Activity edit form where you can make changes to the Activity record.
Delete Activity	Deletes the document - that is, it deletes both the Document Activity and the document file. You are prompted for confirmation before the deletion is completed. Be sure you want to delete the Activity, as there is no way to cancel the deletion.

Change Contact	Displays a search page where you can specify the name of a new Contact for the selected Activity. If the Contact does not yet exist in GIFTS, you can click **New** to create a Contact record.
Generate Letter Correspondence	Displays a Generate Letter page where you can create a new letter.
Generate Email Correspondence	Displays a Generate Email page where you can create a new email.

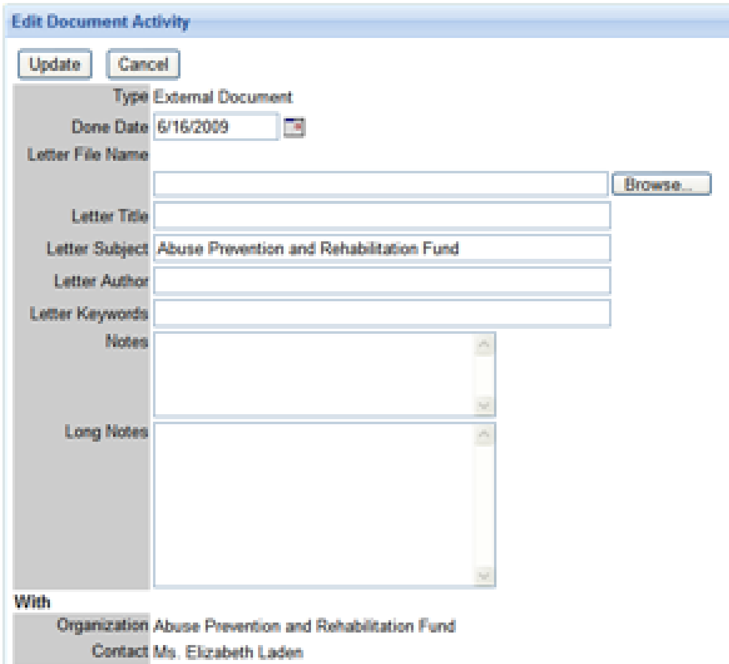
Document Activity Available Actions

A combination of the following Available Actions may be included on the Document Activity edit form:

Edit Activity	Displays a standard Document Activity edit form where you can make changes to the Document Activity record.
Delete Activity	Deletes the Document Activity record. (You are prompted for confirmation before the deletion is completed.) Be sure you want to delete the Activity , as there is no way to cancel the deletion.
Change Contact	Displays a search page where you can specify the name of a new Contact to be associated with the Document Activity.
Generate Letter Correspondence	Displays a Generate Letter page where you can create a new letter.
Generate Email Correspondence	Displays a Generate Email page where you can create a new email.

Editing Document Activity

When you click **Edit Activity** in the Actions menu, the Edit Document Activity page appears.



You can make changes to any of the available fields within the Edit Document Activity form. Click **Save** to save your changes to the Document Activity record.

NOTE: If the document is currently checked out, the Browse button will not appear.

NOTE: When you click **Update**, GIFTS Online will check the Letter File Name field. If you have entered or browsed to another file on your workstation or network, that document is uploaded to GIFTS Online, and the file name in the Document Activity record is altered accordingly.

About the Template Manager

IMPORTANT: The Document Template Manager will only work on a Windows OS workstation.

GIFTS Online users can now use the **Template Manager** feature to create and maintain their own correspondence templates without needing to contact MicroEdge. This includes printed, email, and write-up correspondence.

NOTE: Combined email/letter templates can only be created in the Administrator Module. GIFTS Online only allows creation of separate templates for each type of correspondence.

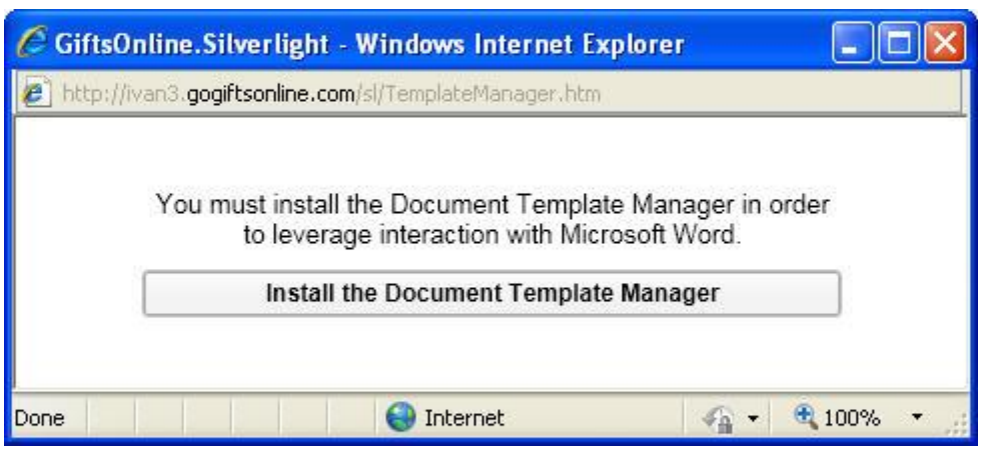
To access the Template Manager go to the Admin menu on the header and select **Template Manager**.

IMPORTANT: If you wish to have access to the Template Manager, please contact MicroEdge as certain preferences and permissions need to be set for your user account(s).

Installing the Document Template Manager

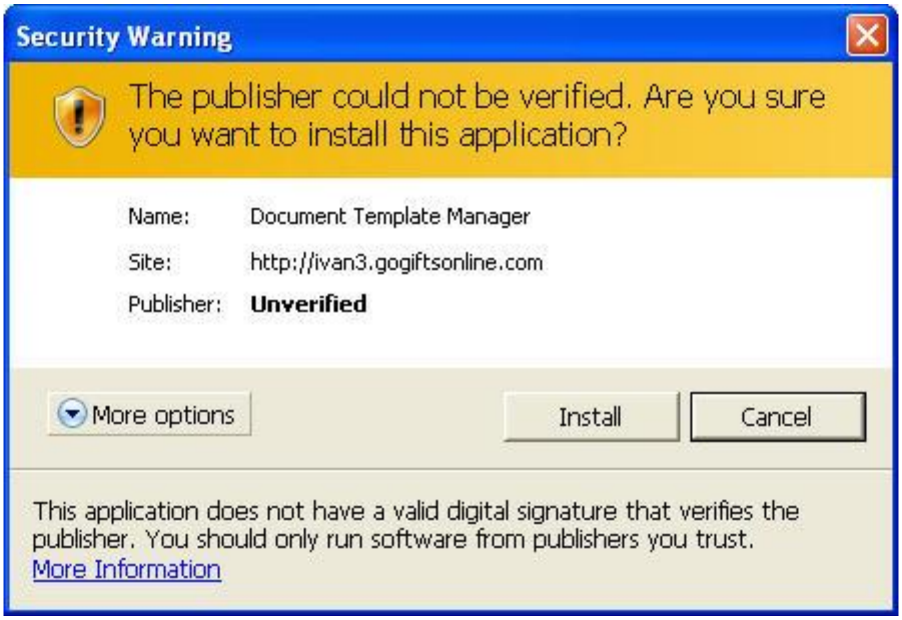
The Template Manager is actually a separate application that must be installed on your workstation.

1. When you first click on **Admin > Template Manager** a new browser window will open prompting you to install the Document Template Manager.



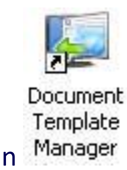
2. Click the **Install the Document Template Manager** button.

3. If a Security warning is displayed, click **Install** to continue.



4. The Template Manager will quickly be installed and a GIFTS Online Login screen will appear.
5. Simply Login as usual to access the **Document Template Manager**.

Accessing the Document Template Manager After Install

From this point forward you will use the **Document Template Manager** icon 

placed on your desktop to start the Template Manager.

NOTE: If you attempt to use the menu option **Admin > Template Manager** again, a message will be displayed prompting you to use the icon on your Windows desktop instead.

As an added measure of security, when you open the Document Template Manager, it will ask you to login again.

Updating Older Versions of the Document Template Manager

If installed the Document Template Manager before July 1st, 2012 and have not used it since then, it must be uninstalled and reinstalled to update the trust certificate.

IMPORTANT: If this is not done, you will get an error when attempting to log in to the GIFTS Online Document Template Manager. The message for this error will begin with text like "[TrustedApplications_CertificatesMustMatch]…" and indicates that the certificate marking the Template Manager as a trusted application has expired.

On each affected workstation, you must first uninstall the current Document Template Manager:

1. From the Start menu, select **All Programs > Document Template Manager**. The Document Template Manager login page opens.
2. Right click on the login page. A menu opens.
3. In the menu, select "**Remove this application…**" A confirmation message opens.
4. Click **Yes** to uninstall Document Template Manager.

Now you can reinstall the renewed GIFTS Online Document Template Manager:

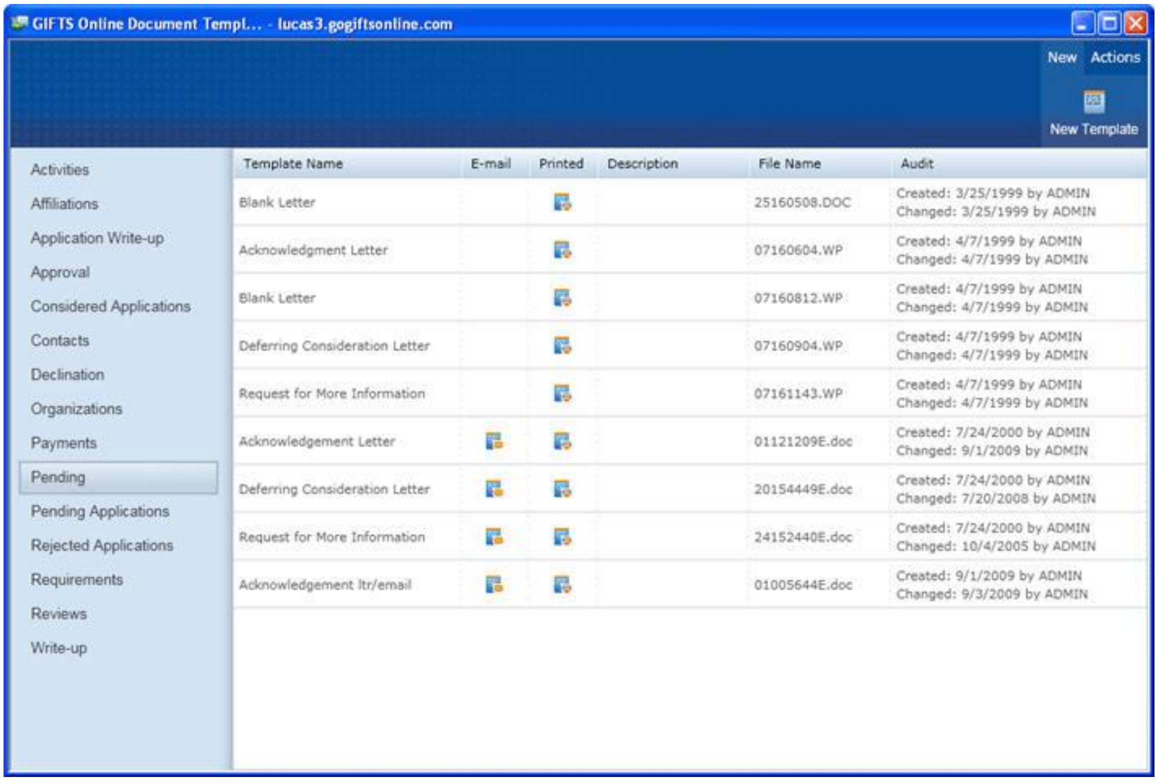
1. Log in to GIFTS Online.
2. In the ribbon menu, select **Admin > Template Manager**. A new browser window opens, telling you that you must install the Document Template Manager.
3. Click the **Install the Document Template Manager** button. A form opens, asking you to confirm you want to install.
4. Click **Install**. Once the installation is complete, the Document Template Manager opens; log in using your GIFTS Online user ID and password to add and edit your templates.

If you need additional support, or the steps above fail to resolve this issue, please contact the MicroEdge Technical Support team.

Letter Events

Letter Events describe what type of record a correspondence is for.

As an example, templates for the Affiliations Letter Event allow correspondence to be sent for Affiliation records.



The following are Letter Events available for Correspondence:

- Activities
- Affiliations
- Approval
- Contacts
- Declination
- Organizations
- Payments
- Pending
- Requirements
- Write-up

The following Letter Events are available in the Template Library when the specified module is included:

Available with *Online Applications and Requirements* Module

- Application Write-up
- Considered Applications
- Pending Applications
- Rejected Applications

Available with *Reviews* Module

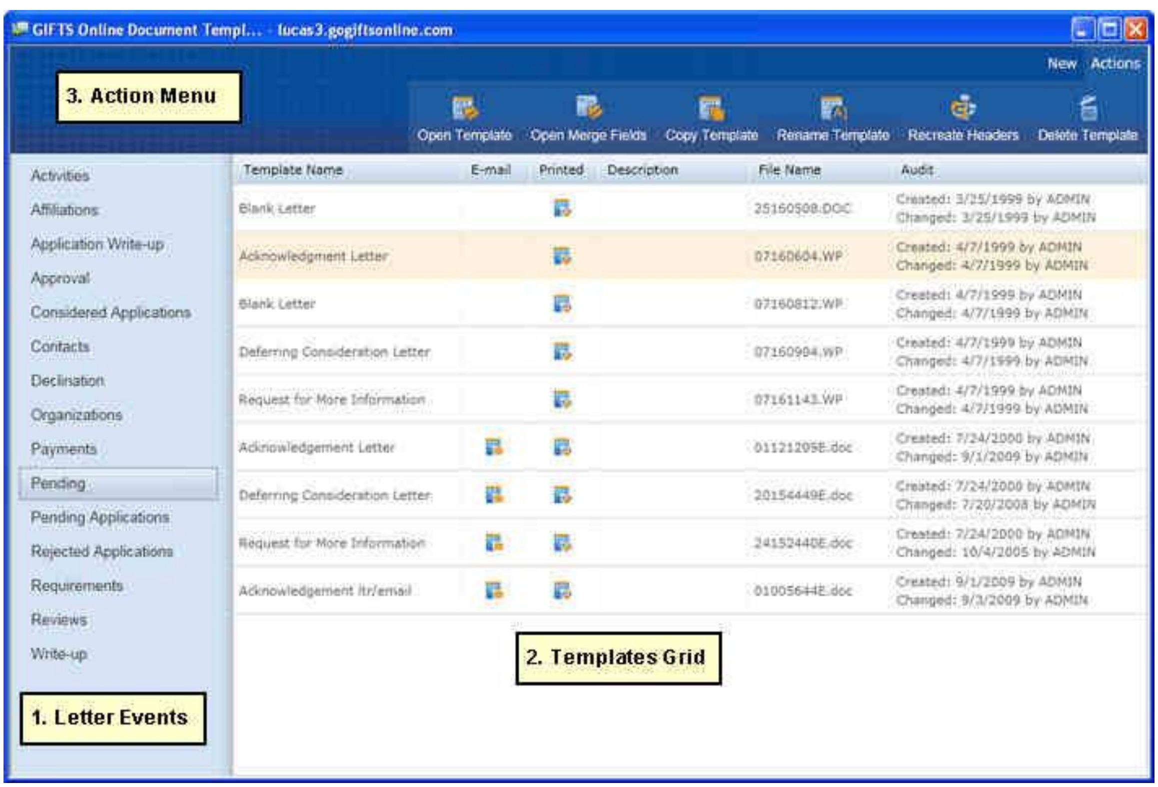
- Reviews

Available with *Accounts Payable* Module with *Check Writer*

- Check Template

The Template Manager Interface

The Template Library contains all the templates in the system for your GIFTS Online site.



1. **Letter Events** – Displays a listing of Letter Events, when a Letter Event is selected, the templates for that event are displayed in the templates grid. Certain Letter Events will only display if the appropriate module is included in the gifts configuration file.

2. **Templates Grid** – Displays a listing of all templates that exist for the selected Letter Event.

3. **Action Menu** – This menu contains the following options:

- Open Template
- Open Merge Fields
- Copy Template
- Rename Template
- Recreate Headers
- Delete Template

The Template Grid Columns

The following information will display in your grid.

Column	Notes
Template Name	Displays the name of the template.
Email	Displays an icon indicating that this is an email template.
Printed	Displays an icon indicating that this is a print.
Description	Displays the description of the template.
File Name	Displays the filename of the template.
Audit	Displays the Create User\Create Date of the template. Displays the Change User\Change Date of the template.

Template Library Actions

Once you select a specific library template, the following Actions become available.

New Template - This action allows the user to create a new template. It is not available if more than one template is selected.

Open Template - Opens the selected template in Microsoft Word (for printed letter templates) or the template editor (for Email templates).

Open Merge Fields - Launches the Merge Field selection form where you can edit the merge fields included in the template.

Copy Template - Saves a copy of the selected template.

Rename Template - Allows users to change the name or description of the template.

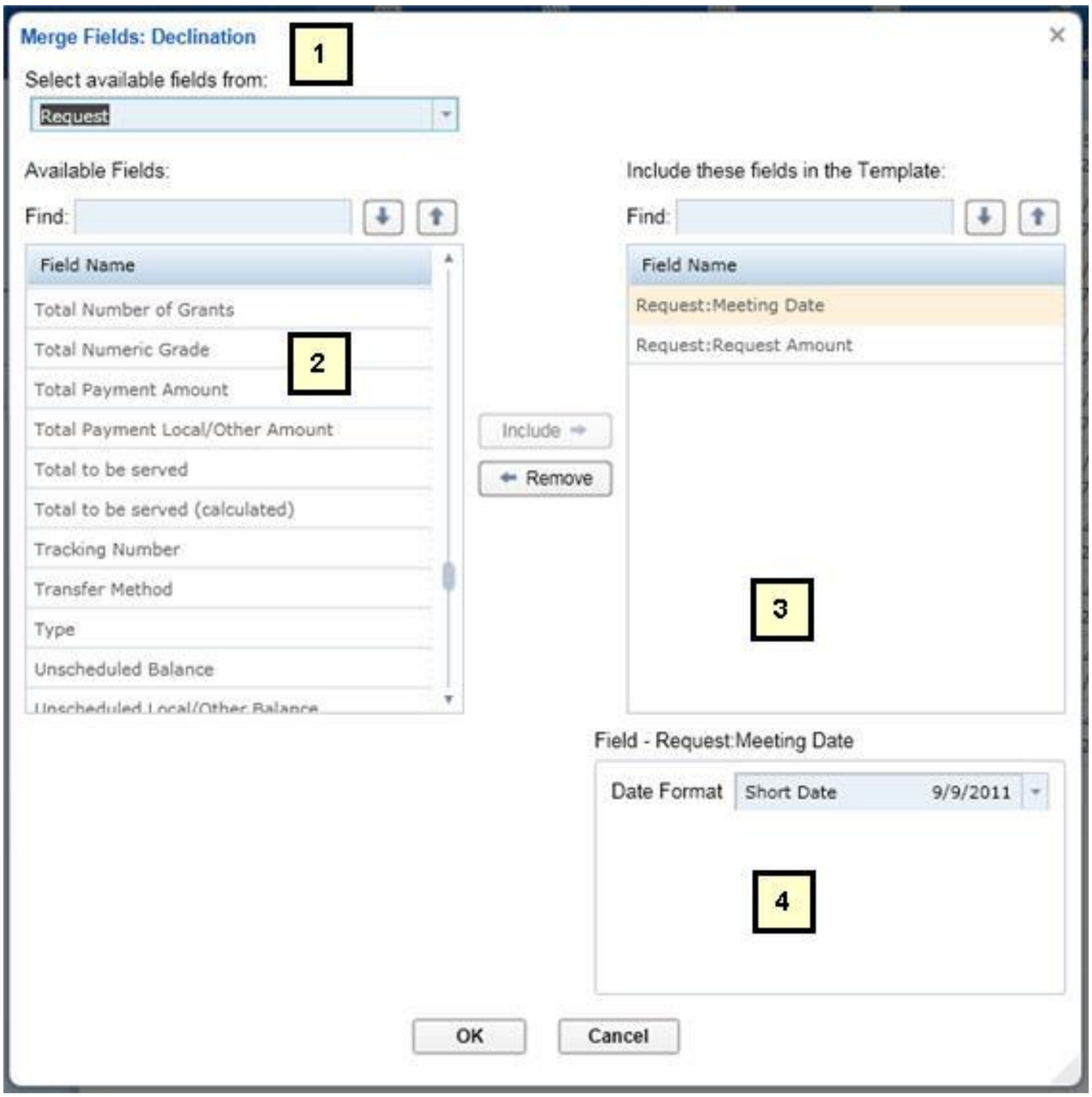
Recreate Headers - rebuild the header merge file for all the templates in a selected Letter event.

Delete Template - Deletes the selected template from the correspondence library.

The Merge Field Form

The following form is resizable and allows you to select which merge fields should be available in the template.

NOTE: Microsoft Word templates have a limitation of 63 total merge fields allowed. The system includes eight standard merge fields in every template, which allows you to add a total of 55 additional merge fields.



1. The **Category** is selected in this section. Fields are available from associated records. Example: For an Approval template, the user can select the "Grantee Organization" category to merge data about the grantee organization.
2. The **Available Fields** section contains a list of the merge fields available for the selected Category. Multiple fields can be selected and then included by clicking the Include button.

3. This section displays a list of all merge fields that have been included for use in the template. Multiple fields can be selected here and removed if desired.
4. This section displays formatting options (if available) for the particular field selected in the "Included Fields" selection list described above. If no options are available, the section will say "No formatting options available." The prompts in this section will appear horizontally instead of vertically listed (if there is more than one set of prompts).

Merge Field Formatting Options

Currency, Numeric\Decimal, Date, Coding Sheet, and Table merge fields can have special formatting. When one of these field types is included in the template, special prompts will appear that allow the user to format the data contained by that merge field.

The heading for the group will change when a field is highlighted in the "Include these fields in the Template" prompt:

Field Options – {Entity}: {Field Name}

Example:

Field Options – Request: Recommended Amount

If the field selected does not have any special formatting options, then the following text will display in the group: "No formatting options available."

Currency Formatting Prompts

- Hide Currency Symbol
- Decimal Places
- Show amount in words
- Include grouping character

Number/Decimal Formatting Prompts

- Decimal Places
- Include grouping character

Date Formatting Prompts

- Date Format

Coding Sheet Formatting Prompts

Single Level Codes

There are no formatting options for single level codes.

Multi-Level Codes

- Code level to display
- Show parent codes
- Delimiter

Multi-Select Codes

- Primary/Secondary Codes
- Delimiter

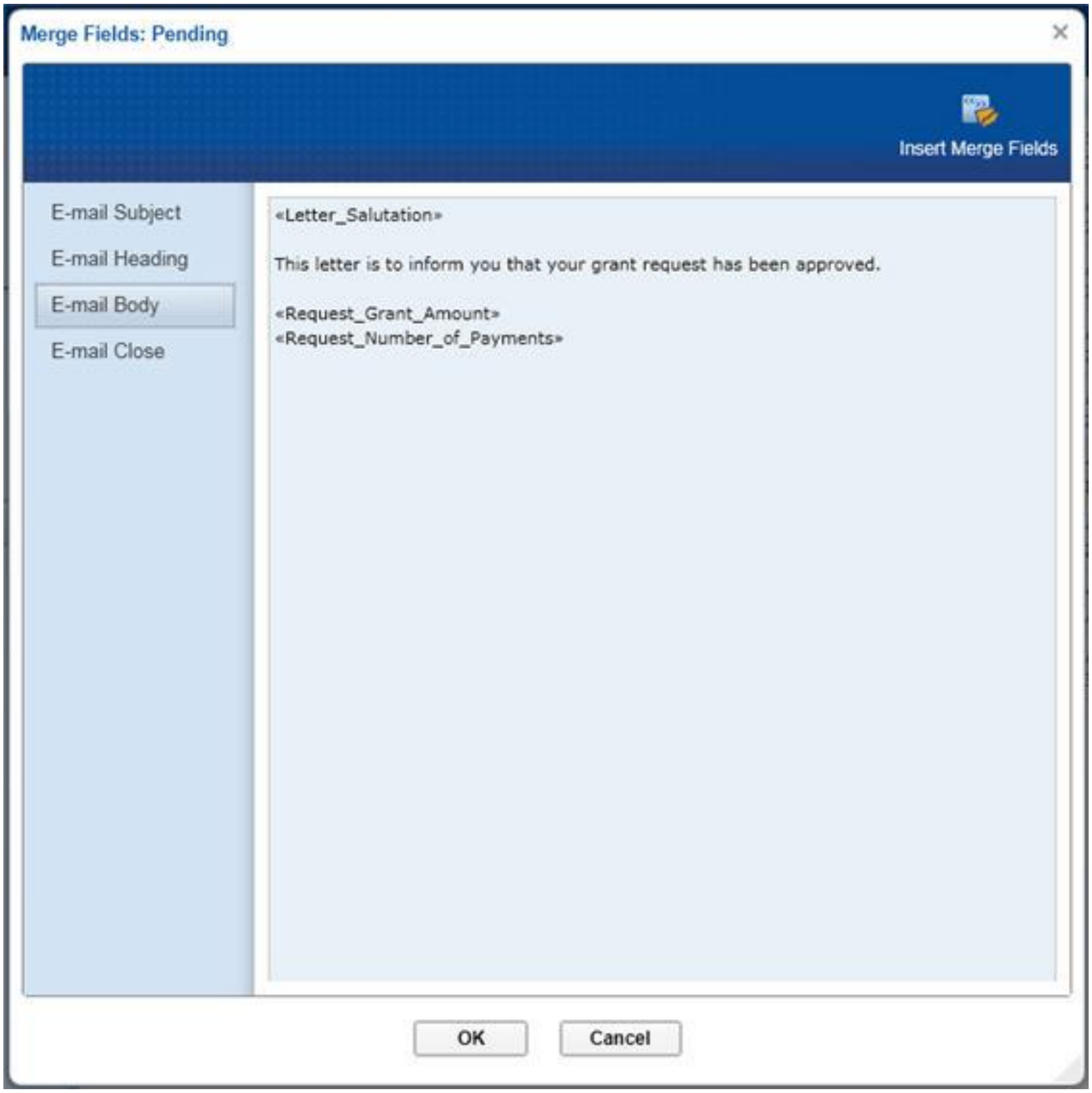
Table Formatting Prompts

- Include Column Headers
- Autofit Column Width to contents
- Use Table Borders
- Summarize by Grant Year
- Show Approved Request Only
- Include Request Fund
- Include Request Type

The Template Editor

When working with Printed Letter Templates, you will edit the template directly in a word processor.

When working with E-mail templates, opening the template will invoke the following Template Editor form:

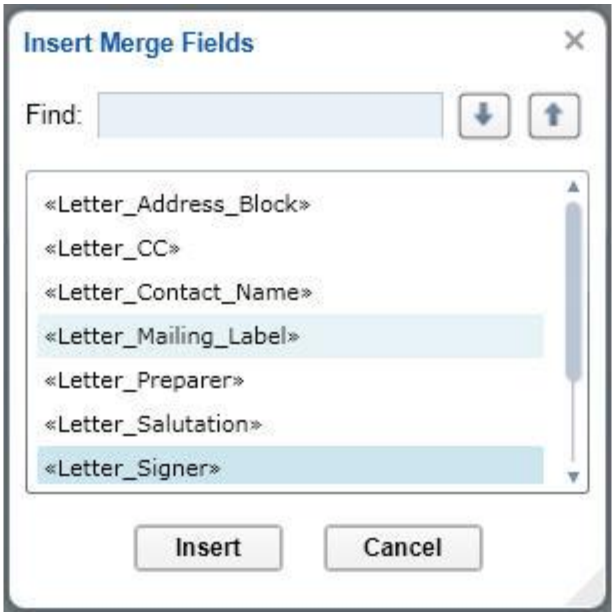


Template Editor Sections

- Email Subject
- Email Heading
- Email Body
- Email Close

Insert Merge Field

This button on the editor opens the Insert Merge Fields window which lets you select new merge fields to add to your template.



Generating Correspondence

To initiate correspondence in GIFTS Online, you should access the edit form of the record that is related to the correspondence. For example, if you wish to send a letter to confirm receiving a payment, go to the edit form for the Payment record involved.

In the Actions menu on the record's edit form, look for the Generate Letter Correspondence and Generate Email Correspondence links. Click the appropriate link to begin creating correspondence.

This section describes how to generate:

- Generating Batch Correspondence
- Generating Email Correspondence
- Generating Letter Correspondence
- Generating Write-ups

Generating Batch Correspondence

You can create a batch of correspondence for any group of records in the Requests, Organizations, Contacts, Payments, Requirements, Affiliations, and Activities Search Results pages. After you generate your correspondence, you can review and modify it before sending it to the email recipients or to your printer.

NOTE: You can also generate write-ups for Requests in batch.

Details on generating letters, emails, or write-ups are found in the linked help topics. Following are tips on finding and selecting the records you want to batch and generate correspondence for.

- You can search for the records using Quick Search, Detailed Search, Recent Searches or Saved Searches. A narrower search will make it easier to target the records you want to generate a letter, email, or write-up for.
- On the Search Results page, use the check boxes in the left column to select which records to generate correspondence for.
- Select or clear the check box in the column header row to select or clear all records on the page.
- You can't put records on different search results pages in the same batch. First click View All at the foot of the grid to get all the records on one page, then select records using the check boxes.
- If you are generating letters for a batch of Requests, all selected Requests must be of the same disposition: pending, approved, or declined. (Write-ups can be generated for Requests with different dispositions, however.)

Batch Email Validations

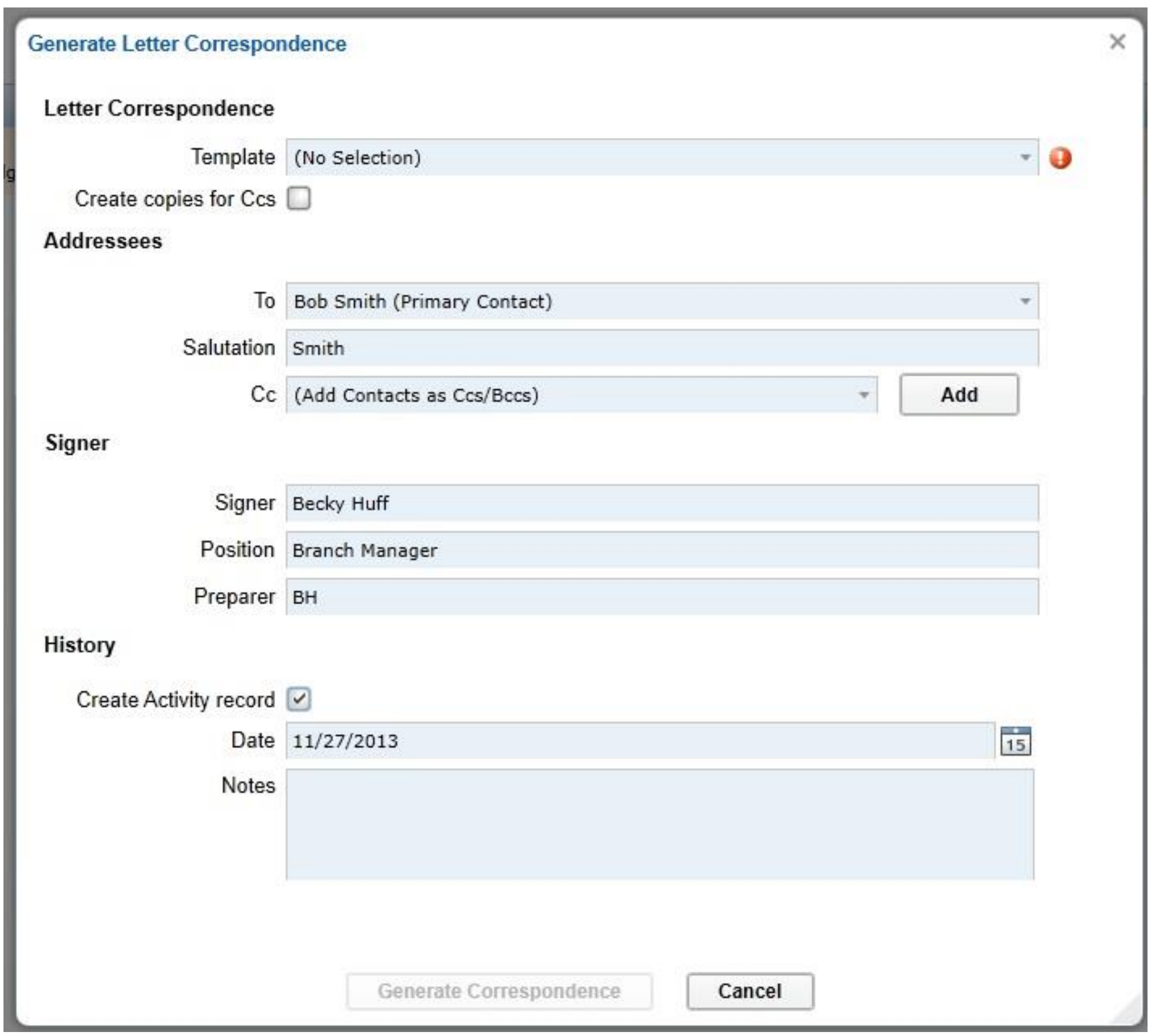
When performing a batch Email correspondence, the system will check all records selected and advise you of records where no email address exists. You can choose to skip these records when sending out the emails or cancel the batch process to correct the records first.

The Correspondence Viewer will also advise you if the email for a specific contact is invalid and needs to be corrected.

Generating Letter Correspondence

You can create letter correspondence in GIFTS Online for a single record or for a batch of records.

- For a single record, access its edit form. In the Actions menu on the record's edit form, select Generate Letter.
- For a batch of records, first search for the records, then select them on the Search Results page.



To create a letter using GIFTS Online:

1. Click **Generate Letter** in the Actions menu of a single record's edit form or at the foot of the Search Results page. The Generate Letter Correspondence page appears.

   NOTE: If you are generating letters for a batch of Requests, all selected Requests must be of the same disposition: pending, approved, or declined.

2. In the Template field, use the drop-down menu to select the template to use for the letter. If the letter will have more than one recipient, select the Create copies for CCs checkbox.

   IMPORTANT: If the template you select contains a merge field that you do not have permission to view or edit, the merge field will be left blank in the final merged letter.

3. In the To field for a single letter, you can use the drop-down menu to select a primary recipient, and then enter a Salutation for the letter. (When generating for a batch of records, the primary contact for each selected record is used automatically. Each contact's default salutation is used, so the Salutation field does not appear when generating a batch.)

4. Including CC recipients is different for single or batch generation:

   - For a single letter, select a recipient in the CC drop-down menu and click **Add**. Repeat this for each CC recipient. If you decide not to send a copy to a recipient who has already been added to the CC list, simply clear the checkbox next to the recipient's name.
   - If you're generating letters for a batch, the CC field appears for Organizations, Requests, and Contacts only. It lists Affiliation Roles; for each selected record, Contacts affiliated by the selected Roles will have CC copies generated.

5. In the Signer field, indicate the name of the person who will be the Signer of the letter, as well as that person's Position in your organization. If the Signer is a person other than yourself, you may wish to add your name to the Preparer field.

   NOTE: Your entries in these fields will be saved along with your other user preferences, and will be used as default settings the next time you create a letter or an email message.

6. In the Create activity record checkbox, you can indicate whether you wish to create an Activity record for the letter(s), as well as a Date and Notes for the Activity.

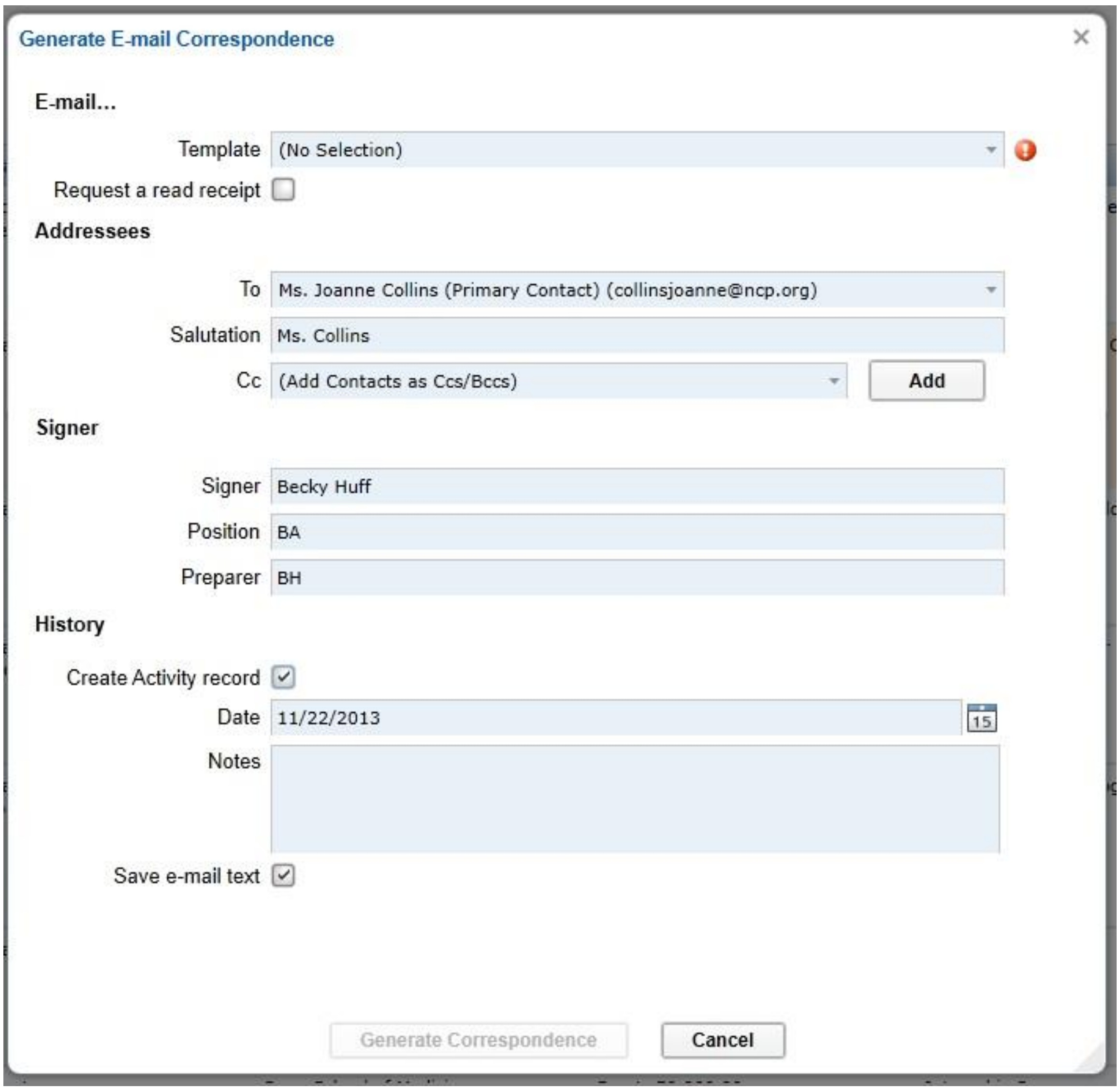
7. Click **Generate Correspondence** to generate your merged letter or letters. When the letters have been completed, a link opening the letters appears at the top of the detail or Search Results page. Click the link to open the Word document.

   TIP: For batch correspondence, the link opens all letters in the batch in a single Word document. This is the most convenient time to print them. If you selected the option to create Document Activities, you can print them later by going to each record's edit form to open and printing them one at a time.

Generating Email Correspondence

You can create email correspondence in GIFTS Online for a single record or for a batch of records.

- For a single record, access its edit form. In the Actions menu on the record's edit form, look for the Generate Email Correspondence link.
- For a batch of records, first search for the records, then select them on [the Search Results page](#).
- You may select up to 100 records of the same disposition (where applicable) when generating batch e-mails. If you exceed 100 records, a warning dialog will be displayed.



To send email correspondence from GIFTS Online:

1. Click **Generate Email** in the Actions menu of a single record's edit form or at the foot of the Search Results page. The Generate Email Correspondence page appears.
2. In the Email Correspondence section, use the drop-down menu to select the template to use for the email. If you would like to be notified when each copy of the email is read by the recipient, check the box to Request a read receipt.
3. In the To field for a single email, you can use the drop-down menu to select a primary recipient, and then enter a Salutation. (When generating for a batch of records, the primary contact for each selected record is used automatically. Each contact's default salutation is used, so the Salutation field does not appear when generating a batch.)
4. Including CC recipients is different for single or batch generation:

    - For a single email, select a recipient in the CC drop-down menu and click **Add**. Repeat this for each CC recipient. If you decide not to send a copy to a recipient who has already been added to the CC list, simply clear the checkbox next to the recipient's name.
    - If you're generating emails for a batch, the CC field appears for Organizations, Requests, and Contacts only. It lists Affiliation Roles; for each selected record, Contacts affiliated by the selected Roles will have CC copies generated.

5. In the Signer section, indicate the name of the person who will be the Signer of the email, as well as that person's Position in your organization. If the Signer is a person other than yourself, you may wish to add your name to the Preparer field.

    NOTE: Your entries in these fields are saved along with your other user preferences, and are used as default settings the next time you create a letter or an email message.

6. In the History section, you can indicate whether you wish to create an Activity record for the email, as well as a Date and Notes for the Activity. You may also select the option to Save email text, which will save the subject line and body text of the message in the Long Notes field of the Activity record.
7. Click **Generate Correspondence** to generate the email(s). When the generation has been completed, GIFTS Online displays your email message.
8. Edit the email, if desired. You can review each email in a batch by clicking the **Previous** and **Next** buttons.

    NOTE: When reviewing a batch of emails, you can select the Skip check box to skip sending that particular email. When you click Send All, those emails will *not* be sent.

9. To send a single message, click **Send**; click **Send All** for a batch of emails. GIFTS Online sends the message(s) and closes the browser window.

Using Quick Emails

The Quick E-mail feature will give users an option to send a quick 'Ad-Hoc E-mail' when generating e-mails related to GIFTS Online records.

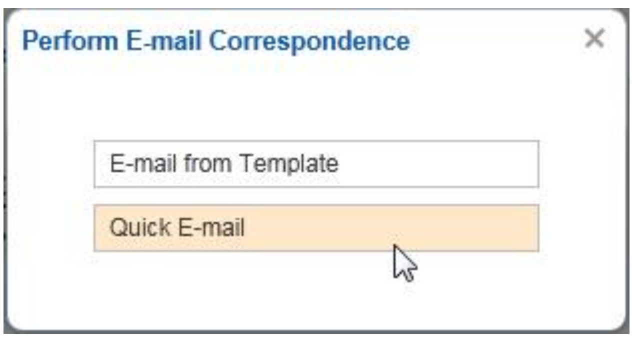
The new functionality will be an alternative to the existing template email generation and will employ the user's default desktop e-mail program, basically opening a new email in that system and populating the e-mail address(es) from the selected record(s) into the To field.

Important Notes:

- Only desktop installed email applications are currently certified for this enhancement.
- Gmail is supported and can be implemented by installing and configuring the Google toolbar.
- No activity records are created with this action.

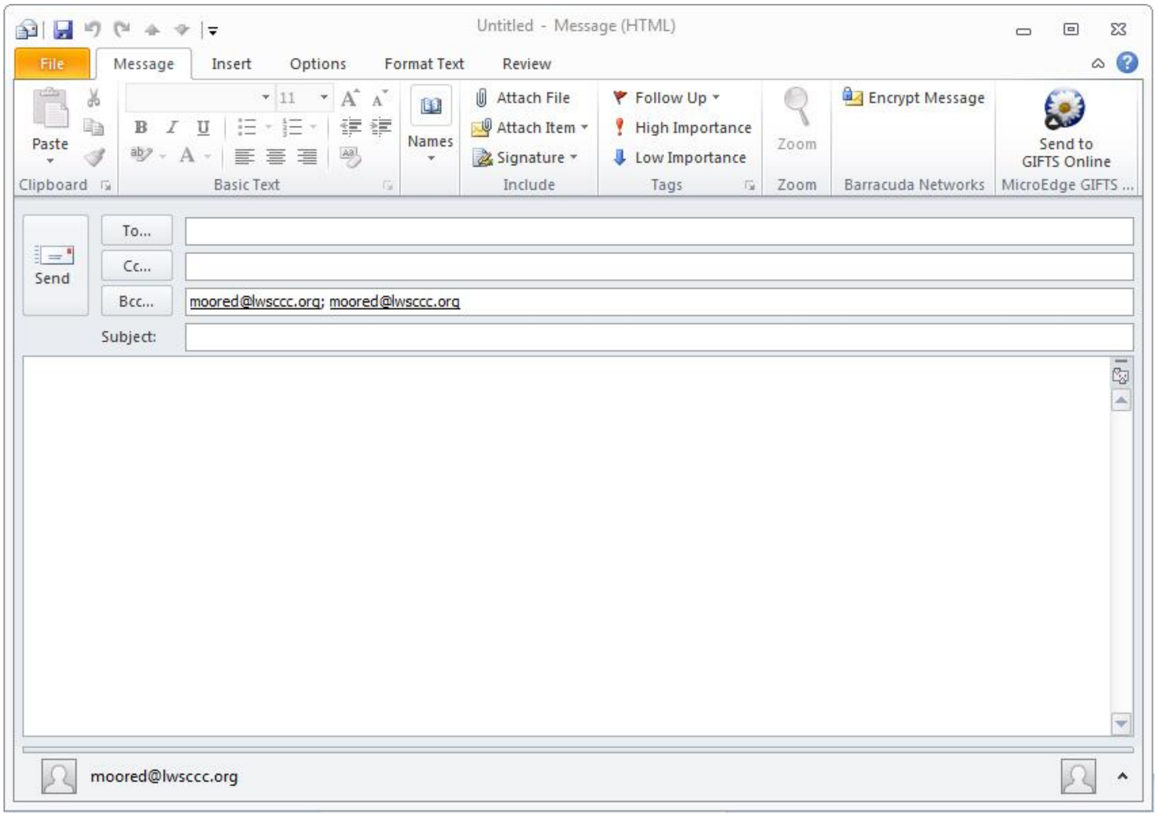
To use the Quick Email feature, do the following:

1. Perform a search and select one or more records.
2. Go to **Actions > Generate Email**.
3. On the Perform Email Correspondence form, click on **Quick Email.**



4. A new email will open using the default email application installed on your workstation.

    - If only one record was selected, the contact's email address will populate the To field.
    - If multiple records were selected, the email addresses for all the contacts will be entered in the BCC field.



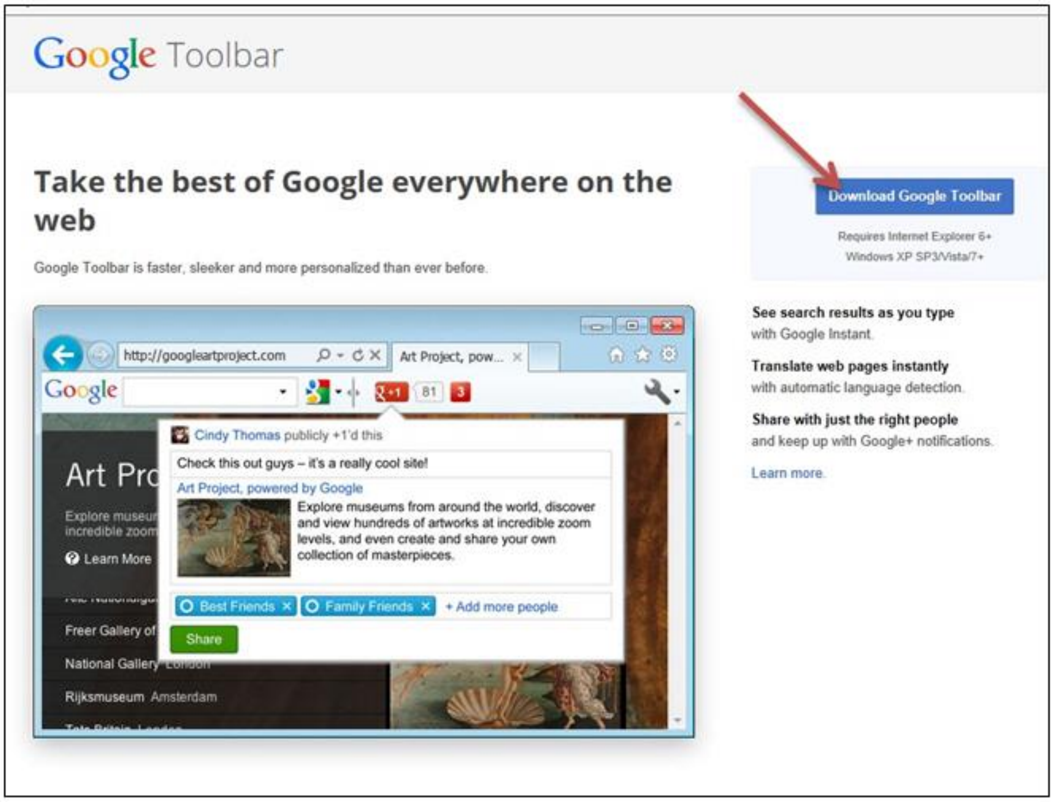
5. You can now enter your own Subject and body text as needed.

Setting Up Google Toolbar to Work with Quick Emails

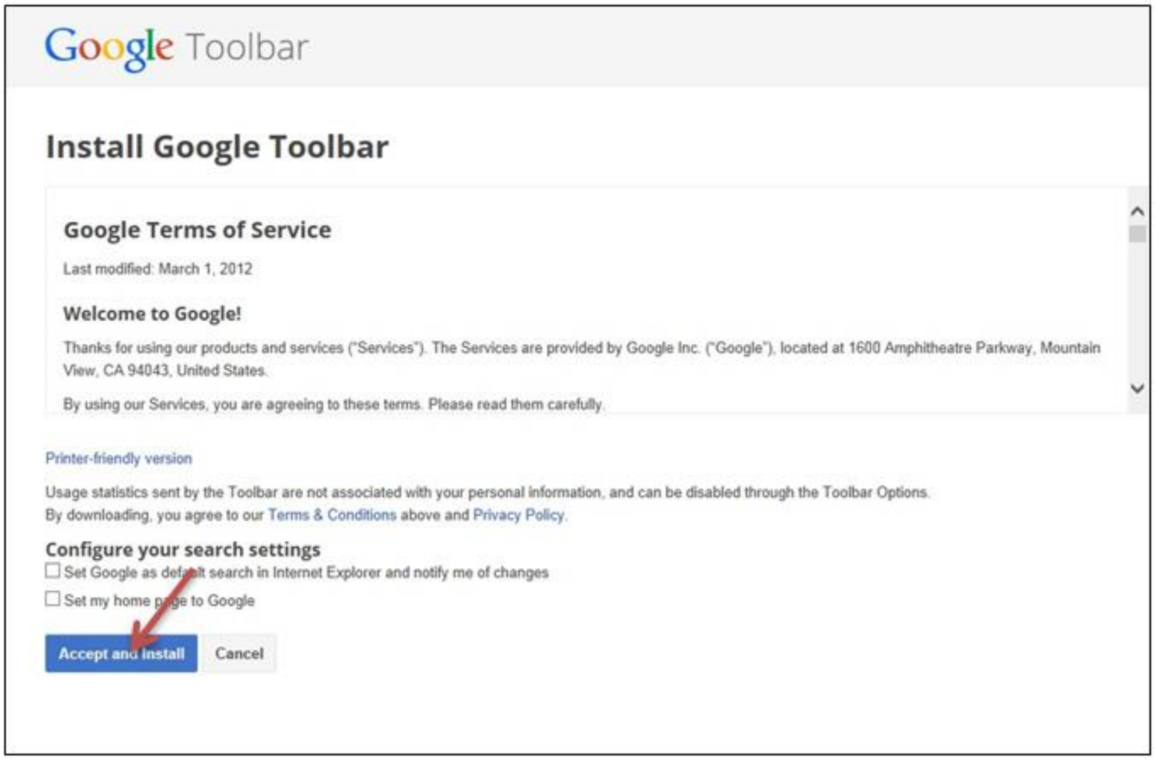
NOTE: The instructions in this section are optional and only apply if you wish to use Gmail as your default email client for 'Mail to' links. The instructions were created using Internet Explorer 11. The steps needed for IE 9/10 may be slightly different.

The following section describes how to optionally install Google Toolbar and configuring it to use Gmail as your email client for 'Mailto' links.

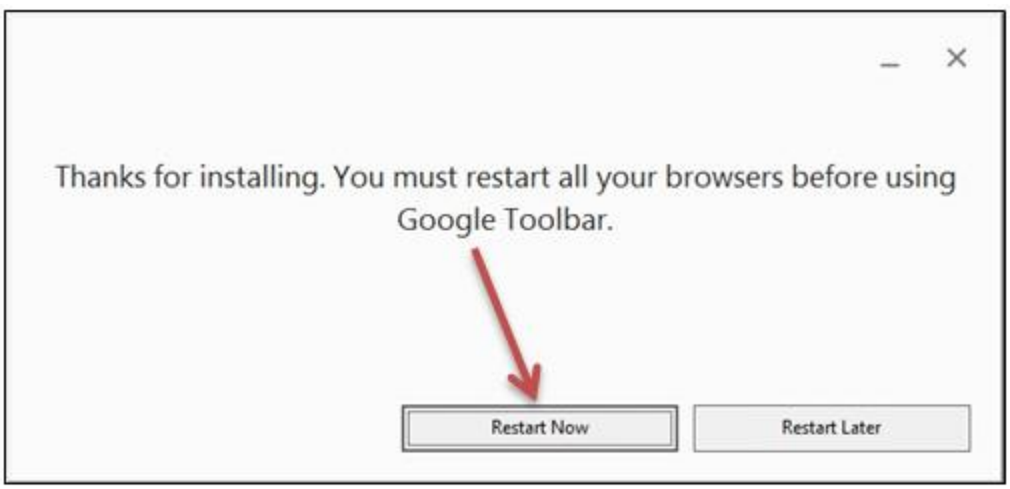
1. While in IE, type toolbar.google.com into the address bar, then click on 'Download Google Toolbar' button.



2. Install the toolbar by clicking on the 'Accept and Install' button.

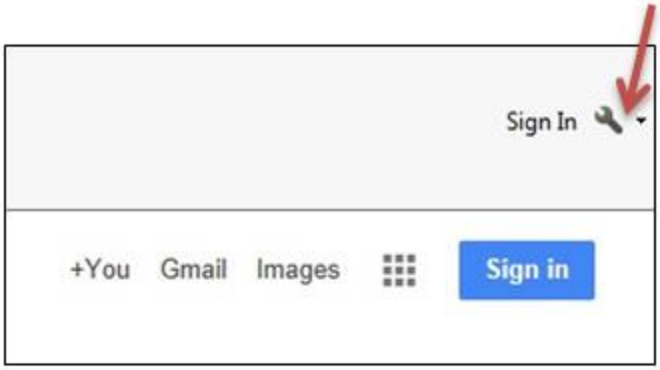


3. When the install is complete, you will be prompted to restart the browser. Allow the restart by clicking on 'Restart Now'.

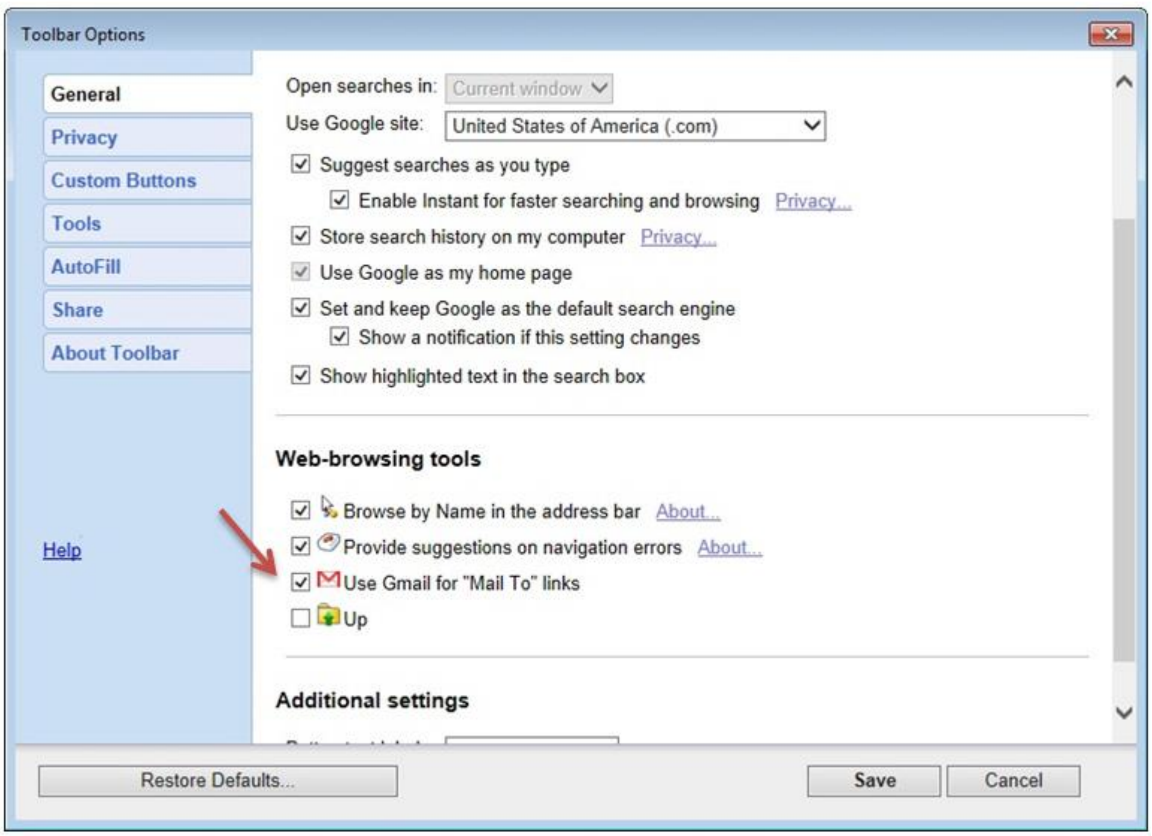


4. The next time Internet Explorer is opened, you should be prompted to enable the Google Toolbar. Click on the Enable button.

5. Once enabled, the Google Toolbar should be available in the upper right hand section of the window. From there, click on the Wrench icon which will allow you to adjust the toolbar options.



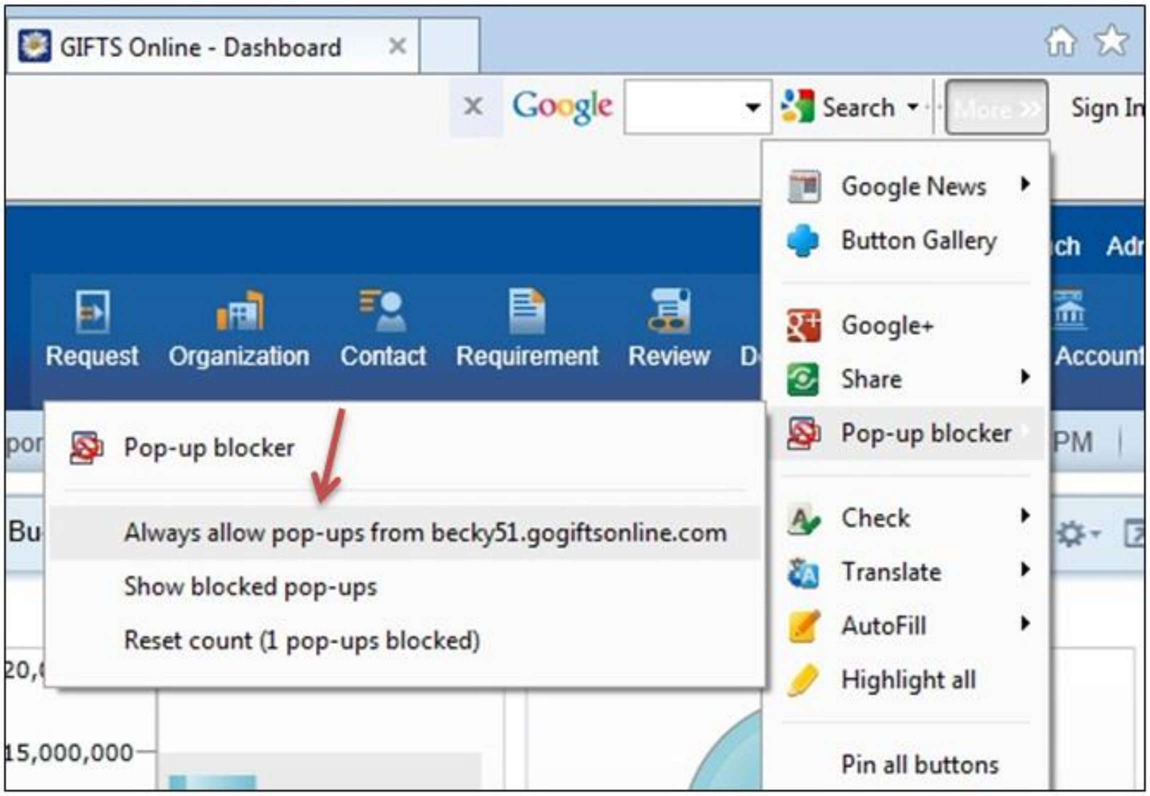
6. In the Toolbar Options window, scroll to the Web-browsing tools section and select the 'Use Gmail for "Mail To" links option and Save the selection.



7. As a final step, please allow pop-ups for your GIFTS Online site in the Google Toolbar. This will allow all of the features in GIFTS Online to work properly.

   To do this, log into GIFTS Online and in the Google Toolbar, expand the list of buttons and hover over the Pop-up blocker button which will expand the options.

Click on the option to 'Always allow pop-ups' from your GIFTS Online site.



This completes the setup for using Gmail for email links when using Internet Explorer including email generation in the GIFTS Online Quick Email feature.

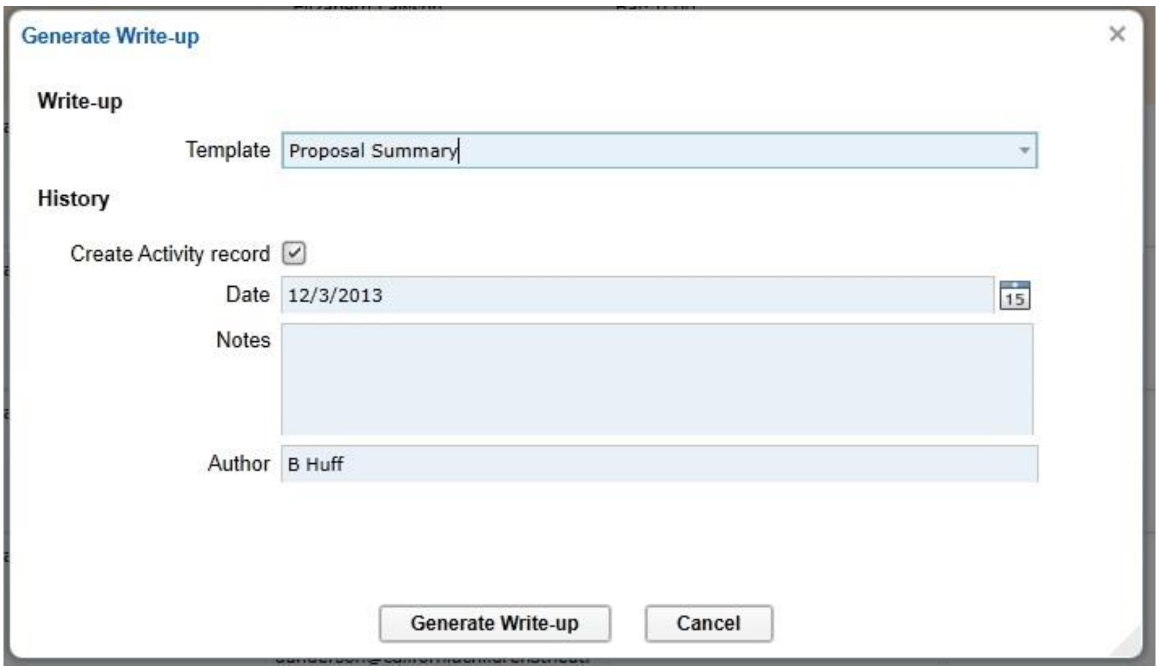
Generating Write-ups

A write-up is a summary of a pending, approved, or declined Request. If someone at your organization still prefers to review proposals on paper - an unlikely scenario with the purchase of GIFTS Online! - you can generate write-ups for them instead.

NOTE: Write-ups are only available for Request records.

You can create Request write-ups for a single record or for a batch of records.

- For a write-up of a single Request, access its edit form.
- For write-ups of a batch of Requests, search Requests and then select them on the Search Results page.



To create a write-up or batch of write-ups:

1. Click **Generate Write-up** in a Request edit form's Actions menu, or at the foot of a Search Results page. The Generate Write-up page appears.
2. Using the Template drop-down menu, select the template to use for the write-up(s).
3. Enable the Create Activity checkbox if you want to create an Activity record for the write-up(s). Each Activity will include the Date, Notes, and Author you specify in their respective fields.
4. Click **Generate Write-Up** to generate the write-up(s). When the generation has been completed, a link opening the letters appears at the top of the detail or Search Results page. Click the link to open the Word document.
   TIP: For a batch of Requests, the link opens all write-ups in the batch in a single Word document. This is the most convenient time to print them. If you selected the option to create Document Activities, you can print them later by going to each Request's edit form to open and printing them one at a time.

Printing Mailing Labels

It is possible to create a letter template that allows multiple record addresses to populate to a single page using the Mailing_Labels merge field.

The steps to create a Mailing Labels template are documented below:

1. Create a new letter template.
2. Go into the **Mailings>Start Mail Merge** option in Word and selected a form (one of the 30 per page options)
3. Change the orientation as needed for the printed labels.
4. Insert the Letter_Mailing_Label field.
5. Click on **Update Fields** in the Mailings toolbar which populated the page with the merge field preceded by a <<Next Record>> field.
6. Save the template.
7. When it is used in GIFTS Online, the labels for the selected records will fill the page.

About GIFTS Online Link to Outlook

This feature allows you to send Outlook emails into GIFTS Online, where each email is saved as a Mail Activity record.

In addition, you can store email attachments in GIFTS Online as documents associated with the Mail Activity. You also have the option to link each Mail Activity with a particular Request, Organization, or Contact in GIFTS Online.

This feature is very helpful for keeping all your communications and documents submitted by grantees in one place.

NOTE: To use this feature, you must first install the GIFTS Online Link to Outlook plug-in which is available for download from the PowerME Portal.

This section contains the following topics:

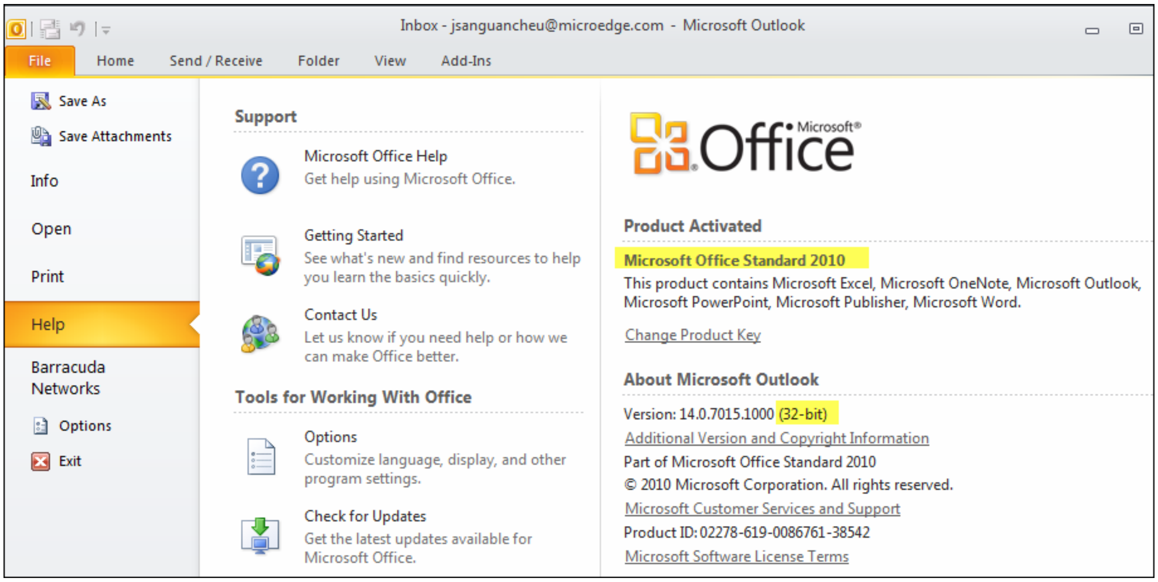
Installing Link to Outlook

The GIFTS Online Link to Outlook is a plugin which must be downloaded from the PowerME portal and installed on your workstation.

NOTE: Outlook 2007, 2010, and 2013 are supported. There is a 32-bit(62mb) and 64-bit(68mb) version depending on the version of Outlook you have installed.

To check which version of Outlook you have installed, do the following:

1. In Outlook, go to the **File** tab.
2. Click **Help**.
3. Review the information displayed on the right panel under About Microsoft Outlook.



To install the plugin, do the following:

1. Go to the PowerME Portal and download the correct plugin for your version of Microsoft Outlook.

- GIFTSOnlineLinkToOutlook_32bit.zip
- GIFTSOnlineLinkToOutlook_64bit.zip

2. Unzip the downloaded file to an easy location to access.
3. Exit Outlook if you currently have it running.

   NOTE: You can install the plugin with Outlook open, however, you won't see the new button until you close and reopen Outlook.

4. Access the GIFTS Online Link to Outlook folder and double-click on the *Setup.exe* file.
5. Accept the license agreement and the install will begin.
6. At the Welcome screen, click **Next**.
7. The Select Installation Folder screen will be displayed.

   Review the default folder path. If desired, you may click Browse to choose a different location for the install.

   The Disk Cost button will give you a list of available drives and the space required for the initial install.

   At the bottom, choose who you want to be able to access this install of GIFTS Online Link to Outlook.

   If you select 'Everyone', all users who have access to the computer will be able to use the new feature.

8. Click **Next** to continue.

9. At the Confirm Installation screen, click **Next**. The installation will take less than a minute.
10. At the Installation Complete screen, click **Close**.
11. Re-open your Outlook.
12. The **Send to GIFTS Online** button should now be visible in your Add-In tab and email menus.

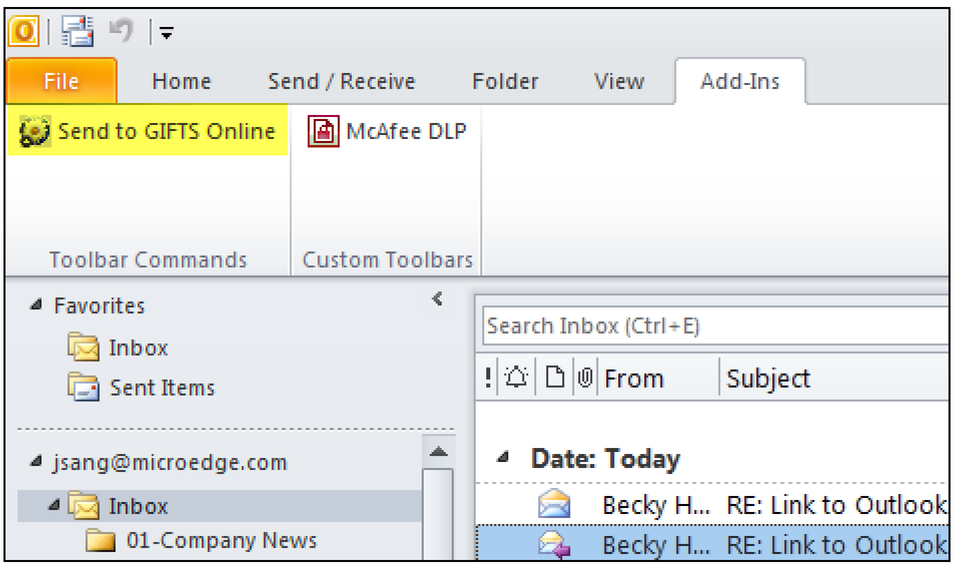
Where Is the Send to GIFTS Online Button?

Once the plugin is installed, there are three places within Outlook where a user accesses the GIFTS Online Link to Outlook button with the label 'Send to GIFTS Online'.

The Standard Toolbar

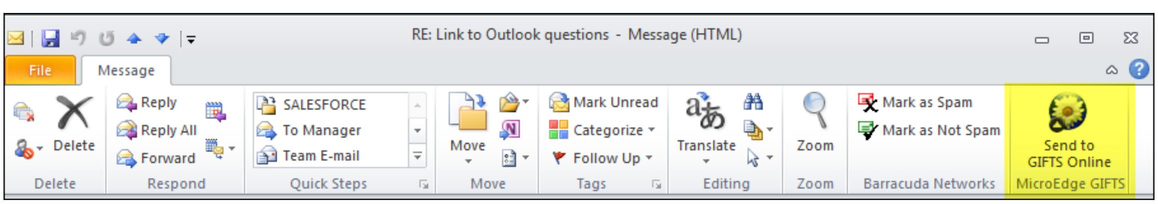
After installing the plug-in, the 'Send to GIFTS Online' button appears with the MicroEdge daisy logo on the Add-Ins tab.

After going to your Inbox or Sent Items folder and selecting any received or sent email(s), you can click this icon to send it to GIFTS Online. Clicking this opens the GIFTS Online Link to Outlook wizard.



Received or Sent Email

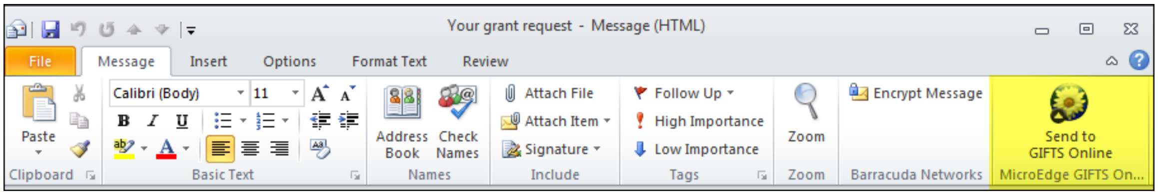
The same icon also appears in a sent or received email when it is opened. As before, it starts the GIFTS Online Link to Outlook Wizard.



An Email Being Sent

For any unsent message you are editing, you can click Send to GIFTS Online button to automatically send the message to GIFTS Online when the email is sent (opening the GIFTS

Online Link to Outlook Wizard). When the email is being edited, this button is an on/off toggle. The initiation of sending the email to GIFTS Online won't happen until the message is sent.



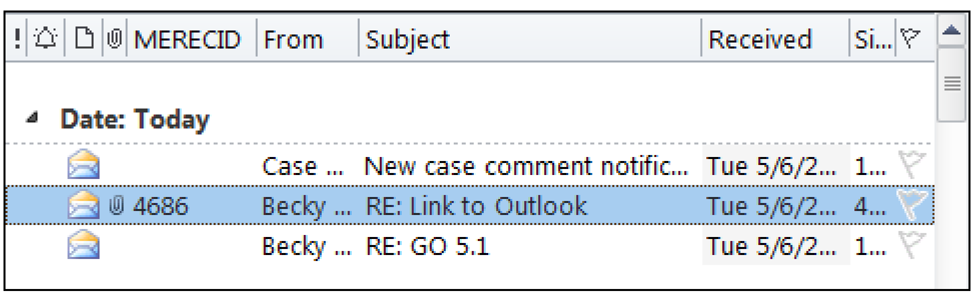
Configuring Outlook

To make your work easier, there are a few things which must be configured in Outlook.

Adding the MERECID Column to Outlook

When an email gets exported via the plug-in to GIFTS Online, the ID of the matching Activity record in GIFTS Online will be stored in the email in Outlook as its MicroEdge Record ID(MERECID) value. If you wish to see the MERECID in Outlook you can add the MERECID column to your Outlook Inbox table. This will allow you to easily see which emails have already been exported to GIFT S Online.

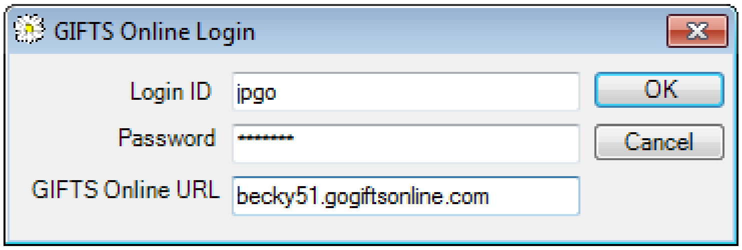
1. In Outlook, go to **View > Add Columns**, OR right click on a header in the email inbox table and go to **View Settings..** and click the **Columns** button.
2. From the drop-down menu, select **User-defined fields** in Inbox.
3. Add the MERECID field to the right pane and position it in the desired order.
4. Click **OK** and then **OK** again.
5. The MERECID column should now be visible in your Outlook Inbox view.



Logging Into GIFTS Online from Outlook

When you choose to send an email from Outlook to GIFTS Online by clicking on the 'Send to GIFTS Online' button, you will first be asked to log in using your GIFTS Online credentials.

NOTE: The login information will be remembered during the current Outlook session only. You won't be asked to login again while you have that instance of Outlook running. You will be asked for credentials if you close and reopen Outlook and attempt to send an email to GIFTS Online.



You will also need to provide your GIFTS Online URL so that the web service knows which client site to access.

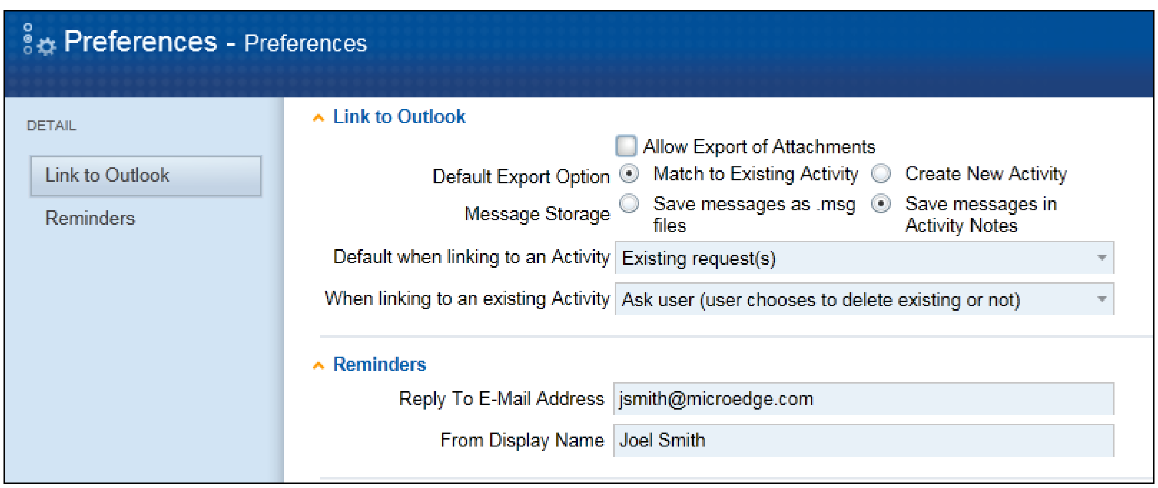
The URL will be accepted with or without the http://, and/or with or without the .com or sub-directories.

For example, the following URLS are all valid entries to this field:

- http://becky51.gogiftsonline.com
- https://becky51.gogiftsonline.com
- becky51.gogiftsonline.com
- becky51.gogiftsonline
- http://becky51.gogiftsonline.com/default.asp

GIFTS Online Link to Outlook Preferences

The Link to Outlook Preferences are accessed by going to Admin > Preferences in GIFTS Online.



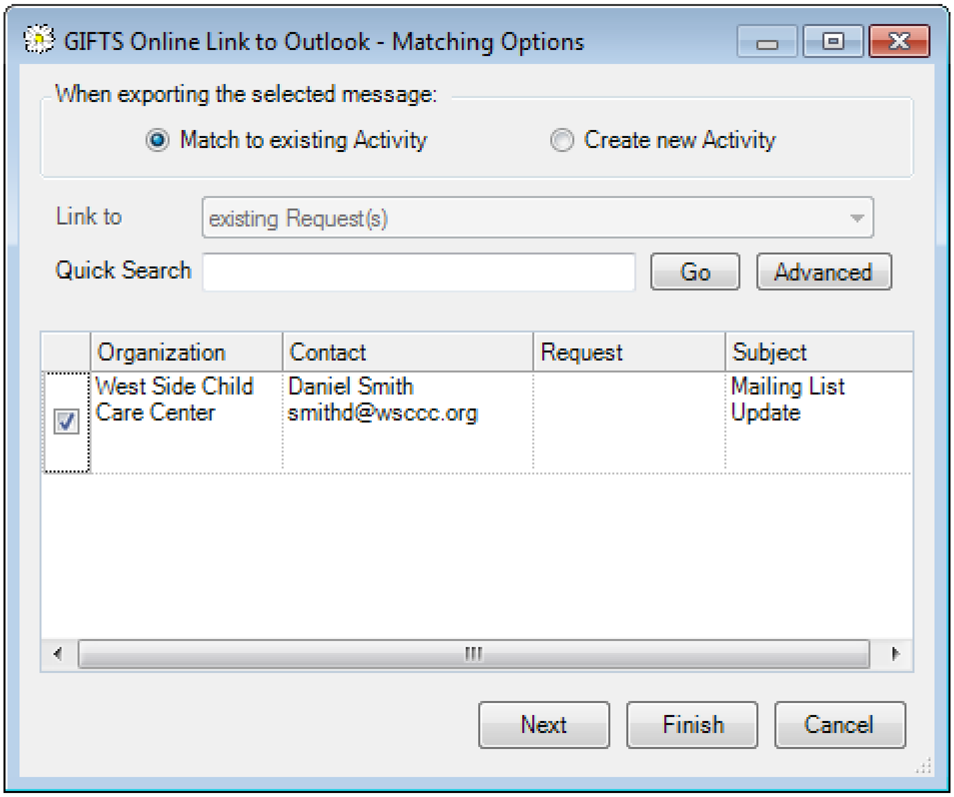
The following table describes what each option does:

Option	Description
Allow Export of Attachments	Indicates whether or not a 'Download attachments' option will be visible on emails in Outlook. If it is selected in the preferences, it will be visible and selected on emails in Outlook. The user will have the option to deselect when linking the email.

Option	Description
Default Export Option	Selection here determines the default option when the user accesses the GIFTS Online Link to Outlook Wizard. Note that the user can override this selection in the GIFTS Online Link to Outlook Wizard. Options: • Match to existing Activity – selected by default. • Create new Activity – deselected by default.
Message Storage	Determines how messages are saved in GIFTS Online. This is the global setting. There is no option to override this setting in the GIFTS Online Link to Outlook Wizard. • Save messages in Activity Notes - When selected, each email's message body will go into the long notes of the Mail Activity created by the upload. • Save messages as .msg files - When selected, the Outlook message file (.msg) will be saved in GIFTS Online and set as the Letter_File_Name of the Mail Activity.
Default when linking to an Activity	This is the selection that will default when you access the GIFTS Online Link to Outlook Wizard. The user can override this setting in the wizard. The default in this dialog is Existing Request(s). The dropdown options are: • Existing Request(s) [default] • Existing Organization(s) • Existing Contact(s) • No Existing Record(s)
When linking to an existing Activity	When sending emails to GIFTS Online and linking to an existing Email Activity (based on matching logic described below), this setting will determine what should be done with the existing Activity (default is Overwrite): • Overwrite (Existing Activity will be deleted) – Will delete the existing mail Activity (and associated .msg file), as well as any Documents (attachments) of the matching Activity (if one is selected/found). • Create new (existing Activity will remain) – no attempt will be made to delete the existing activity or its associated external documents. A new one is created instead. • Ask user (user chooses to delete existing or not) – When exporting email(s), the user will be permitted to choose whether or not to delete the matching existing Activity and its attachments.

Using the GIFTS Online Link to Outlook Wizard

The GIFTS Online Link to Outlook Wizard opens when you successfully log in via the **Send to GIFTS Online** button in Outlook.



When exporting the selected message:

NOTE: The default for this option is determined by the Preference settings.

Match to existing Activity(ies) – with this option selected, the system will attempt to match the email selected with an existing Activity record by MERECID, Subject, or Email address of the Organization or Contact.

When a single email is selected, any matches will be displayed in a grid below the Quick Search field.

NOTE: Branch Security view rights will be applied, if enabled.

Create new Activity – This will create a new 'Mail' Activity and associate it to a record you select using the search tools. If this is selected, The Link to menu will be enabled allowing you to pick from Request, Organization, Contact, or 'no existing records'.

The Link to Menu

Depending the Linked To option selected, the system will attempt to match the email with an existing Activity record by MERECID or Email address and return the Request, Organization or Contact record in the list of results.

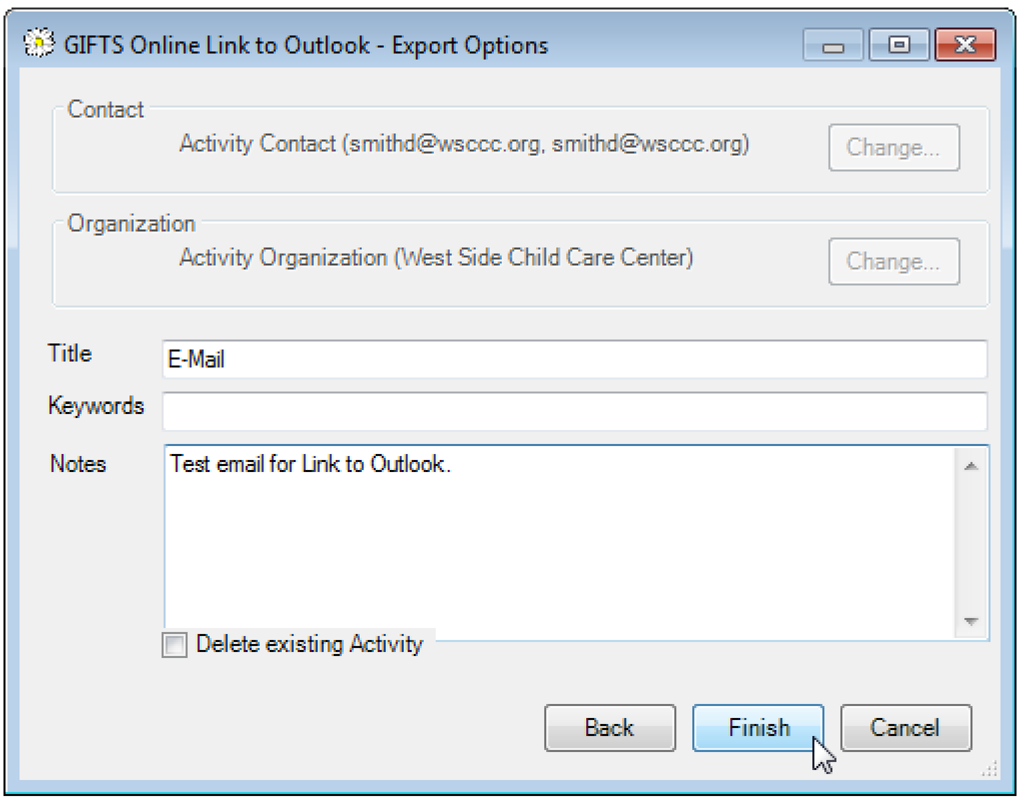
Option	Description
Existing Request(s)	When you select this option, a grid appears with a list of Requests that are possible matches to the email item.
Existing Organization(s)	When you select this option, a grid appears with a list of Organizations that are possible matches to the email item.
Existing Contact(s)	When you select this option, a grid appears with a list of Contacts that are possible matches to the email item.
No Existing Record	No grid is displayed.

Quick Search and Advanced Search

If no matching records are automatically found, you may perform either a **Quick Search** or **Advanced** search from the Link to Outlook Wizard.

TIP: More details about the search functions are available in the Searching from the Link to Outlook Wizard section.

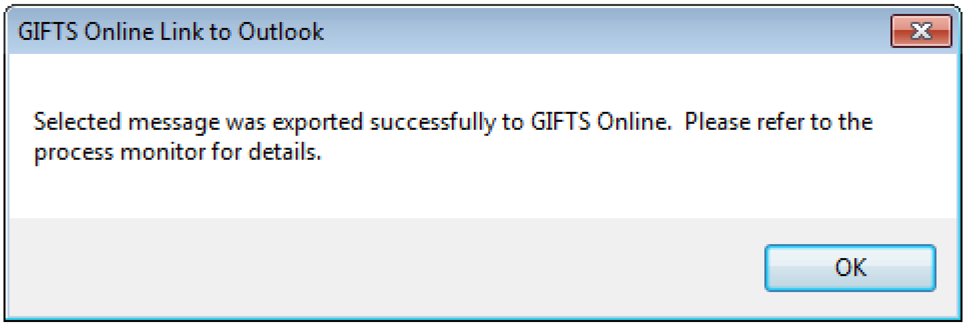
Once you have selected one or more records to export and link the email to, click **Next** to move to the Export Options form.



The table below describes the options available on this form:

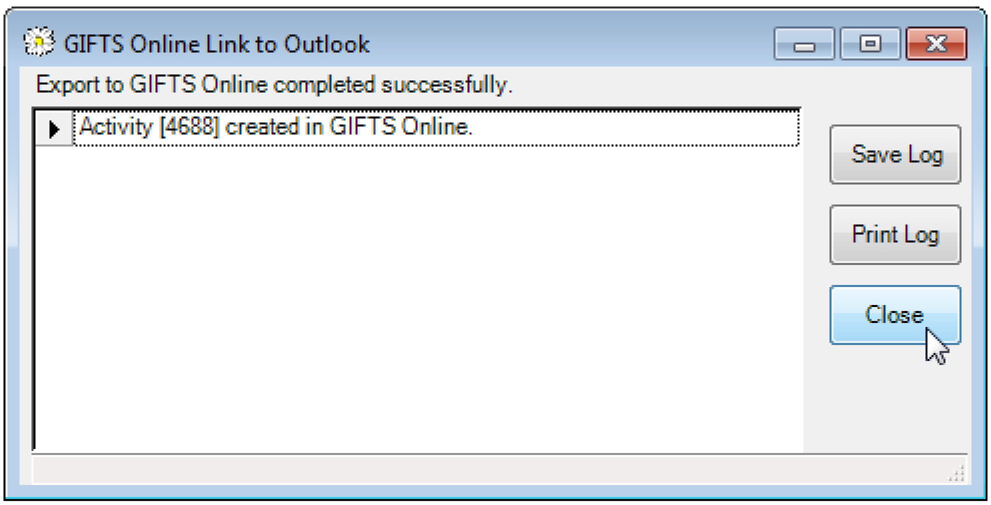
Field	Description
Contact	This section shows the contact to which the activity will be linked. It will be hidden when exporting multiple messages. If needed, the **Change** button may be used to change the Contact. **NOTE:** This option is only available if a new Activity is being created.
Organization	This section shows the Organization to which the activity will be linked. It will be hidden when exporting multiple messages. If needed, the **Change** button may be used to change the Organization. **NOTE:** This option is only available if a new Activity is being created.
Title	Default will be the title of the matching Activity. Otherwise, blank.
Keywords	Default will be keywords of the matching Activity. Otherwise, blank
Notes	Default will be the notes of the matching Activity. Otherwise, "Email sent" (if sender is the current Outlook user) or "Email received" for a single message; blank in batch.
Download Attachments	Will not appear if preference to support attachments is not enabled or there is a single message selected and it has no attachments. Defaults to checked (if unchecked, external documents won't be created for any attachments).
Delete existing Activity	This checkbox determines whether the original email activity (and its attachments) should be deleted when the message is exported. Will default to unchecked. Will only appear if the preference is set to "Prompt User" and the matching options selected in Step 1 may result in matching to an existing Activity record.
Back	Allows you to page back to the first page of the wizard.
Finish	Click to finish the export to GIFTS Online.
Cancel	Cancels the export and closes the wizard.

Once you click **Finish**, the email(s) selected will be exported to GIFTS Online and the following prompt will be displayed.



Click **OK**.

A progress log will also be displayed. You may Save or Print the log at this point for your records.



Click **Close**.

Searching from the Link to Outlook Wizard

Quick Search

Depending upon the record type, this function will perform a search based on a limited number of field parameters as described below. Simply enter a keyword or ID/Reference number and click GO.

Activities

If the 'Match to existing Activity' option is selected at the top of the Link to Outlook form, Activities will be searched in the following manner:

- Will do a "contains" search first on Letter Subject
- Barring that, will do a "is" search on Request ID
- Barring that, will do a "contains" search on Letter Keywords

Contacts, Requests, or Organizations

if the 'Create new Activity' option is selected for the export and a record type is selected from the **Link to** drop-down menu, the search will be performed in the following manner:

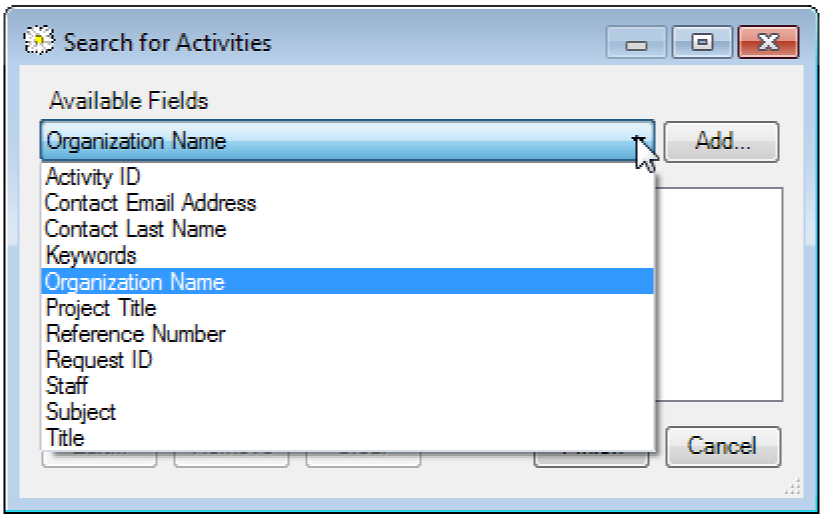
Contacts	• If a space is detected in the entered text, the system will split on the first space and do an "is" search of the piece before the space on Contact First Name and the piece after on Last Name. • Barring that, will do a "contains" search looking for entered text in Contact Last name field.
Requests	• Will do an "is" search first on Request ID. • Barring that, will do an "is" search on Request Ref Number. • Barring that, will do a "contains" search on Project Title.
Organizations	• Will do a "contains" search looking for matching text in Organization name fields.

Advanced Search

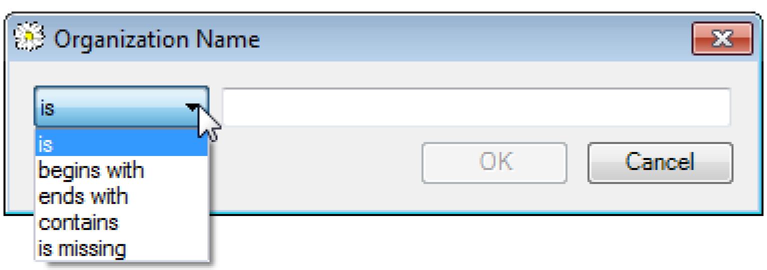
Depending upon the record type, this function will create a search that runs across key fields until one or more matches are found. The following is a description of the options that you have when using the Advanced search functionality.

The Advanced Search form has a limited number of fields which can be used to search for an existing record as shown below.

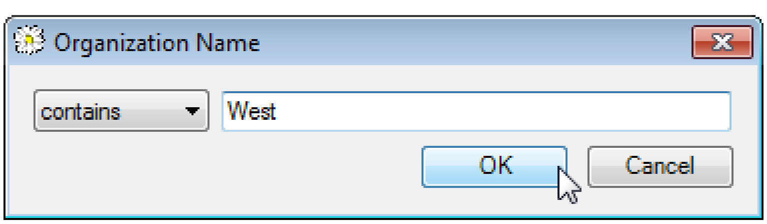
1. Click **Advanced**.
2. With the Search for Activities form open, select a field using the drop-down menu.



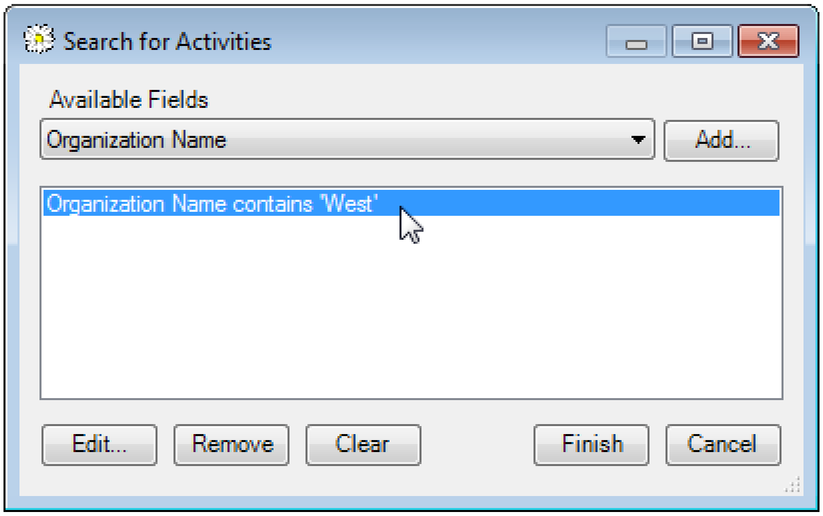
3. Click Add to open the search parameter form.
4. Depending on the field selected, you will have several parameters to choose from.



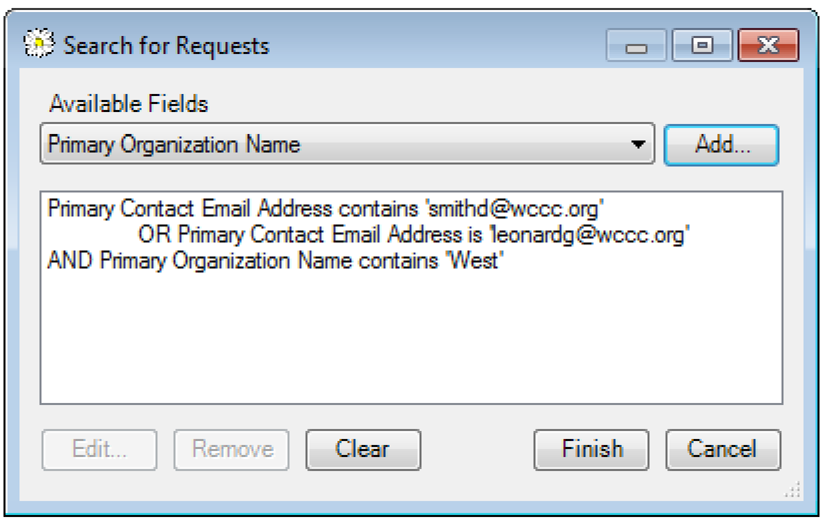
5. Once you have selected a parameter, enter a keyword or number for the search and click OK.



6. Your search filter will be displayed in the open text field.



7. If you select the search filter, you have the option to **Edit** or **Remove** it using the buttons at the bottom. Double-clicking a filter will also open edit mode.
8. You can add multiple filters using the above steps.



9. If two of the same field are added to the search, an OR operator will be inserted instead of AND. In the example above, two primary contact emails were added with OR in between.
10. Click **Finish** to perform the search.

About Tax Status

This chapter describes how to use Tax Status to verify and update tax status information for Organizations in GIFTS Online. It also describes how to search for tax exempt organizations in MicroEdge's Tax Exempt Organization Database.

NOTE: Tax Status requires an active subscription to MicroEdge's tax information service. If you do not have a subscription, contact your sales representative for more information.

Tax Status allows you to verify the tax status of one or more Organizations in GIFTS Online against MicroEdge's Tax Exempt Organization Database. After verifying the tax status of one or more Organizations, you can update GIFTS Online with current tax status information.

You can also use Tax Status to look up tax exempt organizations not in GIFTS Online.

About MicroEdge's Tax Exempt Organization Database

MicroEdge's Tax Exempt Organization Database is a database that contains the most current information on all tax exempt organizations. MicroEdge frequently updates this database with information from the IRS Exempt Organization Master Listing and the Canada Revenue Agency's registered charities database.

Setting Up Tax Status Codes

GIFTS Online can only be updated with tax status codes that are found in its tax status code table. Before you use Tax Status, a Grants Manager must make sure that the tax status code values are up-to-date.

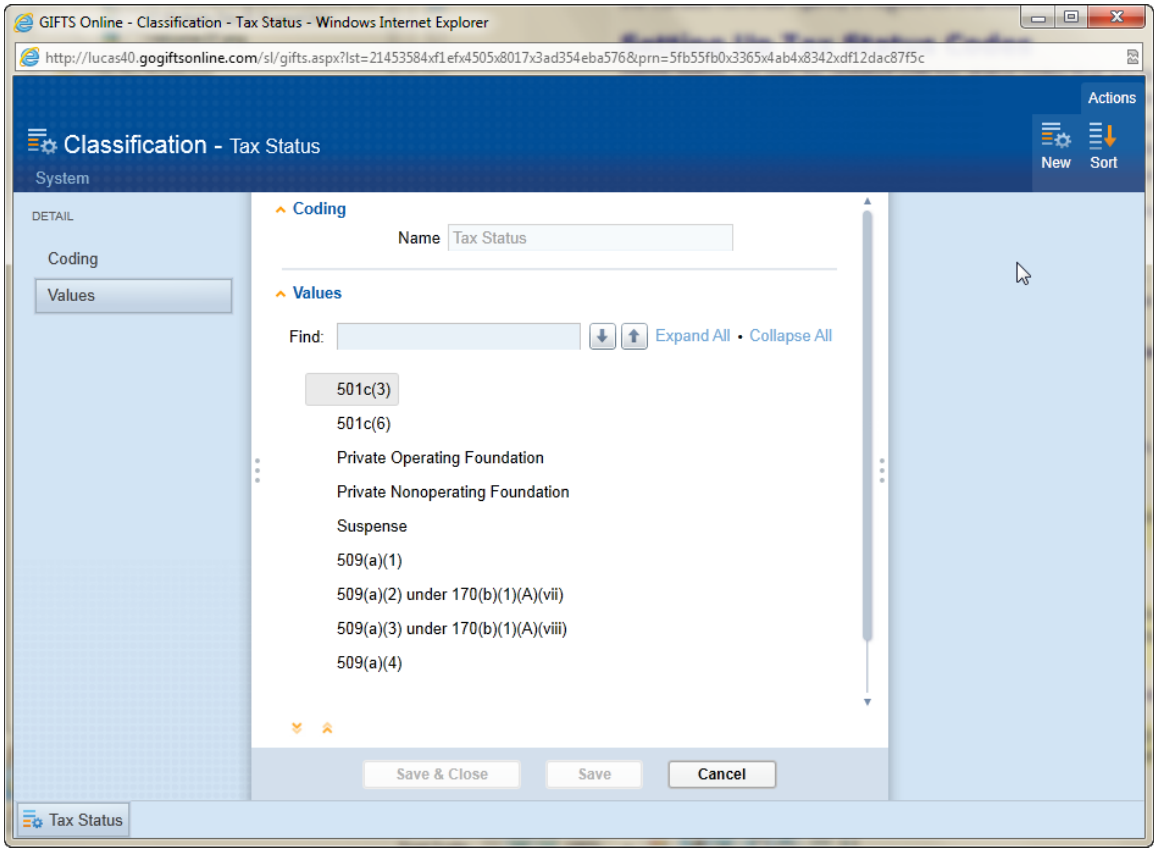
When you verify an Organization's tax status, a search is done on the tax status, and if found, the tax status codes of the Organization in GIFTS Online and MicroEdge's Tax Exempt Organization Database are compared.

Whenever you make an attempt to update with a code not found in GIFTS Online, you will be notified.

A Grants Manager can add the missing code using the steps below, and you can then repeat the update.

To set up tax status codes in GIFTS Online:

1. From the **Admin** menu, go to **Classifications**.
2. Scroll down the list of code tables and click on the Tax Status table.
3. The Classification - Tax Status page is displayed.



4. Do one of the following:
    - To add a new tax status code, click **New**.
    - To update a tax status code already in the table, click on the edit (pencil) icon that appears next to the code when you hover the mouse cursor over it.
5. Enter the **Code** for the tax status.

NOTE: For a listing of all the tax codes and their associated descriptions and organization types, please refer to "Tax Status Codes" section.

6. Enter the **Description** for the tax status. This is what is displayed in the **Values** list.

NOTE: This description appears in the Tax Status section of the Tax Status menu in the Organization window and can be anything that describes the tax status. For instance, if the tax status code is 03, an accurate description might be 501(c)3.

7. Repeat this process until all tax status codes are set up.

Tax Status Codes

The following is a list of tax status codes and their associated descriptions and organization types. Your Grants Manager can use this table when setting up tax status codes.

For more information, please see "Setting Up Tax Status Codes".

Tax Status Code	Description	Organization Type
01	501(c)1	Government Instrumentality
02	501(c)2	Title-Holding Corporation
03	501(c)3	Charitable Organization Educational Organization Literary Organization Organization to Prevent Cruelty to Animals Organization to Prevent Cruelty to Children Organization for Public Safety Testing Religious Organization Scientific Organization
04	501(c)4	Civic League Local Association of Employees Social Welfare Organization
05	501(c)5	Agricultural Organization Horticultural Organization Labor Organization
06	501(c)6	Board of Trade Business League Chamber of Commerce Real Estate Board
07	501(c)7	Pleasure, Recreational, or Social Club
08	501(c)8	Fraternal Beneficiary Society, Order or Association
09	501(c)9	Voluntary Employees' Beneficiary Association (Non-Government Employees)

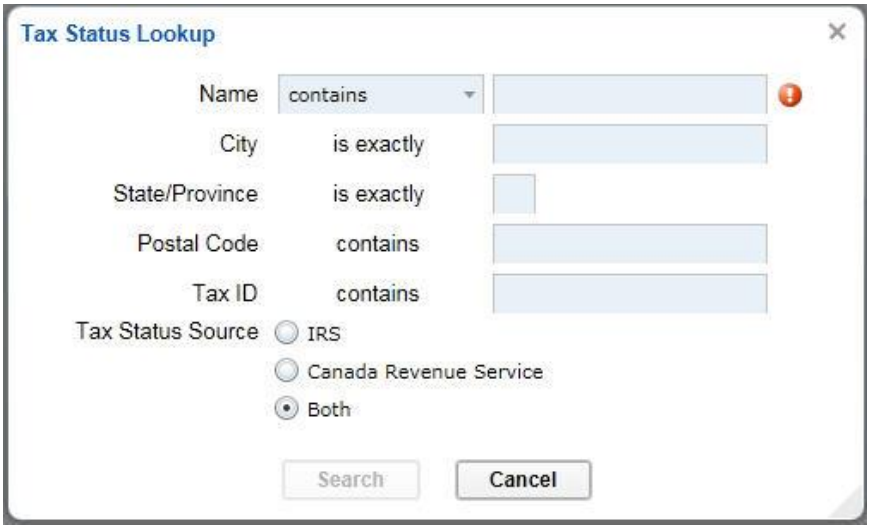
		Voluntary Employees' Beneficiary Association (Government Employees)
10	501(c)10	Domestic Fraternal Societies and Associations
11	501(c)11	Teachers Retirement Fund Association
12	501(c)12	Benevolent Life Insurance Association Mutual Ditch or Irrigation Company Mutual Cooperative Telephone Company Organization Like Those on Three Preceding Lines
13	501(c)13	Burial Association Cemetery Company
14	501(c)14	Credit Union Other Mutual Corporation or Association
15	501(c)15	Mutual Insurance Company or Association Other Than Life or Marine
16	501(c)16	Corporation Financing Crop Operations
17	501(c)17	Supplemental Unemployment Compensation Trust or Plan
18	501(c)18	Employee Funded Pension Trust (created before 6/25/59)
19	501(c)19	Post or Organization of War Veterans
20	501(c)20	Legal Service Organization
21	501(c)21	Black Lung Trust
22	501(c)22	Multiemployer Pension Plan
23	501(c)23	Veterans Association Formed Prior to 1880
24	501(c)24	Trust Described in Section 4049 of ERISA
25	501(c)25	Title Holding Company for Pensions, etc.
26	501(c)26	State-Sponsored High Risk Health Insurance Organizations
27	501(c)27	State-Sponsored Workers' Compensation Reinsurance
40	501(c)40	Apostolic and Religious Organizations (501(d))
50	501(c)50	Cooperative Hospital Service Organization (501(e))
60	501(c)60	Cooperative Service Organization of Operating Educational Organization (501(f))

70	501(c)70	Child Care Organization (501(k))
71	501(c)71	Charitable Risk Pool
81	501(c)81	Qualified State-Sponsored Tuition Program
92	501(c)92	4947(a)(1) - Private Foundation (Form 990PF Filer)

F02	Private Operating Foundation
F03	Private Operating Foundation
F04	Private Non-operating Foundation
F09	Suspense
F10	509(a)(1)
F11	509(a)(1)
F12	509(a)(1)
F13	509(a)(1)
F14	509(a)(1)
F15	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)
A	Public Foundation
B	Private Foundation
C	Charitable Organization

Tax Status Lookup

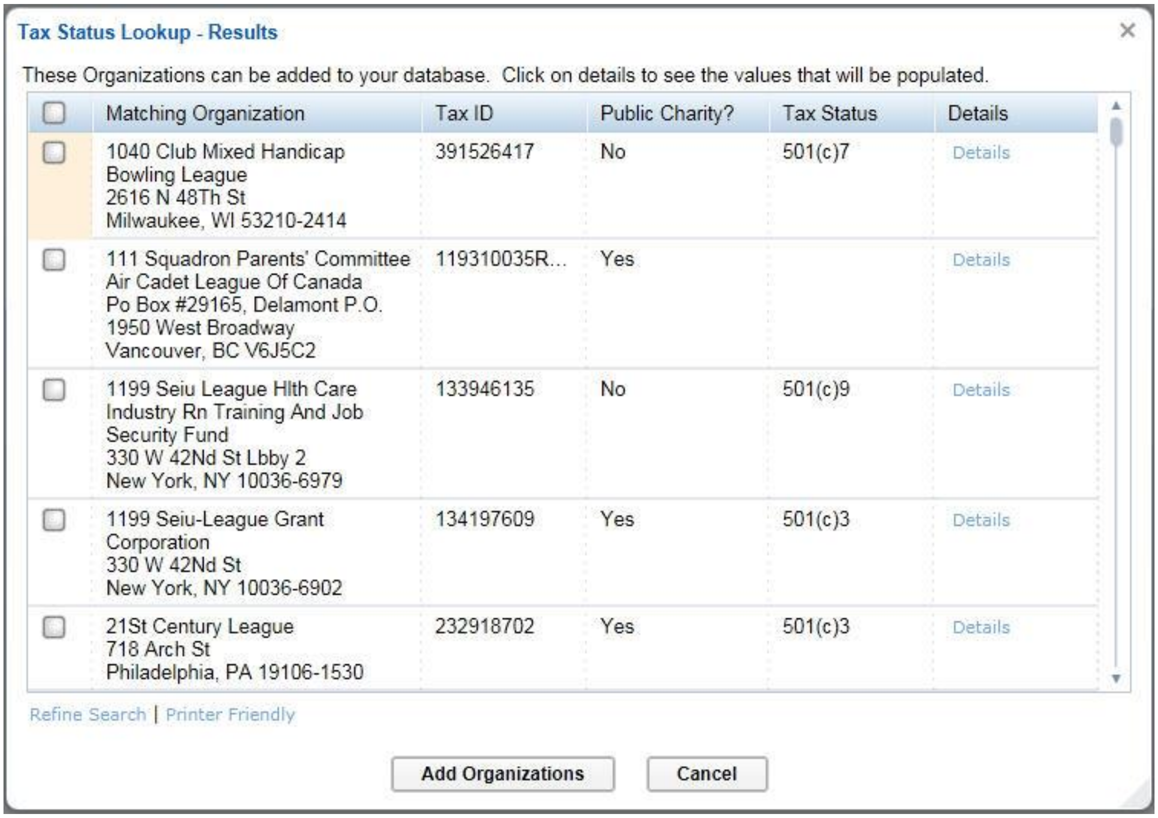
The Tax Status Lookup allows a user to search the IRS database for Organizations that do not currently exist in their GIFTS Online system. The **Tax Status Lookup** option is accessed from the 'Launch' menu of GIFTS Online and does not require any Organization records to be selected. Simply go to **Launch > Tax Status Lookup**.



NOTE: At least one criteria other than "Tax Status Source" must be entered. The **Search** button will be disabled until at least one other value is supplied.

Tax Status Lookup Results

The following page displays the search results from the lookup.

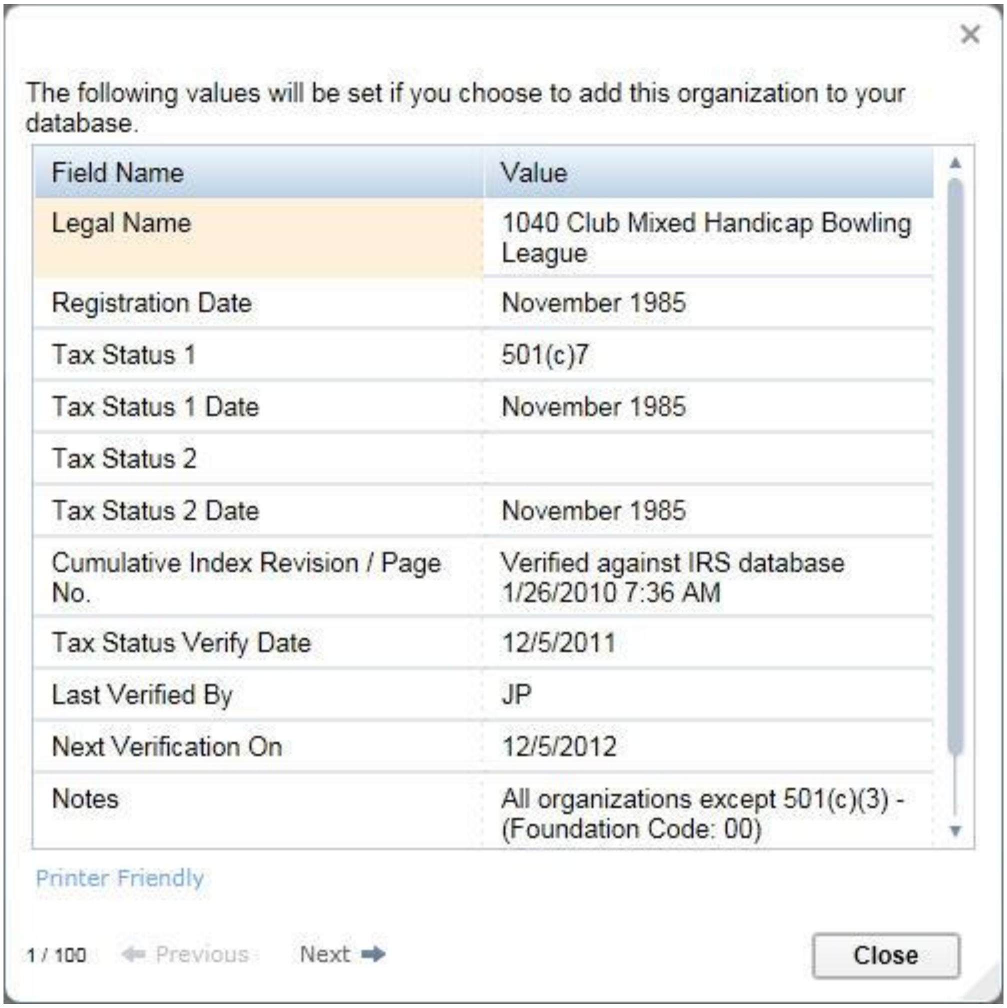


Actions Available

Action	Description
Refine Search	Returns user to the previous search dialogue. The previous search criteria will be pre-populated already.
Printer Friendly	Generates a temporary HTML page with the search results grid.
Details	The details link will launch a modal window that allows the user to see the values for the Organization in question. This will afford the user the opportunity to review the data that will be created.
Add Organizations	Will create Organizations records in the GIFTS Online database for the selected results. See Updates and Error Handling.
Cancel	Closes the results page.

Details

Clicking Details link will display the following for each Organization:


The following values will be set if you choose to add this organization to your database.

Field Name	Value
Legal Name	1040 Club Mixed Handicap Bowling League
Registration Date	November 1985
Tax Status 1	501(c)7
Tax Status 1 Date	November 1985
Tax Status 2	
Tax Status 2 Date	November 1985
Cumulative Index Revision / Page No.	Verified against IRS database 1/26/2010 7:36 AM
Tax Status Verify Date	12/5/2011
Last Verified By	JP
Next Verification On	12/5/2012
Notes	All organizations except 501(c)(3) - (Foundation Code: 00)

Printer Friendly

1 / 100 Previous Next Close

The data grid will show the following:

- **Field Name** – The name of the field in the Organization Record
- **Value** – The value with which the field will be populated

The footer of the dialogue will display:

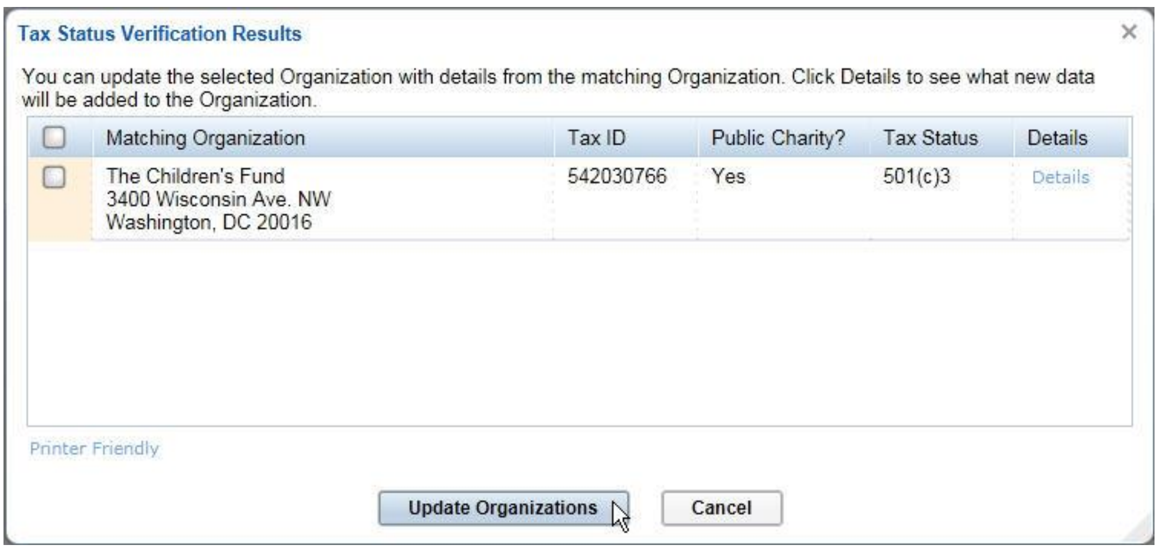
- **x / y records** in the record set
- **Previous** and **Next** to traverse the record set
- **Close** button to close the dialogue

Tax Status Verify

The Tax Status Verify option allows the user to verify the tax status of existing Organization records in their GIFTS Online system against the ME tax database. This action can be initiated from the Organization search results page or from within an Organization edit form itself. You can also use this feature in batch mode by selecting multiple Organizations first and then going to **Actions > Tax Status Verify**.

Single Mode

When Tax Status Verify is invoked against only a single record (either from an Organization Edit Form, or when only one record is selected out of many), there will only be two possible outcomes: 'Matched' or 'Not Found'.



If a match is found, you can click **Details** to view the Organization's IRS information.

If not found, you are given the option to refine your search.

Yes – Opens the Tax Status Lookup form with the fields filled in where appropriate.

No – Returns you the search results page or Organization edit form you were on.

The following actions are available on the results page:

Action	Description
Printer Friendly	Generates a temporary HTML page with the results grid.
Details	The details link will launch a modal window that allows the user to see the existing values and the new value that the record will be updated to. A checkbox column will allow the user to select which fields they would like to update.
Update Organizations	Will update Organization records in the GIFTS Online database for the selected records.
Cancel	Closes the results page.

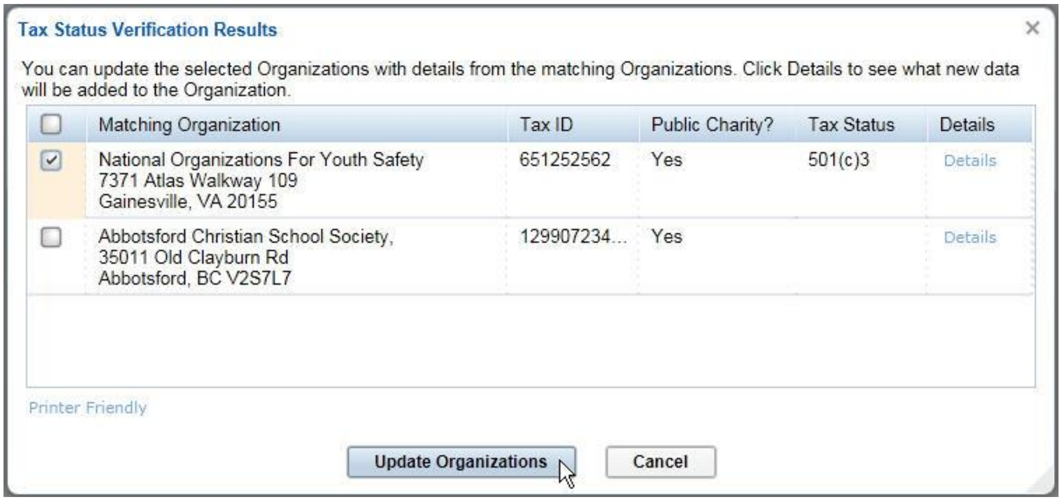
Multiple Records Mode

Selecting multiple organizations on a search results page and then using the Tax Status Verify option will check all selected organization Tax IDs.

A Tax Status Verification Summary will display showing how many Matched and Not Matched tax IDs were found.

You can click the **View results** links to see a list of each.

Matched IDs: This consists of the Organizations whose GIFTS Tax ID and tax status matched the information in MicroEdge’s Tax Exempt Organization Database.



NOTE: On the Results page, the Update Organizations button is disabled unless 1 or more organizations are selected.

Not Matched IDs: If there were Organizations that were not found, you will have the ability to initiate a lookup search from this list.

Action	Description
Printer Friendly	Generates a temporary HTML page with the results grid.
Lookup	The lookup button will launch the Tax Status Lookup form for the selected Organization. The lookup form will open in a new window. The Tax Status Verification ‘No Results Found’ page stays open until user hits the close button.
Close	Closes the results page.

Updating Organization Information

When verifying an Organization's tax status, you can view the tax status fields that can be updated. You can then select the fields you want to update, and update them in GIFTS Online.

Steps 1 and 2 below are optional and only necessary if you want to view or change the tax status fields to be updated. If you only want to update Organization information, go to Step 3.

To view and update Organization fields:

From the **Tax Status Results - Matched** list or the **Tax Status Results - Not Matched** list, click **Details** next to an Organization. The Update Details window is displayed.

1. The Update Details window contains the following columns:

Column	Description
Field	The name of the field. Click the check box next to this field to select it, or clear the check box to clear it.
Current	The field information in GIFTS Online.
New	The field information in MicroEdge's Tax Exempt Organization Database. If you select this field and update GIFTS Online, the information in this field overwrites the information in GIFTS Online.

NOTE: Selected fields will be overwritten in GIFTS Online if you update this Organization. The fields which are selected by default are determined by your setup preferences.

2. Choose one of options on the Update Details window:

Option	Description
Print	Prints the displayed information.
Set	Saves any changes and closes the window. To update GIFTS Online with the selected fields, go to Step 3.
Cancel	Closes the window without saving any changes.

NOTE: For detailed information about the **Tax Notes** field, please refer to "Understanding Tax Notes Field Data," Solution #1369 in the MicroEdge PowerME client portal.

3. From the Tax Status Results window, click **Update**. This updates the selected Organizations with selected information from MicroEdge's Tax Exempt Organization Database. If you do not update all the Organizations on the Tax Status Results window, a window is displayed indicating the number of Organizations that have been updated. Click **View Results** to return to the Tax Status Results window.

Looking Up Tax Exempt Organizations

You can look up tax exempt organizations not in GIFTS Online at any time from the Organizations folder or while verifying Organizations' tax status from the Tax Status Verify - Summary window.

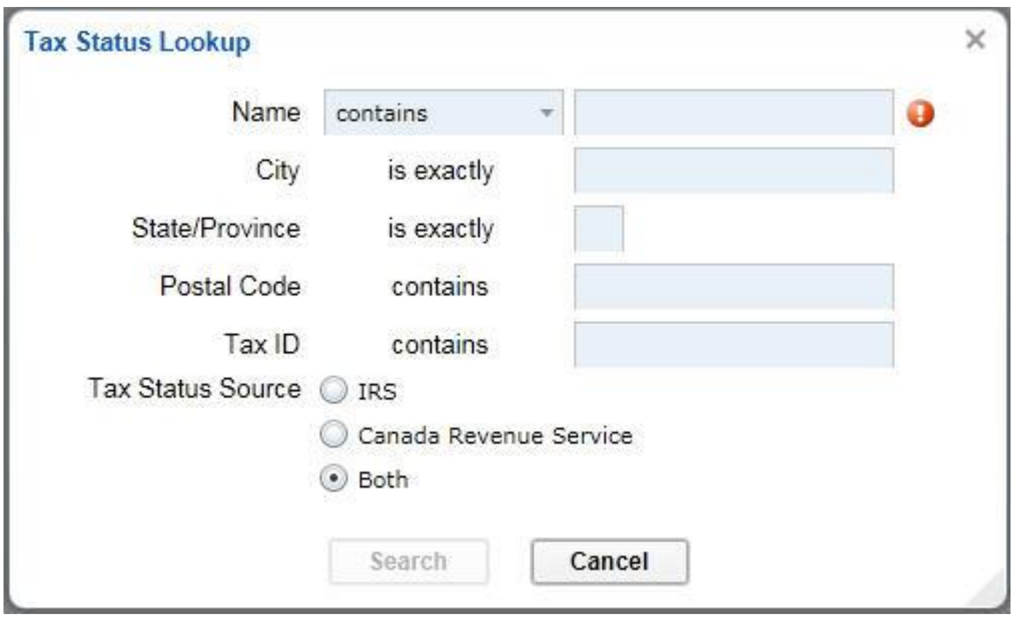
Looking Up New Tax Exempt Organizations

You can look up tax exempt organizations in MicroEdge's Tax Exempt Organization Database at any time. If you choose, you can add these organization to GIFTS Online.

This feature does not check for duplicate or similar Organizations in GIFTS Online. If you add a tax exempt organization using this feature, make sure it is not already in GIFTS Online, or a duplicate Organization will be created.

To look up a new tax exempt organization:

1. From the main menu, choose **Actions > Tax Status Verify**. The Look Up Organization Tax Data window is displayed.

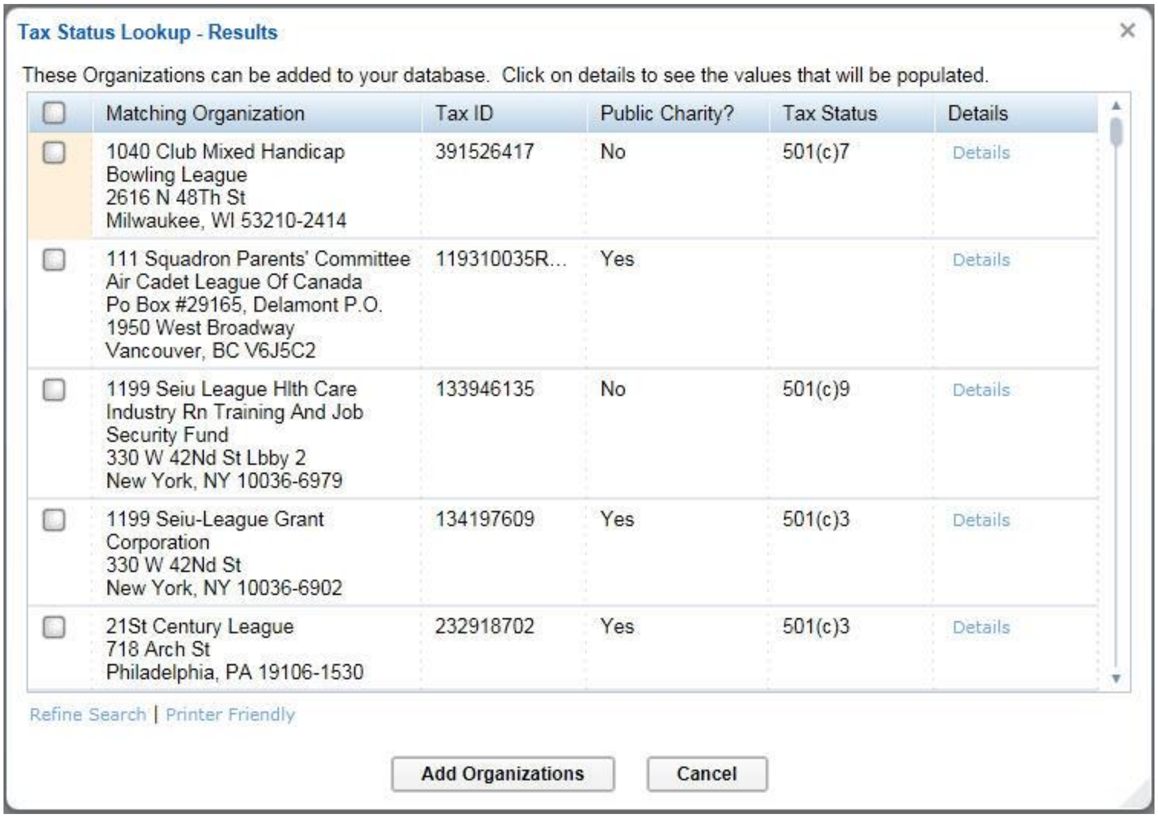


2. Enter search criteria in the following fields:

Field	Description
Name	The name of the organization. Use the drop-down menu to select whether you are entering a whole or partial name.
City	The city where the organization is located.
State/Province	The state or province where the organization is located.
Postal	The postal code of the organization.

Tax ID	The Tax ID of the organization.
Source	Select the section of MicroEdge's Tax Exempt Organization Database to search, either IRS, Canada Revenue Agency, or both.

3. Click **Search**. The Tax Status Lookup - Results window is displayed.



The Tax Status Plus - Search Results window contains the following fields:

Field	Description
Matching Organization	The organization's contact information in MicroEdge's Tax Exempt Organization Database.
Tax ID	The Tax ID of the organization in MicroEdge's Tax Exempt Organization Database.
Public Charity?	This field indicates whether or not the organization is a public charity.
Tax Status	The tax status of the organization in MicroEdge's Tax Exempt Organization Database.
See Details	Click Details to view which fields will be added to GIFTS Online.

NOTE: GIFTS Online only displays the first 100 organizations found. If you need to refine your search criteria, click **Refine Search**.

4. Choose from the following options on the Tax Status Lookup - Results window:

Option	Description
Select All	Selects all the organizations.
Deselect All	Clears all the selected organizations.
Print	Prints the displayed information.
Add	Adds the selected organizations to GIFTS Online. Before clicking this button, select the check box next to the organizations you want to add. To view the details that will be entered into GIFTS Online for the new Organization, click Details.
Close	Closes the window.

About Watchlists

This functionality will provide GIFTS Online users with the ability to comply with the "voluntary" guidelines set forth by the Treasury Departments' Office of Foreign Assets Control (OFAC).

Users will be able to select via preferences the compliance lists to be used for the vetting of their organizations and contacts. Based on the compliance lists selected, WatchDOG would return any hits and these would be presented to the user for processing. The GIFTS Online user would in turn be able to review these "hits" and save information about each, including False Positives. Any organization that was researched and shown to be a "False Positive" could then be added to a "Whitelist". Records included in the "Whitelist" would be excluded from future verifications until the time when and if any of the information in the white-listed record changes.

Watchlists and GIFTS Activities

Activity records are created when selected Organizations or Contacts are verified against Watchlists. When hits are found, the Due Date is set to 5 days from the current date. Users can search for, open, and update these Activities manually as they can for any other History Activity.

Watchlist Setup and Configuration

A new "Execute Watchlist" permission has been added to GIFTS Online, and initially granted only to the Grants Manager role.

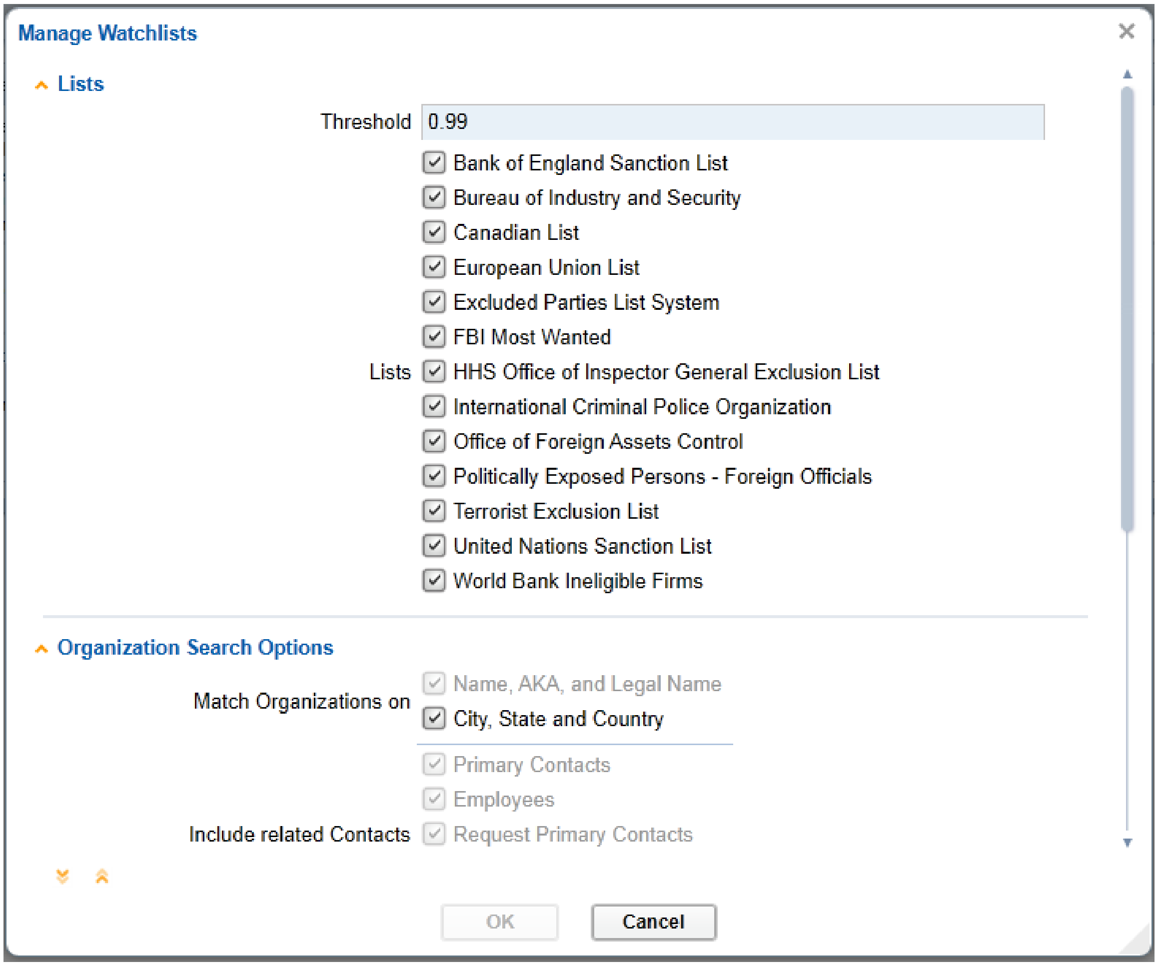
If a user's role does not include this permission, the menu options referenced in this document will be hidden in the ribbon menu, effectively hiding those features from the user.

NOTE: The process creates an Activity record whenever a 'hit' is found on a Watchlist for an Organization or Contact records.

Watchlist Preferences

When a user decides to verify Organizations and Contacts against the Watchlists, there are several options that come into play, like which specific Watchlists to search, whether or not to also search certain related records, and what values need to be matched to be considered a 'hit'.

These settings are accessed in the Manage Watchlists form by going to **Admin > Manage Watchlists**.



Prompt	Description
Lists	
Threshold	To indicate a threshold value, enter a number (only .75-1.00 allowed). The default threshold is set to .85.
Lists	To select a list for inclusion, click the check box next to the list name. Default Search Lists are: OFAC, BIS, OSFI, UNSL, FBI, Interpol, TEL
Organization Search Options	
Match Organizations on	Organizations will automatically be matched by Name, AKA, and Legal Name, so this option is checked and disabled. The client can choose also to match on City, State and Country. Note that in this and all cases, if the source field in GIFTS Online is blank, this is considered a positive match. For instance, if the Organization has City and State but no Country, and City and State match, the match is considered positive. But if the Organization does have a Country and it is different from the value

	on the watchlist, the match is negative.)
Include Parents and Subsidiaries	If this flag is checked (which it is by default) not only will the selected Organization be searched, but also any other Organization related to it as either a Parent or Subsidiary.
Included related Contacts	The client can also choose to search related Contacts when they search the Organization. The client can choose by Role: **Primary Contacts** – the Contact related through the Organization's Primary Contact **Employees** – Contacts related to the Organization through an Affiliation record with a Contact **Request Primary Contact** – an indirect relationship using the Request's Primary Contact **All Affiliated Contacts** – since this option incorporates the three above, if this is checked, the above three prompts should be checked and disabled. Subsequently unchecking this option enables the other prompts and leaves them checked. **Include 'Closed' Affiliations** – if false, then only Affiliations with an empty or null **To date** will be included when evaluating the above relationships. If true, then all Affiliations will be considered. **Defaults:** Primary Contacts and Employees default to true; the rest of the options to false
Match related Contacts on	If the client is including any Contacts, they will automatically be matched on First Name and Last Name. Additional options allow the matching process to include Social Security Number and/or Birth Date. With **Birth Date**, the value will be considered a match if the value in the watch list is up to 'x' years earlier or a year later. (For example, if the value in the database is 6/1/1975 and the default value is left at 1, then any date between 6/1/1974 and 6/1/1976 would be considered a match.)
Contact Search Options	
Match Contacts on	Same as described above for "Match related Contacts on".
Include Related Organizations	The client has the option of choosing the Contact's Primary Organization or All affiliated Contacts, with the same option to include Closed Affiliations as described above. Both options are selected by default; the option to include Closed

	Affiliations defaults to false.
Match Related Organizations on	Same as the options for "Match Organizations on" described above.

Command buttons:

- **OK** – saves the user's changes and closes the form
- **Cancel** – closes the form without saving the changes. If there are unsaved changes, the user will be prompted with the standard dialogue:

  Save changes to Watchlists Preferences?

  Yes/No/Cancel

Actions

The available actions for Watchlists are the following:

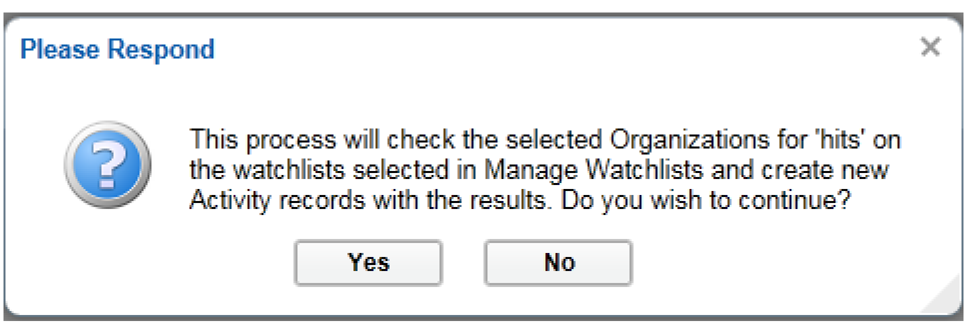
- **Check Watchlists** – Checks the selected Organizations or Contacts (and their related records, if desired) against the selected Watchlists, displays any 'hits', and gives the user the chance to mark them as 'false positives' or add their own notes
- **Review Watchlists** - displays the results of any prior Watchlists checks for those records

Both options will be available in the Actions menu of the Organization and Contact edit forms, and in the Search Results when the search returns Organization or Contact records.

Check Watchlists

This process checks the selected Organizations or Contacts against the watchlists selected in Preferences and creates special Activity records for each one with the 'hit' results. It is then up to the GIFTS Online user to review each hit and determine whether it is a true hit (meaning that person or institution is indeed on that watchlist) or a 'false positive', meaning that although the criteria matched the record in the database with one on the watchlist, they are not in fact the same.

When the user clicks the Check Watchlist action, they are first asked to confirm their intentions:

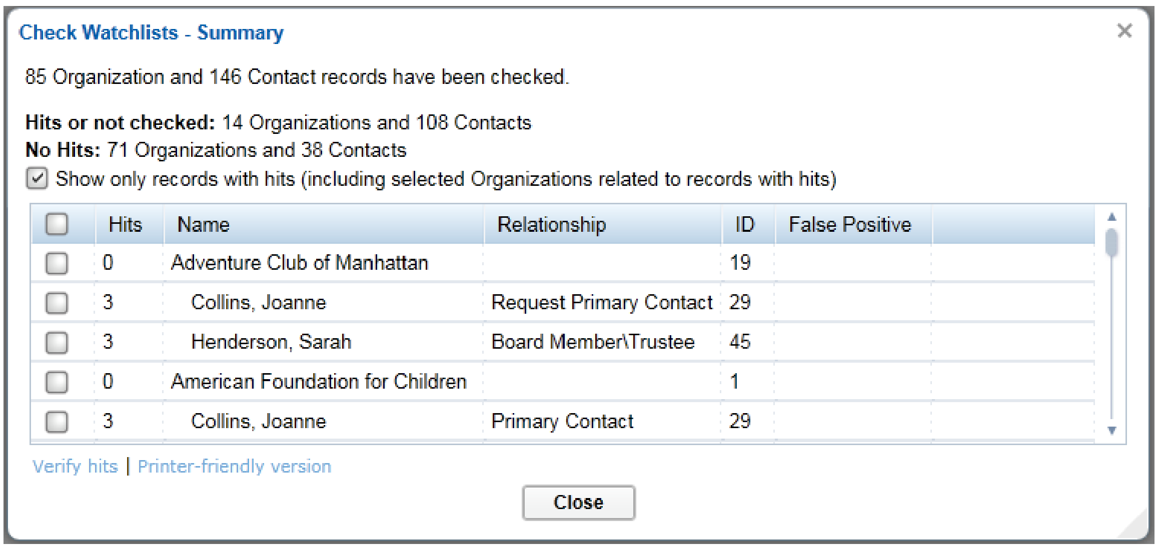


If they click **Yes**, the process will run, and should be tracked by a progress bar. The system will evaluate each record (Organization or Contact) against each Watchlist selected in Preferences and do the following:

- An Activity will be created for each Organization and Contact checked:
    - If there are no hits, the Activity will be created with a status of 'Done'.
    - If there are new hits, the Activity will be created with a status of' Open unless the Organization or Contact was previously marked as a false positive. In that case, the Activity is marked as done, with the text "Hits found. Marked false positive. See Long Notes." in the Notes field.

Check Watchlists - Summary

At the conclusion of the process, the Check Watchlists – Summary form will display:



Note that at this point the Activities have already been created and saved, and that the detail for Hits is displayed by default, and the detail for Non-hits is collapsed by default.

Column	Description
Checkboxes	Used to select individual records for the Printer-friendly version of the report or the More details option
# of Hits	The number of lists that returned occurrences of the Organization or Contact.
Name	The Name is the Organization Name value or the Contact Name (Last, First, Middle).
Relationship	The Relationship is the Contact Role for the Affiliation (joining the Contact to the Organization), if the related record for Primary Contact or Employee is selected. If Parent/Subsidiary is selected as an additional record it will display Parent or Subsidiary accordingly.

	Note that in the case of Contacts, it is likely that more than one Affiliation will meet the criteria. The Role displayed should be the first one encountered: Primary Contact, then Employee, then the Role for any other Affiliations.
ID	ID is the Organization or Contact ID.

The information in the tables is organized first by the record type being verified: each Organization or Contact included in the set is listed alphabetically.

Any related records are presented as a subset beneath each main record.

Note that in some cases, the related record may include a hit while the main record does not. In this case, the main record will be included for context even if it doesn't 'belong' in that category.

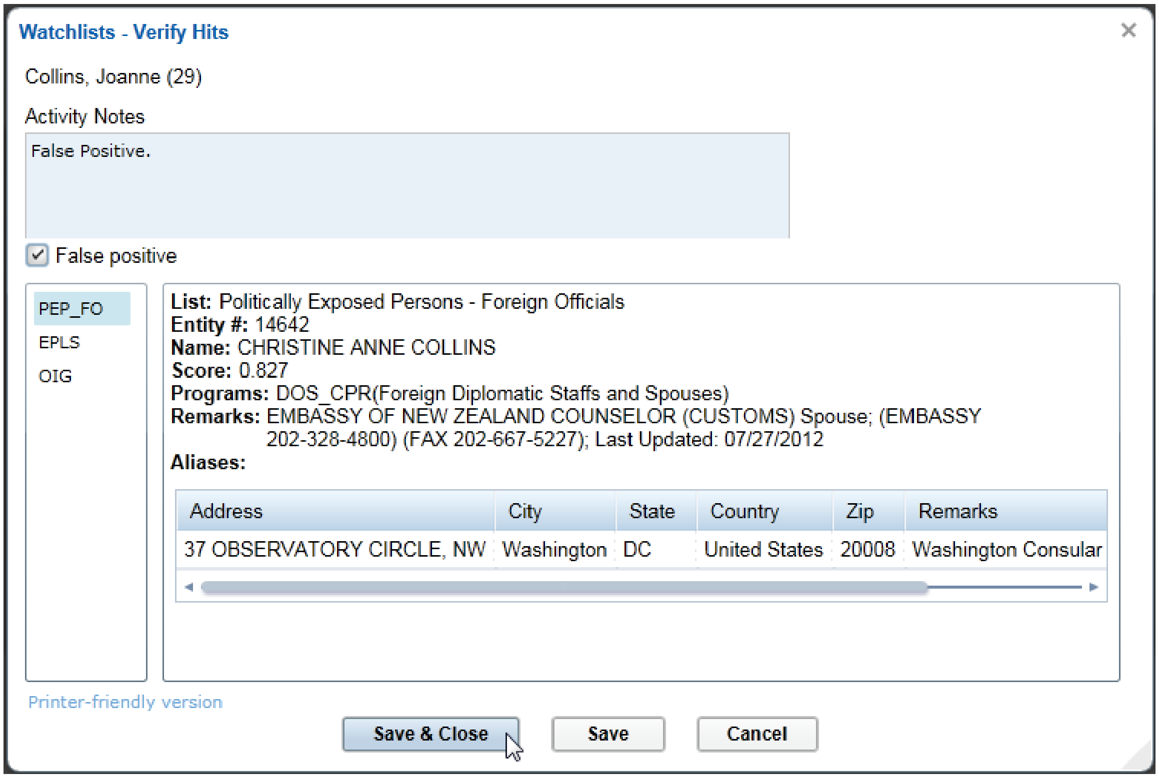
Two options will appear below the grid:

- **Printer-Friendly** – see Printer-friendly.
- **Verify hits** – see Check Watchlists - Verify Hits.

Check Watchlists - Verify Hits

The watchlists check process retrieves much more detail than can be easily presented in the grid on the summary page. This link will open a popup that will provide these details only for the selected records in the grid, and provides the UI for the user to mark the hit as a false positive and/or add any notes to be appended to the Activity records.

The selected records will open as a 'batch' – each page in the batch will display the details for a single record. Selected records with zero hits will be excluded from the batch.



- **Header** – Organization Name or Contact Full Name ({record ID}) in GIFTS Online.
- **Activity Notes** – a text box where the user can enter the text that will be appended to the Activity Notes about this hit, preceded by a carriage return. Existing Notes – either system- or user- defined – will not display and cannot be modified through this UI. If necessary, the text will be truncated to due to the field's 255 character limit.
- **False positive** – a checkbox, indicating that the hits do not concern the person or institution represented by the record in GO. In the database, this is represented by specifying a Done Date and Done User in the Activity record. Once this flag is enabled and saved, it cannot be unchecked from this interface, only directly from the Activity record (by marking the Activity as not done.) Records marked in this way add the entity to a "White List", exempting it from future 'hits'.
- **List** – a list box listing the name of each watchlist returning a hit. Clicking on a list in the box populates the panel on the right with the specific information for that list. The first or only list is highlighted by default.
- **List info** – the panel on the right lists the information gathered from the watchlist. Each data element will be preceded by its label name and a colon. Following this information

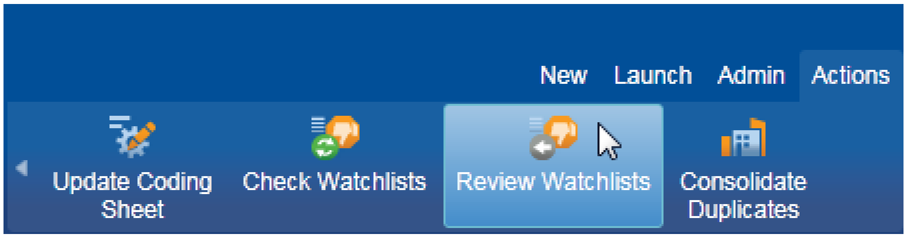
will be a grid of the Contact or Organization's addresses, if any. (If there are no addresses, the grid should still display, just without any data in it.)

Label	Comments
List	Name of the list
Entity #	Value from the watch list uniquely IDing the entity matched.
Name	Value of the Organization or Contact Name
Score	Value that specifies the max match score of the entity
Programs	Text identifier for a list. An example they give is "Specially Designated national Terrorist" (sic).
Remarks	Data typically found here includes; DOB, Place of Birth and Citizenship.
Aliases	Any aliases

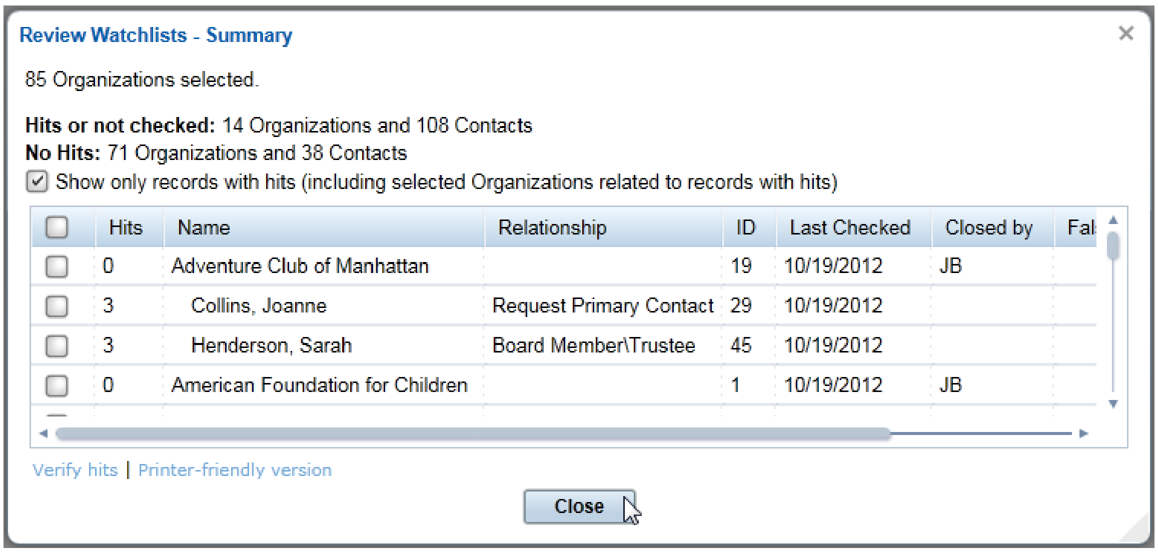
- **Navigation** – navigation should mimic the navigation used in the edit form 'batch open', with a display of the current record and the number of records in the set, and Next and Previous controls. Each 'page' is associated with an Activity record, so the same feature to ask the user to save their changes when they click Next or Previous should be included as on the edit forms.
- **Printer-friendly** – The printer friendly mode will generate an HTML version of the data grid.
- **Save** – saves any change to the current Activity record but does not close the form Updates.
    - If the user has checked the "False positive" checkbox, the Activity will be updated with a Done Date of the current date and a Done User of the current user
    - If the user added any Notes, these will be appended, preceded by a carriage return, to the existing Notes supplied by the system. Since Notes has a 255 character limit, the text defined here will be truncated if necessary. (No messages or warnings.)
- **Save & Close button** – saves any change to the current and closes the form, returning the user to the Check Watchlists – Summary form.
  At this point, if any of the records have been marked as false positives, they should be moved from the open to the not open section, and the totals and grids updated appropriately.
- **Cancel** – closes the form without saving any changes to the current Activity. The standard messaging will be included:
  Save changes to Watchlists Activity?

  Yes/No

Review Watchlists - Summary



This process is mostly the same as the process for checking Watchlists in the first place, but instead of performing a new check and creating Activity records, it simply retrieves the Activities from the most recent check – in other words, the Watchlist Activity record with the most recent Create Date (any earlier Activities are ignored).



The summary is very similar to the Check Watchlists – Summary, with the following exceptions.

- **Form title:** Review Watchlists – Summary
- **Summary text:** {#} {Organization(s) or Contact(s)} selected.
  Note that this is the number of selected Organizations or Contacts in the Search Results or Related Records grids.
- **Open summary:** Hits are open or checks were not performed for # Organization and # Contact records.
  This section reflects not only the selected records, but any related records as determined by the Watchlists Preferences.
  If any record in the batch is not associated with any Watchlist Activity record, it is included in this category – we consider it open because we don't know whether there are hits or not since it hasn't been checked. (Note that the user cannot take any action on that from here.)
- **Not Open Summary:** No hits are open for # Organization and # Contact records.
  This category includes all records where the most recent Watchlist Activity.
- **Grid columns:** The grid in this view will include two additional columns: Last checked and Closed by. Last checked is the Create Date of the Activity record. Closed by is the Done

User ID of the Activity record. Note that a record that has never been checked will have no value in this column.

Verify Hits and Printer-friendly version will function exactly as they do for the Check Watchlists process, with the exception that when the user closes the popups, they are returned here to the Review Watchlists Summary.

Working with Grantees Online

NOTE: This help topic describes features found in the optional Online Applications and Requirements Module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

Online Applications and Requirements allows you to manage your entire grantmaking workflow online.

This includes configuring your site preferences, creating application and requirement forms, visual elements on pages viewed by grantees, editing correspondence, and allowing grant seekers and your grantees to submit proposals and reports online.

- Grant applicants can submit proposals to you electronically by completing an online application form. Applications that meet your preliminary requirements can be brought directly to GIFTS Online as pending Requests— without further data entry by your staff.
- That kicks off your workflow. Later, grantees you've decided to fund can go online to submit reports and other information you've required. This information is submitted using an online form, and the Requirement record in GIFTS Online can be directly updated with the grantee's submission.

Using GIFTS Online's online grant application features, you can:

- Preview your online application forms.
- Retrieve proposals submitted by online grant seekers.
- Review the pending applications you've received.
- Make decisions on whether to consider each proposal further.
- Generate stage 2 applications for grant seekers whose first-stage submissions garnered your interest.
- View historical applications, including ones you've rejected without creating a Request.

To work with submitted applications and online grantee reports, it may help to understand these two process from the grantees' perspective. Click here to learn about application processes; an overview of online grantee reporting is here.

Topics in this section:

- Setting Site Preferences
- Using the Forms Manager
- Designing Online Forms
- Retrieving Applications and Requirements
- Processing Application Decisions
- Publishing Online Requirements
- Generating Reports
- Managing Grantees
- The Grantee Perspective
- Online Grantee Collaboration

About Online Application Processes

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

Online grant application forms are set up for you as part of your initial GIFTS Online implementation. This form (or forms) capture the data most important to decision-making in your particular workflow.

To place this in context, let's look at broad outlines of the two possible application processes you and grant seekers will work together to complete: a single-stage application process, or a two-stage application process.

Single-Stage Application Process

With a single-stage application process, your online form is designed to gather all needed information at once. You base your decision to fund using that information:

1. The grant-seeking applicant accesses, fills out, and submits an online application.
2. You retrieve the application (and any attached documents) to the Pending Applications staging area.
3. You make an initial decision whether to look deeper into funding the project; you can reject the application or consider it, which creates a pending Request in GIFTS Online.

You then move the new pending Request through your decision-making workflow.

Two-Stage Application Process

In a successful two-stage application process, the online grant seeker must fill out two different online forms. In the first stage application, the grant seeker enters enough information for you to decide whether you want to review the whole proposal. If you do, you can then ask the applicant to fill out the second, usually longer, application.

1. The grant-seeking applicant accesses, fills out, and submits a *first-stage* online application.
2. You retrieve the application (and any attached documents) to the Pending Applications staging area.
3. You make an initial decision whether to look deeper into the project; you can reject the application or consider it, which creates a pending Request in GIFTS Online.
4. You and other GIFTS Online users review the Request and decide whether or not to ask the applicant to provide fuller details on the proposal. If so, you then generate the stage 2 application.
5. At the same time, you can generate an email to notify the applicant. He or she can then log back in, complete, and submit the second-stage form.
6. As before, you retrieve the application and either reject it or consider it.

- If you consider it, the existing Request is updated with the additional information from the stage 2 application.
- If you reject it, that pending Request is automatically declined.

Now with full details on the proposal, you can review and then approve or decline the Request.

Generating Stage 2 Applications

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

A two-stage application process requires that an applicant fill out two online forms. The first-stage application, if considered, creates a pending Request in GIFTS Online.

If you want to hear more about the proposal in a second-stage application, you want to make sure that it's linked to the existing Request record. For that reason, generating the stage 2 application begins from the selected proposal's Request edit form.

1. Search for or navigate to the proposal's Request edit form.
2. In the Actions menu, click **Generate Stage 2 Application**. The stage 2 form is now published to the applicant.
3. You have the option to generate an email for the grant seeker, letting him or her know they can log in and complete the second stage of the proposal.

About Online Grantee Reporting/Requirements

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

In GIFTS Online, reports and other obligations a grantee must fulfill as conditions of a grant are captured in Requirements. For example, your grant agreement may call for interim reports quarterly during a year-long project. You could add four Requirements, enter Progress Report as each one's type, and set their due dates according to the schedule.

With GIFTS Online, however, you can complete the process online. Rather than update Requirements yourself, you can "publish" them to the grantees - that is, post them as online forms - and have grantees complete and submit these forms to fulfill their requirements online.

Once retrieved, they will automatically update the Requirements. You can review the information they've provided and mark the Requirement done if their efforts are satisfactory.

You can update these Requirements yourself if grantees submit information offline or via email.

A broad outline of the online grantee reporting process follows:

1. During initial setup of your GIFTS Online implementation, online Requirement forms fitting your needs are built.
2. You will add Requirements to pending or approved Requests, specifying type, due date, and other key data.. For example, you might add a Grant Requirement calling for a Progress Report, due six months after the Project Start Date.

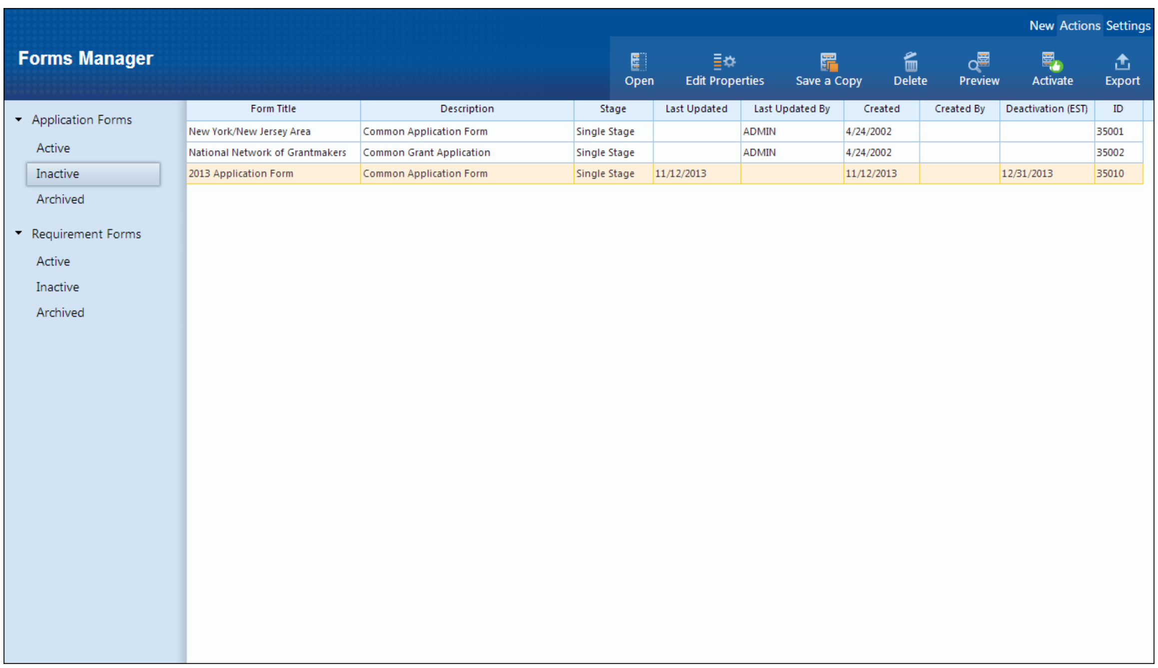
3. You publish the Requirement to the grantee. That is, you generate an online form which the grantee can log in and fill out. (It doesn't matter if the proposal originated offline - you can create an online account for a grantee if need be.)
4. The grantee logs in, completes the form, attaches any required documents, and submits it.
5. You retrieve their submissions and review the update Requirement records, then mark each done (or not).

The Forms Manager

The Forms Manager replaces the old View Forms action in GIFTS Online and can be accessed via **Launch>Applications>Forms Manager**.

The Forms Manager page keeps a listing of available Active, Inactive, and Archived Application and Requirements forms.

From this page, you are allowed to create new forms, edit existing forms, delete existing forms, or restore archived forms.



The left panel allows the user to select which form category to display in the main listing area.

Active Forms

Clicking the **Active** button for Applications or Requirements will display a list of forms currently active for applicants to use. The only actions available for active forms are to Save a Copy, Deactivate, or Export the list.

Inactive Forms

Clicking the **Inactive** button for Applications or Requirements will display a list of inactive forms. The actions available for inactive forms include Open, Edit Properties, Save a Copy, Delete, Preview, Activate, or Export the list.

Archived Forms

Clicking the **Archived** button for Applications or Requirements will display a list of forms that have been deleted from the Inactive list. The only actions available for active forms are to Save a Copy, Export the list, or Restore to the Inactive list.

The Ribbon Menus

There are three ribbon menus in the Forms Menu.

- The New Menu
- The Actions Menu
- The Settings Menu

Forms Manager: New Menu

The options in the New menu of the Forms Manager are always the same no matter what type of form is currently selected.

NOTE: There are no batch actions available. All actions shown are available only with a single selected record.

New	
Application Form	Opens Form Properties for editing. Upon setting form properties, the Form Designer displays for the new Application Form.
Requirement Form	Opens Form Properties for editing. Upon setting form properties, the Form Designer displays for the new Requirement Form.

Forms Manager: Actions Menu

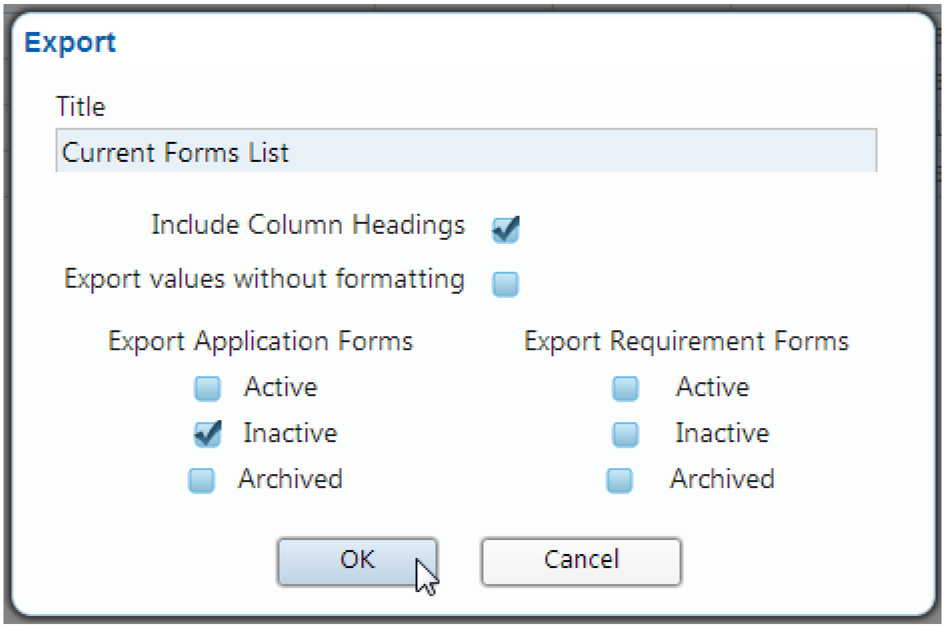
NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

The Actions menu in the Forms Manager displays various options available to the user depending on the status of the form currently selected.

With no forms selected:

Export

This will export a list of the forms currently in the forms manager to an Excel spreadsheet.



Option	Description
Title	Adds a title to the top of the spreadsheet
Include Column Headings	Uncheck this box if you do not want column headings in the spreadsheet
Export values without formatting	
Export Application Forms	Defaults to the list currently displayed. You may choose to add Active, Inactive, and/or Archived.
Export Requirements Forms	Defaults to the list currently displayed. You may choose to add Active, Inactive, and/or Archived.

With an Active form selected:

Save a Copy

This option will copy the selected form and allow you to save it under a new name in the Inactive list. This can be helpful for creating new forms which are very similar to existing forms and only require minimal modifications.

View URL

This option will only be available for Single and Stage 1 Application forms.

This option displays the URL for the active form currently selected.

You may click on the link to go directly to the form and begin an application, or choose **Copy to Clipboard** to copy the link for use in another location such as a company webpage or document.

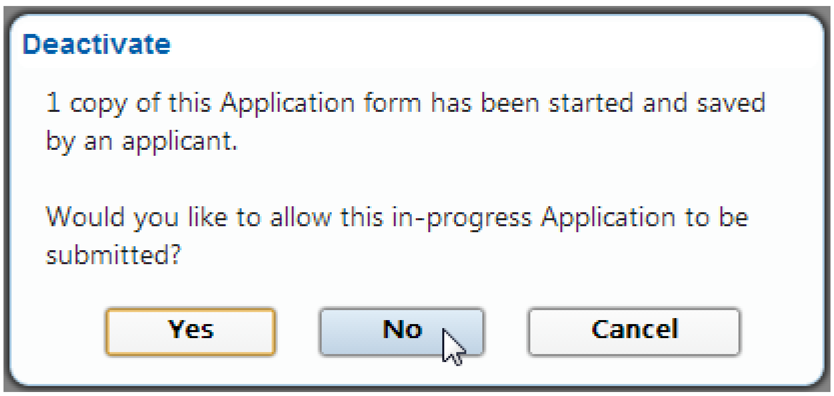
Deactivate

Clicking this option will automatically deactivate the form currently selected.

IMPORTANT: There is no confirmation prompt for this action. The form is immediately deactivated.

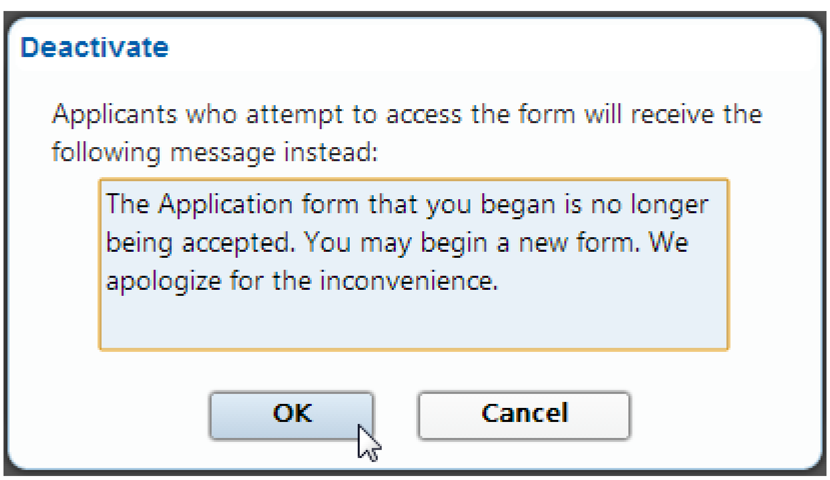
To deactivate a currently active form, do the following:

1. Select the desired active form.
2. Go to **Actions > Deactivate**.
3. The system will advise you if there are any in-progress applications/requirements using the form and ask if you would like to allow them to be submitted.



Click **Yes** or **No** as desired. Clicking **Cancel** will abort the deactivation process.

4. Clicking **No** will display the default message the applicant will receive about the form being unavailable. The message can be edited directly here, if necessary.



Click **OK**.

5. A message will display stating that the form has been successfully deactivated. Click **OK**.

Export

Clicking this option will export the current forms list to an Excel Spreadsheet. See above for more details.

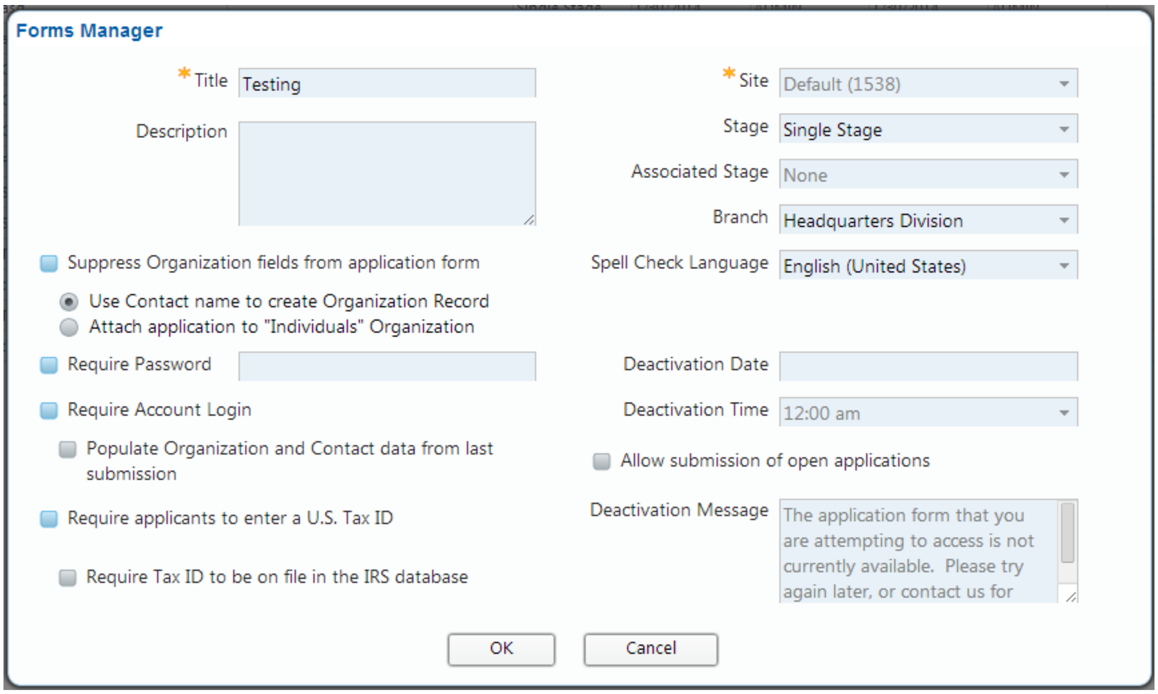
With an Inactive form selected:

Open

This option will open the currently selected inactive form in the Form Designer.

Edit Properties

This option will open the Edit Properties form.



Option	Description
Title	**Required field.** The form title 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.
Suppress Organization fields from application forms	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. To setup a dummy organization, please contact MicroEdge Professional Services. services@microedge.com
Require Password	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	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. The system 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 pre-populate the Name, Legal Name, AKA, Tax Notes, and Tax Status fields on the application form, if you have chosen to include them.
Site	**Required field.** Defaults to the client's 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 **Save a Copy** menu option. This will create an inactive 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	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.
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 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 are **Decentralized data entry** and **Centralized data entry**. ❖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.
Spell Check Language	Defaults to English(United States). You may change this to one of several options available: • English (United States) • English (United Kingdom) • English (Canada) • English (Australia) • French • Spanish
Deactivation Date	Set a date for the form to deactivate. Clicking in this field will open a calendar for you to select a date.
Deactivation Time	Set a time for the form to be deactivated from the menu options. *Disabled if no deactivation date is set.*
Allow submission of	Check this box to allow in-progress applications to still be submitted after

open applications	the form has been deactivated. *Disabled if no deactivation date is set.*
Deactivation Message	In this field, you may change the message displayed to applicants when they attempt to access a deactivated form. *Disabled if no deactivation date is set.*

Save a Copy
This option will copy the selected form and allow you to save it under a new name in the Inactive list. This can be helpful for creating new forms which are very similar to existing forms and only require minimal modifications.

Delete
Clicking this option will delete the selected form and move it to the Archived folder. You will be prompted for confirmation.

NOTE: Deleted forms in the Archived folder can be restored to the Inactive folder at a later time, if necessary.

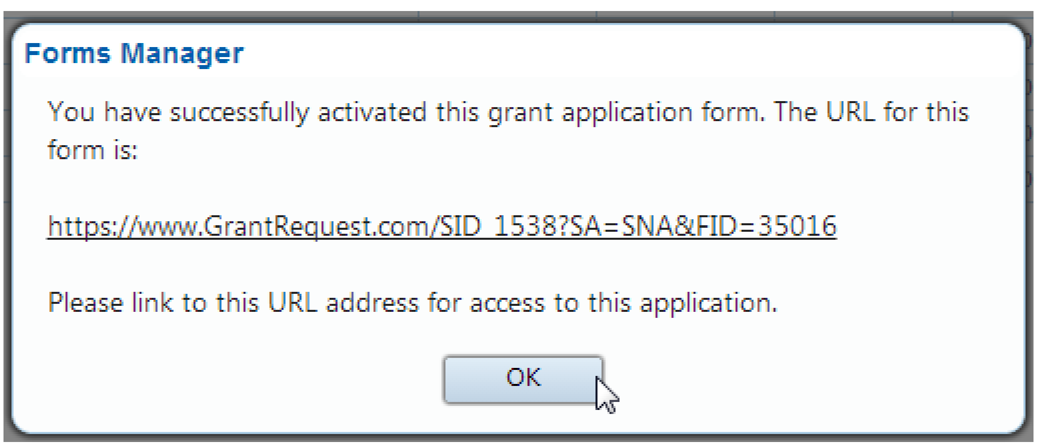
Previewing Application Forms
NOTE: In order to preview your form, you must have an open connection to the Internet.

This option opens the form in Preview mode. Previewing the form will give you a sense of the applicant's online experience.

Please note, in Preview mode any field set to pre-populated with a value from GIFTS Online or a Stage 1 form will be blank.

Activate
This option will activate the currently selected inactive form.

The activation prompt will provide you with the active form's URL which can be copied to other web pages or documents as needed.



Export
Clicking this option will export the current forms list to an Excel Spreadsheet. See above for more details.

With an Archived form selected:

Save a Copy

This option will copy the selected form and allow you to save it under a new name in the Inactive list. This can be helpful for creating new forms which are very similar to existing forms and only require minimal modifications.

Export

Clicking this option will export the current forms list to an Excel Spreadsheet. See above for more details.

Restore

To restore a currently archived form, do the following:

1. Select the desired archived form.
2. Go to **Actions > Restore**.
3. At the confirmation prompt, click **OK**.
4. At the successfully restored prompt, click **OK**.

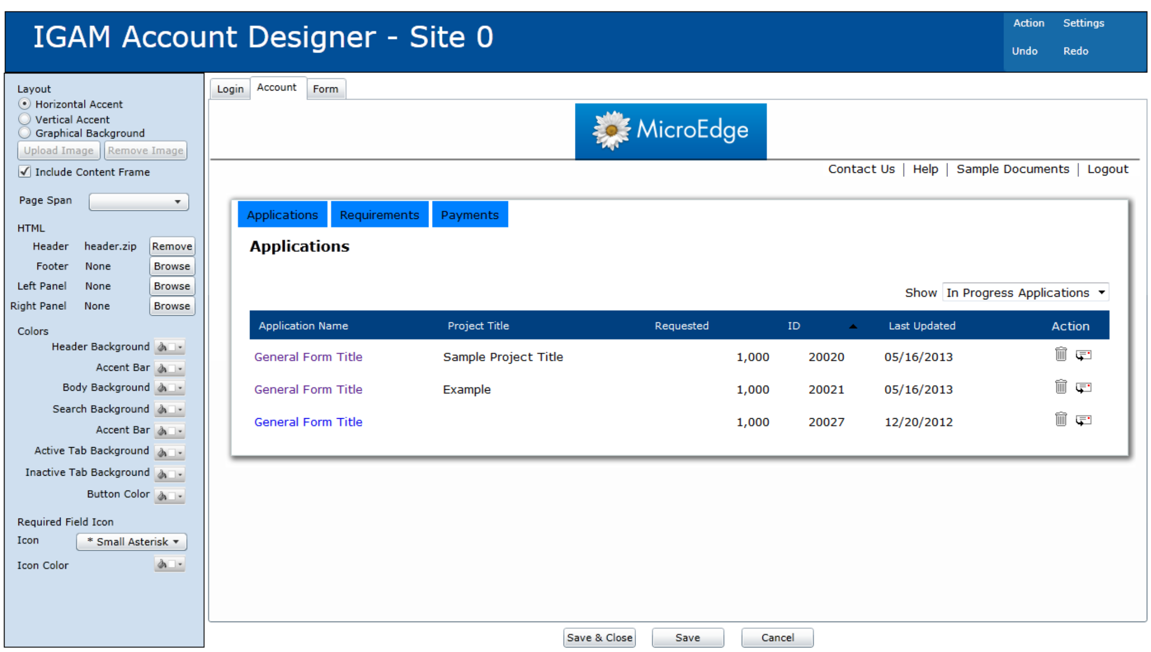
Forms Manager: Settings Menu

The options in the Settings menu of the Forms Manager are always the same no matter what type of form is currently selected.

Account Designer

The Account Designer is used for changing the default settings and design for the Grant Request Login page, My Account page, and any new Application or Requirement forms created.

NOTE: Design options selected in individual forms will take precedence over the default settings in the Account Designer.

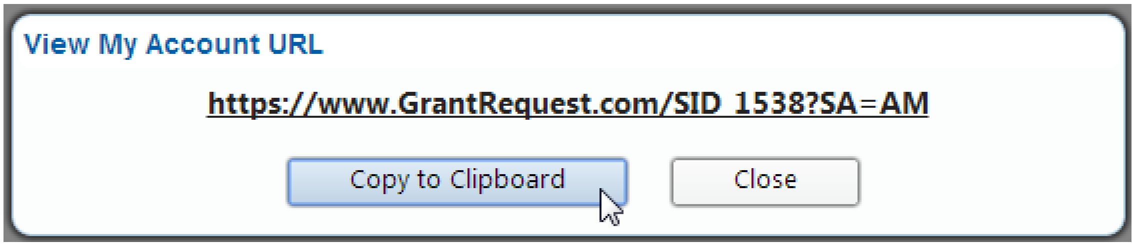


For more information, please refer to the Account Designer section.

View My Account URL

This menu option displays the URL to the current user's specific My Account page.

If you are using Multi-SIDs, you will be prompted to select a Site ID before displaying the URL.



You may click on the link to go directly to the login page, or choose **Copy to Clipboard** to copy the link for use in another location such as a company webpage or document.

The Account Designer

The Account Designer is used for changing the default settings and design for the Grant Request Login page, My Account pages, and any new Application or Requirement forms created.

It is also where many of your site preferences are set.

TIP: It is recommended when working with the Account Designer to maximize your browser window.

Accessing the Account Designer

The Account Designer can be accessed from the Forms Manager via the **Settings>Account Designer** menu option.

The Account Designer is divided into 3 panels.

Left Panel: The left side panel displays various configuration options depending on the current Setting menu selection.

Center Panel: The center or main panel serves as a WYSIWYG preview for the Login, Account, and Forms tabs.

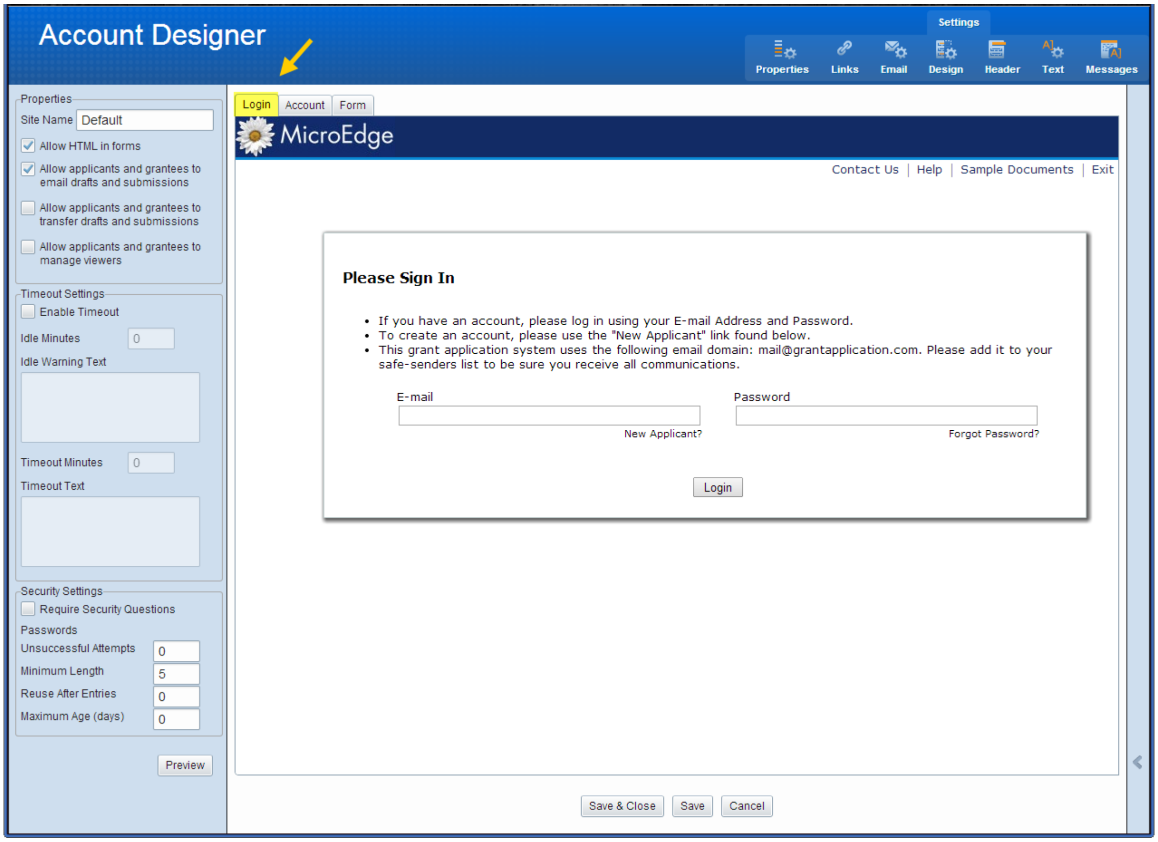
Right Panel: The right panel is initially collapsed by default and not shown. Its purpose is to display additional property settings when specific Links or Messages are selected on the left panel. If not in use, the panel can be hidden by clicking the Show/Hide arrow in the lower right.

Command buttons

All tabs will have **Save, Save & Close**, and **Cancel** buttons so that you can save your changes as your work on modifications.

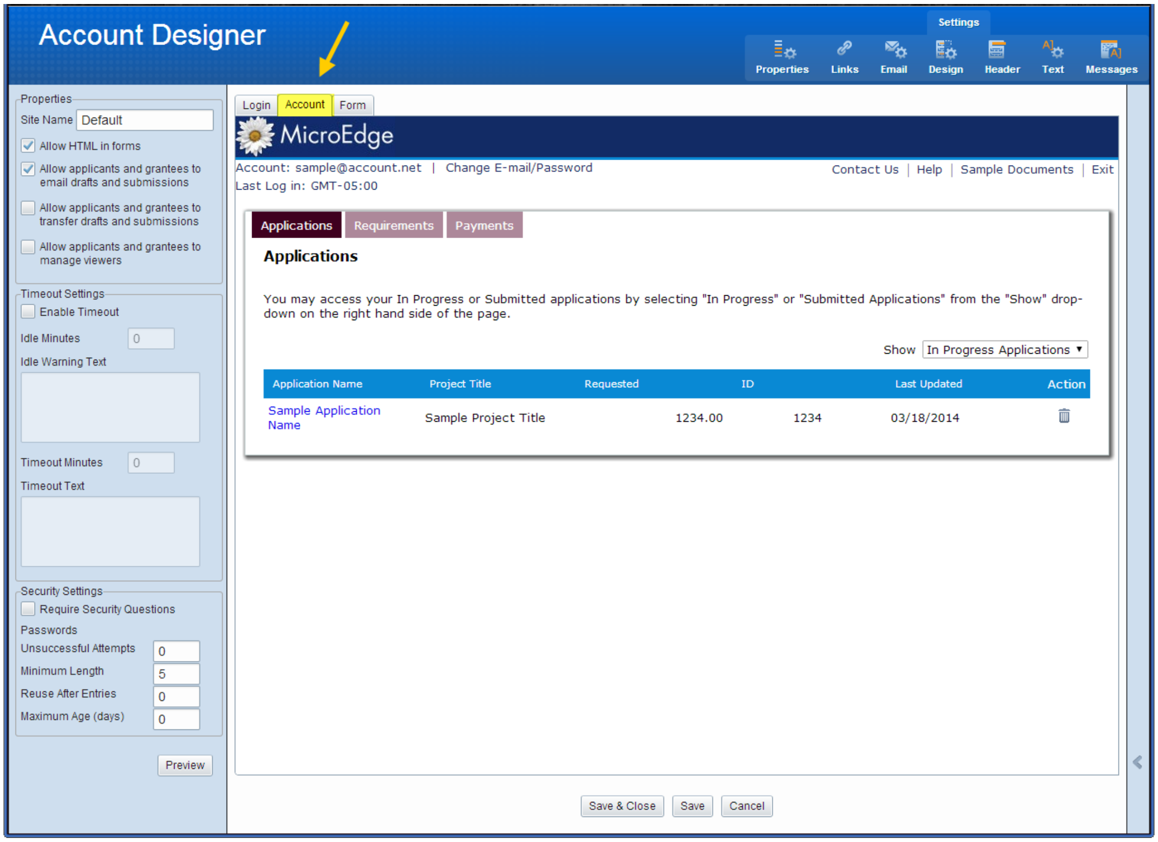
The Login Tab

This tab displays what the Login page will look like to applicants.



The Account Tab

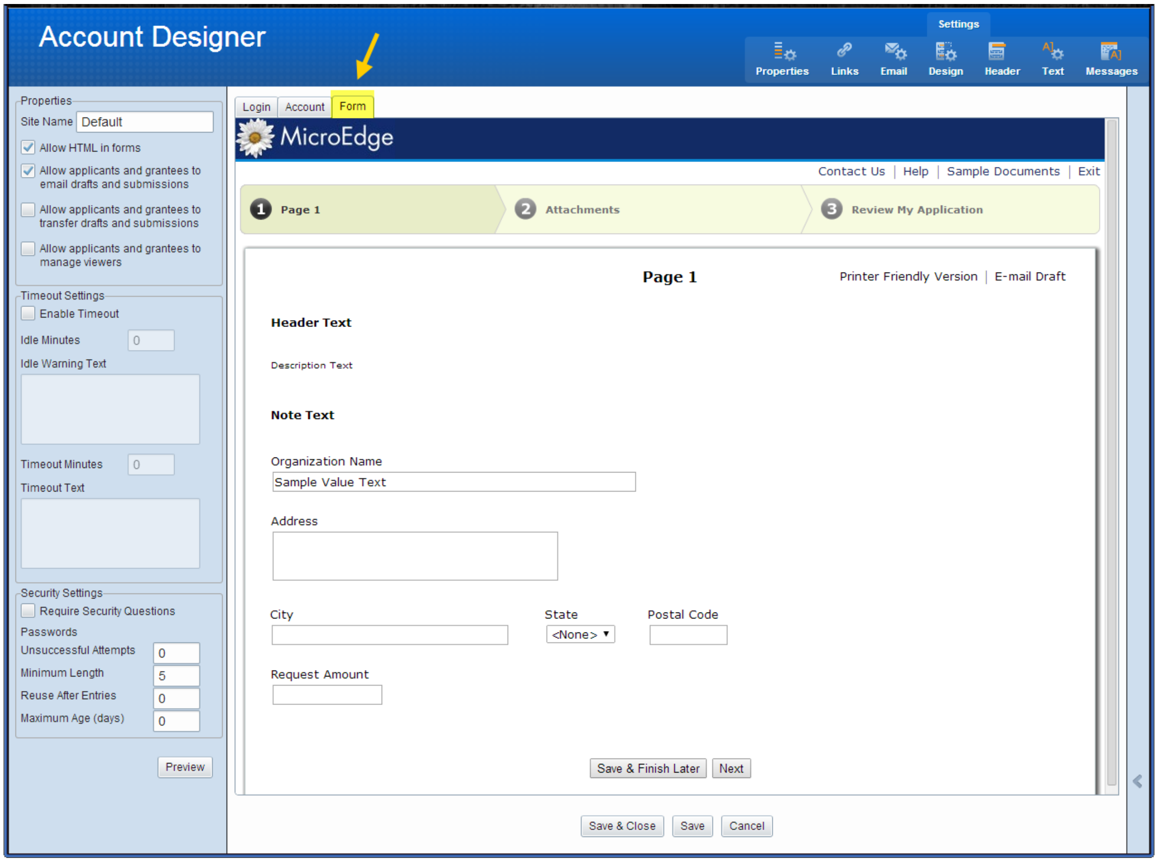
This tab displays what the My Account pages will look like to applicants.



The Form Tab

This tab displays the default settings and design for all NEW Application or Requirement forms.

NOTE: The design settings for each form can be modified using the Form Designer and will take precedence over the default settings shown here.



Account Designer Settings: Properties

This option displays general site Properties, Timeout Settings, and Security Settings.

Properties:	
Site Name	'Default' is the default setting here. You may change it if desired.
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.
Allow applicants and	Required to enable Application and Requirement collaboration.

grantees to email drafts and submissions	
Allow applicants and grantees to transfer drafts and submissions	Required to enable Application and Requirement collaboration.
Allow applicants and grantees to manage viewers	Required to enable Application and Requirement collaboration.
Timeout Settings:	
Enable Timeout	Checking this box enables the Timeout Settings features.
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.
Security Settings:	**All passwords in GIFTS Online are case sensitive and a more stringent password policy will be enforced when applicants create passwords (either on first login, or after a password reset).**
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. See How Security Questions Work below for more details.
Passwords:	
Unsuccessful Attempts	This will determine the number of password attempts available to an account holder until the account is locked out. See Account Lockout below for more details.

Minimum Length	This will determine the minimum password length. This number must be between 5 and 25.
Reuse After Entries	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.

How the Timeout Settings Work:

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:

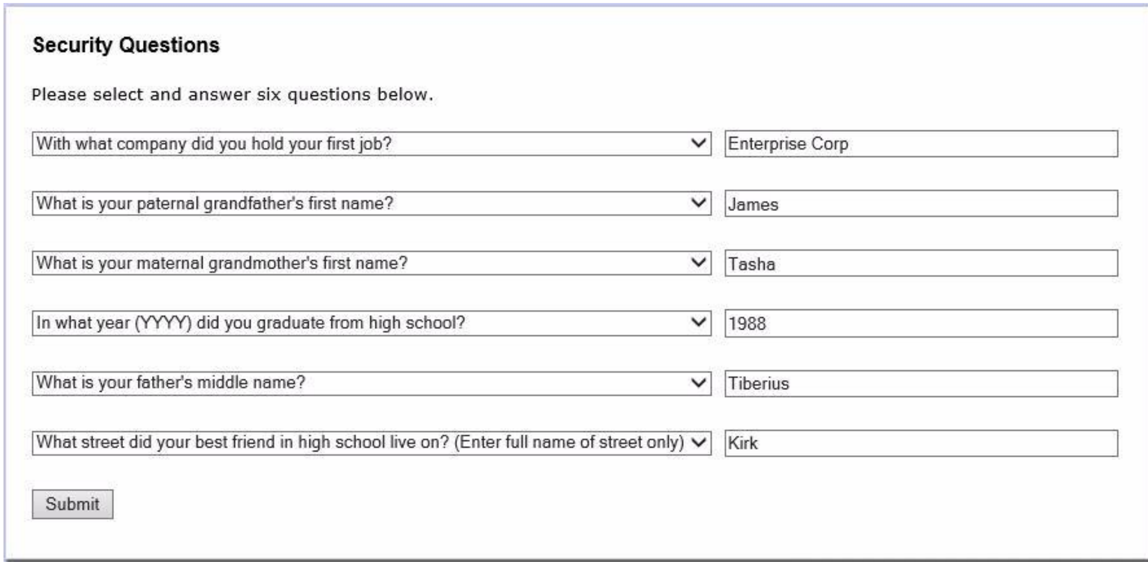
- Going to a different page of the application using Next/Continue links, Page Number or Page Title links/tabs, or Chevron Progress Bar links.
- Clicking **Save & Finish Later**.
- Uploading Attachments.

How Security Questions Work

Once the option to require Security Questions has been enabled, existing 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.



Security Questions

Please select and answer six questions below.

With what company did you hold your first job?	Enterprise Corp
What is your paternal grandfather's first name?	James
What is your maternal grandmother's first name?	Tasha
In what year (YYYY) did you graduate from high school?	1988
What is your father's middle name?	Tiberius
What street did your best friend in high school live on? (Enter full name of street only)	Kirk

Submit

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.

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

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 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 must contact the Grants Manager to reset the password for the applicant's account email using the **Reset Grantee Password** option on the Online Applications menu.

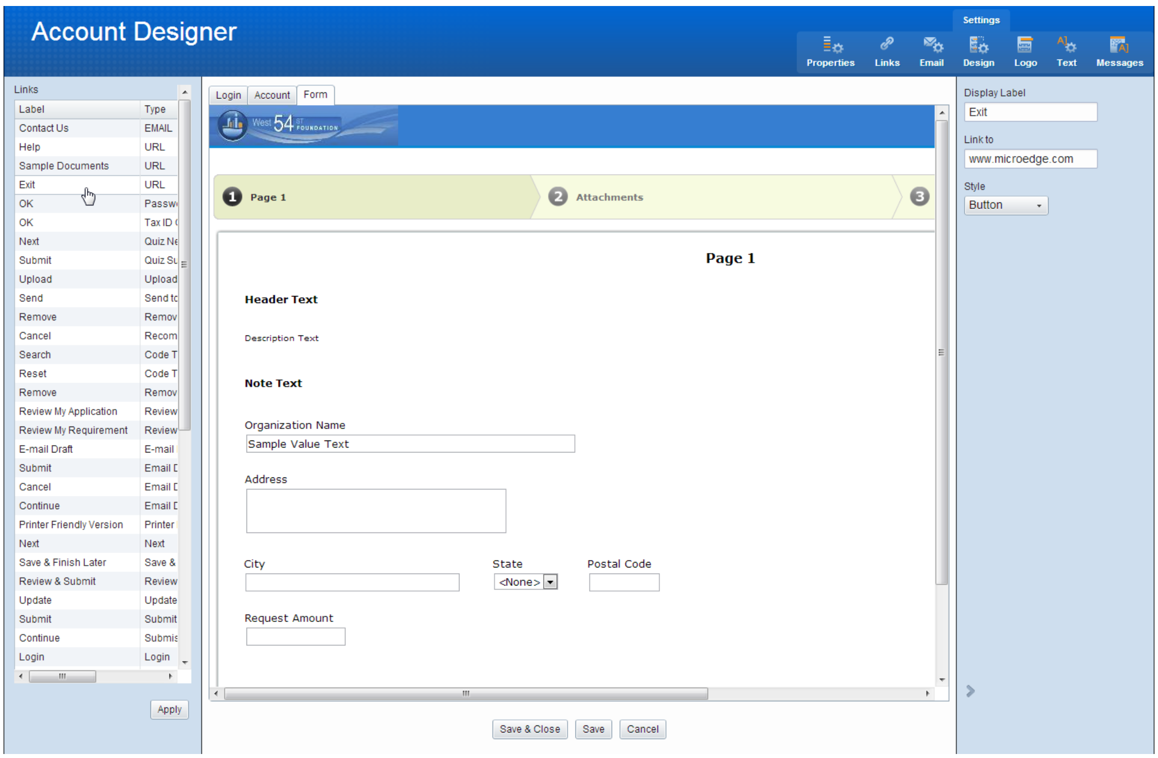
Account Designer Settings: Links

This option displays the list of all the various links and buttons available on the Online Applications pages.

To see the available settings for each link/button, simply click on it in the left panel list. The settings available for that specific link/button will be displayed on the right side panel.

NOTE: The order of the first four links (Contact Us, Help, Sample Documents, and Exit) can be reordered by dragging and dropping. They will then appear on applicant's pages in the same order.

The example below shows the settings for the **Exit** link on the right panel.

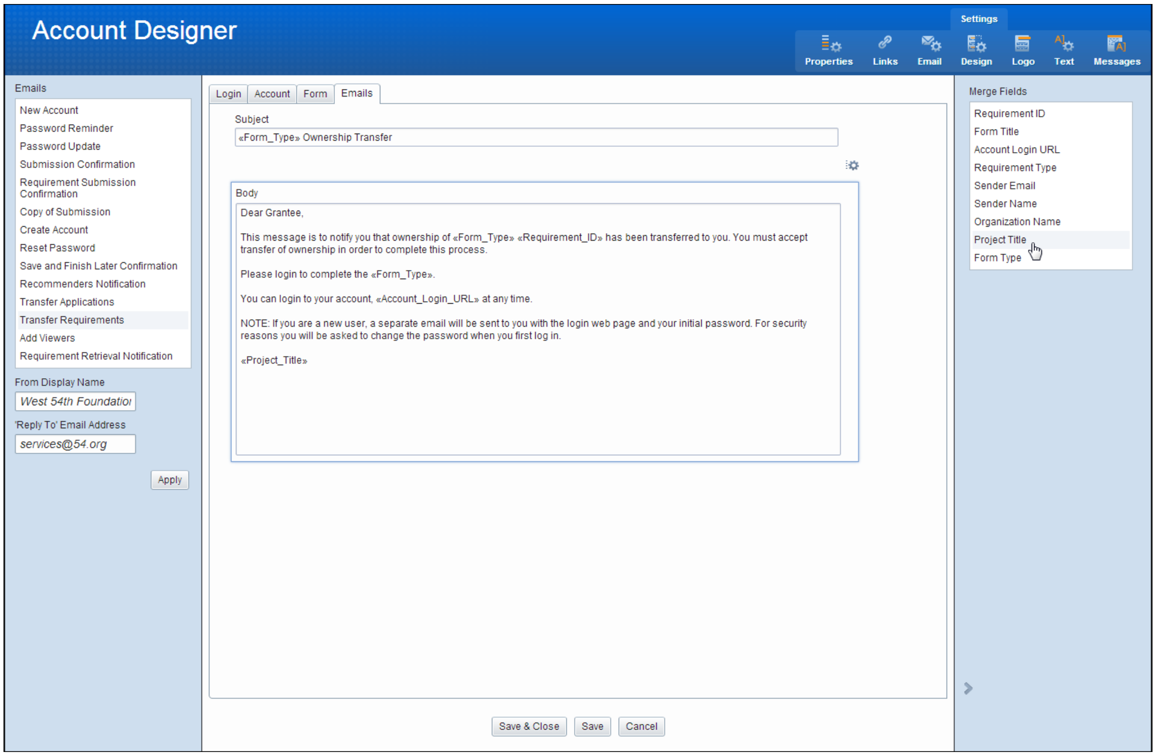


The settings available for each link will vary depending on one selected. The table below describes the options which may be displayed.

Setting	Description
Display Label	This is the text displayed on the site page or form.
Style	If available, allows you to select between a Link or Button display.
Link to	For links that require a URL or Email address.
Position	Select the position for the link. Left, Right, or Standard.
Duplicate to Top	By default some links are only displayed on the footer area. Checking this box will also place the link in the header area.

Account Designer Settings: Emails

This menu option displays the settings for automated emails sent by Online Applications.



The left panel displays a list of all the email types. Simply click one of the email types to view its settings and default subject/body text.

The **From Display Name** and **'Reply To' Email Address** can be set here for each one of the emails.

Clicking in the **Subject** or **Body** fields of any email will display available merge fields on the right side panel.

To add a merge field, place the cursor in the location you want the merge field to appear and then double-click it on the right panel list.

Requirement Retrieval Notification

This email notification is sent to the staff owner when a Requirement they are assigned to is retrieved.

The option can be enabled by selecting the *Requirement Retrieval Notification* email type and unchecking the **Do not send notification** checkbox.

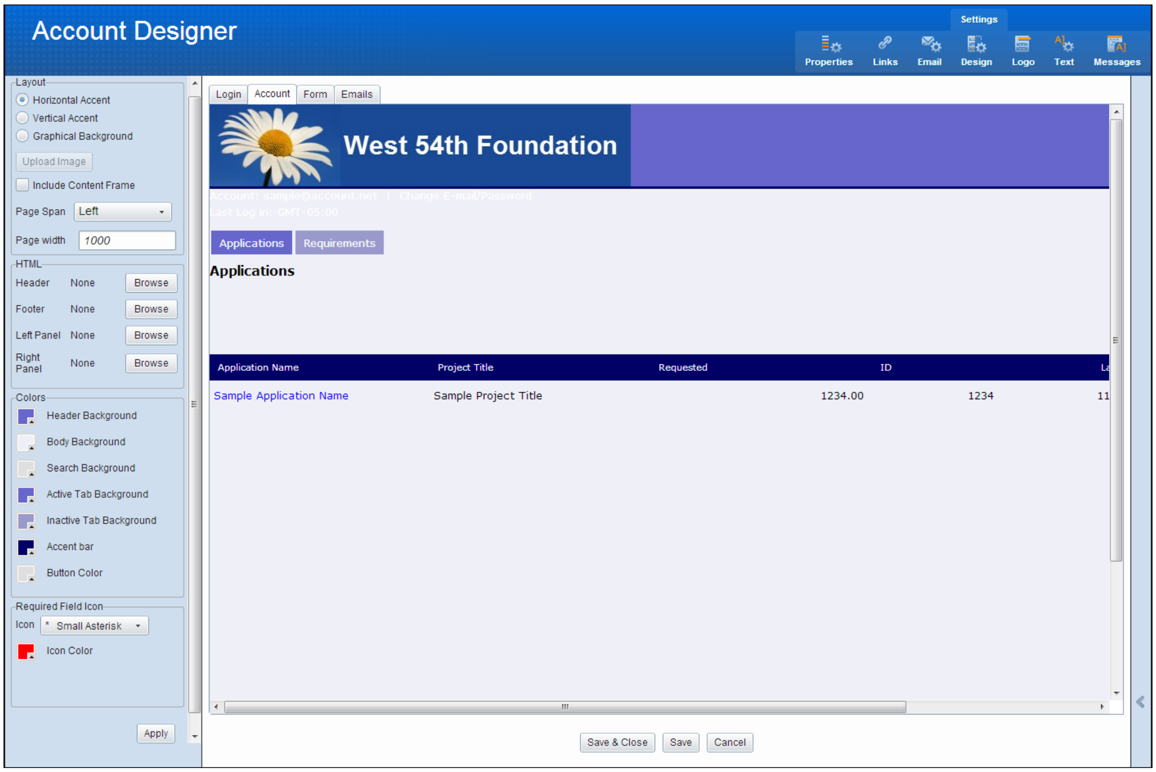
By default this option will be checked, meaning no email notification is sent.

Account Designer Settings: Design

This menu option displays the settings responsible for much of the layout aspects of the site pages and forms.

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.



The left panel is divided into four sections as described in the table below:

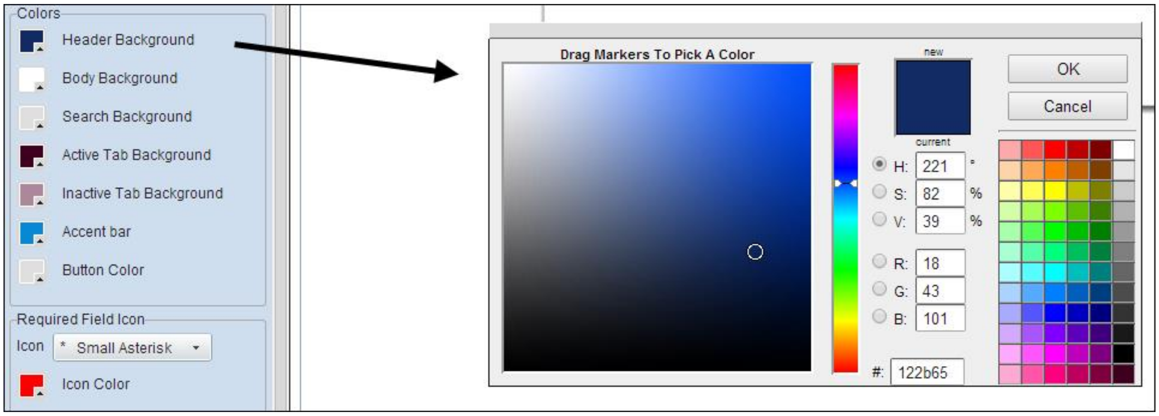
Layout	
Horizontal Accent	This default layout option consists of a colored header, a differently colored body area, and a menu bar separating the two.
Vertical Accent	This layout option will create an application/online requirement with a solid background color and an accent bar along the left-hand side.
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 section.
Include Content Frame	Checking this box creates a frame around your entire form page. Note: In IE 9 or later and Firefox, this frame has a shadow effect.

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.
HTML	**Please review the Custom HTML section for more details.**
Header	Click **Browse** to add your own custom HTML to the area indicated.
Footer	Click **Browse** to add your own custom HTML to the area indicated.
Left Panel	Click **Browse** to add your own custom HTML to the area indicated.
Right Panel	Click **Browse** to add your own custom HTML to the area indicated.
Colors	**See the Selecting Colors section for more details.**
Header Background	
Body Background	
Search Background	
Active Tab Background	
Inactive Tab Background	
Accent Bar	
Button Color	
Required Field Icon	
Icon	Select an icon to display next to all required fields on your application/online requirement using the dropdown menu.
Icon Color	You may also choose the color of the icon.
Apply	

Selecting Colors

CAUTION: You must to consider that changes made in Design panel will take immediate effect on the My Account and Account Login pages when you **Apply**. Care must be taken to avoid publishing HTML files that do not render correctly.

In this section, you can override the system default settings for the colors on the application/online requirement.



To select a new color, you may do any of the following:

- Click one of the preset colors in the palette to the right.
- Enter the desired color's hex value in the # field at the bottom.
- Adjust the HSV and RGB values manually.
- Move the color slide up or down as desired.
- Or drag the small white circle around the left side color field.

Click **OK** when ready to proceed.

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.

Custom HTML

The Account Designer 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 Design panels will take immediate effect on the My Account and Account Login pages when you **Apply**. 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 Account Designer 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, the presence of a custom HTML header file will disable the Logo, Logo Alignment and Logo Rollover Text fields.

Creating an HTML Zip File

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 its 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 GIFTS Online server.

GIFTS Online 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:

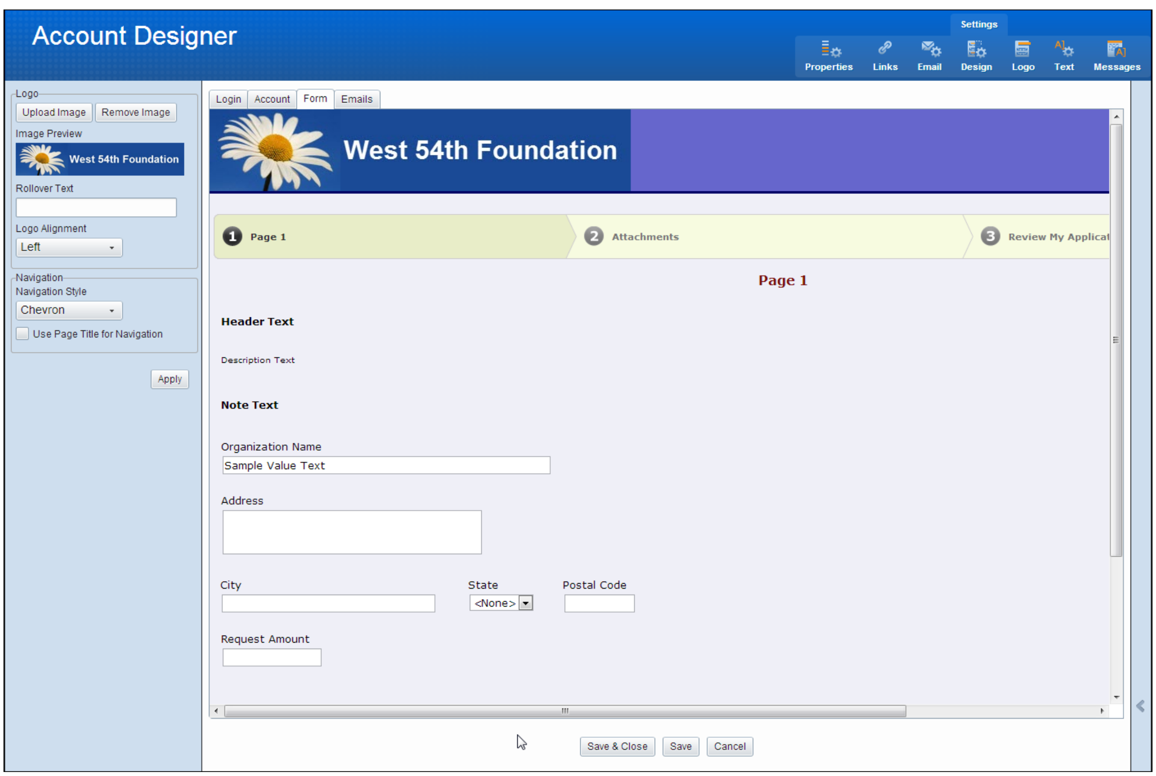
background: transparent url('/SID_0001/Default.asp?SA=PI&IMAGE=Header/image.gif&IFID=0') center left repeat-y;

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.

Account Designer Settings: Header

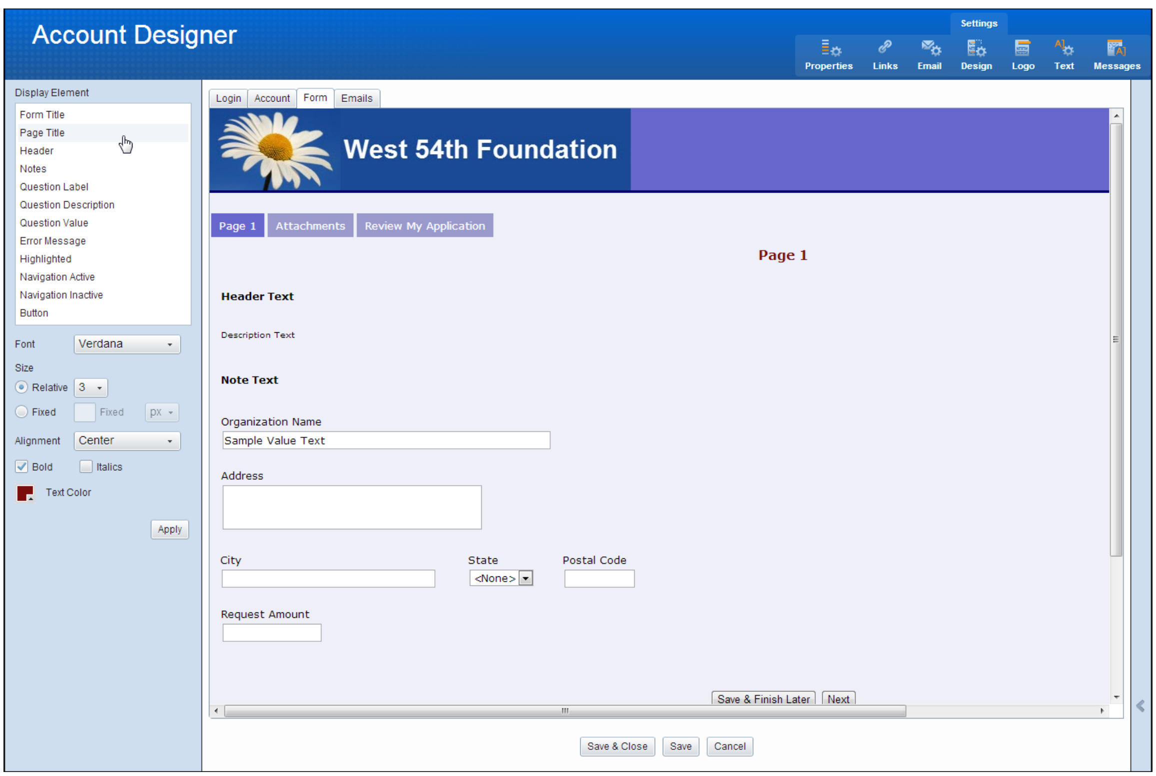
This menu option displays the Logo and Navigation settings.



Logo	
Upload Image	Click to browse for an image to upload as a logo.
Remove Image	Click to remove the current logo image.
Image Preview	Displays the current logo image.
Rollover Text	Enter text here to be displayed when a user place their mouse over the logo.
Logo Alignment	Select the alignment for the logo in the header area.
Navigation	
Navigation Style	Select from Classic number tabs or Chevron style (shown above).
Use Page Title for Navigation	Checking this box will cause the page titles to be displayed at the top instead of page numbers on application/requirement forms.

Account Designer Settings: Text

This menu option allows you to select the font formatting options for your application and online requirements.



Choose an element to edit from the Display Element list.

You may change the Font, Size (relative or fixed), Alignment, Bold, Italic, and Color.

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

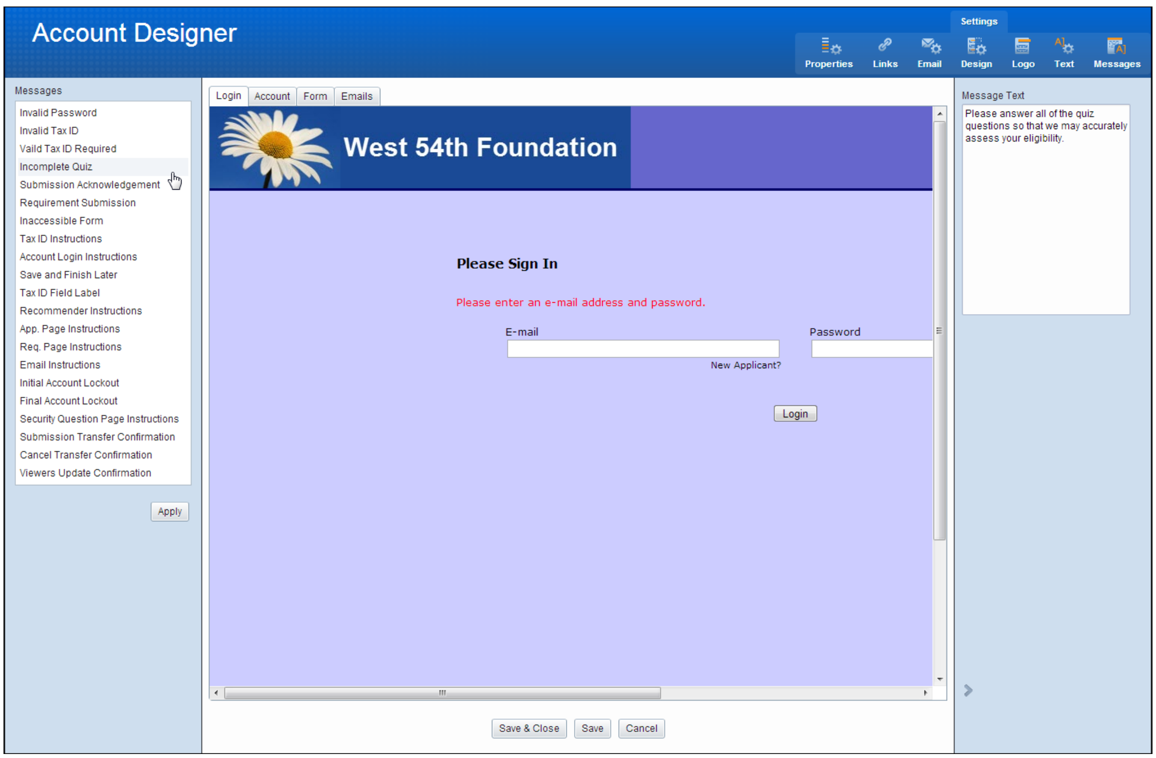
If you would like to make the selected element bold or italicized, select the appropriate checkbox.

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.

Account Designer Settings: Messages

This menu option displays a list of the system messages which may appear to a grantee/applicant.

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.



Clicking the message type selects it and displays it's text on the right side panel.

The text can then be edited on the right panel and saved by clicking **Apply**.

The Forms Designer

The Form Designer is GIFTS Online's tool for creating or modifying Application and Requirements forms.

Clients can access their forms directly and change them as needed.

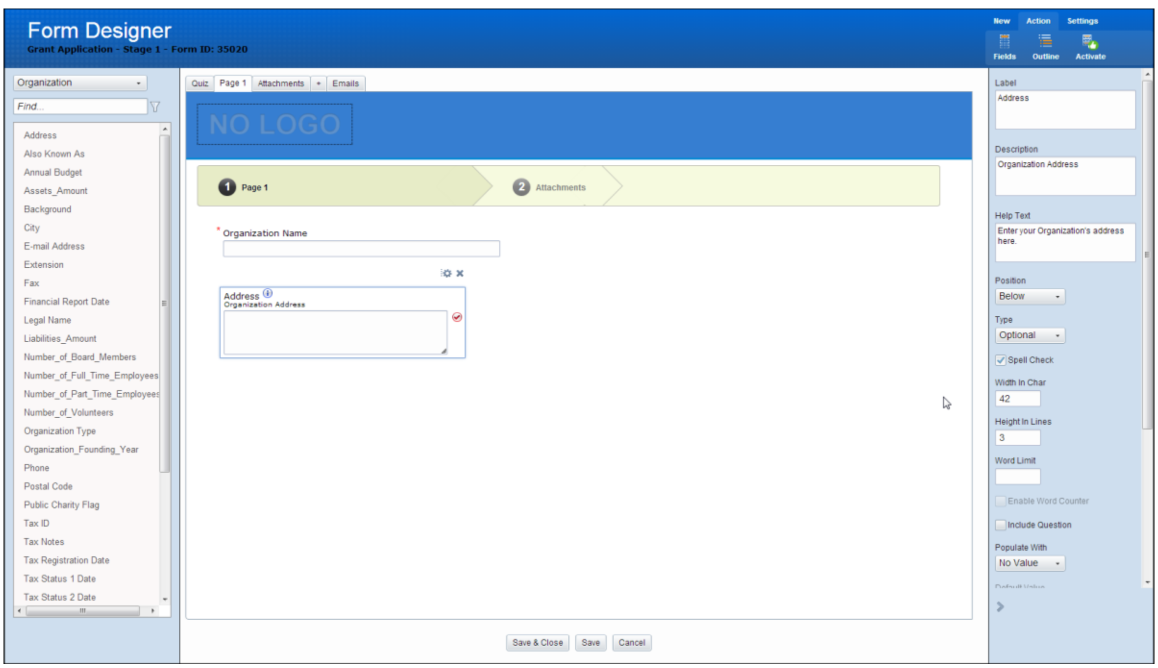
Accessing the Form Designer

The Form Designer window can be accessed in two ways:

1. Select the **New>Application** or **New>Requirements** option from the Forms Manager.
2. Select an existing Inactive form and either go to **Actions>Open** or double-click the form.

Understanding the Form Designer Layout

The Form Designer consists of 3 main sections: left panel, the middle or main section, and the right panel.



Panel	Description
Left Panel	The Left Panel by default displays a list of the fields available to be added the current form. It can also be set to display an outline of the form, or other elements. More details about changing this display can be found in the menu options table.

Middle Panel	The Main part (middle) is where the form is displayed and can be edited. Sections can be added here to group related fields together. Tabs on the top of the main section represent different pages in the form.
Right Panel	The Right panel allows the user to edit highlighted field settings.

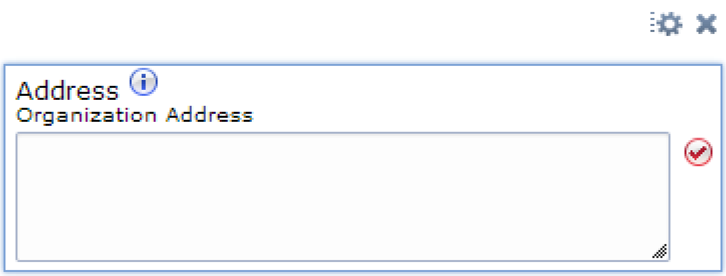
Command Buttons

The form has **Save, Save & Close, and Cancel** buttons so you can save your changes.

NOTE: If the current form is active, your changes will not be reflected in any currently in-progress applications.

Field Selection and Relocating

Many of the fields in the Form Designer will look similar to the one shown below.



Panel	Description
Edit (gear)	This button allows users to edit field properties by opening the right panel with associated settings.
Delete	This button allows users to delete a selected field.
Resize corner (lower right)	Dragging the bottom right corner of the field allows users to resize fields to desired size.
Repositioning fields	You can position fields in desired locations on the form by dragging and dropping.
Help Text	If you add Help text to a field, this icon will be displayed next to the field label.
Spell Check	When the spellcheck option is enabled on long text fields, this icon is displayed to the right of the field.

Forms Designer Menu Options

The menu is presented in the style of the current GIFTS Online application.

New	
Page	This option adds a new page to the form and displays the page. This is presented as a tab in the form designer. Upon adding the page, the page is displayed and the page name is editable. The page name and page position – can also be adjusted after the section is inserted. Double clicking the tab name allows for editing the name. Dragging and dropping allows for adjusting page order. If more than one page is present, an X icon appears next to the page titles. This icon allows the user to remove the entire page. A confirmation is presented to you before allowing deletion. On hover over the X icon, a tooltip will display "Delete Page".
Section	A section is a separation of fields that contains its own title and. This option adds an empty section to the bottom of the current page. This button is disabled if a section is already selected; a section cannot exist within another section.
Actions	
Fields	Hides the Outline panel and displays the Fields panel.
Outline	Hides the list of available fields left panel and displays the Outline panel.
Activate/Deactivate	Before a form is actually accessed by users, it must be activated. Until then, the form is inactive and will not be presented to users for data entry. The Activate option should be hidden if the form is already active and the Deactivate option should be hidden if the form is already inactive.
Settings	
Properties	Set various defaults for your new forms such as Title, Description, Language, and Authentication requirements here.
Links	Allows the editing of special links on the My Account pages.
Emails	Allows the editing of automated emails for Applications or

	Requirements.
Eligibility	Allows you to configure the Eligibility Quiz, if enabled, which is displayed before the application.
Attachment	Allows the editing of the Attachments page, if enabled.
Design	Allows the editing on various layout aspects such as background, accent colors, and tab colors.
Text	Allow the editing of various aspects of text displayed including font, size, and color.
Messages	Allows the editing of default system messages such as Invalid Password or Successful Submission.

Forms Designer Control Panels

As discussed earlier, the Forms Designer has control panels on the left and right.

Left Panel: Fields List

The left panel by default displays a list of the fields available for adding to your form.

If the panel is currently in Outline mode, you can change to Fields mode by going to Actions>Fields in the ribbon menu.

The fields displayed are based on the category selected in the top menu.

Field Type Category Menu

Selecting a record type filters the list of available fields by that record type. Record types available are:

- Organization
- Organization Primary Contact
- Request
- Request Primary Contact
- Text
- Add Additional Contact

Find search box

Typing in this field filters the list of available fields by the entered text. If the field contains the text entered in the search box, it will appear in the list of available fields. When this box is empty, all fields are available.

List of Available Fields

Displays the list of fields that can be added to the form.

Left Panel: Outline View

Available via Actions > Outline.

This mode displays the form in its current state in a tree view.

The tree is presented in a Page/Group/Field hierarchy.

Clicking a field in the outline selects the field in the main window.

Using the **Find** function highlights the fields in the outline window where the field name contains the text entered in the find box.

Right Panel: Field Settings

The right panel is typically used for setting field properties.

When a field is selected, the right panel displays the properties for that field.

This panel can be closed/hidden via a **Close** icon on the lower right. Once closed, an icon appears on the right side that reopens the panel. Clicking the appropriate **Edit** icon for a field also opens the panel.

NOTE: The right panel only displays when an element has been selected. If no element is selected, it is hidden.

Forms Designer Sections

Clicking on a section of a form selects and highlights the entire section, inclusive of the fields contained. The Right Panel will open and display the section properties.

Clicking the **Section label** allows for editing of the label. Edit and Delete buttons are displayed when the section is selected.

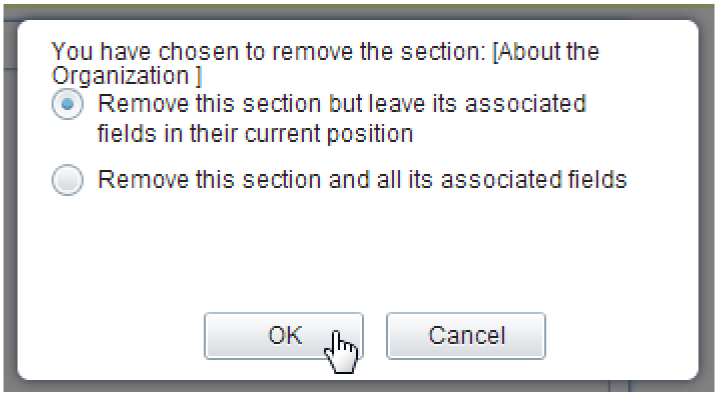
Clicking **Edit** will either hide the right panel (if it's open already) or show it (if it was hidden).

It is possible to move an entire section via drag and drop. Once moved, any fields contained within the section are moved along with it.

The Right Panel will show the following Section options:

- Label
- Title Color
- Title Background Color
- Group Background Color
- Border Color
- Border Width

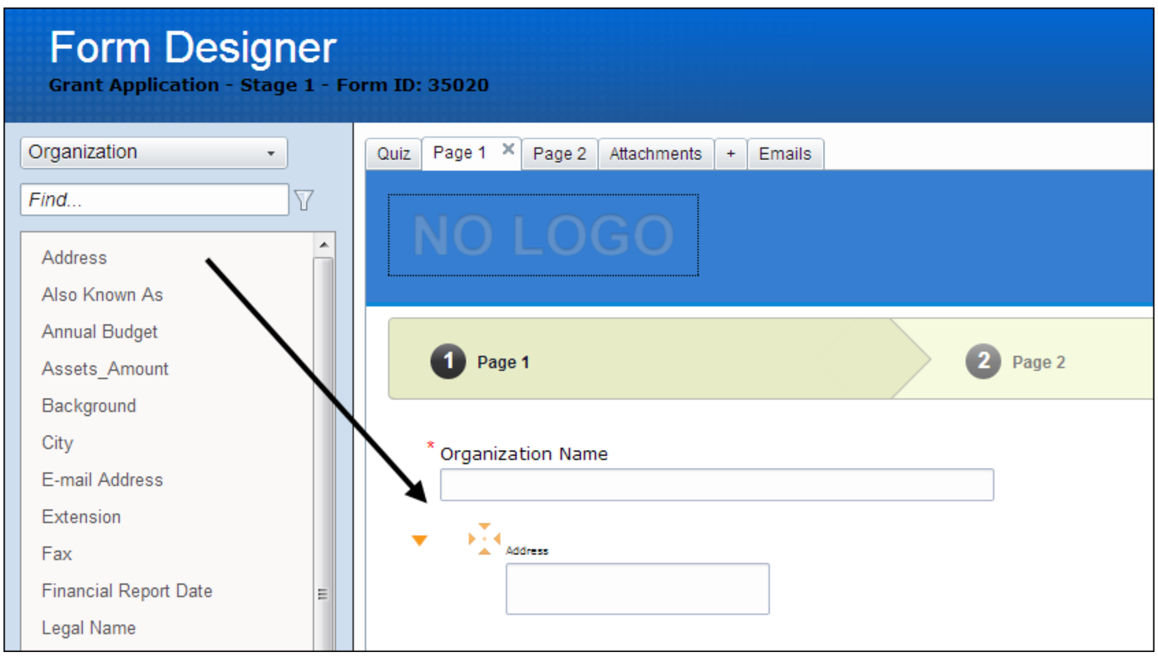
Clicking the **Delete** button presents the following prompt:



Forms Designer Labels and Fields

Adding a Field

To add fields, you can double-click on the field or drag the value from the left panel onto the form. Both the field and its label are added. By default, the label is positioned above the field and the field label is the name of the field with spaces replacing any underscores. Once added to the Form Editor, the field is no longer available to be selected (removed) from the left panel. The exception to this are items in the Text category (not fields, regular text), and long text fields.



If a section is first selected, double-clicking a listed field adds the field to the bottom of that section. Otherwise, the field is added to the bottom of the page. When dragging and dropping, the field is added to the highlighted location where the field can be dropped.

Field Selection

Any field in the Form Editor window can be selected. Selecting the field highlights the label and field. Two icons appear alongside the field, one for Edit, and one for Delete. For coding fields, an additional icon/button/text (Edit Code) appears that allows for setting of coding options. Selecting a different field/element deselects the current field and selects the one clicked.

It is possible to edit more than one active field at the same time by holding down the CTRL key and clicking multiple elements. On the right panel, only properties shared by the selected elements (e.g. width) will be shown.

Removing a Field

Each field has a **Delete** button that appears when the field is selected. Clicking the **Delete** button deletes both the field and its associated label.

Resizing Labels and Fields

When a field is selected an arrow icon appears on the lower right that allows you to resize the field. With the exception of text fields, resizing can only occur horizontally. Text fields can be resized horizontally and vertically. It is not possible to resize a label. The label should automatically take up the width of the text within.

Moving Labels and Fields

Moving a label and field involves clicking on the field and dragging it to its new location. Dragging either the label or field moves both together.

Labels and fields can be dragged and dropped to the following positions:

- Blank page
- Blank sections
- Above or below an existing field
- Above or below an existing section
- To the left or right of an existing field

In order to allow movement of a field to another page, upon dragging the field to the tab at the top of the Form Editor, the page for that tab displays.

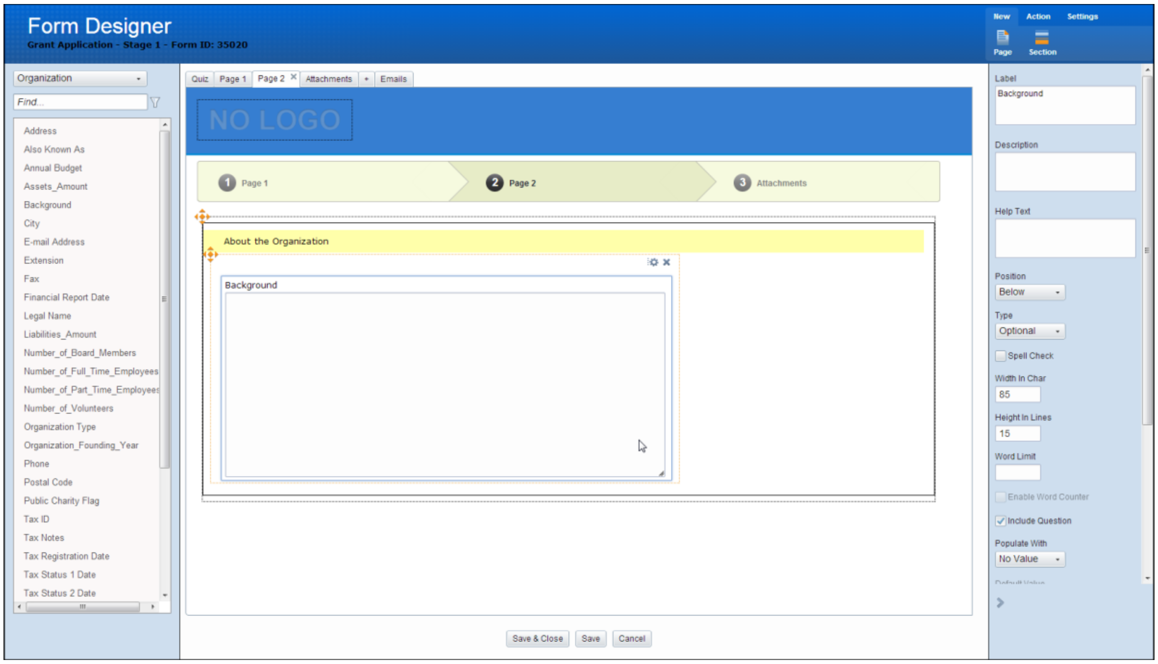
If a page is scrollable in any direction, dragging a field and hovering over the edge of the page for more than 1 second scrolls the page in that direction.

Forms Designer Field Properties

Selecting a field or its label brings up the Field Properties in the Right Panel.

Double-clicking a label also allows a user to edit the label text.

The Field Properties appears in the right panel on the screen. The window contains the field name and type as the header. The available field properties are dependent on the field type.



Field Type	Properties
Date	• Label • Description • Help Text • Minimum Value (Date) • Maximum Value (Date) • Populate With (No Value/Set Value) Set Value provides a date control or a checkbox for Today's Date • Radio button selection for Optional (Default), Required, Read-Only, Hidden • Require Verification checkbox • Verification Label • Verification Description
Long Text	• Label • Description • Help Text • Word Limit • Enable Word Count • Enable Spell Check • Include Question in GIFTS Online

	• Populate With (No Value/Set Value) Set Value provides a textbox • Radio button selection for Optional (Default), Required, Read-Only, Hidden • Require Verification checkbox • Verification Label • Verification Description
Text	• Label • Description • Help Text • Enable Spell Check • Populate With (No Value/Set Value) Set Value provides a textbox • Radio button selection for Optional (Default), Required, Read-Only, Hidden • Require Verification checkbox • Verification Label • Verification Description
Attachment	• Label • Description • Help Text • Word Limit • Allowed File Types • Radio button selection for Optional (Default), Required, Read-Only, Hidden • Require Verification checkbox • Verification Label • Verification Description
Number	• Label • Description • Help Text • Minimum Value (Number) • Maximum Value (Number) • Populate With (No Value/Set Value) Set Value provides a textbox • Radio button selection for Optional (Default), Required, Read-Only, Hidden • Require Verification checkbox • Verification Label

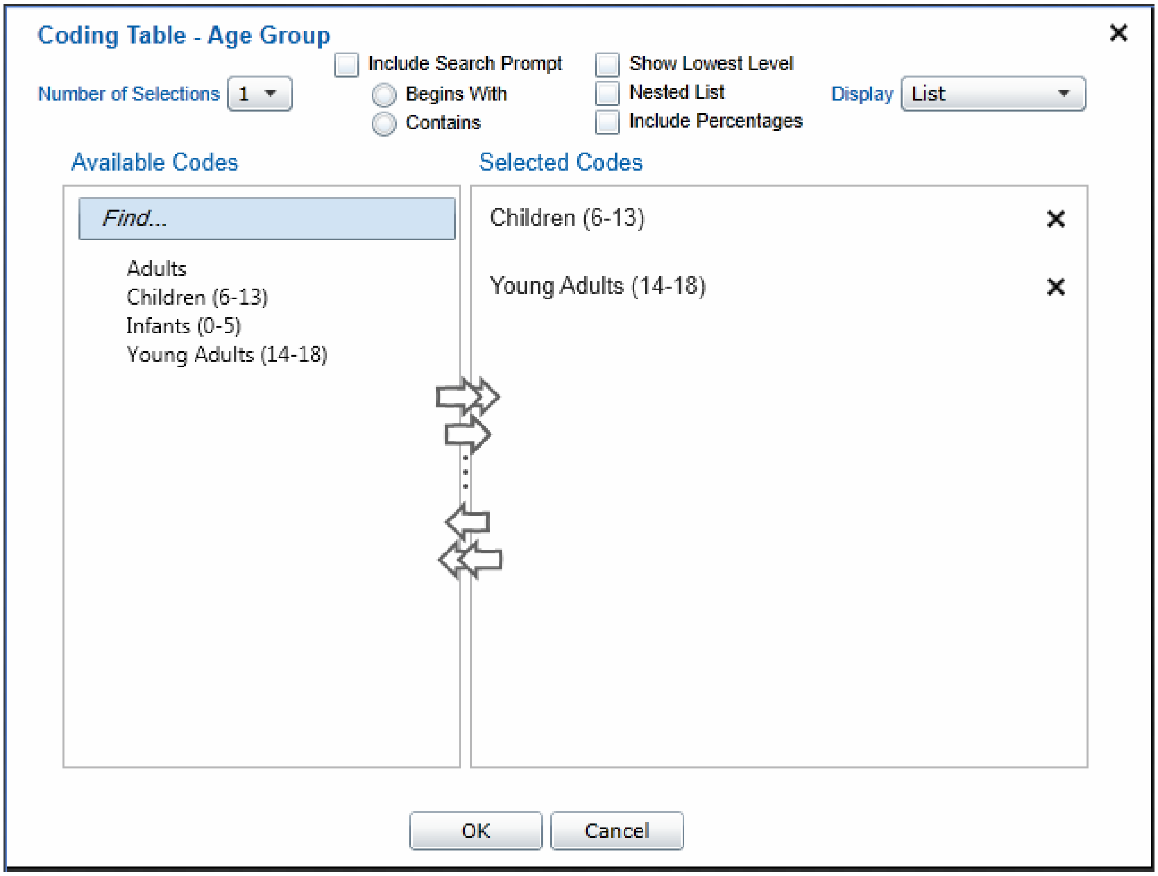
	• Verification Description
Currency	• Label • Description • Help Text • Minimum Value (Currency) • Maximum Value (Currency) • Display decimals separately • Populate With (No Value/Set Value) Set Value provides a textbox • Radio button selection for Optional (Default), Required, Read-Only, Hidden • Require Verification checkbox • Verification Label • Verification Description
Checkbox	• Label • Description • Help Text • Alignment (Above/Right) • Populate With (No Value/Set Value) Set Value provides a textbox • Radio button selection for Optional (Default), Required, Read-Only, Hidden • Require Verification checkbox • Verification Label • Verification Description

Forms Designer Editing Codes

When selecting a code field, an additional icon/button/text (Edit Code) appears that allows for setting of coding options. The Code Properties appears as a modal window centered on the screen. The window contains the Coding Sheet - Code Table name as the header. The top of the window contains settings particular to this field. Two columns are displayed side by side below the settings, Available Codes and Displayed Codes.

The Available Codes section contains a Find filter and a list of fields that can be displayed. The find filter filters the selection of Available codes by the text entered. Double clicking on a field or dragging and dropping it adds the field to the Displayed Codes section. An icon is displayed to add all fields. The Displayed Codes section shows fields that are displayed on the Form. Each selection contains an icon to the right that allows the user to remove the field. An icon is displayed to remove all fields.

This popup will have the standard **OK** and **Cancel** buttons.



Show Lowest Level

If turned on, "Nested List" is automatically disabled.

Nested List

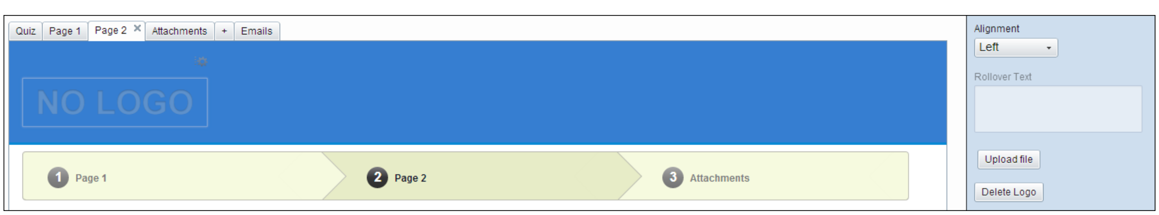
If turned on, "Show Lowest Level" is automatically disabled.

Include Percentages

If turned on, an additional numeric box, and "%" text appears next to each selection.

Forms Designer Logo/Header

When a new form is created, the header of the page will display the text 'No Logo'.



If selected, settings will be shown in the right panel to **Upload** an image. **Accepted file types are .jpg and .gif.** Once a file is selected, the Form Editor displays the uploaded picture file and selects it.

Clicking on the logo selects the logo as described in Field Selection. Clicking the **Edit Properties** button displays the following settings in a right panel.

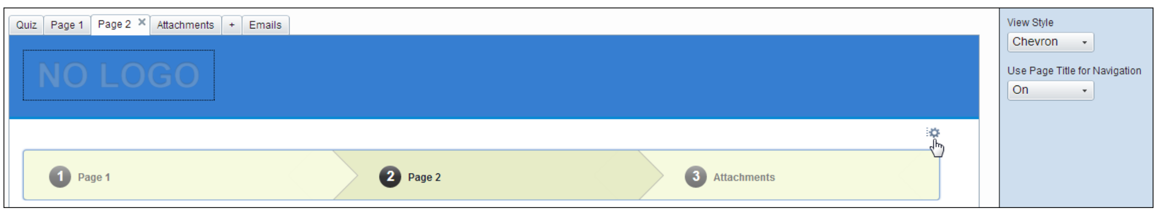
- Logo Path and File Name (Read-Only)
- Alignment [Left/Center/Right]
- Rollover Text
- **Upload files** button
- **Delete Logo** button

Clicking the **Delete Logo** button removes the picture file and displays a NO LOGO image in its place.

Forms Designer Navigation Bar Settings

Form navigation is shown underneath the logo (Chevron or Classic Tabs).

While in Form Editor mode, the links in the navigation cannot be clicked. Clicking the navigation selects the element without the **Delete** button.



Clicking the Edit button displays the following settings in in the right panel.

• View Style [Chevron/Classic] – default is Chevron.

• Use Page Title for Navigation [On/Off]

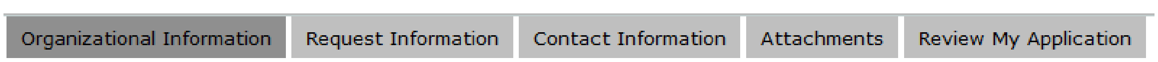
- When this option is Off, navigation will display "Page 1, Page 2" etc. instead of the name of the page. When On, the navigation will use the name of the page instead.
- Min 1 char, Max 100 chars

Navigation Styles

Classic

Displays page navigation in a table as links.

Example:



Chevron

Will display navigation in a table separated by number and arrow images.

Example:

Forms Designer Settings Menu

The Settings menu in the Forms Designer gives you access to various configuration options for your forms.

Please note, any changes made to the settings are displayed in the Form Editor.

Options include:

- Properties
- Links
- Email
- Eligibility
- Attachments
- Design
- Text

Settings: Properties

- Form Title
- Description
- Form Language/Spell Check Language
- Form Type (Application, Scholarship, or Requirement)
- Stage (and Associated Stage 1 if Stage 2 is selected), Enabled if Form Type=Application
- Site ID (For Multi-SID)
- Branch
- Suppress Organization fields from application form
- Authentication
  - o Require password to access form
  - o Require Account Login (default On)
  - Populate Organization and Contact data from last Submission (default On)
  - o Require applicants to enter a U.S. Tax ID
  - Require Tax ID to be on file in the IRS database
- Additional Contacts
  - o Organization Primary Contact is required
  - o Request Primary Contact is required
  - o Add (Action, creates a pop up window that creates an additional Contact type

o Edit

o Remove

Settings: Links

Allows the editing of special links on the page.

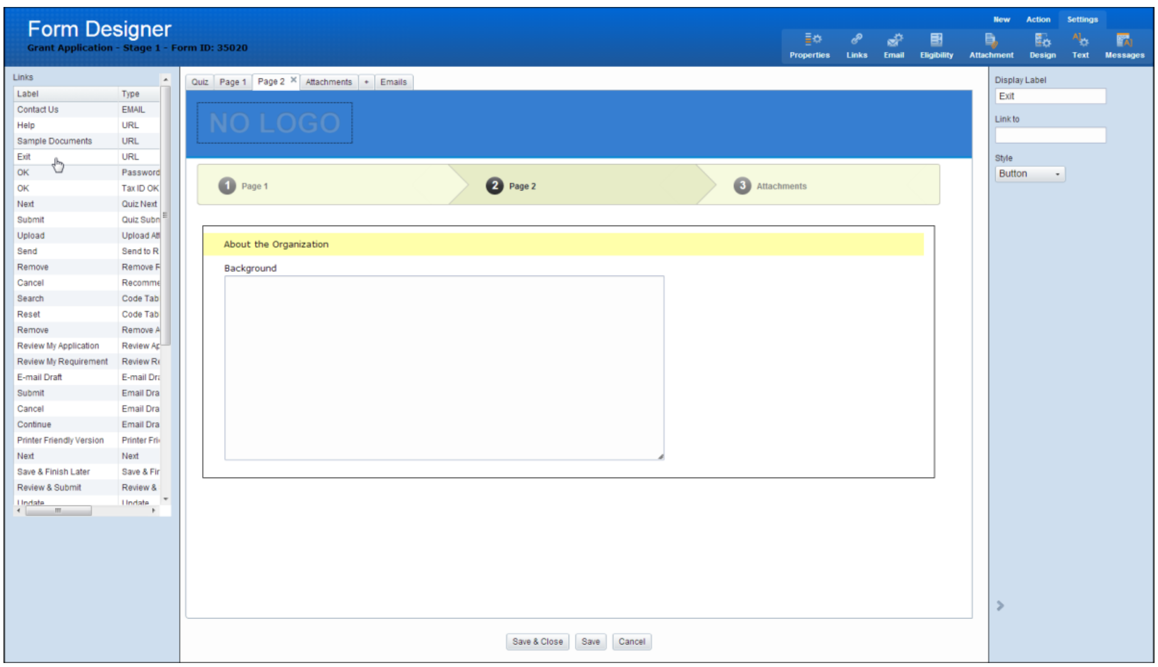
By default, a new form will not have any links.

The links available to edit are predetermined.

To add a link, add the URL to the **Link To** setting.

The Left Panel lists of the various links on the page. Clicking on the link type highlights and selects the link (or the position of where the link would appear in its default position) and opens the link properties. If the link is on a different page than what is currently shown in the Form Editor, the page is switched to the one where the link resides and the link is selected.

Links cannot be dragged and dropped.



When a link is selected, the properties of the link are displayed on the right panel.

Available options for the link are:

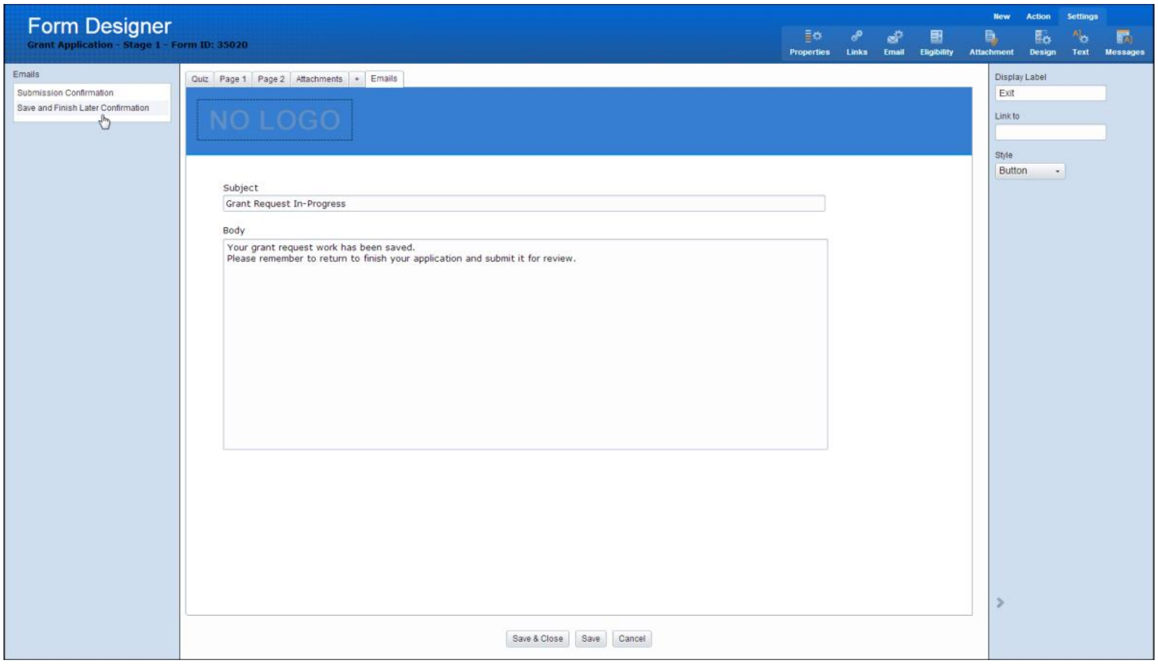
- Display Label
- Link To
- Style

Settings: Email

Allows the editing of automated emails for Applications or Requirements.

The Left Panel displays the list of automated emails that can be edited. Once selected, the form editor will display the message in an editable text box.

A button is included that allows the user to add merge fields.



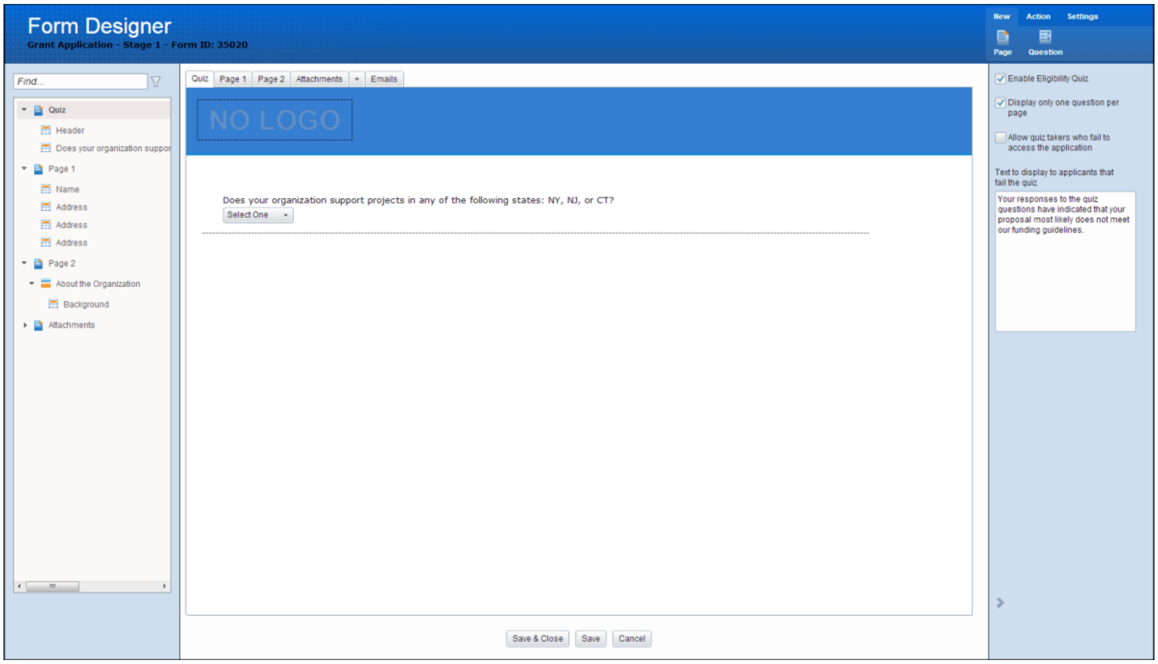
Settings: Eligibility

The Eligibility Quiz, if enabled, is displayed before the application.

Once clicked, the right panel displays Quiz Settings. Once "Enable Eligibility Quiz" checkbox is checked, the Quiz page is added as a tab, and is also available in the Outline View.

The Quiz is not shown in the navigation bar in the main panel.

The quiz page is always set as the first tab, and cannot be moved.



Quiz Menu Actions

New

- **New Page** - Add a new quiz page
- **Add Question** - Adds a new question to the Form Editor and selects it.

Questions are displayed in the main section. Questions can be dragged and dropped above or below each other using the same logic as dragging and dropping fields (without the ability to drop to the right)- and moves the entire Question and associated Answers. Selecting a question highlights it and displays an Show Properties and Remove button.

Once a question is selected, the right panel will display the Edit Question Properties.

Right Panel Quiz Settings

Quiz Settings are shown in right panel anytime there is no question selected in the Quiz main panel. Also shown when **Settings>Quiz** is selected in menu.

Enable Eligibility Quiz: Checking this box creates a new page with different available actions than a normal page. Anytime this special page is selected, the Quiz settings are shown in place of the fields list. Fields cannot be added/moved to this page

Display only one question per page: Checking this box adds a page separator between questions. This can be represented by a dotted line between questions

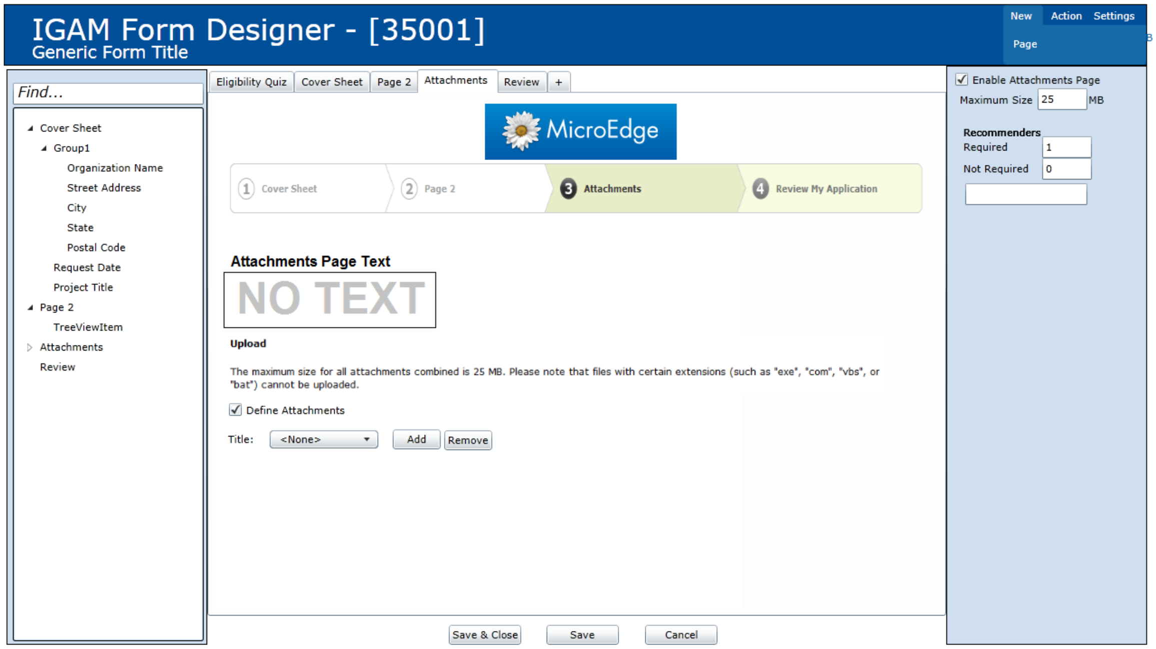
Allow quiz takers who fail to access this application: selecting this box will allow applicants who failed the eligibility quiz to still access the application.

Text to display to applicants that fail the quiz: Default text is shown below.

Your responses to the quiz questions have indicated that your proposal most likely does not meet our funding guidelines.

Settings: Attachments

Accessible via **Settings>Attachments** in top ribbon menu.



Once clicked, the right panel displays Attachment Settings.

Once "Enable Attachment Page" checkbox is checked, the Attachments page is added as a tab and is also available in the Outline View.

The attachment page is always set as the last page, and cannot be moved.

Main Edit Window

Attachments Page Text

Attachments page text is a selectable element. On initialize, it displays NO TEXT. When selected, Attachment Page Text right panel is displayed

Upload Text

Displays the following:

- Upload

The maximum size for all attachments combined is <Maximum Size> MB. Please note that files with certain extensions (such as "exe', "com", "vbs", or "bat") cannot be uploaded.

Define Attachments Checkbox

When checked, the drop down box, Add, and Remove buttons are enabled

Defined Attachments List

Drop down box of defined attachments. To add an attachment, click on the Add button. To Edit an attachment, select the attachment by selecting it in the drop down box. To remove an attachment, select the attachment in the drop down box and click remove. A confirmation message should display "Do you want to remove <Attachment Name>?" OK/Cancel

Adding or selecting a defined attachment displays the Defined Attachment Properties right panel.

Right Panel
Attachment Settings

Attachment settings is shown in right panel anytime there is no active selected element in the Attachments main panel. Also shown when Settings>Attachments is selected in menu.

Enable Attachments Page:

Checking this box creates a new page with different available actions than a normal page. Anytime this special page is selected, the Attachment settings are shown in place of the fields list. Fields cannot be added/moved to this page

Maximum Size:

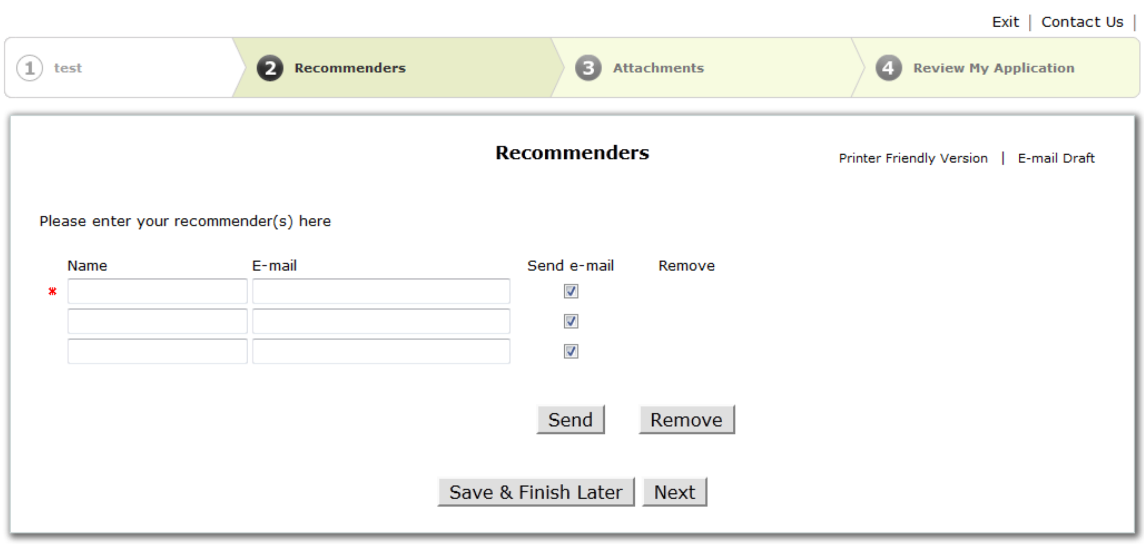
Enter the maximum size allowed for the attachment in megabytes(mb).

Recommenders (Only enabled if a blind attachment is added to the attachments list)

- # Required
- # Not Required

Adding a recommender in either the Required or Not Required box adds a Recommenders Page to the Form Editor.

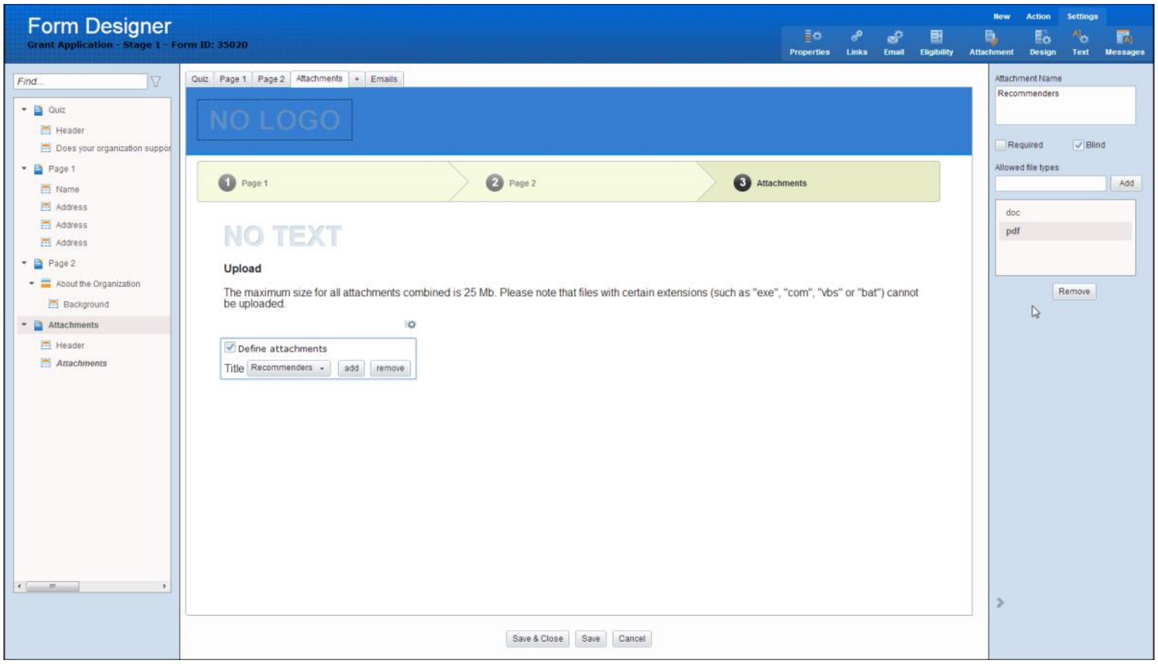
Example of recommenders page with 1 required, 2 not required set:



Attachment Page Text

[Textbox] When the attachment page text element is selected in main panel, a text box is displayed in the right panel. Changes to this textbox will replace the text in Attachment Page Text in main panel.

Defined Attachment Properties



When clicking **Add** in the defined attachments list on the main panel, the right panel displays the options for adding the attachment. The same panel displays options to edit an existing defined attachment when the drop down element is selected, and displays the element selected in the drop down box.

[Textbox] Attachment Name

- Populates the drop down box

[Checkbox] Required

- When checked, option in drop down box displays (Required) next to the name

[Checkbox] Blind

- When checked, option in drop down box displays (Required) next to the name

[Textbox][Add Button] File Type

- Allows the user to type in a file type and click Add or press enter to add to the File Type List

[Listbox] [Edit Button] [Remove Button]List of Allows File Types

- Listing of File Types added
- File types editable by double clicking in list or selecting the file type in list and clicking edit
- File types deletable by selecting file type in list and clicking delete

Settings: Design

This menu option allows you to configure the following:

Layout

- [Radio Button] Horizontal Accent
- [Radio Button] Vertical Accent
- [Checkbox] Include Content Frame
- Page Span [Entire Page/Left, Fixed Width/Right, Fixed Width] [Page Width: Pixels]
- Background File [Browse][Remove]
- HTML
    - Header [Browse][Remove]
    - Left Panel [Browse][Remove]
    - Right Panel [Browse][Remove]
    - Footer [Browse][Remove]

Colors

- [Color Picker] Header Background
- [Color Picker] Accent Bar
- [Color Picker] Body Background
- [Color Picker] Search Background
- [Color Picker] Active Tab Background
- [Color Picker] Inactive Tab Background
- [Color Picker] Button Color

Required Field Icon

- Icon
- Color

Settings: Text

This menu option allows you to configure the following:

Selecting the Text Display Element highlights the affected text in the Form Editor.

Display Element

- Form Title
- Page Title
- Header
- Notes
- Question Label
- Question Description
- Question Value
- Error Message
- Highlighted

- Navigation Active
- Navigation Inactive
- Button

Font [List of Fonts]
Size
Alignment
Bold
Italic
Color
Required Fields

- Icon
- Color

Creating a Grantee Account

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

Online grantee accounts are created by grant seekers when they first access and submit online grant applications. Grantees then use these same accounts to log in and access online Requirement forms.

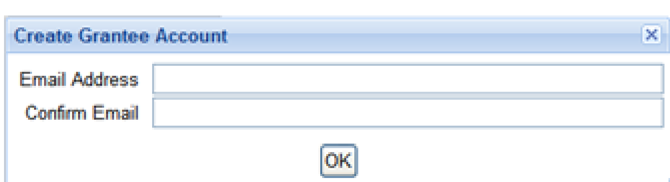
In some cases however you will need to create a grantee account in GIFTS Online yourself. If you want to publish a Requirement to a grantee or grant seeker who has no online account, you'll have to add it yourself.

To create a grantee account:

1. Search for or otherwise navigate to the Request edit form for which you want to create an account.

   NOTE: Grantee accounts are linked to Requests in GIFTS Online. The Requirements for that Request can then be published to that account.

2. In the Actions menu, click **Create Grantee Account**. The Create Grantee Account window opens:

   NOTE: If the link does not appear in the Actions menu, a grantee account is already linked to the Request. While a grantee account can be linked to many Requests, each Request can only be linked to a single account.

3. Enter the email address of the person for whom you want to create an account. (The field will default to the email address of the Request Primary Contact, but you can change it.)
4. Re-type it in the Confirm Email field and click **OK**.

The window closes and message notifies you that an email with the login information has been sent to the email address you entered.

NOTE: If there is already a grantee account for the email address, GIFTS Online will not create a second. Rather, the system offers you the option to link the Request to that existing account.

Once linked, you can publish Requirements for this pending or approved Request to that grantee account.

Resetting a Grantee's Password

Resetting a Grantee's Password

If an applicant or grantee forgets his or her password, or if you want to simply reset a grantee's password, you can use the **Reset Grantee Password** link on the Online Applications menu.

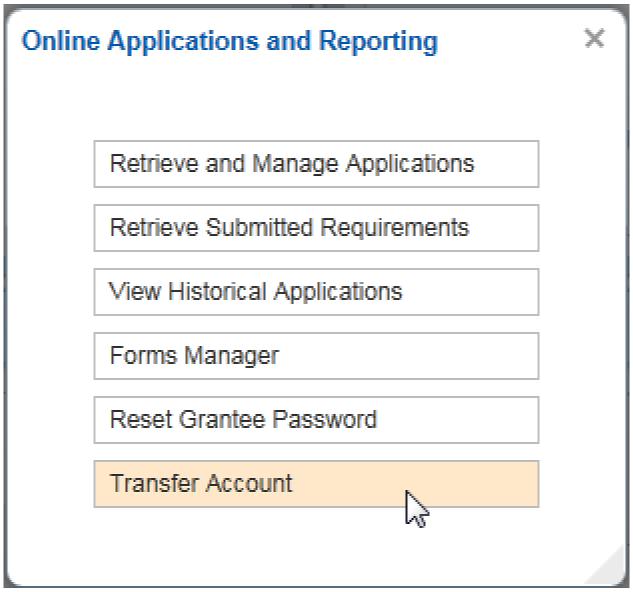
To reset a grantee's password:

1. Click **Reset Grantee Password**.
2. Enter the Email Address and New Password for the grantee.
3. Click **Submit**. The grantee's password is reset and an automated password update message is sent to the grantee that contains a temporary password. The grantee must change it when they login.

Transferring an Account

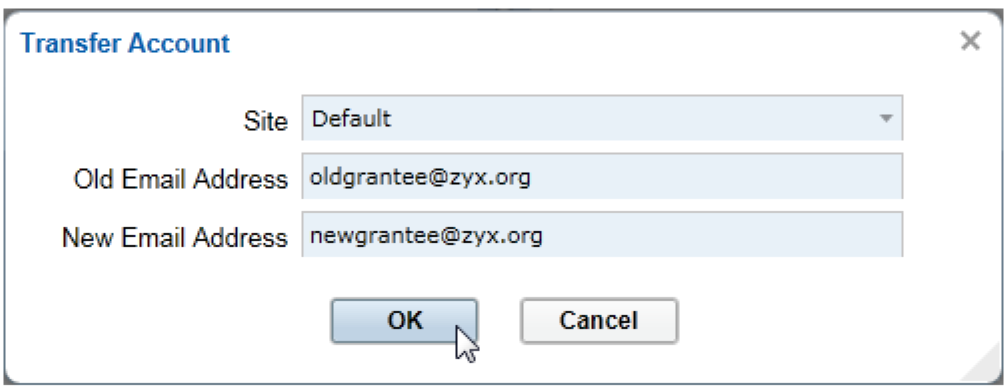
An entire account can be transferred from one user to another. This includes all of the in-progress and historically submitted applications and reporting forms.

From the **Launch > Applications** popup menu, select **Transfer Account**.



The Transfer Account form will allow you to enter the email address of the current user and the email address of the new user.

NOTE: The **Site** field is only visible to clients with Multi-SIDs enabled.



Click **OK**.

Working with Applications

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

GIFTS Online allows you to receive grant applications from applicants online. Grant seekers can submit proposals to you electronically by completing an online application form(s), created for you specifically by MicroEdge Services.

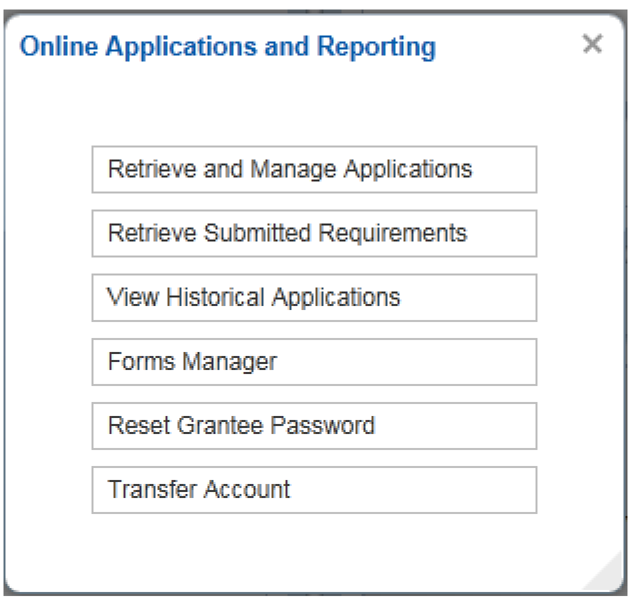
Using GIFTS Online's online grant application features, you can:

- Preview your online application forms.
- Retrieve proposals submitted by online grant seekers.
- Review the pending applications you've received.
- Make decisions on whether to consider each proposal further
- Generate stage 2 applications for grant seekers whose first-stage submissions garnered your interest.
- View historical applications, including ones you've rejected without creating a Request.

Launch: Applications

To access the Online Applications and Requirements functions in GIFTS Online, go to the **Launch > Applications** menu.

Available only to the Grants Manager users, this menu option gives you access to the various Online Applications functions listed below.



Retrieving and Managing Applications

The **Retrieve and Manage Applications** button allows you to view all pending applications and retrieve any new applications. For more information about Pending applications, click here. For more information about Retrieving applications, click here.

Retrieving Submitted Requirements

The **Retrieve Submitted Requirements** button retrieves any online Requirement forms grantees have submitted. For more information about Online Grantee Reporting, click here.

Viewing Historical Applications

Click this button to view online grant applications you have considered or rejected in the Applications History page. For more information about historical applications, click here.

The Forms Manager

The **Forms Manager** button allows you to access the Forms Manager where you can view, manage, and create application and requirement forms. It is also the gateway to the Account Design Manager where site preferences may be set.

For more information, see:

- The Forms Manager
- The Account Designer
- The Forms Designer

Resetting a Grantee's Password

If an applicant or grantee forgets his or her password, or if you want to simply reset a grantee's password, you can use the Resent Grantee password link.

To reset a grantee's password:

1. Click **Reset Grantee Password**.
2. Enter the Email Address and New Password for the grantee.
3. Click **Submit**. The grantee's password is reset and an automated password update message is sent to the grantee that contains a temporary password. The grantee must change it when they login.

Retrieving Applications and Attachments

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

Submitted applications are stored on MicroEdge's application server. In order to view and process these applications, you need to retrieve them first.

Retrieved applications remain on the Pending Applications page until you reject them or consider them and turn them into pending Requests in GIFTS Online.

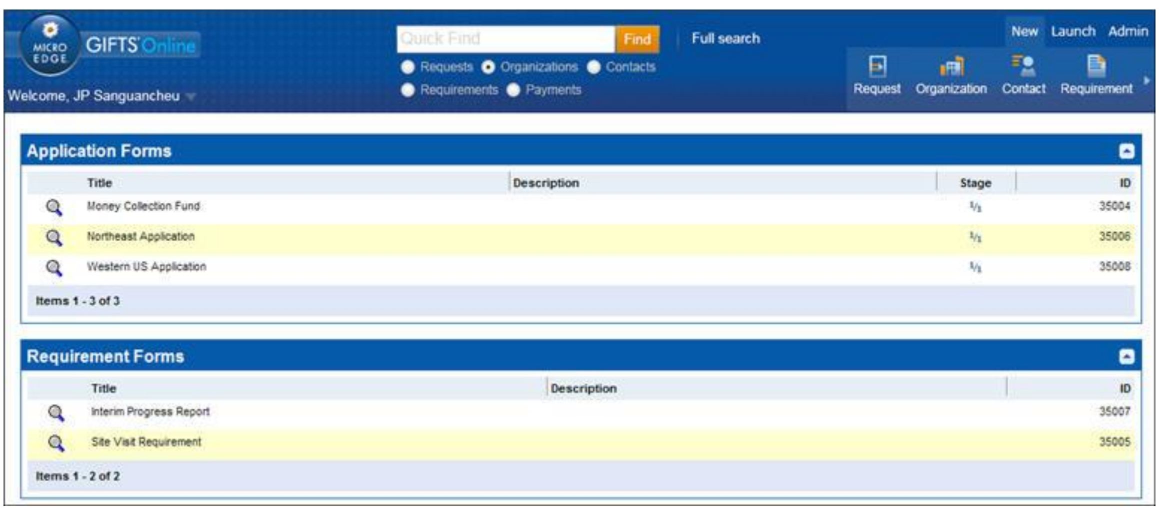
To retrieve applications:

1. From the home page, go to **Launch > Applications** and click **Retrieve and Manage Applications**. The Pending Applications page opens.
2. Click **Retrieve**. If there are applications on the server, a message informs you of the number of applications, and asks if you want to retrieve them.
3. Choose one of the following options:

    - Click **Yes** if you want to retrieve the applications and their attachments. The applications and all attached files will be brought in.
    - Click **No** to leave the applications and their attachments on the server for retrieval at a later time.

    If you click **Yes**, the files are downloaded and the dialog box summarizes the results of the retrieval.

After you retrieve applications, you can review them and their attachments, then make the decision to consider them further, or reject them outright.



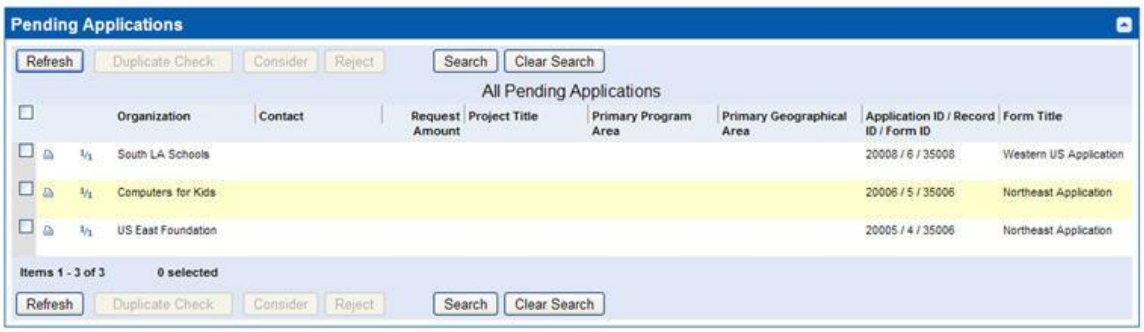
Retrieving & Managing Applications

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

You can view the Pending Applications page by clicking **Retrieve & Manage Applications** from the **Launch > Applications** menu.

The Pending Applications page is where you manage all pending applications submitted to you by grant applicants. Here you can view the applications and any attached files, then make your decision on whether to further consider the proposal.

The image below displays the Pending Applications page.



- **Refresh:** This button allows you to check for new applications. For more information, click here.
- **Duplicate Check:** This button allows you to perform duplicate checking on pending applications; it helps you link data in the application to an Organization and Contacts already entered in GIFTS Online. For more information, click here.
- **Consider:** This button allows you to consider any selected applications. If you consider an application, it becomes a Pending Request in GIFTS Online. For more information, click here.
- **Reject:** This button allows you to reject any selected applications. For more information, click here.
- **Search:** This button allows you to search for pending applications. For more information, click here.
- **Show All:** Click this link to show all available pending applications.
- : Click this icon to view the application.
- : Click this icon to view the application attachments. A menu opens, listing each file; click the link to open it.

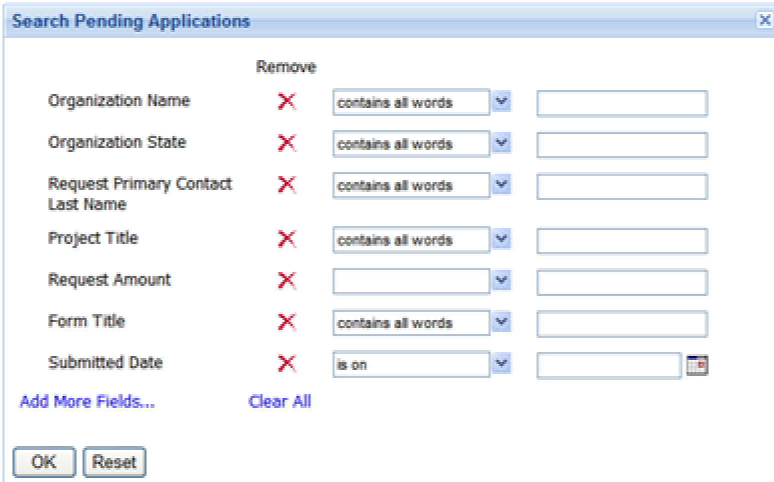
Searching for Applications

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

You can search for pending applications in the Pending Applications page.

Open the Pending Applications page by going to **Launch > Applications** on the homepage and then clicking **Retrieve and Manage Applications**.

To search for applications, click **Search**. The Search Pending Applications window appears.



To search for pending applications:

1. From the Pending Applications page, click **Search**. The Searching Pending Applications window appears.
2. Enter search criteria in the text boxes on the right side of the Search Pending Applications window that correspond to each field in the window.
3. Use the drop-down menu next to each field to select search parameters, such as "contains all words", "begins with", or "contains exact phrase."
4. If you want to add more fields to the search criteria, click **Add More Fields**. Select the checkboxes next to the additional fields you want to add to the search criteria, and then click **OK**.

   NOTE: You can add the same field more than once. If you add the same field to the search criteria more than once, the related fields will have an 'OR' relationship, meaning that the search results will contain pending applications that contain any of the search criteria for that field.

   TIP: Click the 'X' icon next to each field you do not want to add to the search. Click **Clear All** to remove all search fields from the window.

3. Click **OK**. All pending applications meeting your search criteria appear.

   TIP: Click **Reset** to remove all search criteria from all text boxes.

Processing Applications

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

On the Pending Applications page, you can open submitted applications and review attached documents. Once you know whether or not you'd like to further consider funding the proposal, you follow this process to implement your decision.

If you'd like to consider the proposal:

1. Perform duplicate checking.

A considered single or first stage application creates a pending Request; it can also create an Organization or one or more Contacts. To prevent creating duplicate Organizations or Contacts, you must first perform duplicate checking. If an Organization or Contact submitted as part of the application already exists in GIFTS Online, you can update that record, rather than create a duplicate one.

NOTE: Second stage applications do not create a new Request, but rather update the Request created by the considered first-stage application.

2. Consider the application.

   The application moves to the Applications History page; in GIFTS Online, a Request is created (or updated in stage 2); Organization and Contact records may also be created or updated.

If you don't plan to consider the proposal, you can reject it instead. Duplicate checking is not required to reject an application. These applications and their attachments move to the Applications History page.

About Linking Applications with GIFTS Online

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

In GIFTS Online, each Request is associated with an Organization and a Primary Contact. Before you consider an application—and turn it into a Pending Request—you can link it to existing Organizations, Contacts, and Requests in GIFTS Online.

You are required to attempt to link an application with Organizations and Contacts in GIFTS Online before you can consider it. This is done through the Duplicate Check function on the Pending Applications page.

Click here for instructions on performing linking.

Duplicate Checking Applications against GIFTS Online

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

Why Duplicate Check Organizations and Contacts?

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

When you consider an application, the new Pending Request that is created in GIFTS Online must be associated with an Organization and a Primary Contact. If GIFTS Online 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, GIFTS Online lets you check for duplicates. If found, you can link an applicant's organization and contact(s) to existing Organizations and Contacts. 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.

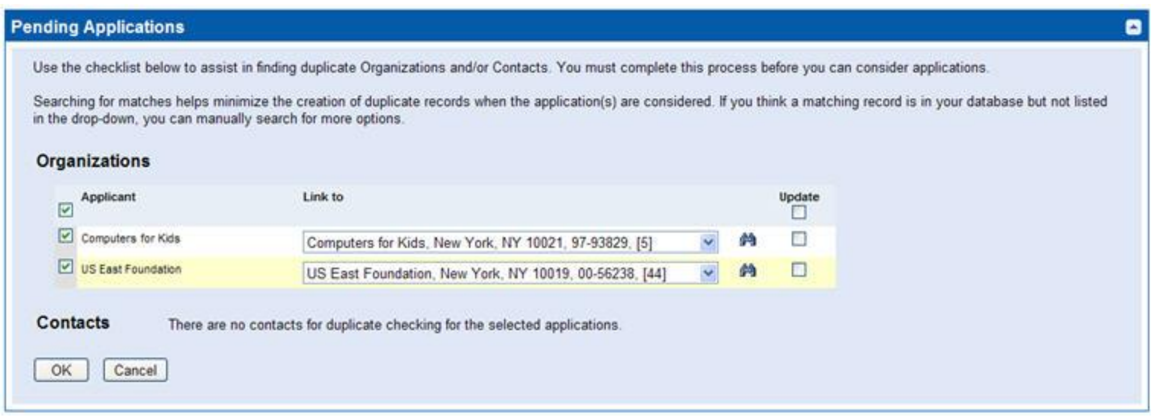
NOTE: When overwriting Organization and/or Contact information, an Update Activity is automatically created for the Organization or Contact record in GIFTS Online. This Activity contains both the old and updated information.

Click here to start linking applications.

How to Check for Duplicates

To check for duplicate Organizations and Contacts and then link applications to them:

1. Enable the checkbox next to the applications that you want to link in the Pending Applications dashboard part, and then click **Duplicate Check**. The duplicate check page opens.



2. In the Organizations section, select the checkbox next to the applicant's organization you wish to link to an Organization in GIFTS Online.

3. Select the Organization to which you want to link the applicant to in the Link to drop-down menu or click the eyeglass icon to search for another Organization. The Link to drop-down menu contains all Organizations based on the Organization matching logic. To find out more about this matching logic, click here.

   NOTE: Select 'Create new' if you want to create a new Organization for the applicant.

   TIP: If you click the eyeglass icon, enter the Name, AKA, Sort As Name, Legal Name, ID, or Tax ID of the desired Organization, and then click the eyeglass icon. All Organizations containing your search criteria appear. Click the name of the Organization to select it.

4. Enable the Update checkbox to overwrite the linked Organization fields in GIFTS Online with the corresponding application fields during the consideration process. This updates the following fields if they are included on the application: Address, City, State,

Zip/Postal, Country, Phone, Extension, Fax, Email, WWW Address, and Organization Annual Budget.

NOTE: Blank application fields do not overwrite corresponding GIFTS Online 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.

5. In the Contacts section, select the checkbox next to the applicant you wish to link to a Contact in GIFTS Online.
6. Select the Contact to which you want to link the applicant to in the Link to drop-down menu or click the eyeglass icon to search for another Contact. The Link to drop-down menu contains all Contacts based on the Contact matching logic. To find out more about this matching logic, click here.

NOTE: Select 'Create new' if you want to create a new Contact for the applicant.

TIP: If you click the eyeglass icon, enter the First Name, Last Name, ID, or Primary Organization Name of the desired Contact, and then click the eyeglass icon. All Contacts containing your search criteria appear. Click the name of the Contact to select it.

7. Enable the **Update** checkbox to overwrite the linked Contact fields in GIFTS Online with the corresponding application fields during the consideration process. This updates the following 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, and Email.

NOTE: Blank application fields do not overwrite corresponding GIFTS Online fields. However, if the application form contains Phone information but not Extension information, any Extension information for the associated GIFTS Online 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.

8. When you are done linking Contacts, click **Link**. You are asked to confirm that you want to save your links.
9. Click **Yes**. If you are linking a batch of applications, a process log summarizes your links.

Contact Matching Logic

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

When you attempt to link the applicant's contact information with Contacts in GIFTS Online, GIFTS Online matches the contact's First Name, Middle Name, Last Name, and Telephone Number.

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.

Organization Matching Logic

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

When you attempt to link an applicant with Organizations in GIFTS Online, GIFTS Online matches the applicant organization's Tax ID, name, state, and postal code with Organizations 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.

Considering Applications

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

Applications which you have linked to GIFTS Online can now be considered and become Pending Requests containing the date from the application. From that point on, you manage the application as you would any other Request in GIFTS Online. Considered applications are removed from the Pending Applications page and maintained in the Applications History page.

To consider an application or applications:

1. Click the checkbox next to the application(s) in the Pending Applications page and click **Consider**. The Consider Applications window appears.
2. Enter the following Request information, which will be added to the new Request created from the application:

   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.' This field is required.

   Status: The status of the Request.

   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.

   Generate Correspondence: Click this checkbox if you want to generate correspondence. For more information, click here.

3. Click **Consider**.
4. Review the process log to see a summary of the results. 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.

Rejecting Applications

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

If an application does not meet your funding requirements, you can reject it. Rejected applications are removed from your workflow and transferred to the Applications History dashboard part. You can record a Rejection Reason and generate rejection correspondence.

To reject an application or a batch of applications:

1. In the Pending Applications page, click the checkbox next to the application(s) you want to reject, and then click **Reject**. The Reject Applications window appears.
2. Enter the following information for Rejected application(s):

   - **Reason for rejection:** Reason for Rejection is a coded field.

- **Comments:** Any additional notes you want to make regarding this rejected application.
- **Generate Correspondence:** Enable this checkbox to generate correspondence. For more information, click here.

NOTE: If you are rejecting a batch of applications, the rejection information you provide is applied to all applications in the batch.

3. Click **Reject**. The rejected applications are transferred to the Applications History dashboard part. A process log summarizes the results.

Generating Correspondence

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

You have the option to generate email correspondence when you consider or reject an application.

1. Consider or reject an application, and enable the 'Generate Correspondence' checkbox. The Generate Email Correspondence window appears.
2. Enter the following information for the email correspondence:

   - **Job Title:** The job title of the correspondence. This is for reference purposes only.
   - **Template:** Select the email template.
   - **Request a read receipt:** Enable this checkbox if you want to receive a copy of the email correspondence.
   - **To:** Enter the email address(es) of the person(s) who will receive this email. Separate multiple email addresses with commas. If you are generating correspondence for more than one application, this field cannot be edited and the following message appears: 'Applicant's address will be used.'
   - **Salutation:** The email salutation, such as "Dear applicant."
   - **Signer:** The staff member who signs the correspondence.
   - **Position:** The signer's position.
   - **Preparer:** The initials of the staff member preparing the correspondence.
   - **Create Activity record:** Enable this checkbox if you want to create an Email Activity.
   - **Date:** Today's date.
   - **Notes:** Enter any additional information.
   - **Save email text:** Enable this checkbox if you want to save the text you entered in this window for future correspondence.

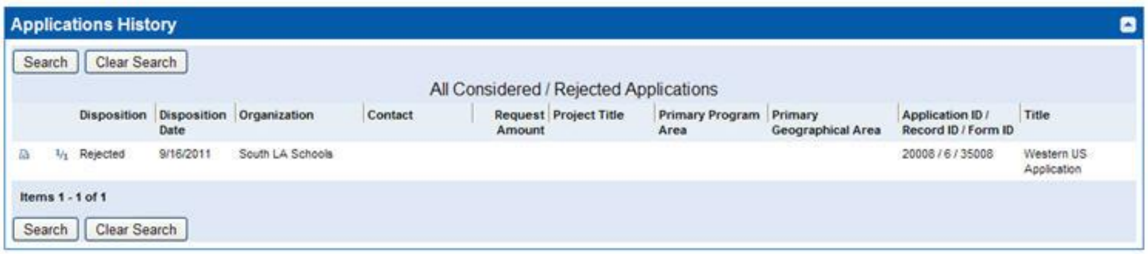
3. Click **Generate Correspondence**. The email is sent to the recipient(s). After the correspondence job has been run, it appears in your Job Status log.

The Applications History

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

The Applications History popup contains all historical applications, both applications that have been considered and those that have been rejected.

From the **Launch > Applications** menu on the homepage, select **View Historical Applications**.



This page contains the following buttons and fields. Note that columns will only have data in them if the fields were included in your online application form(s).

- **:** Click this icon to view the application.
- **:** Click this icon to view the application attachment.
- **Disposition:** The disposition of the application (Considered or Rejected).
- **Disposition Date**: The date when the disposition was assigned to the application.
- **Organization:** The organization's address.
- **Contact:** The primary contact person's name, title, telephone numbers, and email address.
- **Request Amount:** The amount of the request.
- **Project Title:** The name of the project.
- **Primary Program Area:** The program under which the applicant organization or proposed project falls, such as 'Education' or 'Health and Human Services.'
- **Application ID/Request ID/Form ID:** Applications generated from the same form are assigned sequential Application ID numbers. When an application is retrieved, it is also assigned a Record ID to identify the record. 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.
- **Title:** The title of the application form.
- **Search:** This button allows you to search for pending applications. For more information, click here.
- **Show All:** Click this link to show all available pending applications.

Generating Stage 2 Applications

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

A two-stage application process requires that an applicant fill out two online forms. The first-stage application, if considered, creates a pending Request in GIFTS Online.

If you want to hear more about the proposal in a second-stage application, you want to make sure that it's linked to the existing Request record. For that reason, generating the stage 2 application begins from the selected proposal's Request edit form.

1. Search for or navigate to the proposal's Request edit form.
2. In the Actions menu, click **Generate Stage 2 Application**. The stage 2 form is now published to the applicant.
3. You have the option to generate an email for the grant seeker, letting him or her know they can log in and complete the second stage of the proposal.

Request/Payment Status Update to My Account Page

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. Please disregard this section if your GIFTS Online system does not include this module.

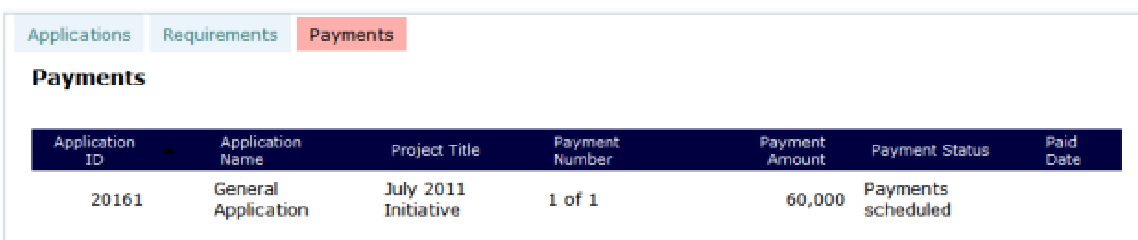
This option, available through MicroEdge Services (services@microedge.com), allows for the updating of Request and/or Payment statuses to the My Account pages of all your applicants. This gives your applicants access to the status of their Requests and lets them see if a Payment has been scheduled.

Applications | Requirements | Payments

Applications

Show Submitted Applications

Application Name	Project Title	Requested	Status	ID	Submitted	Action
General Application	July 2011 Initiative	60,000	Approved	20161	05/17/2011 3:57:56 PM	
General Application	August 2011 Initiative	75,000	Considered for Board	20162	05/17/2011 3:59:39 PM	
General Application	Sept 2011 Initiative	150,000	Initial Review	20163	05/17/2011 4:01:29 PM	



Applications | Requirements | Payments

Payments

Application ID	Application Name	Project Title	Payment Number	Payment Amount	Payment Status	Paid Date
20161	General Application	July 2011 Initiative	1 of 1	60,000	Payments scheduled	

NOTE: The new statuses are updated on a nightly basis to the applicant My Account pages.

For more information, please contact MicroEdge Services at services@microedge.com.

Working with Online Grantee Reporting/Requirements

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

Requirements in GIFTS Online capture information about the obligations you may impose as part of your agreement with a grantee. For example, your grant agreement may call for interim reports quarterly during a year-long project. You could add four Requirements, enter Progress Report as each one's type, and set their due dates according to the schedule.

You can update these Requirements yourself if grantees submit information offline or via email.

With GIFTS Online, however, you can complete the process online. Rather than update Requirements yourself, you can "publish" them to the grantees - that is, post them as online forms - and have grantees complete and submit these forms to fulfill their requirements online.

The process for getting grantee reports online follows:

1. First, you will add Requirements to pending or approved Requests, specifying type, due date, and other key data.
2. From the Requirement's edit form, you then publish it to the grantee and send an email telling them how to log in and complete the form.
3. The grantee logs in, selects the form, completes it, attaches any supporting documents, and submits it.
4. You periodically retrieve Requirements from all grantees. The system updates Requirements with information from the grantee and updates the Received Date.
5. You can then review the data and files the grantee has sent and, if they meet your approval, mark the Requirement done.

Publishing Requirements to Grantees

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

When you publish a Requirement to a grantee, you post an online form which s/he can then log in, complete, and submit. Note that the grantee must have an online grantee account set up to log in and access Requirements.

Online Requirement forms are set up by MicroEdge Services as part of your initial system implementation. Grants Managers can preview these forms just as they can online grant application forms.

NOTE: With the Form Design Wizard, you can also make your own Requirements forms or modify existing ones as needed.

These forms are usually designed to work with a particular Requirement Type. For example, GIFTS Online comes "out of the box" with Requirements forms for Progress Report and Final Report. However any Requirement can be published if you have at least one online Requirement form active.

To publish a Requirement to a Grantee:

1. Search for or otherwise navigate to the edit form for the Requirement you want to publish.
2. In the Actions menu, click **Publish to Web**.

   NOTE: If there is no online grantee account associated with the Request this Requirement is tied to, you will be asked first to create an account for the grantee. The Publish to Grantee window will open once that step is complete.

3. In the Publish to Grantee window, select the online Requirement form you want the grantee to complete.

4. Select the **Generate Correspondence** check box to generate an email to the grantee notify them of the online form you want them to complete.

   NOTE: If you clear the check box, you can still generate an email later.

5. Click the **OK** button. The online Requirement form is now published.

If you selected the Email Grantee? check box, the email generation window opens, allowing you to email the grantee about the newly available online reporting form.

Retrieving Requirements

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

Grants Managers can retrieve Requirements completed and submitted by grantees from their home page.

Go to **Launch > Applications** on the homepage and select **Retrieve Submitted Requirements**.

By default, the page is set to show Requirements Received This Week. Based on your GIFTS Online implementation, the time period might be "this month" or "this quarter," for example.

To retrieve the latest Requirements submitted, click the **Retrieve Grantee Submissions** icon in the toolbar:

IMPORTANT: The retrieve action will bring in all submitted Requirements, not just those associated with grants for which you are responsible.

When an online grantee form is retrieved, the Requirement record from which it was published is updated. Requirement fields are updated with data provided by the grantee (based on which fields you included on the form). Any attached documents are linked to the Requirement and may be managed from the Request or Organization edit form.

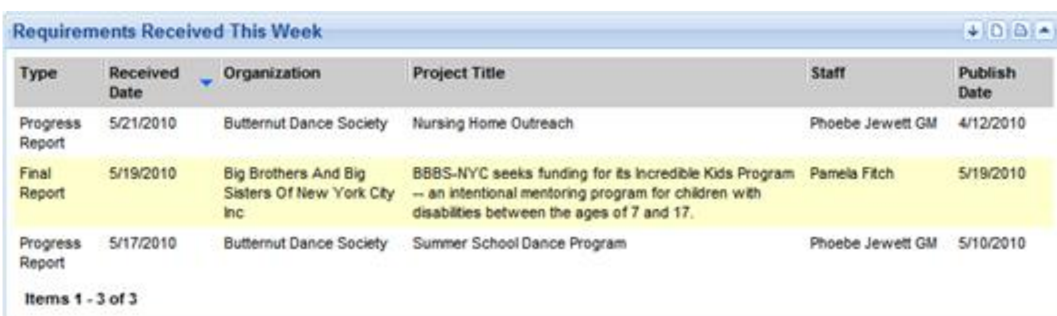
The Requirements Received

NOTE: This help topic describes features found in the optional Online Applications and Requirements module. If your GIFTS Online system does not include Online Applications and Requirements, you may disregard this information.

The Requirements Received popup lists reports and other Requirements submitted online by your grant seekers and grantees.

The columns contain the following information:

Type	Shows the Requirement Type, such as Payment Receipt or Final Report
Received Date	The date on which you retrieved the submission. By default, the dashboard part sorts Requirements with the more recently received Requirement first.
Organization	The grantee Organization's name.
Project Title	The Project Title of the Request with which the Requirement is associated.
Staff	The staff person entered as the proposal owner on the Request.
Publish Date	The date on which you published the Requirement to the grantee.


Requirements Received This Week

Type	Received Date	Organization	Project Title	Staff	Publish Date
Progress Report	5/21/2010	Butternut Dance Society	Nursing Home Outreach	Phoebe Jewett GM	4/12/2010
Final Report	5/19/2010	Big Brothers And Big Sisters Of New York City Inc	BBBS-NYC seeks funding for its Incredible Kids Program -- an intentional mentoring program for children with disabilities between the ages of 7 and 17.	Pamela Fitch	5/19/2010
Progress Report	5/17/2010	Butternut Dance Society	Summer School Dance Program	Phoebe Jewett GM	5/10/2010

Items 1 - 3 of 3

You can perform the following actions:

- Click any record in a table dashboard part to display that record.
- Click any column heading to sort the table dashboard part records by that column.
- When the number of records in a table dashboard part exceeds the dashboard part length, the records are paginated. You may click **Next**, **Previous**, or a record count range (such as **6-10**) to view those records.
- Click **View All** to expand the dashboard part to view all matching records.

- Click the Report Options icon, , to view the Search Results for the records in the table dashboard part. This allows you to change the View, or export the records to Excel, among other tasks.
- Click the Printer icon, , to display a printer-friendly version of the records in the table dashboard part.
- Resize any column in a table dashboard part by hovering over it with your mouse until your cursor becomes a double arrow (<->), and then left-clicking your mouse and resizing the column.

Online Applicant Collaboration

GIFTS Online Applications and Requirements includes several collaboration features allowing applicants to easily share their in-progress application and reporting forms with other users.

Enabling Sharing of Applications and Requirements

Sharing of Request and Requirements by applicants can be enabled in the Accounts Manager by a Grants Manager/Administrator.

New Grantee Concepts with Sharing Enabled

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 requirement.

- 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 users; a read-only version of the application or requirement will be listed on the other users' Grantee Portal.
- 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 Grantee Portal, and can view read-only copies until view rights are taken away by the owner.

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

Additional Grant Maker Functionality

In addition, Online Applications will grant the following capabilities to grant makers:

The grant maker can transfer an application or requirement to a different owner from GIFTS Online.

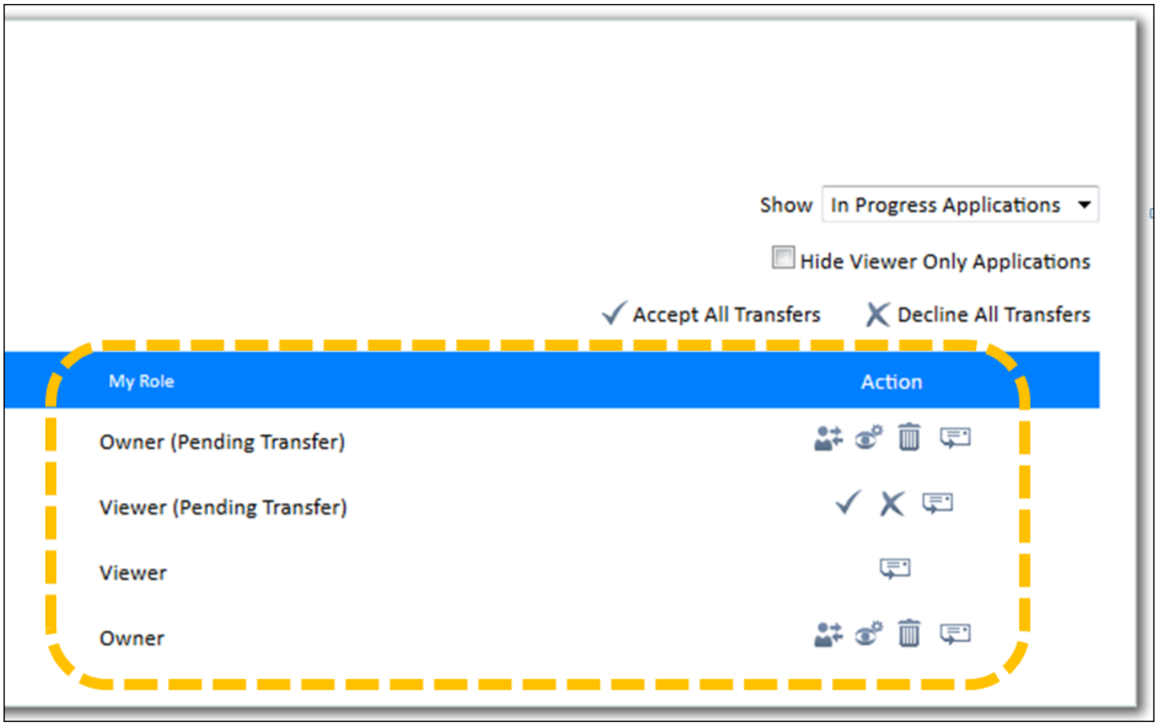
When publishing a Requirement to the web, the grant maker may choose whom to publish it to:

- the current application owner
- the Requirement contact
- or any Contact affiliated with the Request

Collaboration Options and Actions

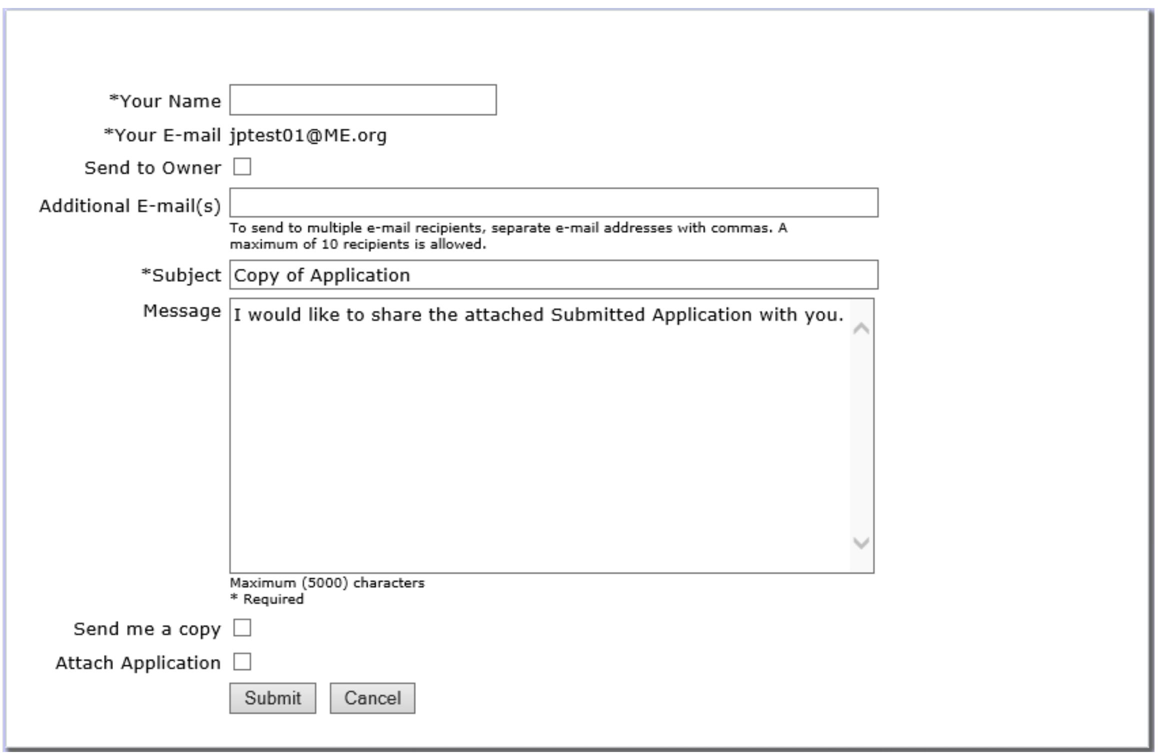
Once enabled, the following features will become available to your applicants/grantees.

On the Applications and Requirements pages the applicant will notice the following new options.



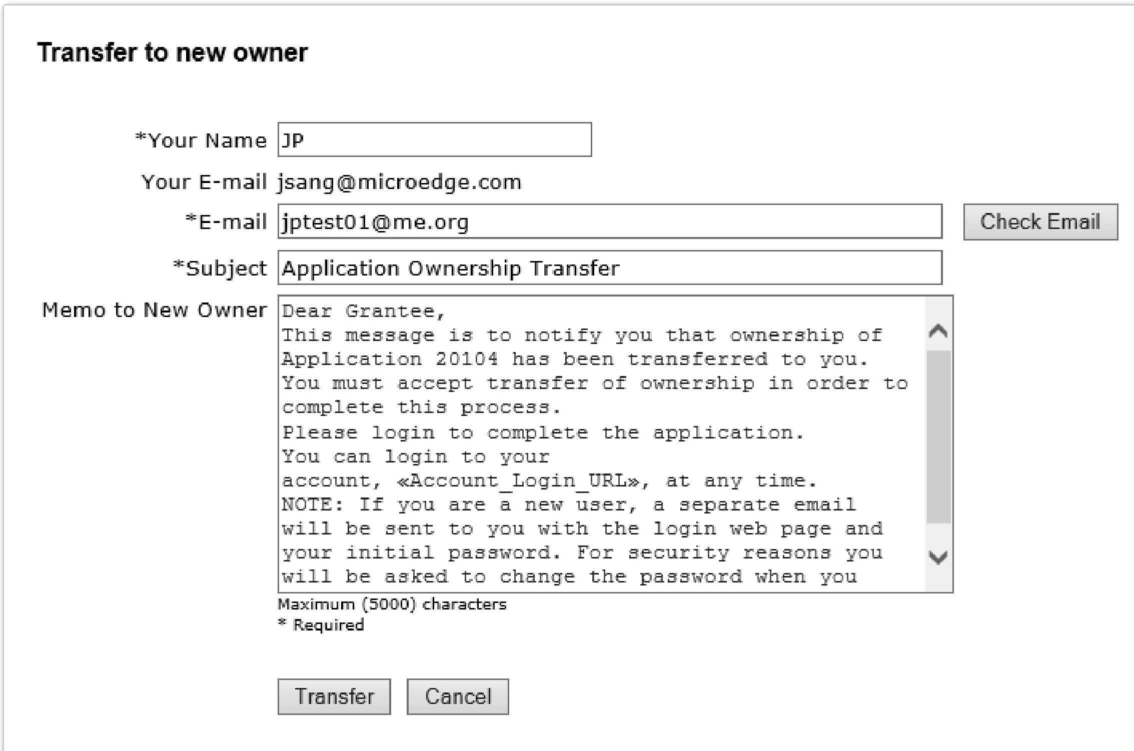
Option/Action	Description
Hide Viewer Only Applications	Checking this box will immediately hide all applications for which the current user is a Viewer.
Accept All Transfers	Clicking on this link will accept all pending transfers.
Decline All Transfers	Clicking on this link will decline all pending transfers.
My Role	This column added to the Applications & Requirements pages shows the status of the current user for each Request or Requirement listed.
Owner	The current user is the owner of the Application/Requirement.
Owner (Pending Transfer)	The current user has a Request or Requirement being transferred to them.
Viewer	The current user is a Viewer of the Application/Requirement.
Viewer (Pending Transfer)	The current user has a Request or Requirement being transferred to them as a Viewer.

Action	The following options will be available under the Action 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. **Delete** – If the current user is the owner, the Delete option will be available for In-progress Applications. Not available for Requirements. **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.



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 of the Grantee Portal.



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: This transfer process does not apply to New Requirements/Stage 2 applications 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 Grantee 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 Applications Page in the Grantee Portal, 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 applications page in the Grantee Portal and the process continues with the newer owner.

The new owner of the application will see the application/requirement listed next time they log in to the Grantee Portal 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 main Applications or Requirements 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 main Applications or Requirements page.

Accepting or Declining Transfers

A user can either accept or decline transferred applications/requirements individually or all at once.

The Actions column will have the actions to accept or decline a transfer individually. The links to accept or decline in batch is at the top of screen, right under the "Hide Viewer Only Applications" checkbox.

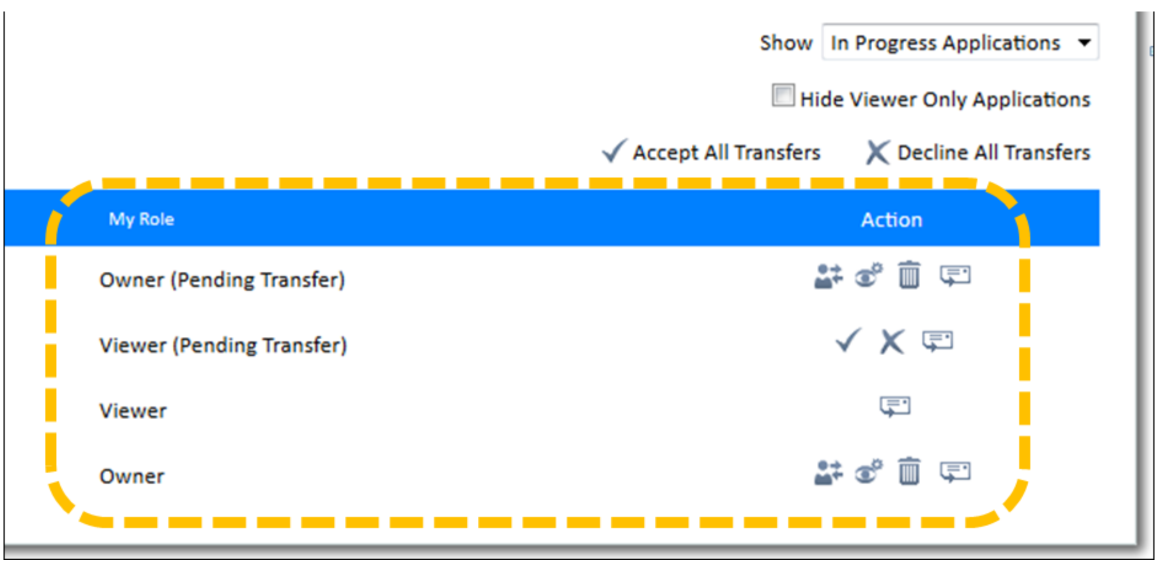
If the Accept/Decline All Transfers link is selected, a prompt will appear to confirm the choice.

If the user clicks Decline, the system will email the current owner(s) that the application transfer has been declined.

Deleting Applications

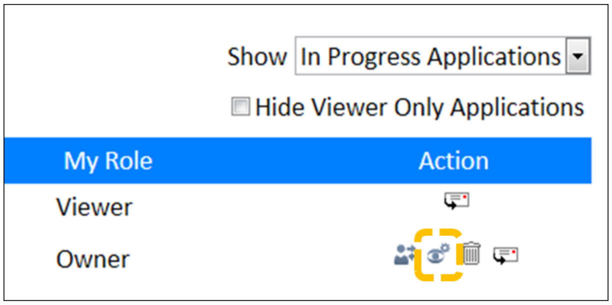
A trashcan icon will be available on In-Progress lists for owners.

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



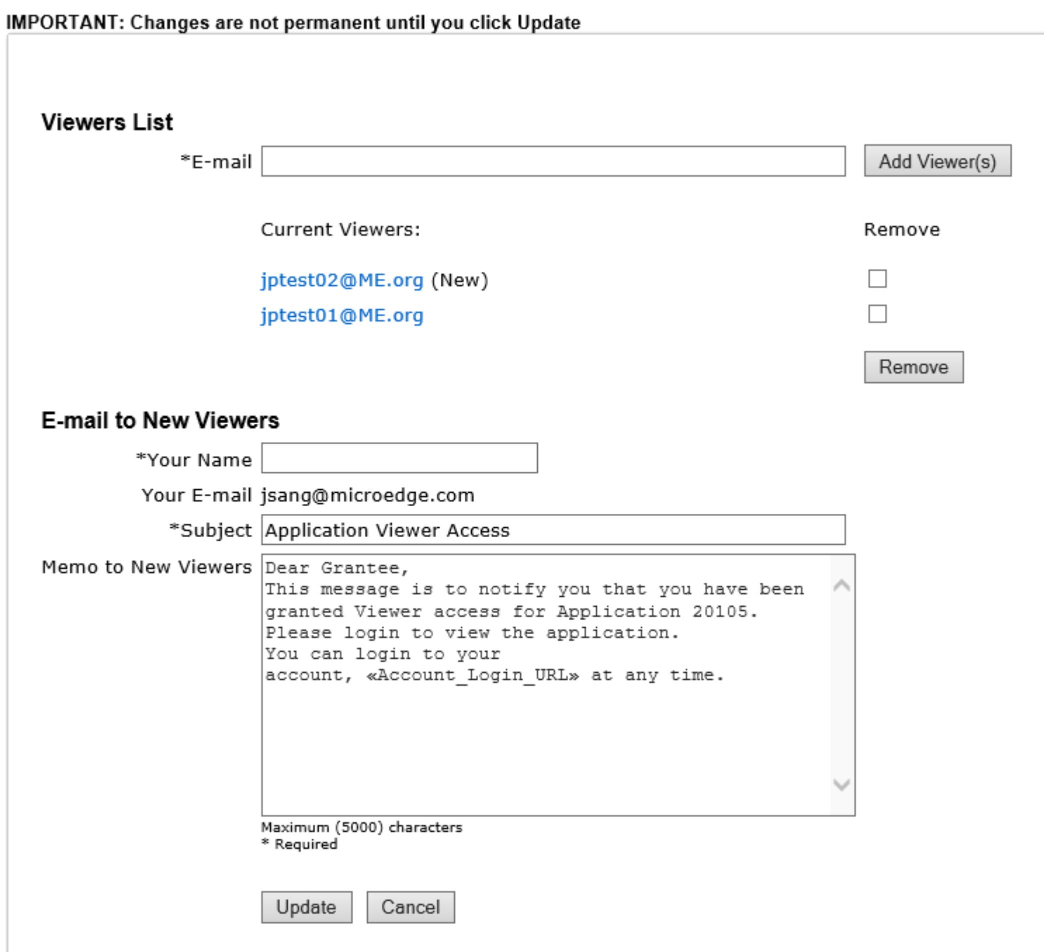
Managing Viewers

To access the Manage Viewers interface, click the **Manage Viewers** icon for a specific Application or Requirement in the Actions column.



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



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 a viewer is added that doesn't have an account, the system will create a new account for them. The new viewer will be listed with the following status: newuser@microedge.com (New, New Account will be created).

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.

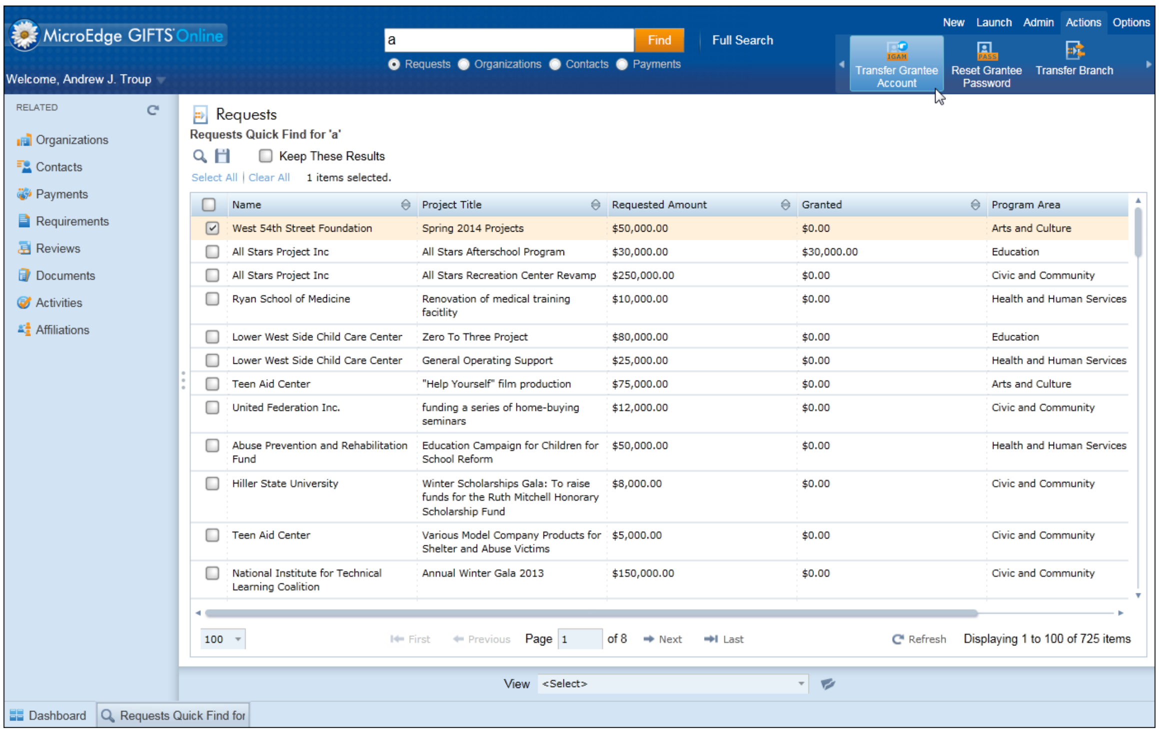
NOTE: There is no notification sent to a Viewer when View access is removed. The Application or Requirement will simply no longer appear in their account.

Transferring a Request in GIFTS Online

GIFTS Online users can use the **Transfer Grantee Account** option is available in the Action menu for both Requests and Requirements.

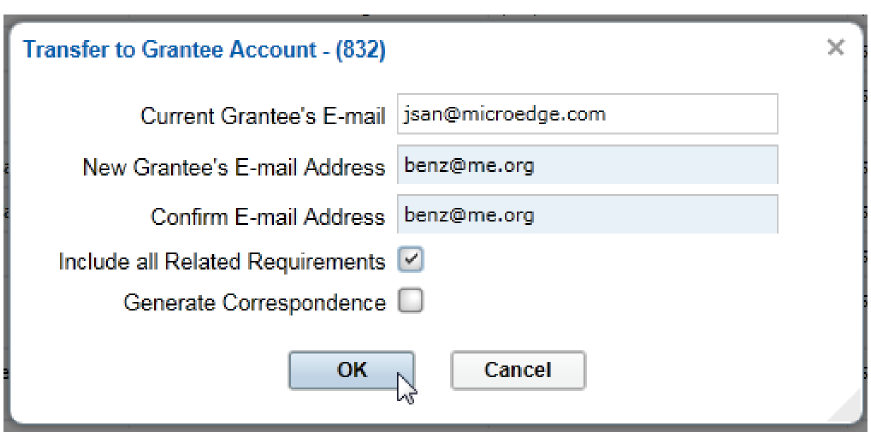
NOTE: This action is unavailable if the Request or Requirement does not have an account associated.

In order to transfer a Request to another owner, the user must select a Request from the Workspace or have one opened.



NOTE: Batch transferring of multiple Requests is not available. However there is a Transfer Account option in the Applications popup menu that will transfer an entire account from one user to another. This includes all of the in-progress and historically submitted applications and reporting forms.

When you choose the option, a form similar to the one below opens:



The current grantee owner will be displayed in the Current Grantee's Email field. This is a read only field and cannot be edited.

The grant maker can enter, and then confirm, a new e-mail address. Ownership of the selected request transfers to the account of the e-mail address provided.

If the **Include all Related Requirements** checkbox is checked, all requirements associated to the request will also be transferred. If a requirement associated with the application has already been transferred to a 'New' owner, that requirement will be included in the transfer.

The **Include all Related Requirements** checkbox does not appear if the selected record is a Requirement or if the Request does not have any associated Requirements.

If **Generate Correspondence** is checked, after clicking **OK** the Generate Correspondence Wizard will open where you can select from one of the available templates.

The primary contact for the organization will be the default recipient. The main purpose of this is to notify the primary contact of the organization that ownership is being transferred for one of the Requests/Requirements within their organization.

If an email template is chosen, additional existing contacts/affiliations in GIFTS Online may be included.

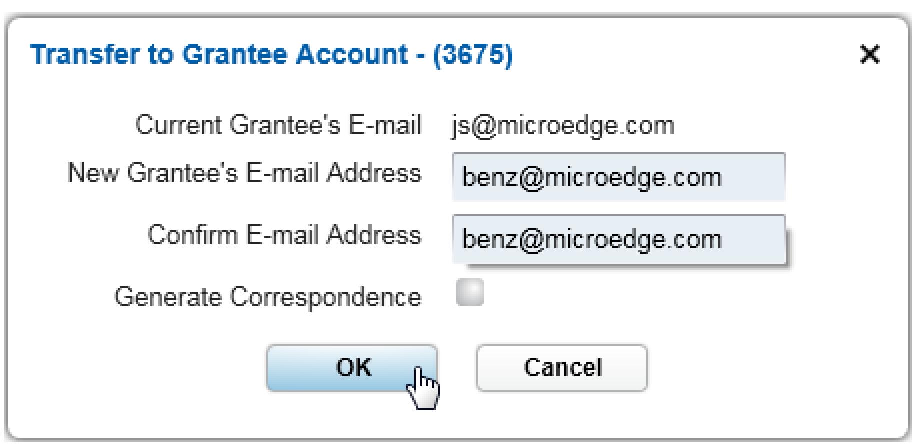
NOTE: It is recommended that a 'Transfer' correspondence template be created in the Document Template Manager for both the Requests Pending/Approval categories as well as Requirements with the intention to be sent to an organization's primary contact or other contacts/affiliations notifying them of the transfer.

Transferring a Requirement in GIFTS Online

GIFTS Online users can transfer a Requirement to another owner. To do this, the user must select the Requirement or have the record opened before accessing the **Transfer Grantee Account** option. Multiple Requirements can be selected.

NOTE: All selected Requirements must have already been published and have a Grantee Account associated to them. The **Transfer Grantee Account** action will be unavailable if any of the selected Requirements does not have an account associated.

When the **Transfer Grantee Account** option is selected, you will be able to enter a different email address to send the Requirement request to:



The batch process transfers all selected records to the given e-mail address, even if selected records have different associated accounts.

A Process Monitor screen will display with all successes, errors and details provided.

If **Generate Correspondence** is checked, after clicking **OK** the Generate Correspondence Wizard will open where you can select from one of the available Requirements templates.

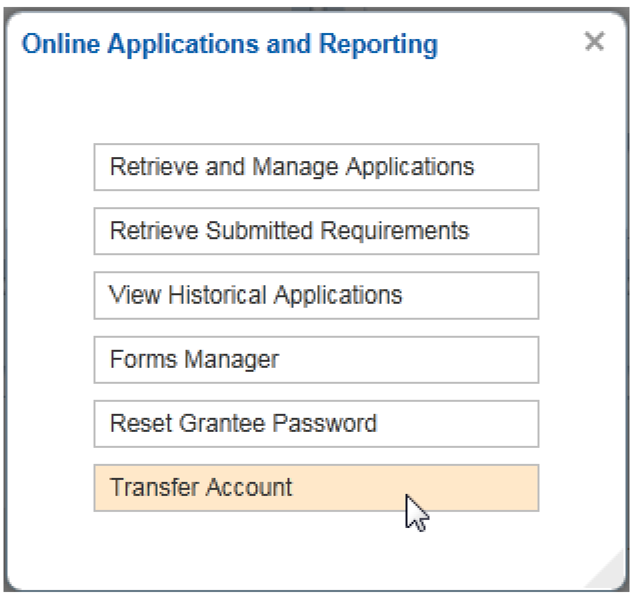
The primary contact for the organization will be the default recipient. The main purpose of this is to notify the primary contact of the organization that ownership is being transferred for one of the Requests/Requirements within their organization.

If an email template is chosen, additional existing contacts/affiliations in GIFTS Online may be included.

Transferring Accounts in GIFTS Online

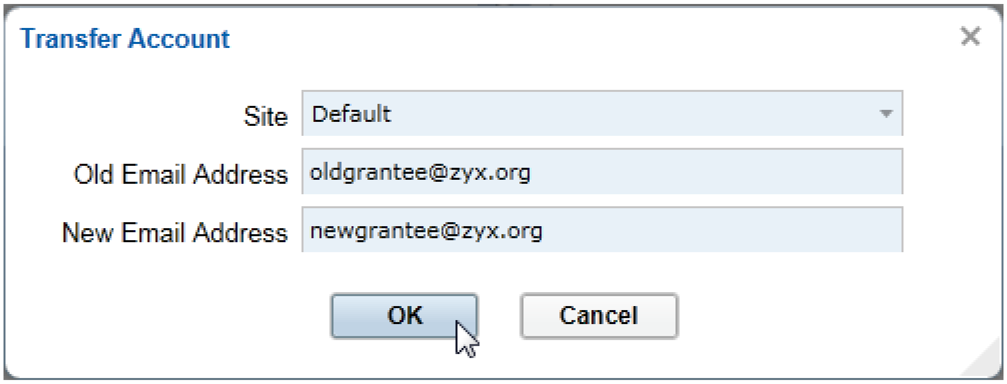
GIFTS Online users can transfer all of the records associated with an existing user account to another using the Transfer Account option. This includes all of the in-progress and historically submitted applications and reporting forms.

From the **Launch > Applications** popup menu, select **Transfer Account**.



The Transfer Account form will allow you to enter the email address of the current user and the email address of the new user.

NOTE: The Site menu is only visible if your site has Multi-SIDs enabled.


Transfer Account
Site
Default
Old Email Address
oldgrantee@zyx.org
New Email Address
newgrantee@zyx.org
OK
Cancel

Click **OK**.

The Accounts Payable (A/P) Module

This chapter describes your options for using the optional GIFTS Online Accounts Payable (A/P) Module.

The optional GIFTS Online Accounts Payable (A/P) Module allows you to process your payments in two ways:

1. **A/P Link:** Exchange payment information between GIFTS Online and your accounting system using import/export functionality.
2. **Check Writer:** Select pending payments to merge into a check template and print directly to your own check stock.

About the A/P Module

The GIFTS A/P Module provides a variety of options that you can use to share your GIFTS Payment information with your accounting department or to print checks for your grant payments.

A/P Export & Import

You can use the **A/P Export** option to generate export files that contain your Payment data. These files can be imported into your accounting software, which is used to generate invoices and checks.

NOTE: The AP Export/Import process now allows you to select between the *Standard or Quickbooks* layouts.

After your checks have been cut, you can export the payment data out of your accounting system and use the **A/P Import** option to import your check data back to GIFTS Online. Then your Payments are updated with check info.

A/P Check Writer

The Check Writer option in the Accounts Payable Module allows you to print Payment data in the right places on your own check stock.

The Check Writer feature will update Payment records with their new Paid status and a check number reference.

Changes to Payments

After the A/P Module is added to your site, the following changes will be noticeable depending on whether you selected A/P Link or Check Writer:

A/P Link Changes

- On the **Payment Edit Forms**, the subtitle will display the export date.
- In the **Query Builder** for Payments, the following fields will be available as search criteria:
  - Export to AP Date
  - Export to AP User

    - Import from AP Date
    - Import from AP User
- In **Views**, the above fields will also be available to be used as columns.
- The **Payment Status** column will also display "Exported" if a record has been exported.

Check Writer Changes

- On Payment **Views** the Payee/Reference column will display the **Check No** if one has been issued.
- On Payment **Edit Forms**, a **Check Number** field will be available in the Paid section.
- In the **Query Builder** for Payments, the following fields will be available as search criteria:
    - Bank Name
    - Check Number

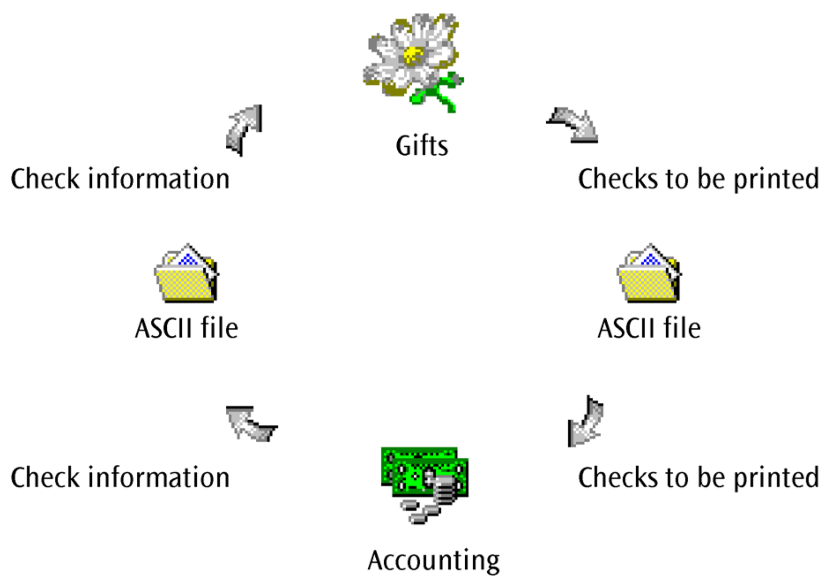
How the A/P Link Transfers Data

The GIFTS Online Standard A/P link exports Payment information from GIFTS Online to your accounting system by means of an ASCII text file.

Once this information has been processed by your accounting department, the relevant check data (check number and check date) can then be imported back into GIFTS. Most accounting packages can produce a file that conforms to the Standard GIFTS Online A/P Import layout.

You can mark the GIFTS Payments as 'Paid' during either the export or the import phase, according to your preference.

The following graphic illustrates the general flow of information from one system to another, starting with GIFTS.



For more information about using the standard export and import layouts, please refer to "Using the Standard A/P Link".

NOTE: It is not necessary to export GIFTS Online Payment information in order to import check information from your accounting system. However, the GIFTS Online Payment ID is a required field in the import file. If you do not export data from GIFTS, it will be necessary to track GIFTS Online Payment IDs in your accounting system.

Exporting Payment Data

You can use the standard ASCII or Quickbooks file generated by the GIFTS Online Export Payments feature to export your Payment information to external accounting software or check-writing software.

- Refer to "Standard Payment Export File Layout" for a description of the ASCII file format.
- Refer to "Quickbooks Export File Layout" for a description of the Quickbooks file format.

In order to export Payments, you should be familiar with the GIFTS Online procedures for searching for and selecting Payment records.

You can also use Workspace Views to modify the content, format, and sort order of Payments in the A/P Module.

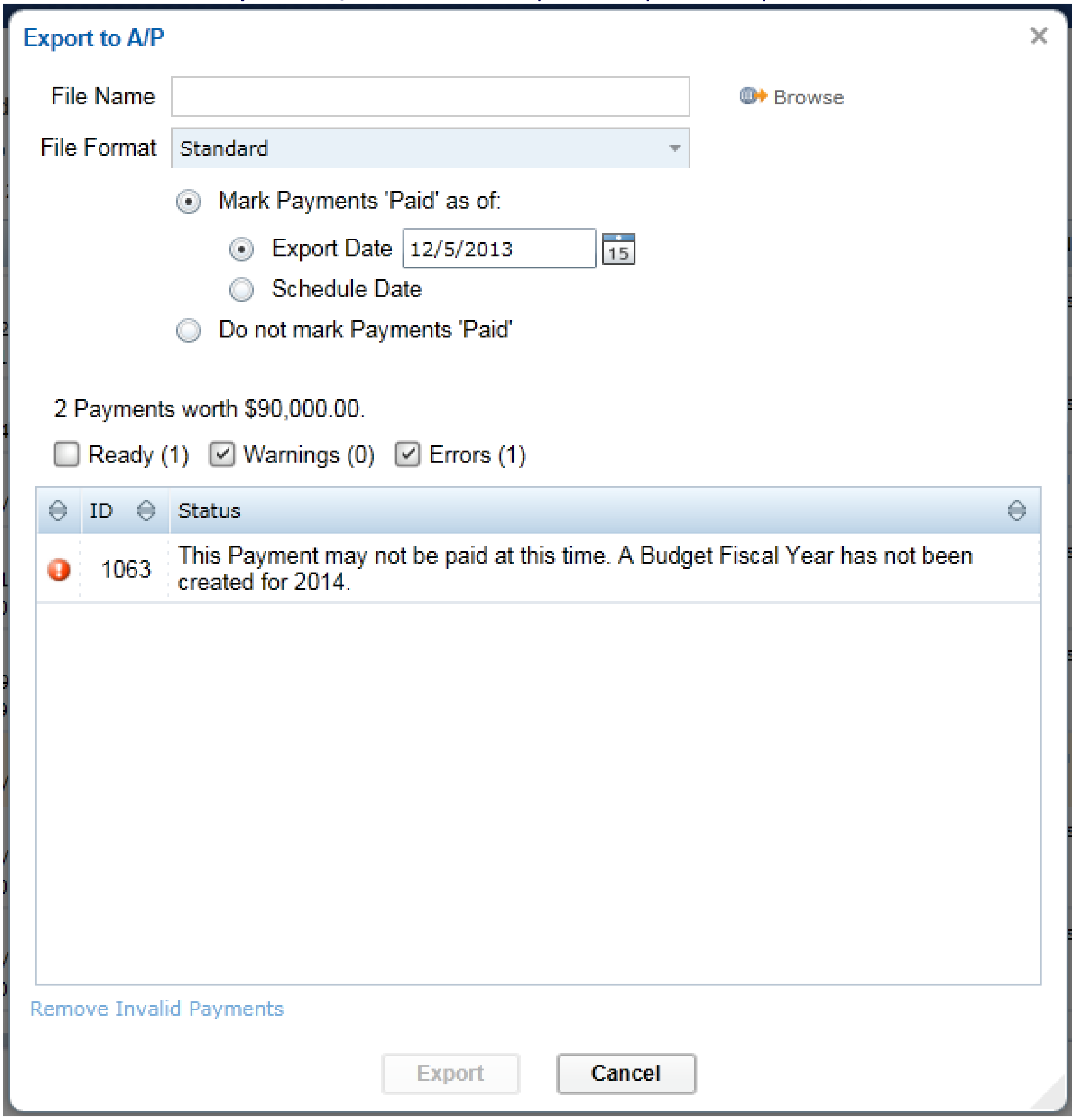
For more information regarding these functions, please refer to the GIFTS Online User's Guide.

Standard Payment Export

Follow the instructions below to use the Standard Layout for Payments export:

1. Log in to the GIFTS Online.
2. Search for the Payments you desire to export using Quick Find, Full Search, or Related lists.
3. Select the Payments that you wish to export.

4. Click the **Actions > Export to A/P** ribbon menu option to open the Export to A/P window.



5. The selected payments will automatically be checked for any issues and a status will be displayed in the lower half of the window. The check boxes **for Ready, Warnings**, and **Errors** can be used to show or hide records with those statuses.
6. If there are any Payments which are invalid, make a note of them and then click the **Remove Invalid Payments** link on the bottom left to remove them.
7. Click the **Browse** button and then enter a **File Name** for your export file. Be sure to select a Save location for the file which will be easy to find later.
8. Click **Save** to return to the Export to A/P window. Notice the filename is now displayed in the File Name field.
9. Select if you want the Payments marked as Paid or not. If you would like them marked as Paid, select if you want it to be on the **Export Date** or the **Scheduled Pay** date. The Export Date can be modified using the date field/icon.
10. Click **Export** to continue.

11. After completing the export, the system will display a list of the processed records and their status.
12. Click **OK** to complete the Export process and return to the GIFTS Online Workspace.

Re-Exporting Payments

You can re-export a batch of previously-exported Payments, allowing you to:

- Reflect changes made to the Payments since the original export
- Use different Payment export options

To do so, simply select the same Payments as a previous export and perform the **Export to A/P** process again.

The system will warn that the Payments were previously exported on XX/XX/20XX date, however, once a **File Name** is entered you will be able to use the **Export** button.

Standard AP Export File Layout

The standard Export file consists of a single-line header section, a detail section that lists each payment separately, and a single-line footer section that summarizes the file contents. Each payment appears on a single line in the detail section. Each line within the file is separated by a CR (carriage return) and LF (line feed). The fields within each line are separated by tabs.

Header

The header section includes the following fields:

Field	Description
Title	The following text: CHECKS EXPORT FILE
Current Date	mm/dd/yyyy.
Current Time	hh:mm:ss format (military time).

Details

For each Payment, the detail section includes the following fields:

Field	Description
Payment_ID	The ID of the exported Payment.
Request ID	The ID of the associated Request.
Project Title	Description of associated Request, taken from the Project Title field.
Fund ID	Fund_Donor_ID from the Payment record.
G/L Account ID	GL_Account_ID from the Payment record.
Schedule Date	Schedule_Date of the Payment in mm/dd/yyyy format.

Payment Amount	Amount of the Payment, including decimal point.
Payment Note	Notes from the Payment.
Payee Organization	The Legal Name of the Organization associated with this Payment.
Payee Contact Name	Name of the Contact associated with this Payment.
Address 1	First line of Organization address.
Address 2	Second line of Organization address.
Address 3	Third line of Organization address.
City	City of Organization.
State	Two-character state code of Organization.
Postal Code	The postal code of Organization (as many as nine characters).
Country	Country of Organization.
G/L Account Code	The code, as defined in the Code Table, of the GL Account ID associated with the Payment.
G/L Account Description	The description, as defined in the Code Table, of the GL Account ID associated with the Payment.
Organization Vendor #	The vendor number of the Organization associated with the Payment.

Footer

The Footer section includes the following fields:

Field	Description
Label	The following text: END OF FILE
Number of Payments	Total number of payments exported.
Total Payment Amount	Sum of all payment amounts exported.

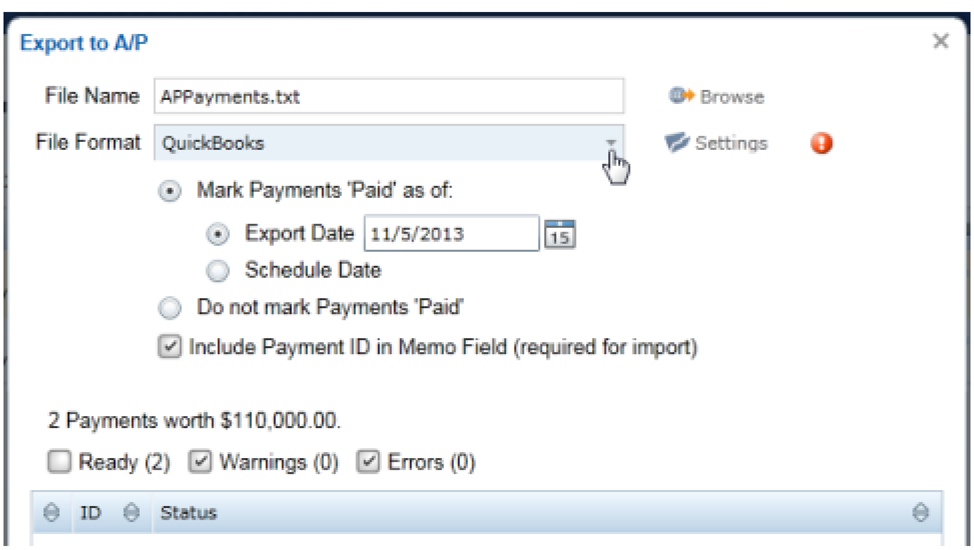
Example Export File

CHECKS EXPORT FILE	02/17/2012	11:47:04																	
32097	20589	Project Title	8465	8464	09/30/2011	1260.00	No notes here	Dauphin River First Nations School	Mr. Ronald Francois	PO Box 140	66 Anama Bay	No Address 3 here	Gypsumville	MB	R0C1J0	Canada	PCCC NATIONAL	72000-96-0220	91564
32096	20588	Project Title	8465	8372	09/30/2011	300.00	No notes here	Grace Lutheran Church	Mr. Bruce Gelhorn	211 Kimberly Ave	No Address 2 here	No Address 3 here	Winnipeg	MB	R2K0X3	Canada	CASH CARDS	72000-96-0210	13870
END OF FILE	2	1560.00																	

QuickBooks Payments Export

Exporting Payment information with the QuickBooks format produces an ASCII file which clients can then import to their accounting software.

Export form with QuickBooks file format:

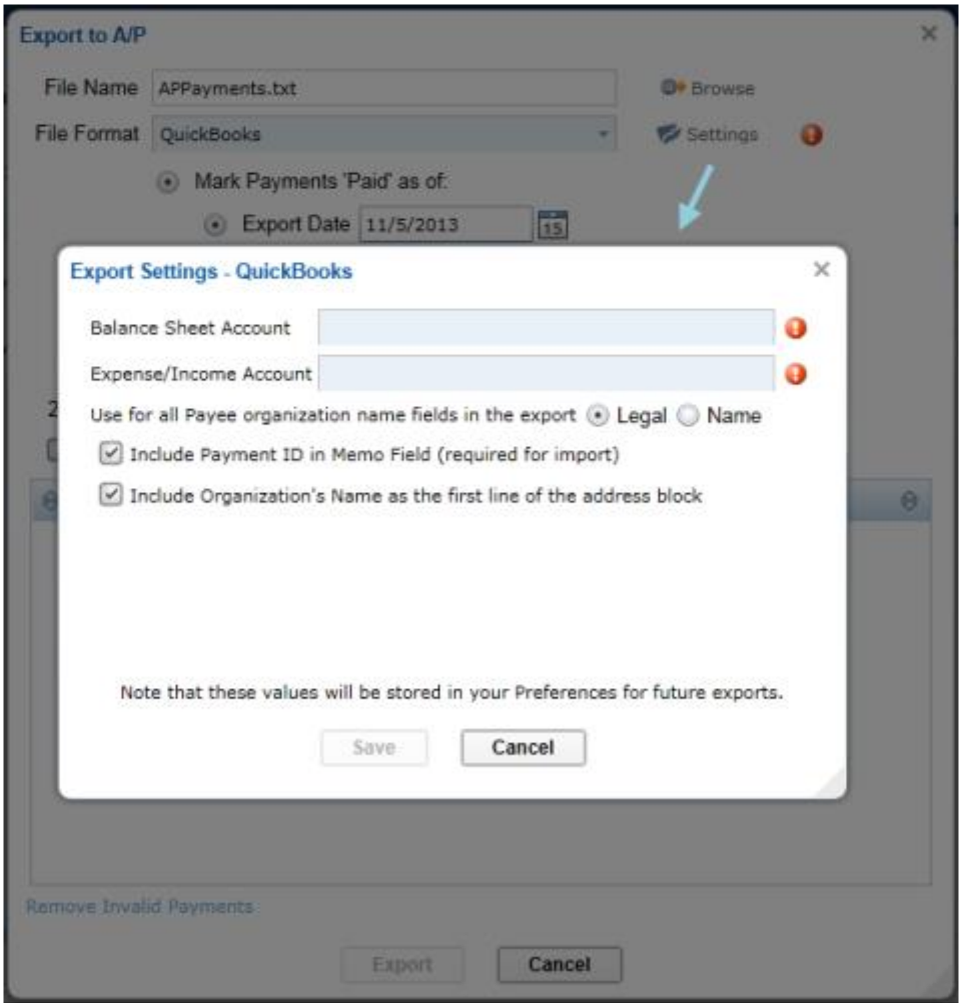


QuickBooks Settings

There are certain settings that will affect the data that is exported in a QuickBooks formatted file. They may be set or changed by the client during the Export in the Settings.

NOTE: The settings button is only visible when the user has selected QuickBooks as the export File Format.

If there are values set for these fields such as the Balance Sheet Acct and the Expense/Income Acct settings, they should show when the user opens the Settings window. When the user updates these settings, the client's AP Module QuickBooks preferences are also updated.



The table below describes the fields available here.

Field	Notes
Balance Sheet Account	Field for users to enter their Balance Sheet Account. This will populate to the Export file.
Expense/Income Account	Field for users to enter their Expense/Income Account. This will populate to the Export file.

Use for all Payee organization name fields in the export	Radio buttons with Legal or Name. If Legal is selected, the organization's legal name will populate to the export file where we populate the organizations' name. If 'Name' is selected, the value in the organization's Name will populate. The default is 'Legal'.
Include Payment ID in Memo Field (required for import)	Check box, defaulted to checked. When checked, the payment ID is passed in the MEMO field of the export file. If this is unchecked, no value will be passed in the MEMO field.
Include Organization's Name as the first line of the address block.	Check box, defaulted to checked. When checked, in the export file the organization's name populates to ADDR1. If unchecked, the ADDR1 begins with the first line of the Organization's address block.
Note that these values will be stored in your Preferences for future exports.	Informational text to let the user know that making changes here will update their preferences and will appear in future exports so they don't have to enter them each time.
Save	Saves user's changes to the database (updates their preferences), closes window and takes them back to the Export dialog.
Cancel	Closes window and takes user back to the Export dialog. If user has made changes, prompt user to save.

QuickBooks A/P Export File Layout

This section details the ASCII file format for exporting Payments data compatible with the QuickBooks import facilities.

The Export file consists of a header section containing three lines, as well as a detail section that lists each payment separately with three lines per payment (a Transaction record, a Distribution record, and an End Transaction record).

Each line in the file is separated by a CR (carriage return) and LF (line feed). The fields within each line are separated by tabs.

Header Rows

The first three lines of the file are a header that includes the names of the fields in the Transaction, Distribution, and End Transaction records. The following is the exact format of these first three lines:

!TRNSTRNSTYPEACCNTAMOUNTDATEMEMOTOPRINTNAMEADDR1ADDR2ADDR3ADDR4ADDR5

!SPLSPLIDTRNSTYPEACCNTAMOUNTDATEMEMO

!ENDTRNS

Transaction Record

The following fields comprise the Transaction record that precedes each Payment or Payment group contained within the ASCII file. Data that appear in quotes ("") are literal values that always reside in the field.

Field Name	Description	Sample Data
!TRNS	"TRNS", indicates that a transaction is beginning.	"TRNS"
TRNSTYPE	"CHECK", indicates the transaction type.	"CHECK"
ACCNT	The Balance Sheet Account entered into the A/P Module preferences.	Checking
AMOUNT	The Payment Amount, prefixed by a minus sign (-). For Payments grouped by Request, this is the total amount of the Payment in the group.	-30000.00
DATE	The Schedule Date of the Payment, in mm/dd/yy format. For Payment groups, this is taken from the earliest scheduled Payment in the group.	10/15/00
MEMO	The values in this field populate based on the 'Include Payment ID in Memo Field (required for import)' setting on the export dialog. If it is checked (true) - This field is populated with "(*GFW=[Payment ID])". [The Project Title of the Request with which the Payment or Payments are associated.] If it is unchecked, the values in this field will be the Project Title of the Request.	(*GFW=345)General Operating Support
TOPRINT	Y	"Y"
NAME	In the QuickBooks Preference/Settings, if the user has the 'Use for all Payee organization name fields in the export' radio button as 'Legal', this field populates with the Legal name of the payee Organization. In the QuickBooks Preference/Settings, if the user has the 'Use for all Payee organization name fields in the export' radio button as 'Name', this field populates with the Organization Name of the payee Organization. If the Name is longer than 40 characters, it is truncated.	Jeter College of Dentistry

	Changes are noted in the process log.	
ADDR1	In the QuickBooks Preference/Settings, if the user has the 'Include Organization's Name as the first line of the address block' set to checked/true, populate this with the Organization's Name (legal or name, depending on the name setting/preference). If this is set to unchecked/false, populate this with the first line of the organization's address block.	Jeter College of Dentistry
ADDR2	The first line of the Organization's address block unless the preceding field ADDR1 used that value, then populate this with the second line of the Organization's address block.	133 South Form Rd.
ADDR3	The second line of the Organization's address block unless the preceding field ADDR2 used that value, then populate this with the third line of the Organization's address block.	Hillsborough Hall
ADDR4	The third line of the Organization's address block unless the preceding field ADDR3 used that value, then populate this with the fourth line of the Organization's address block.	Raleigh, NC 27607
ADDR5	The fourth line of the Organization's address block unless the preceding field ADDR4 used that value, then populate this with the third line of the Organization's address block. If the address block is longer than four lines, GO ensures that the line containing the city, state, and Postal code are inserted here.	

Address Fields

As many as 3 lines are taken from the "Address" field of the Primary Address associated with the Organization. The last line of the address must always be in the format:

[City], [State_Province_Code] [Zip_Postal_Code]

Distribution Record

The following fields comprise the Distribution record for each Payment or Payment group contained within the ASCII file. Data that appear in quotes ("") are literal values that always reside in the field.

Field Name	Description	Sample Data
!SPL	"SPL", indicates the distribution record is beginning.	"SPL"
SPLID		1
TRNSTYPE	Indicates the transaction type.	"CHECK"
ACCNT	The Expense/Income Account entered into the A/P Module preferences.	Contributions
AMOUNT	The Payment Amount. For Payments grouped by Request, this is the total amount of the Payments in the group. (The amount is not prefixed by a minus sign.)	30000.00
DATE	The Schedule Date of the Payment, in mm/dd/yy format. For Payment groups, this is taken from the earliest scheduled Payment in the group.	10/15/00
MEMO	The values in this field populate based on the 'Include Payment ID in Memo Field (required for import)' setting on the export dialog. If it is checked (true) - This field is populated with "(*GFW=[Payment ID])". [The Project Title of the Request with which the Payment or Payments are associated.] If it is unchecked, the values in this field will be the Project Title of the Request.	(*GFW=345)General Operating Support

End Transaction Record

The following field comprises the End Transaction record for each Payment or Payment group contained within the ASCII file. Data that appear in quotes ("") are literal values that always reside in the field.

Field Name	Description	Sample Data
!ENDTRNS	"ENDTRNS", indicates that the transaction is ending.	"ENDTRNS"

Example Export File

!TRNSTRNSTYPEACCNTAMOUNTDATEMEMOTOPRINTNAMEADDR1ADDR2ADDR3ADDR4ADDR5

!SPLSPLIDTRNSTYPEACCNTAMOUNTDATEMEMO

!ENDTRNS

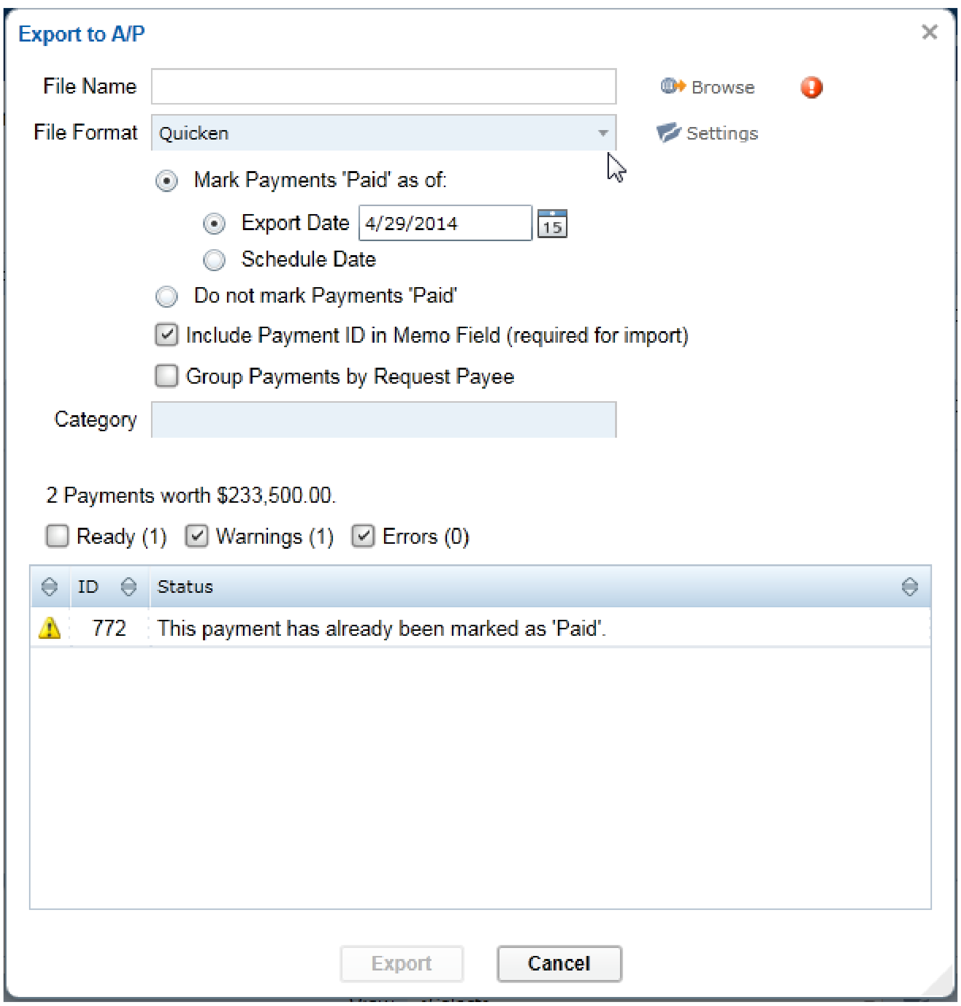
TRNSCHECKChecking-30000.0010/15/00(*GFW=[Payment ID])General Operating SupportYJeter College of DentistryJeter college of Dentistry133 South Form Rd.Hillsborough HallRaleigh, NC 27607

SPL1CHECKContributions10/15/00(*GFW=[Payment ID])General Operating Support

Quicken Payment Format

Support for the Quicken file format was added to GIFTS Online in version 5.1 and is available in the File Format drop-down menu of the Export to A/P form.

Export to A/P form with Quicken file format selected:

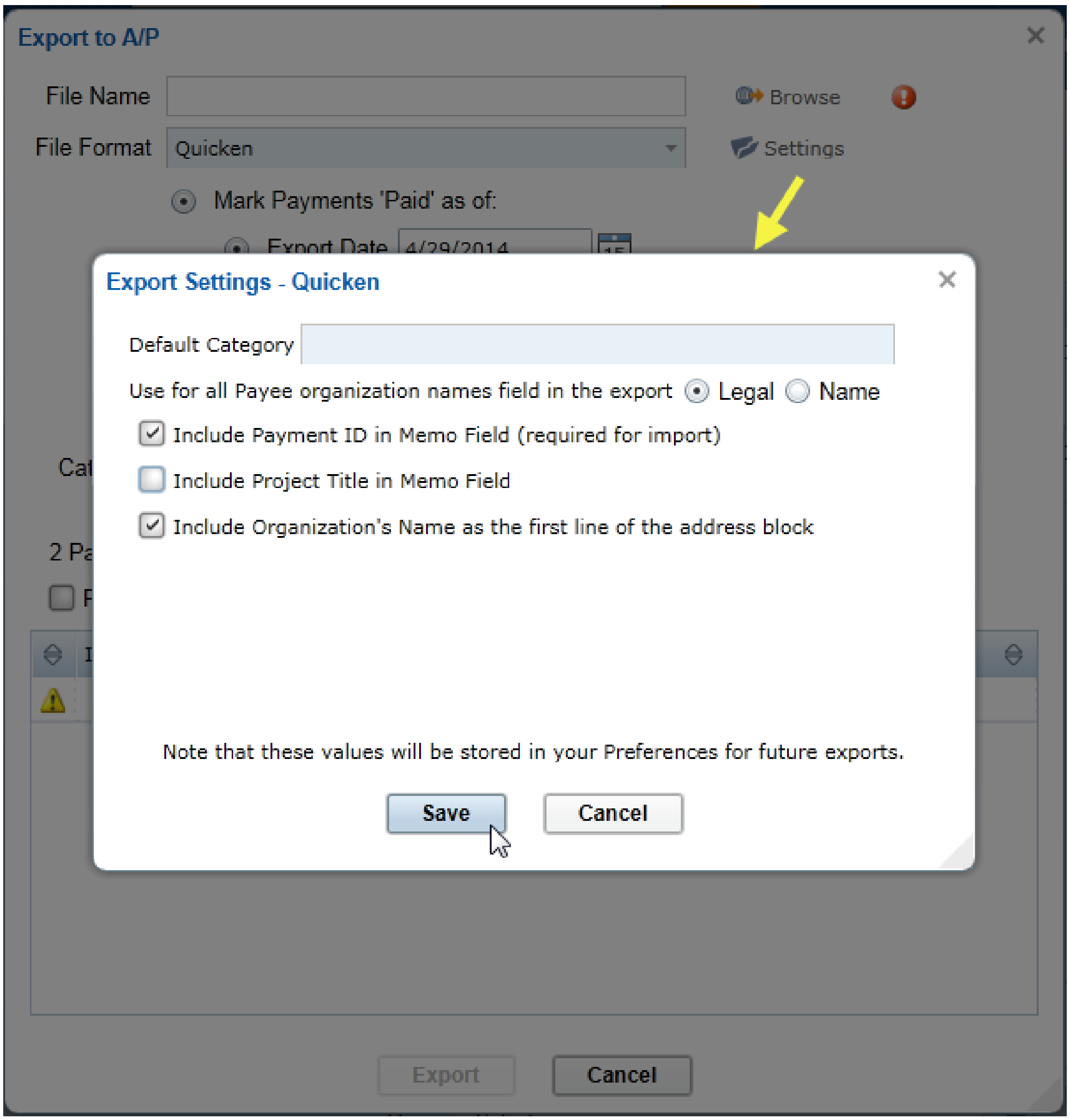


Quicken Format Settings

There are certain settings that will affect the data that is exported in a Quicken formatted file. They may be set or changed during the Export by clicking **Settings**.

NOTE: The **Settings** button is only visible when the user has selected Quicken as the export File Format.

If there are values set for these fields such as the **Balance Sheet Acct** and the **Expense/Income Acct** settings, they should show when the user opens the Settings window. When the user updates these settings, the client's AP Module Quicken preferences are also updated.

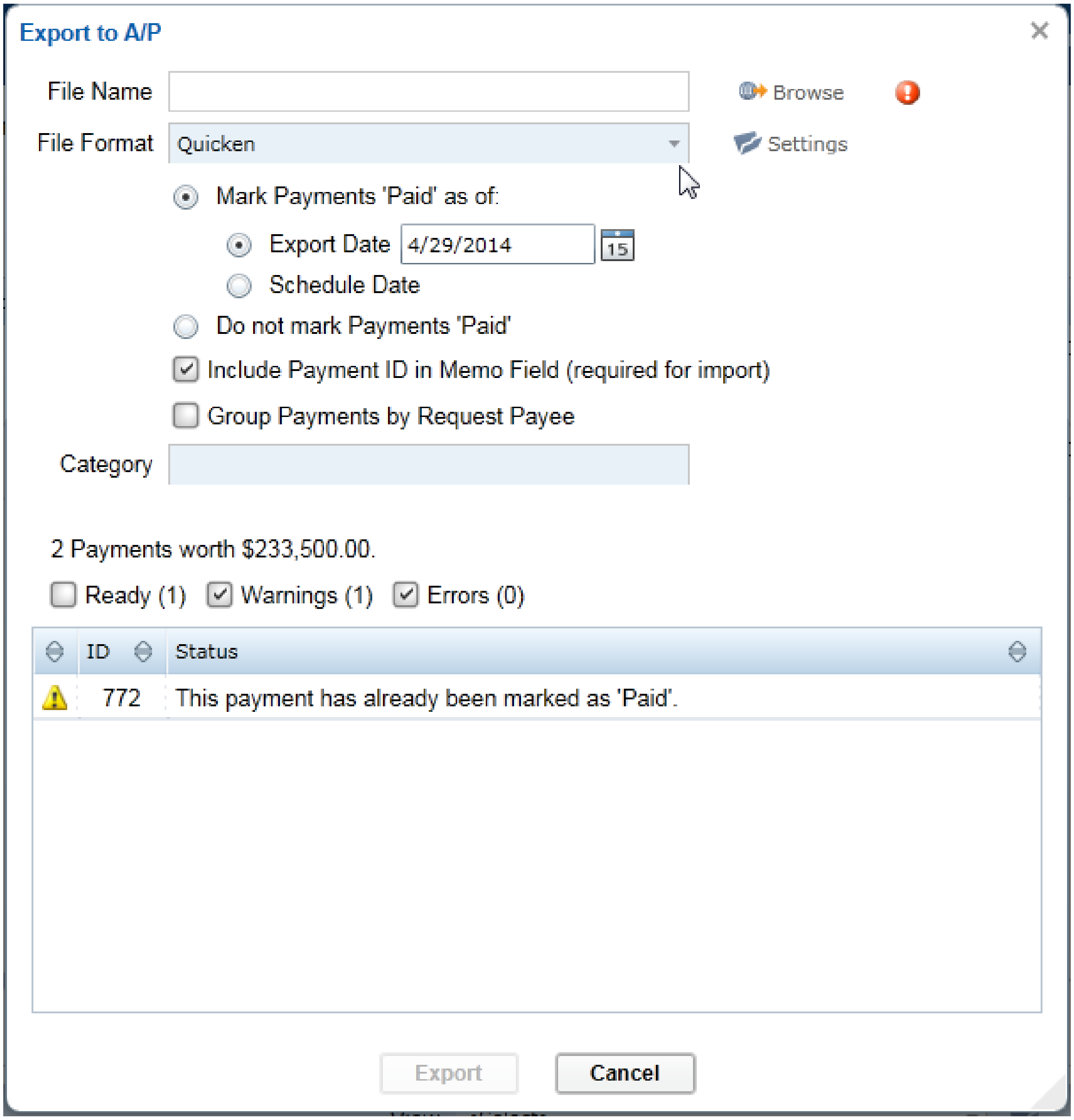


The table below describes the fields available here.

Field	Description
Default Category	Determines the value that will populate to the 'Category' field in the Export form. Users can override there. Defaults to blank
Use for all Payee organization name fields in the export	• Legal – When this is selected, the Organization's Legal Name (database field is Legal_name in the Organizations table) will populate to the sections of the Export file that populate with the Organization's name value (sections with the prefixes of P and A if the client opts to include the Organization's name in the address field in their Settings). • Name – When this is selected the Organization's Name (database field is name in the Organizations table) will populate to the sections of the Export file that populate with the Organization's name value (sections with the prefixes of P and A if the client opts to include the Organization's name in the address field in their Settings). This is the default selected option.
Include Payment ID in Memo Field (required for import)	This selection determines the default client setting for the field in the Export form when the user has selected Quicken as their export format. Users can override this default setting in the Export form. It is selected by default.
Include Project Title in Memo field	This determines whether the Project Title will be included in the Memo field of the Quicken export file. It is deselected by default.
Include Organization's Name as the first line of the address block	This selection determines whether the first line of section A of the export will contain the Organization's name. This is deselected by default.

Quicken Export Options

When the Quicken file format is selected on the Export to A/P form, then following options become available:



Payment Date Options

Mark Payments 'Paid' as of: Select if you want to have the payments successfully exported marked as 'Paid' in GIFTS Online. The date options to allow you to set the date to use as the Paid Date when the payment is marked as Paid in GIFTS Online.

- **Export Date:** Default selected and is followed by a date formatted field with the current date populated. Users can edit the Date.
- **Schedule Date:** When selected, the payment's Scheduled Date from its record will be used as the Paid Date.

- Both Export and Schedule Date radio buttons are disabled if **Mark Payments 'Paid' as of** is not selected.

Other Options

Do not mark Payments 'Paid': When selected, the Payments included in the export will not be marked as 'Paid' in GIFTS Online.

Include Payment ID in Memo Field (required for import)

When selected, the Payment ID is populated to the M field in the export file. This is required if you intend to import back into GIFTS Online from Quicken as this ID will indicate which GIFTS Online record to update.

Group Payments by Request Payee

This new optional field is specific for Quicken exports.

NOTE: The default setting is determined by the client's preferences set up in the Admin.exe.

When selected, the export record will group first by grants, then by payees and then by payment address any grants for which more than one Payment has been included in the export so that the payments are combined into a single check in Quicken.

So if a request has four payments included in the export and the user elects to group them, if they have a common payee and address, they are grouped into one record in the export but if any have different payees or addresses they will be grouped separately in the payment file so there will be separate records for each of the request's payees with distinct payment addresses. If this option is not selected, individual checks are generated for each specific Payment, even if those Payments are attached to the same grant.

Quicken Category

This new optional field is specific for Quicken exports.

The default value comes from what is defined in the Quicken settings.

The value here should be the Quicken Category to which the payments should be assigned in Quicken. Users should be sure to type the Category name exactly as it appears in Quicken. If users are exporting a batch of payments, all payments will be assigned to the category entered here. Payments to be assigned to different categories should be processed in separate batches.

Export Information Section

The section at the bottom of the page gives information about the export.

A summary of the value of the export will show reading "[# of Payment files being exported] Payments worth $[Total value of all Payments being exported]."

Check boxes showing how many payment records are Ready for Export, Have Warnings (warnings will appear in the payment export process monitor at the bottom of the page), and have Errors (Errors will appear in the payment export process monitor at the bottom of the page.

Export button

It is disabled when there is no value in the File Name field.

Clicking it initiates the Export process which includes:

- Checking for errors
- If no errors the export file is created and the payment record is updated.

Cancel button

Clicking it closes the Export Form and cancels any export action.

Quicken AP Export Layout

This section details the ASCII file that is created by GIFTS Online when payments are exported. Quicken uses the .QIF file extension to recognize the ASCII file as a Quicken data file.

- The .QIF file begins with the following single line header: !Type:Bank
- Each transaction consists of the following – each row contains a Prefix and Data (no space separation). If the data is static, it is contained in quotation marks.
- Transactions in the file end with the character ^ in the last row.

Prefix	Data
D	If the user is not grouping payments, and the user has chosen to mark the payments as 'Paid' based on a specified Export Date, this date appears here; otherwise, the current date is used (mm/dd/yyyy format).
T	The Payment Amount or sum of all the Payment Amounts in the group, if grouping by organization. The amount is formatted to two decimal places and preceded by a hyphen.
N	Print
P	The first 40 characters of the Organization Name. If the Organization name is greater than 40 characters, the name should be truncated (in the same manner that is done in the Standard and QuickBooks export for this field).
M	This field will include the Project Title if the client's preference is set to include that in the Memo field and the Payment ID if they have chosen to include on the Export form. The Project Title, if present, directly follows the M and is followed by the Payment ID in parentheses (if included). Neither value is required. If the user has not chosen to include the Payment ID or the Project Title in the Memo field, there will be no value following the M. If the user has chosen to group payments by Requests and to include the Payment ID in the Memo field, this field contains the Transaction_ID from the grouped payment records that was added upon export followed by a comma and the first Payment ID included in this group. Note that this is true even if they only have one payment selected for the group.
A	Payment Address. The address consists of as many as five lines, each preceded by the indicated prefix. If the user has chosen to include the Organization name as the first line of the address is the Organization name, populate the first line or Legal Name depending on the Client's preference setting. This allows as many as three lines for the street address, while the last line should consist of the City, State, and

Prefix	Data
	Postal Code. Note that even for grouped payments in the export record, the address populates with the payment address from the first payment address (payment with the lowest ID).
L	The entry from the Category text box from the export form.

Sample .QIF Export file:

```
!Type:Bank
D01/16/2014
T-87500.00
NPrint
PRyan School of Medicine
M203
ARyan School of Medicine
A142 Pennington Ave.
AOlin Hall
ALos Angeles, CA 34253
LGrants
^
D01/16/2014
T-87500.00
NPrint
PRyan School of Medicine
M204
ARyan School of Medicine
A142 Pennington Ave.
AOlin Hall
ALos Angeles, CA 34253
LGrants
^
```

Importing Payment Data

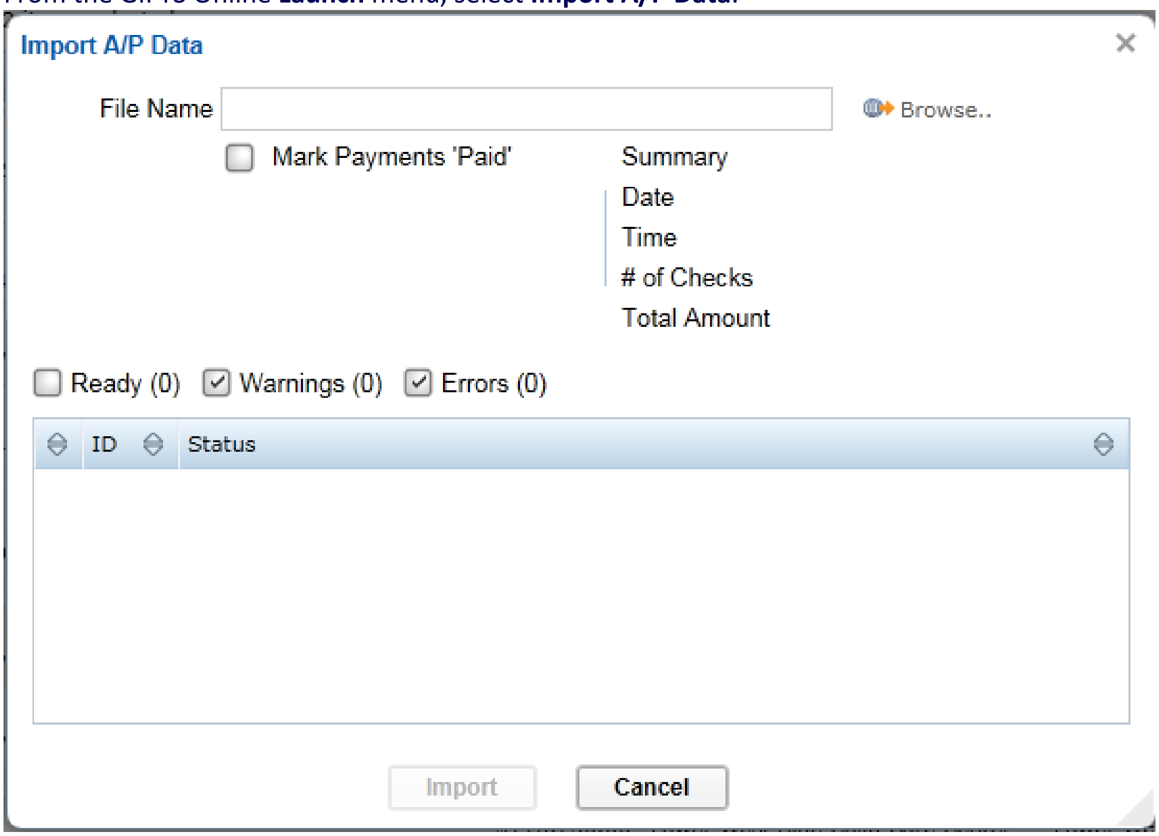
After a check has been cut, you can use the Payment Import feature to import check number and check date information from your accounting system into GIFTS Online. The Payment Import updates existing Payment records with the imported check number and check date information; it does not create Payment records.

In order to use this feature, your accounting system must be able to generate a standard GIFTS Online ASCII file; this format is defined in "Standard Payment Import File Layout".

CAUTION: Before performing any import, make sure that you have a backup of your GIFTS Online database. In case of problems, it may become necessary to restore the backup in order to continue working.

To import payment information from an ASCII file:

1. From the GIFTS Online **Launch** menu, select **Import A/P Data**.



2. Click the **Browse** button and select the file you wish to import.
3. Click **Open** to return to the Import A/P Data window. The system will automatically check the data in the import file to make sure the payment ID, Dates and Amounts match existing Payment records.
4. Once all warnings and errors are cleared, click the Import button to continue.
5. The Import A/P Data window will display a Payment successfully imported message for each record.
6. Click **OK** to complete the process.

The following will be updated depending on the import file type:

Standard A/P Import File:

- The date, time will be taken from the header lines of the import file and displayed.
- The # of checks and total amount will be taken from the footer line of the import file and displayed.

QuickBooks A/P Import File:

- The date range will be taken from the second header line of the import file and displayed.
- Time will be hidden and its label suppressed.
- The # of checks will be calculated by counting the number of transactions in the import file and displayed.
- Total amount will be calculated from the detail section of the import file by adding up the AMOUNT fields and displaying the sum as a positive number.

Standard A/P Import File Layout

The standard Import file consists of the following sections in a text file.

Header

The header section includes the following fields:

Field	Description
Title	The following text: CHECKS IMPORT FILE
Current Date	mm/dd/yyyy.
Current Time	hh:mm:ss format (military time).

Details

For each Payment, the details section includes the following fields:

Field	Description
Payment_ID	The ID of the payment that was exported from the GIFTS Online system.
Payment Amount	Amount, including decimal point.
Check #	The check number.
Payment Date	mm/dd/yyyy format.
Organization Vendor #	If the Organization associated with a Payment does not have a Vendor Number in GIFTS Online, this optional field is used to update the Organization's Vendor Number with the number assigned by your accounting department.

Footer

The footer section includes the following fields:

Field	Description
Label	The following text: END OF FILE
Number of Payments	Total number of payments included in the file.
Total Payment Amount	The sum total of the amount of the payments included in the file.

Example Import File

CHECKS IMPORT FILE	02/21/2012	11:47:04		
32097	1260.00	0015587	02/19/2012	91564
32096	300.00	0015588	02/19/2012	13870
END OF FILE	2	1560.00		

QuickBooks A/P Import File Layout

This section details the ASCII file generated by the "GIFTS Export" report that users create in QuickBooks.

The Import file consists of a two-line header section, a detail section that lists each payment on a separate line, followed by a single-line footer section. Each line in the file is separated by a CR (carriage return) and LF (line feed). The fields within each line are separated by tabs.

Header Rows

The first line of the file is a header that consists of an empty field followed by fields containing the name of each field in the transaction records. The following is the exact format of this first line:

TYPEDATENUMNAMEMEMOACCOUNTCLRSPLITAMOUNT

The second line consists of the date range selected in the QuickBooks report, followed by ten blank fields. The date range in the header is not required. The format for the date range is mm/dd/yyyy-mm/dd/yyyy. The following is an example of the second line:

01/01/2012-12/31/2012

Detail Rows

For each Payment, the detail section includes the following fields:

Field Name	Description	Sample Data
[left	Blank.	

margin]		
TYPE	NOTE: This field is not used during import. Indicates the transaction type.	CHECK
DATE	Check date, in mm/dd/yyyy format. If the Payment is marked as Paid during the import, this is imported to GIFTS Online as the Payment Date.	10/13/2012
NUM	The Check Number, which is imported into the appropriate Payment record or records.	0006454
NAME	NOTE: This field is not used during import. The legal name of the payee Organization. If the name in GIFTS Online was longer than 40 characters, it was truncated when it was exported to Quick Books.	Jeter College of Dentistry
MEMO	NOTE: This field is only used to get the Payment ID, otherwise it is not imported. The values in this field populate based on the 'Include Payment ID in Memo Field (required for import)' setting that was set on the export dialog. If set to checked (true) - This field is preceded by "(*GFW=[Payment ID])". The Project Title of the Request with which the Payment or Payments are associated. If set to unchecked (false) this value will be blank and the records will error out.	(*GFW=345)General Operating Support
ACCOUNT	NOTE: This field is not used during import. The QuickBooks Account Number entered into the A/P Module preferences.	1234-567-8
CLR	NOTE: This field is not used during import. Can indicate whether the check has cleared.	
SPLIT	NOTE: This field is not used during import. Identical to the ACCOUNT	1234-567-8
AMOUNT	The Payment Amount, prefixed by a minus sign (-). For Payments grouped by Request, this is the total amount of the Payments in the group.	-30000.00

Footer Row

The last line is identical to the second line of the header. As with the date range in the header row, the date range is not required in the footer row but if there is a date range in the header, there must be one here as well because the two rows need to match exactly.

Example Import File

TYPEDATENUMNAMEMEMOACCOUNTCLRSPLITAMOUNT

01/01/2012-12/31/2012

CHECK10/13/20120006454Jeter College of Dentistry(*GFW=345)General Operating Support1234-567-8-30000.00

CHECK11/10/20120006487Jeter College of Dentistry(*GFW=345)General Operating Support1234-567-8-30000.00

01/01/2012-12/31/2012

Verifying a Quickbooks Import File

When a file is selected, GIFTS Online must detect the import file type and confirm all lines in the file match the appropriate layout and that the data is correct and can be used to update the appropriate field in Payment records.

If any errors are found, a process log opens detailing each line in error.

GIFTS Online reads the first line of the import file to decide on the file format. If the first line exactly matches the QuickBooks header first line format, then import process proceeds to parse it as a QuickBooks A/P import file layout.

The QB header is specified in QuickBooks Header Row section of this document.

The exact text to match is below:

TYPEDATENUMNAMEMEMOACCOUNTCLRSPLITAMOUNT

If the first line does not exactly match the text above, the import process assumes a standard A/P import file format.

Quicken AP Import File Layout

The following section describes the Quicken Import process.

Import Form

GIFTS Online will recognize that the file is from Quicken when it parses the file and will attempt to import the file and will expect it to be in the format as outlined in section below.

Once you attempt to import, a process log in the Import Form displays the progress of the import, listing the status of each payment and explaining why any individual payments were not imported.

When the import is complete, the Check Number field of each Payment record will have been updated with the Check Number from the Quicken transaction record.

If you chose to mark the payments as 'Paid', GIFTS Online will have also changed the Status of each payment to 'Paid' and updated the Payment Date with the date of the Quicken transaction.

Quicken QIF Import File

This section details the format expected for a .QIF file from Quicken to be imported into GIFTS Online.

- The first line of the file is: !Type:Bank
- The file consists of one or more Quicken transactions and each transaction consists of multiple data elements. Each data element appears on a separate line, preceded by a single character that indicates the nature of the data.
- Each transaction with in a file ends with the "^" character on a separate line.
- Each transaction must consist of at least one of the following data elements:

Prefix	Data
D	Payment Date. The date of the transaction, in mm/dd/yy format for years prior to 2000, and in mm/dd'yy format for year 2000 or later.
T	Payment Amount. The amount of the transaction, preceded by a hyphen.
N	Check Number (the check number of the transaction). The value here should update in the Payment record (payments.check_number). If payments were grouped all payments in the group should update with this number.
M	The Payment ID which matches up to the Payment ID when exported from GIFTS Online. Used to match this transaction to the GIFTS Online Payment or Payments that were originally used to create the transaction. The system should check this field for a value in parentheses with a comma (like "(84,21)" as this will indicate that this was a group of payments rather than an individual payment. If there were grouped payments, the Transaction_ID will be the first number in parentheses in this field (following the title if that was included). The system should find all payments with this ID in the Transaction_ID field of their payment records in order to determine which records are updated upon import.

If any transaction has less than the above data, or if the transaction's Payment Amount is not preceded by a hyphen, the transaction is ignored by the GIFTS Online import. Note that the .QIF file may include additional data for each transaction that is not used by GIFTS Online. The extraneous data is ignored and does not affect the import.

Sample .QIF Import File

NOTE: There is extra information in this file that would be ignored during the import. Rows preceded by U, P, and L will be ignored.

!Type:Bank

D1/16'14

U-87,500.00

T-87,500.00

N1003

PRyan School of Medicine

M203

LCategory

^

D1/16'14

U-82,000.00

T-82,000.00

N1004

PRyan School of Medicine

M204

LCategory

^

Check Writer

The Check Writer option in the Accounts Payable Module allows you to print Payment data in the right places on your own check stock.

The Check Writer feature will update Payment records with their new Paid status and a check number reference.

Since checks must ID the bank account from which the funds will be drawn, the system also includes bank account records, each with a check register listing checks printed.

Check Writer customers will therefore have access to the following:

Bank Accounts

The system will allow you to add multiple bank accounts, capturing basic information like name, account number, bank routing number, and so on.

GIFTS Online will maintain a check register for each Bank Account that details the checks that have been issued from the account. The register also indicates which checks have been voided, providing a complete record of the activity on the account.

NOTE: This function is for historical tracking only and in no way interacts directly with your financial institutions.

Check Templates

Through the use of Check Templates in the Document Template Manager, you will be able to arrange Payment merge fields on a page and then configure settings like margins, fonts, and font size so your checks will turn out perfectly.

To make sure all elements are nicely aligned, an option to test print is available.

Roles and Preferences

Access to Bank Accounts and the ability to print checks will be restricted in GIFTS Online to those in the Grants Manager role, as they are responsible for processing Payments.

Enabling the Check Writer Feature

To enable the Check Writer feature, you must email a request to MicroEdge at **services@microedge.com**.

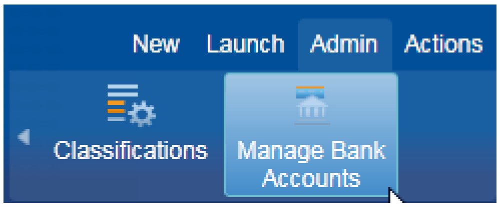
Current Accounts Payable (A/P) module clients will have the option of choosing between using the A/P Link or Check Writer option.

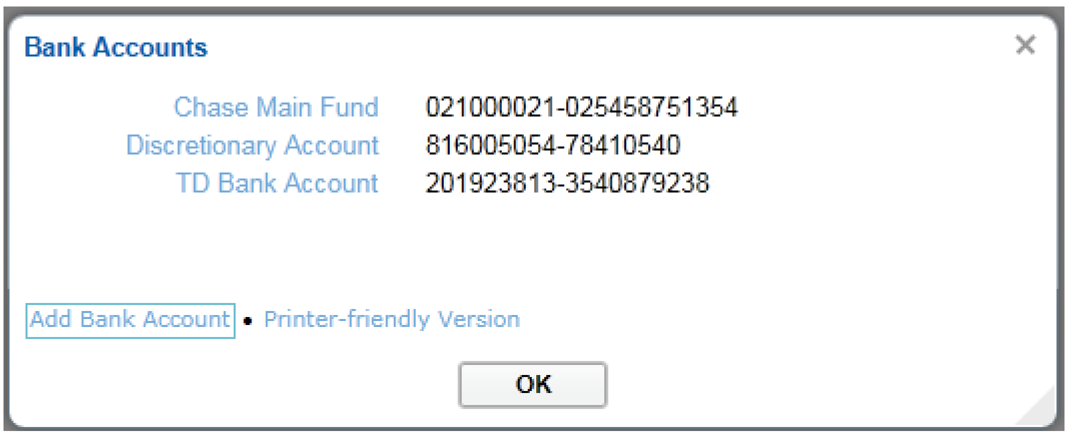
As part of implementation, MicroEdge will set up the A/P module for new clients to use either Check Writer or the A/P link.

Bank Accounts

To print checks, you will need to create the bank account(s) from which your checks will be drawn. GIFTS Online will maintain a sort of "check register" for each account, which will detail the checks that have been issued from the account. The register also indicates which checks are void, providing a complete record of the activity on the account.

You will be able to access Bank Accounts using a new Manage Bank Accounts option on the Admin menu.





This window provides access into all the functions of Bank Account maintenance:

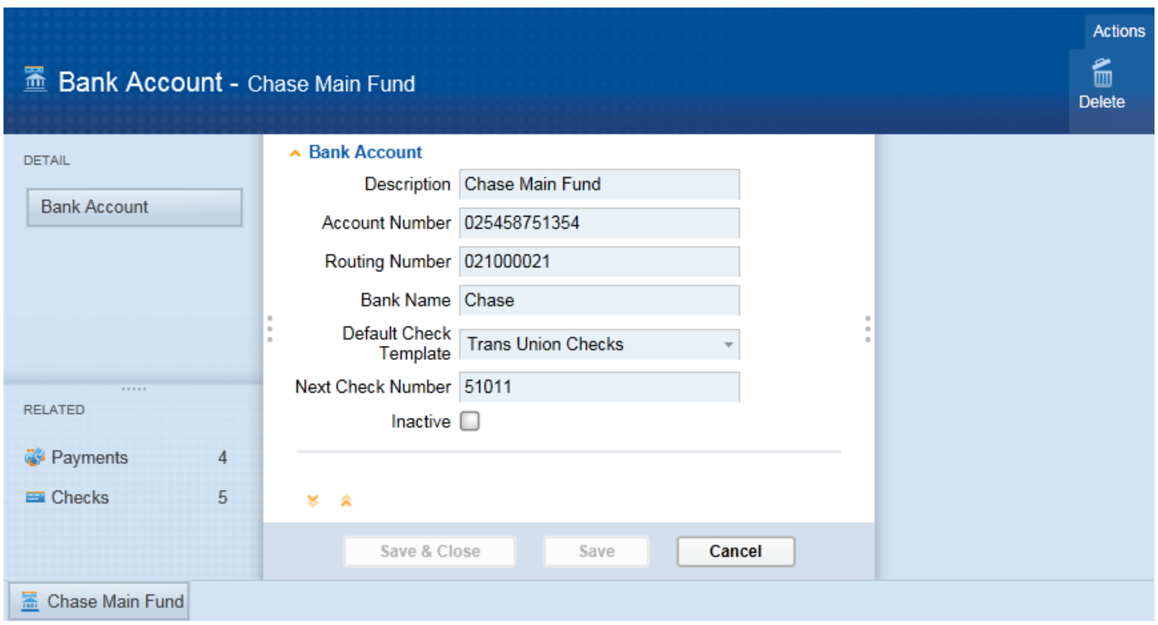
- Bank Accounts are listed in alphabetical order by Description.
- Clicking the Description (left column, in blue) navigates to the Bank Account Edit Form where you can edit the Bank Account details and view the check register.
- The right column shows the account number for the Bank Account.
- The Add Bank Account link opens a new Bank Account Edit Form.
- Clicking the Printer-friendly Version link displays the bank accounts list in new browser window which can be easily printed.

The Bank Account Edit Form

The Bank Account Edit form will look similar to the form below and allow you to enter/modify the following settings:

Setting	Description
Related List	Located on the left panel, this area will list all Payments or Checks for the currently displayed bank account.
Description	A short name for the bank account. (50 chars max)

Account Number	The account number printed on the check stock. (50 chars max)
Routing Number	The bank routing number printed on the check stock. (50 chars max)
Bank Name	The name of the bank. (50 chars max)
Default Check Template	The check template to use for this bank account.
Next Check Number	The next check number to start with.
Inactive Checkbox	Check this box to make the bank account inactive.
Save & Close	Save your changes and close the edit form.
Save	Save your changes.
Cancel	Close the edit form without saving changes.

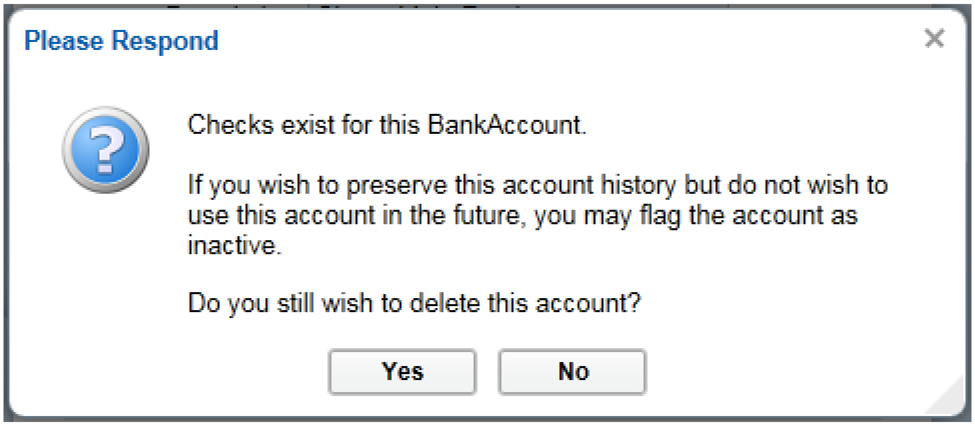


Deleting Bank Accounts

NOTE: If you are creating a new bank account, this option will not be available.

To delete an existing bank account:

1. Open the bank account's edit form.
2. Click the **Delete** menu option.
3. A prompt will ask you to confirm the deletion. Click **Yes** to continue.
4. If transactions have been process for this bank account, another prompt will be displayed.
5. Click **Yes** again to confirm the deletion or **No** to cancel out of the process.



Related Lists on Bank Account Edit Forms

The following Related records will be available on the Bank Account Edit Form:

- Payments – will display the standard Related Payments grid
- Checks – click to display the check register list with the following columns:
    - Date
    - Status
    - Amount
    - Check #
    - Payment ID
    - Organization/Contact

Printing the Check Register

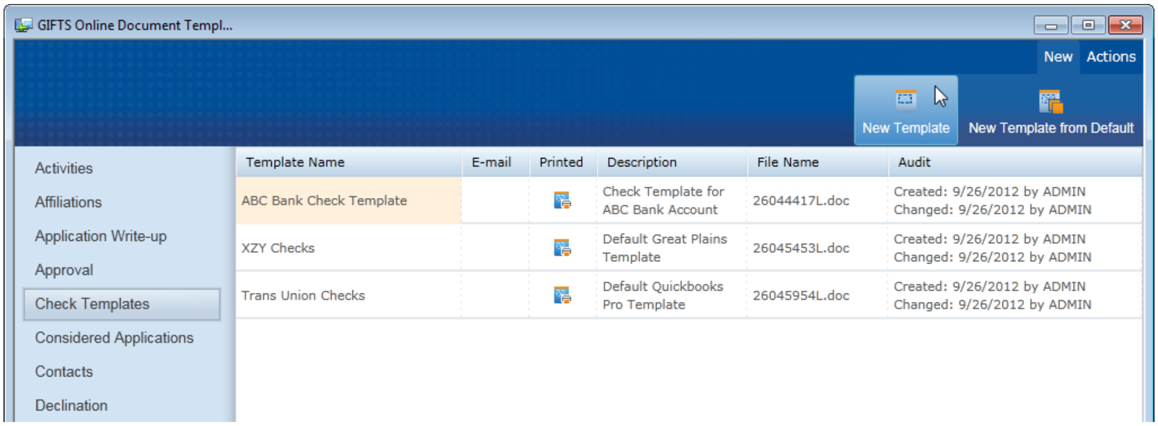
When viewing the Related Checks list, you can generate a view for printing by clicking the Printer-friendly Version button in the Actions menu. This will open a new browser window from where you can easily print the list.

Check Register for Account [025458751354] at Chase
10/10/2012

Date	Status	Amount	Check #	Payment ID	Organization/Contact
10/10/2012	Void	$1,000.00	51007	949	Deadspin Org Rivers
10/10/2012	Produced	$1,000.00	51008	949	Deadspin Org Rivers
10/10/2012	Produced	$20,000.00	51009	956	JP Chase Community Center Mr. JP Sanguancheu
10/10/2012	Produced	$5,000.00	51010	955	JP Chase Community Center Mr. JP Sanguancheu
10/10/2012	Produced	$15,000.00	51006	762	Ryan School of Medicine Mr. Jack K. Ryan

Check Templates

A new correspondence category called Check Templates will available in the Document Template Manager. Multiple check templates can be created in the Document Template Manager.

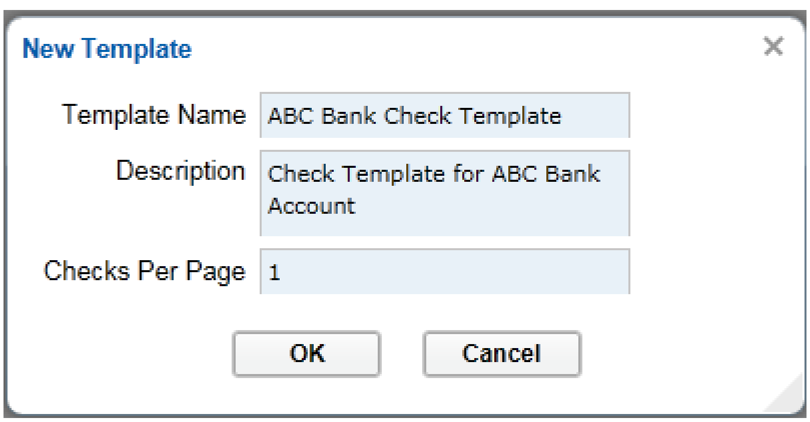


Creating a New Check Template

To create a new check template:

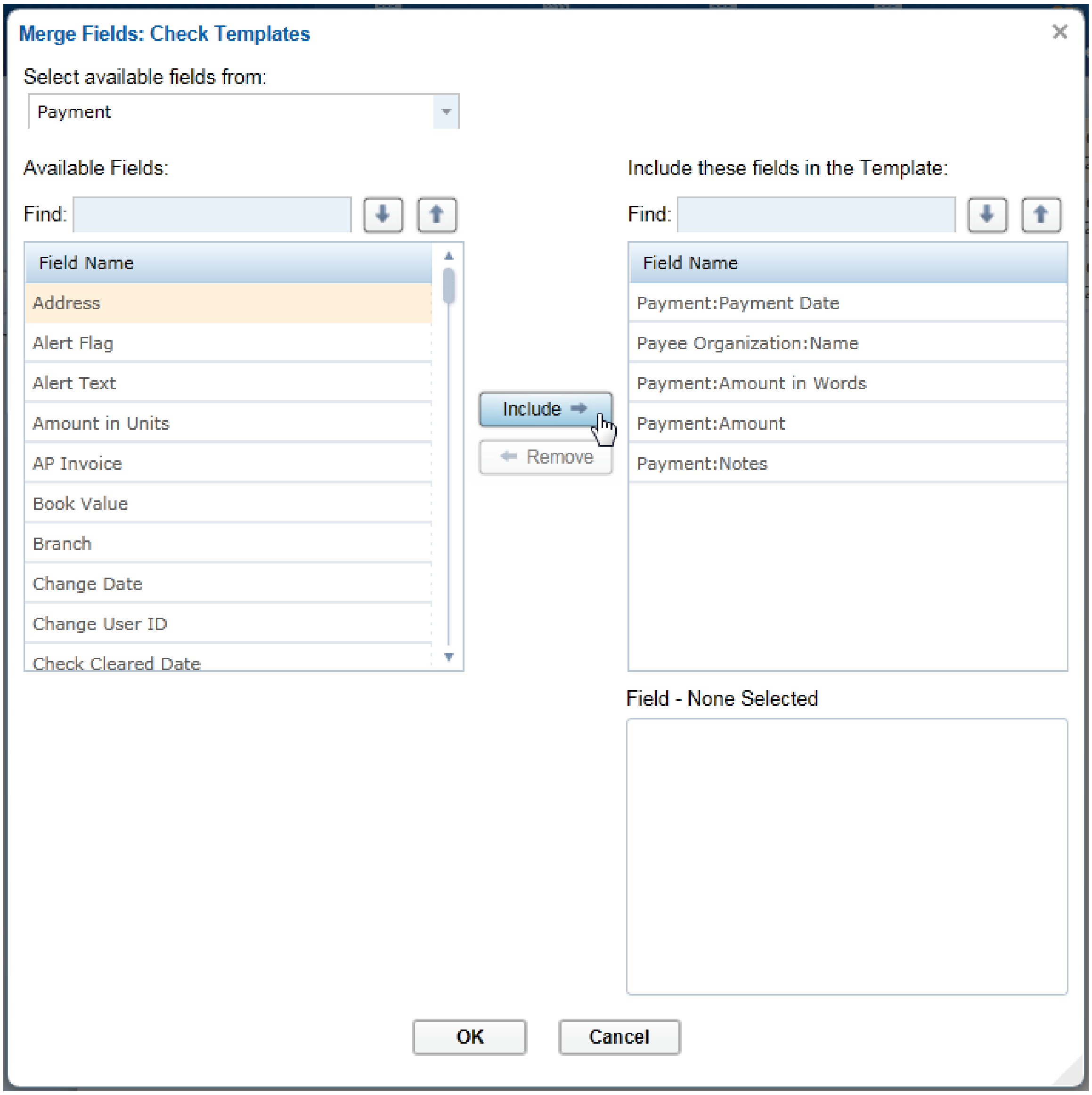
1. Select the **Check Templates** category on the left pane.
2. Use the **New > New Template** menu option.

NOTE: You may also use the New Template from Default option if you would like to start from a Great Plains or Quickbooks Pro default template.



3. Enter a **Template Name, Description**, and verify the number of **Checks Per Page**.
4. Click **OK** to move on to the **Merge Fields: Check Templates** form.

NOTE: If you chose a default template, the Merge Fields selection form will be skipped. Jump to step 8.



5. Select a category from the drop-down menu in the upper left corner and then locate the fields you wish to have available as merge fields on the template.
6. Select a field and click **Include** to move it to the list on the right.
7. Repeat steps 4 and 5 as necessary.

The categories of merge fields available for check templates are the same as for Payments including all the related record types.

In addition, the following merge fields will be available once the template is opened in Word:

- Account Number
- Bank Name
- Description
- Routing Number

8. Click **OK** when done and Microsoft Word will open your new template.
9. You can now set up/modify the check template to fit your check stock. Issues to keep in mind include dimensions, margins, which fields to merge in, customized text, images, and position of all those elements.

US East Foundation
2311 Eagle Way
Rye, NY 10095
(646)333-4500

«Bank_Name»
123 Finance Road
Pricetown, PA 10002

«Check_Number_1»

«Payment_Payment_Date_1»

«Payee_Org_Name_1»
«Payment_Amount_in_Words_1»

«Payment_Amount_1»

«Payment_Notes_1»

10. Save the template when done and close Word. Your new templates will be listed on the main Document Template Manage page.

Modifying Existing Check Templates

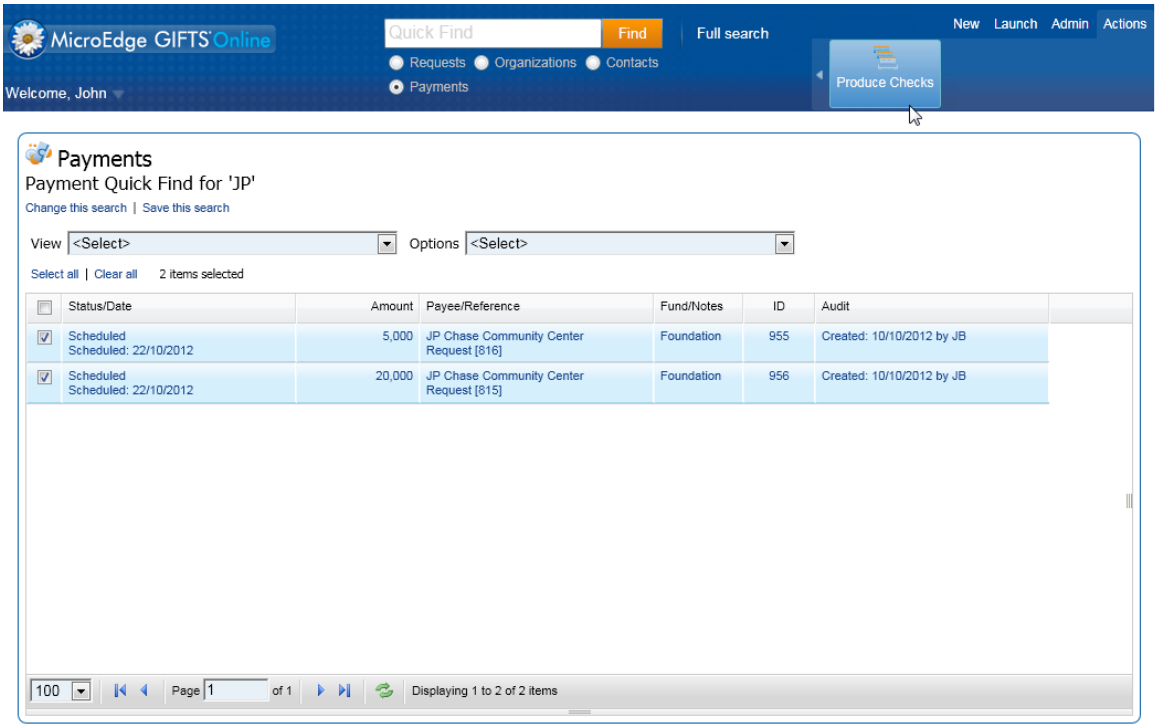
There are several ways to modify existing check templates:

Action	Description
Double-click a listed template	This action will directly open the template in Word for editing.
Select a template and then click Open Template	Same response as above.
Select a template and then click Open Merge Fields	This will open the Merge Fields: Check Template form with the merge fields for the selected template listed and allow you to add or delete fields as needed.
Select a template and then click Copy Template	This action will open the Copy Template form which allows you to copy the existing template and save with a new name. You will have the option to include Header Only or Header and Text.
Select a template and then click Rename Template	This action will open the Rename Template form which allows you to modify the Name or Description.
Recreate Headers	
Delete Template	This action will delete the selected template after you select Yes at the confirmation prompt.

Printing Checks

To print the payment checks, the following must be done:

1. Perform a search for Scheduled Payments.
2. Select one or more Payments from the search results page(s).
3. Go to **Actions > Produce Checks**.



4. On the Produce Checks form:

   a. Select the **Bank Account**.

   b. Modify the **Check Date** if necessary. (defaults to the current date)

   c. Select a different **Check Template** if necessary.

   d. Check the box if you want to **Test template alignment.**

      i. If printing on blank paper, leave on **Do not update next check number**.

      ii. If using actual check stock for the test, select **Test on check stock.**

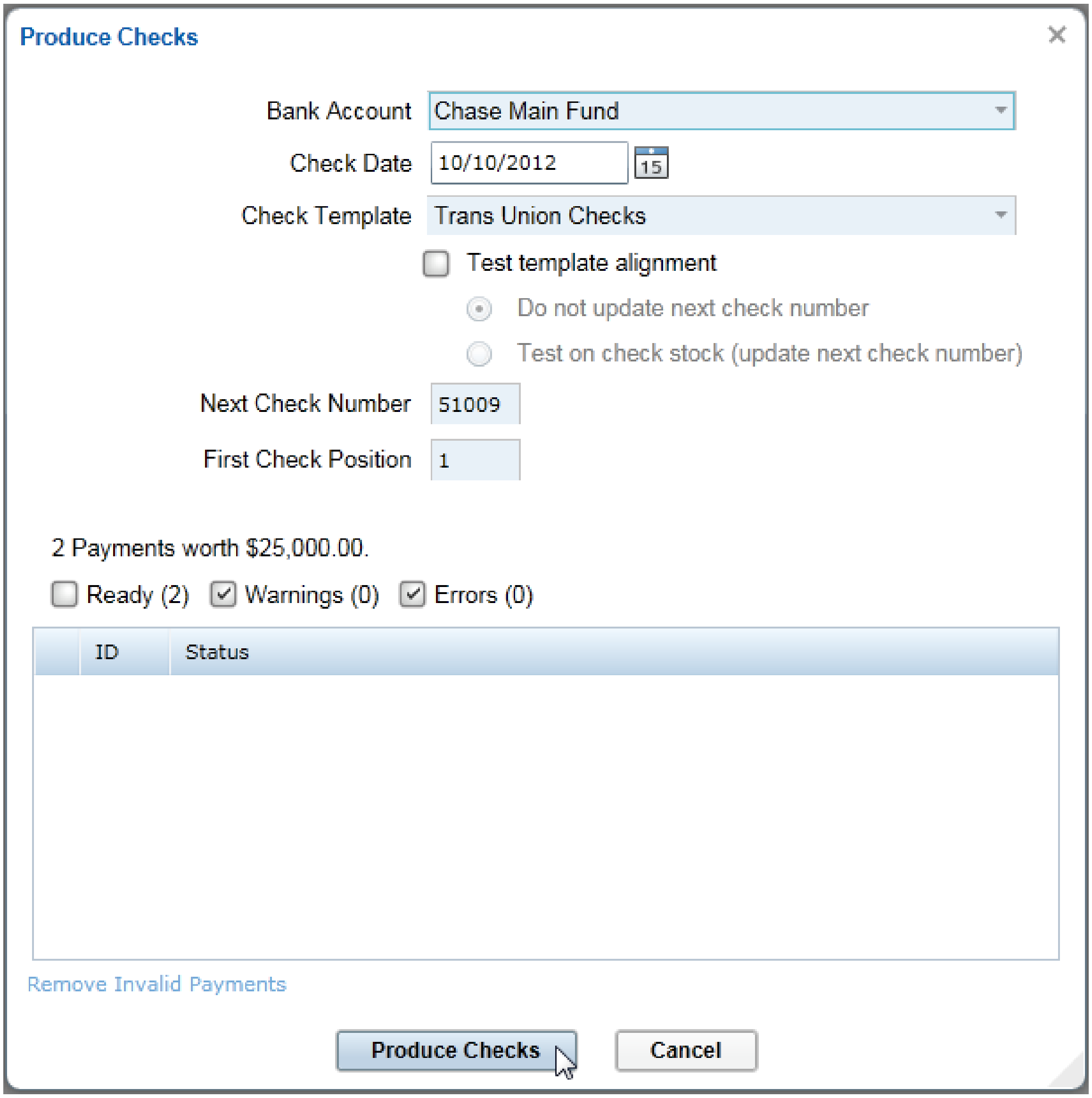
   e. Enter the Next Check Number according to your current check stock.

   f. If your template accommodates multiple check positions, enter the number of the **First Check Position** you wish to start printing on.

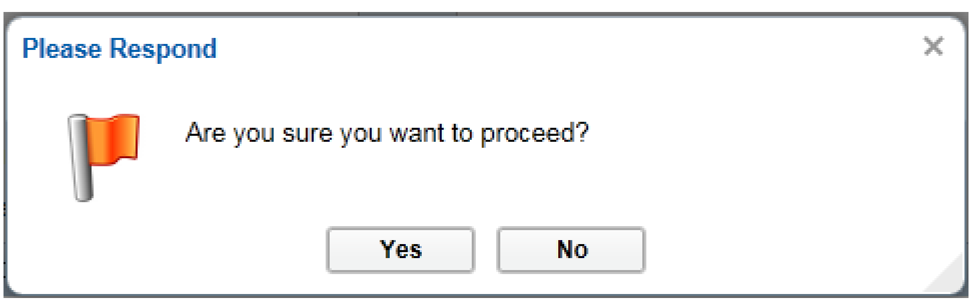
   g. Note any Warnings or Errors listed at the bottom.

      i. To remove invalid payments, click the **Remove Invalid Payments** link at the bottom of the list.

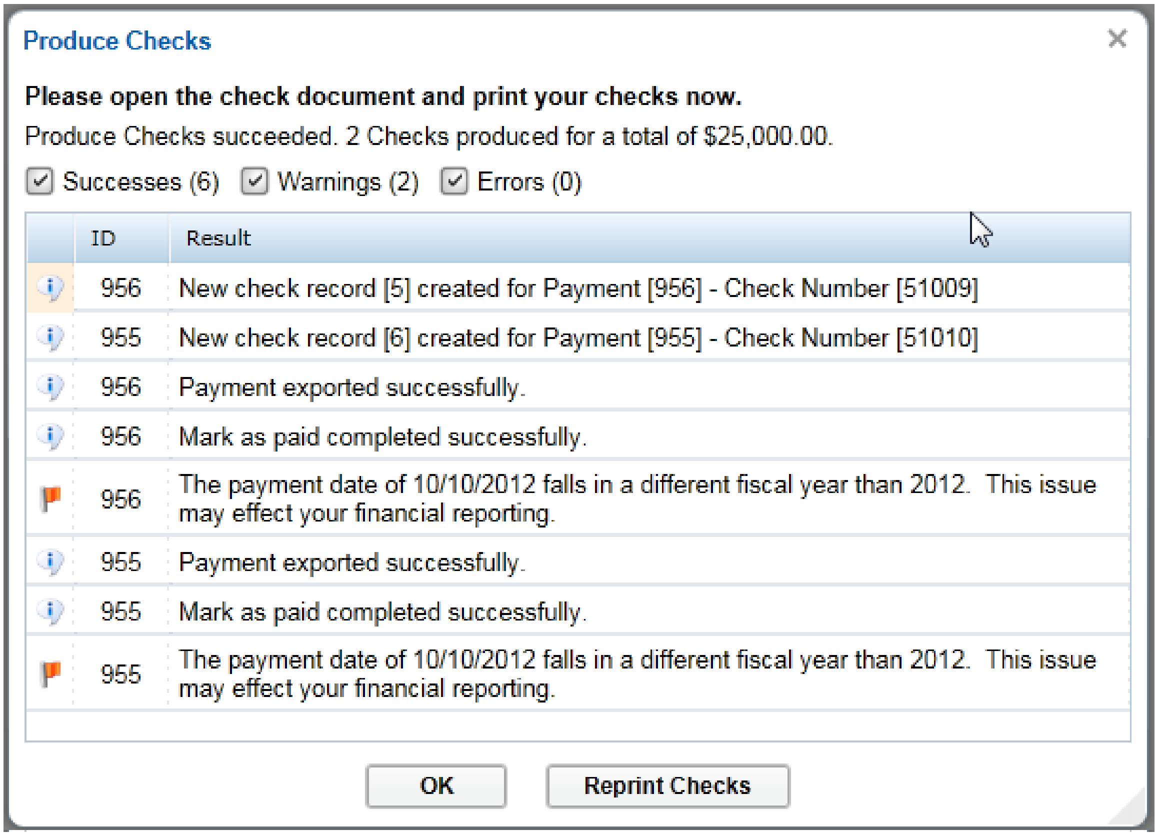
   h. Click **Produce Checks** to continue or **Cancel** to close the form.



5. A prompt will popup asking "Are you sure you want to proceed?" Click **Yes** to continue or **No** to cancel the process.



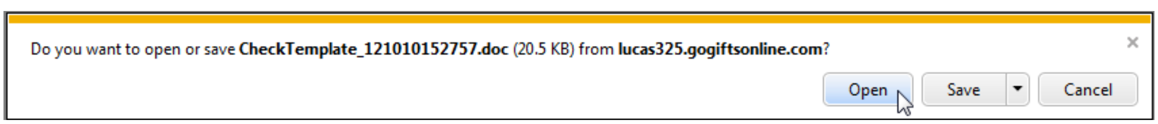
6. When complete, a Produce Checks progress log will be displayed.



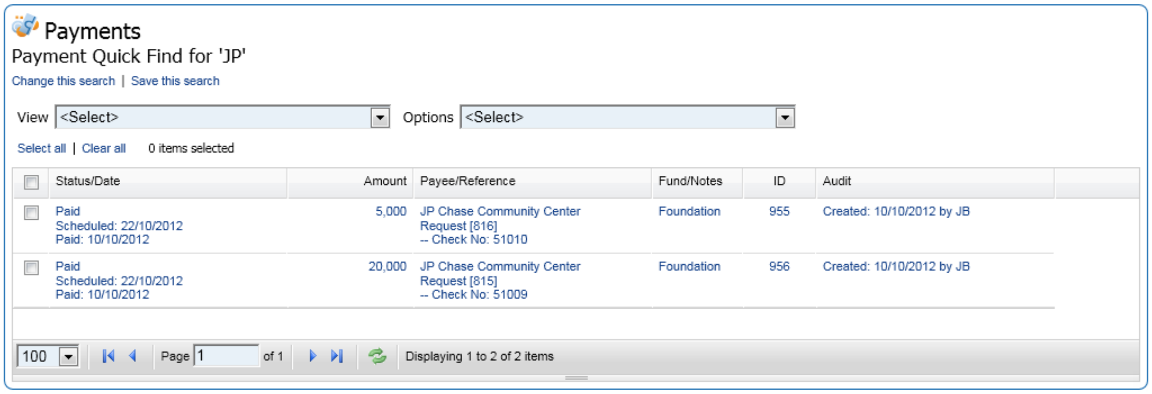
7. Note any Warnings or Errors which may be listed. Don't click **OK** yet.

   NOTE: The **Reprint Checks** button will be discussed on the next page.

8. On the bottom of the screen, you will note an orange popup message asking if you would like to open the new check document. Click **Open** to see the merged Payments on the check template you selected.



9. The produced check document will be opened in Word where you can then print to your check stock.
10. If the checks printed correctly, you can now close the check document and click OK on the Produce Checks log.
11. Notice your Payments now have a status of Paid and a Check No referenced in the Payee column.



Reprint Checks

1. If a problem occurred during the printing process, you have the option to use the **Reprint Checks** button on the Produce Checks log form.

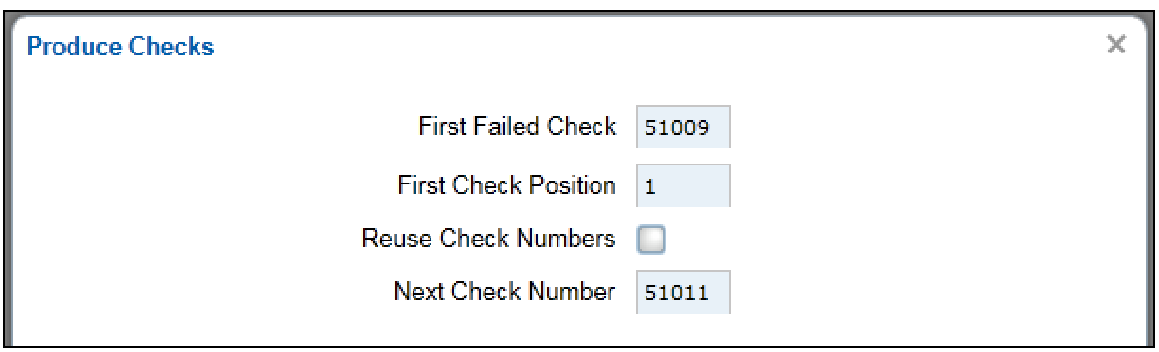
2. Clicking **Reprint Checks** will display following the fields on top:

   a. **First Failed Check** – enter the number for the first check that you want to reprint.

   b. **First Check Position**

   c. **Reuse Check Numbers** – check this box if you caught an error before printing on the check stock and want to regenerate the merged check document. Checking this box will disable the Next Check Number field below.

   d. **Next Check Number** – if some or all of the actual check stock were used in the initial printing, you can enter a new starting check number here.



3. Fill in the fields as needed and then click the **Print** button to regenerate the check document.

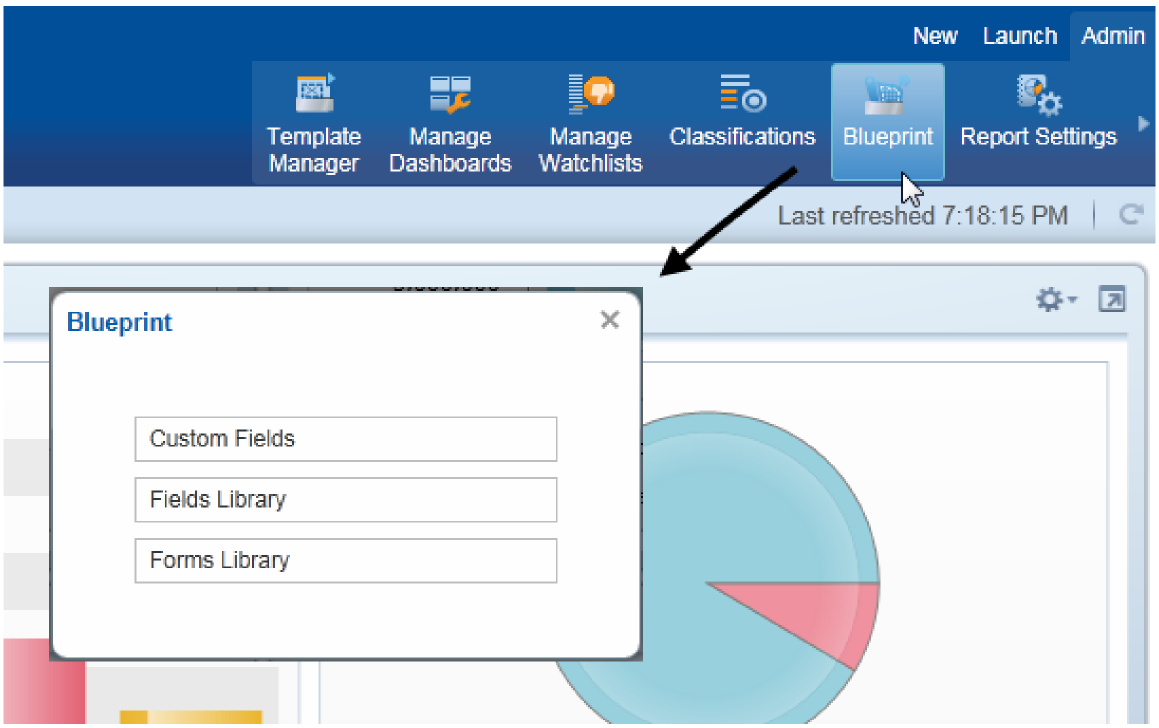
4. **Open** the new document and **Print** it on the check stock.

About the GIFTS Online Blueprint Module

GIFTS Online Blueprint is a comprehensive set of tools which have been built using the new GIFTS Online interface to help create custom fields and forms which can be used to personalize your GIFTS Online system using your own language and terminology through the system and tailoring of the experience of each of your users.

You can access the Blueprint tools by going to the Admin menu and clicking Blueprint. A submenu will be displayed allowing you to access each specific tool.

NOTE: This option will only be available to Grant Managers.

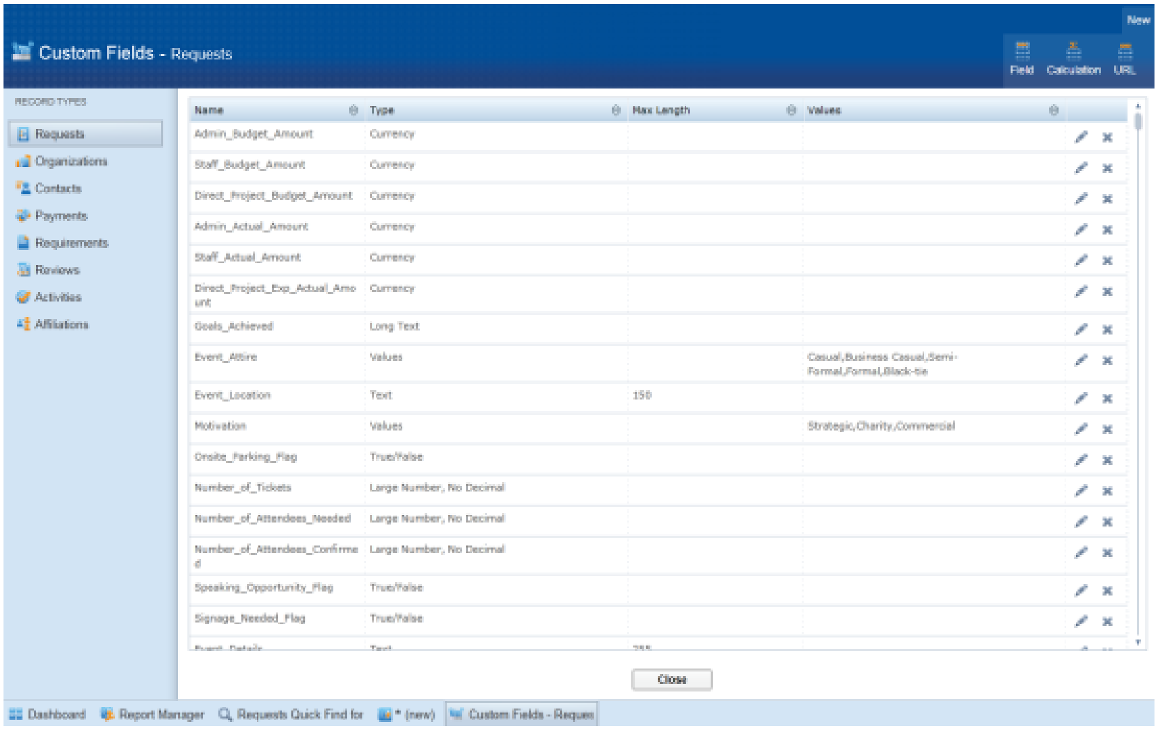


The Custom Fields Manager

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

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

The Custom Fields page will open and look similar to the following:

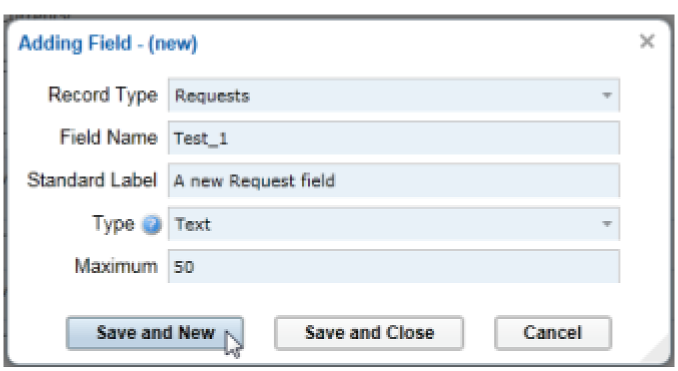


The left panel lists all the Record Types you may choose from. Simply click on a record type to see a list of existing custom fields for that specific Record Type on the main area to the right.

Adding a Field

IMPORTANT: Please note there is a limit of 500 custom fields per record type. It is recommended, however, to keep your custom fields to under 250 per record type as higher numbers may impact form loading performance for your applicants and users.

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



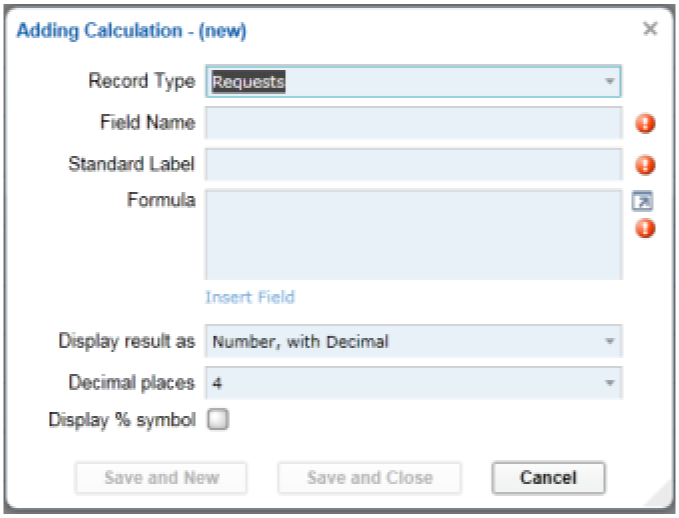
The table below describes the various types of fields which can be created:

Field Type	Description
Text	Holds any text information up to a limit of 255 characters. If you want, you can make the character limit smaller.
Long Text	Holds any text information up to a very high limit. (The precise limit varies among different client/server and file server systems, but in every case it is many tens of thousands of characters.) If you want, you can designate a specific character limit.
Small number, no decimal	Permits integers between zero and 255.
Medium number, no decimal	Permits integers between -32,768 and 32,767.
Large number, no decimal	Permits integers between -2,147,483,647 and 2,147,483,647. **NOTE:** Please do not use Small, Medium, Large number types if the field is to be used for currency values as an error can occur if a currency symbol is entered.
Currency	Permits numbers with two decimal places and a currency symbol.
Number, with decimal	Permits numbers with as many as four decimal places.
Date	Permits dates in the following format: mm/dd/yyyy)
Values	Holds a value from a list that you define. During data entry, users can choose from the values you enter, much in the same way that users choose from lists of classifications in coded fields like Request Status and Request Type. If you choose this field type, you must also enter the available values. NOTE: This type field can only hold a maximum of 255 characters. Anything over 255 characters will be truncated when you save. For a longer list of values, it is recommended to use a code table instead.
True/False	Permits a "Yes/No" or "True/False" response. On the data entry screen, it appears as a check box. A selected check box indicates "True"; a cleared check box "False."

Adding a Calculation Field

IMPORTANT: Please note there is a limit of 500 custom fields per record type. It is recommended, however, to keep your custom fields to under 250 per record type as higher numbers may impact form loading performance for your applicants and users.

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



Clicking the **Insert Field** link will display a list of all the current Currency, Date, or Number fields which can be added to the formula.

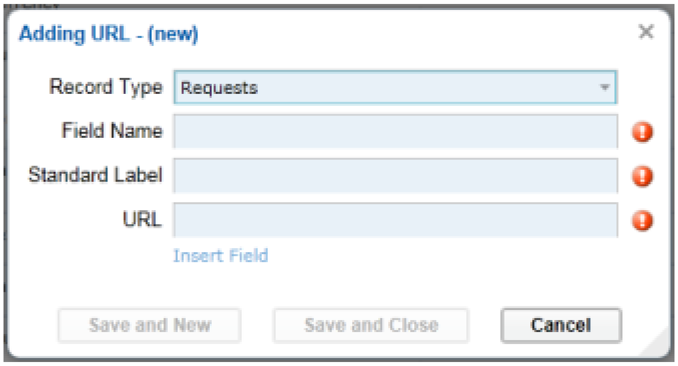
NOTE: You will need to add mathematical symbols (+, -, *, or /) between field variables manually. SUM and AVG functions are also allowed but must be in all CAPS. SUM() or AVG()
Example: SUM(Field1, Field2, Field 3) or AVG(Field1, Field 2, Field 3)

Alternatively, you may also use the Add operator instead of SUM.
Example: {Field_1}+{Field_2}+{Field_3}

Adding a URL Link

IMPORTANT: Please note there is a limit of 500 custom fields per record type. It is recommended, however, to keep your custom fields to under 250 per record type as higher numbers may impact form loading performance for your applicants and users.

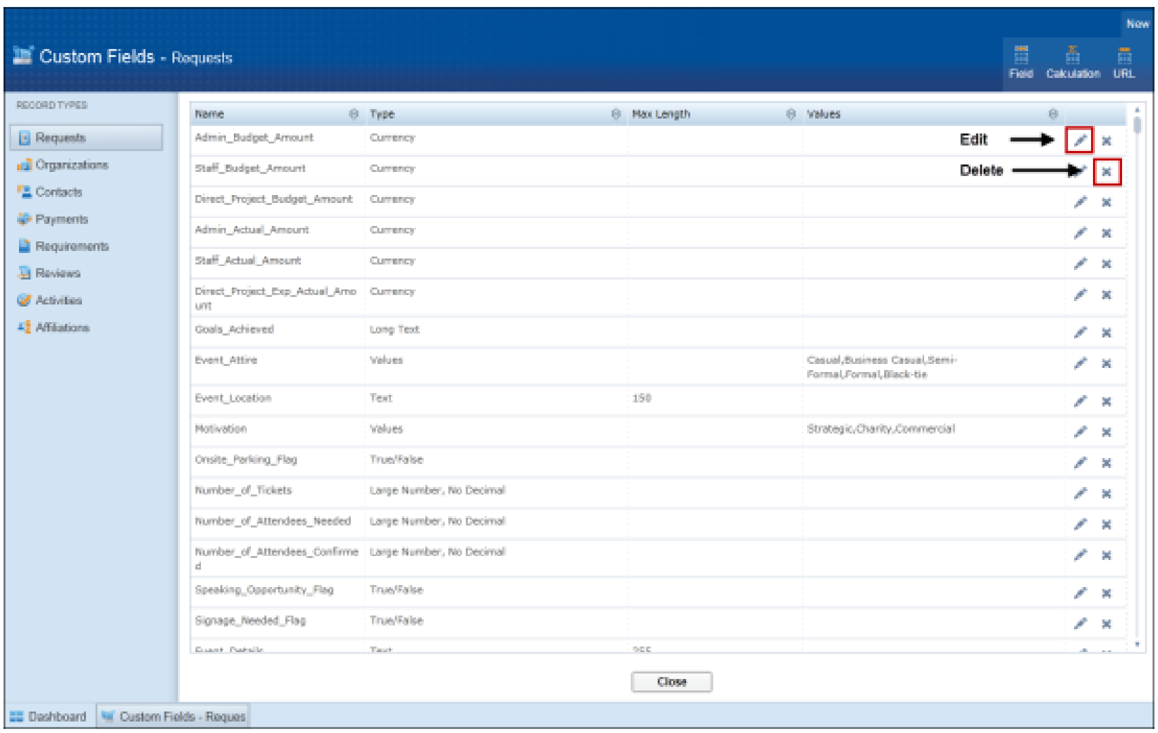
To add a new field, go to **New > URL** on the upper right menu to open the Adding URL (New) form.



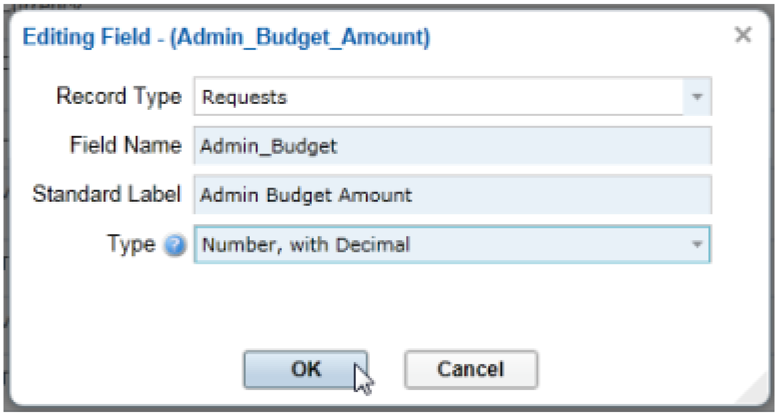
The **Insert Field** link will display a list of all fields for the selected Record Type and allow you to add one or more to the URL.

Editing and Deleting a Custom Field, Calculation, or URL

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



If clicked, the pencil opens the Editing Field form:



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

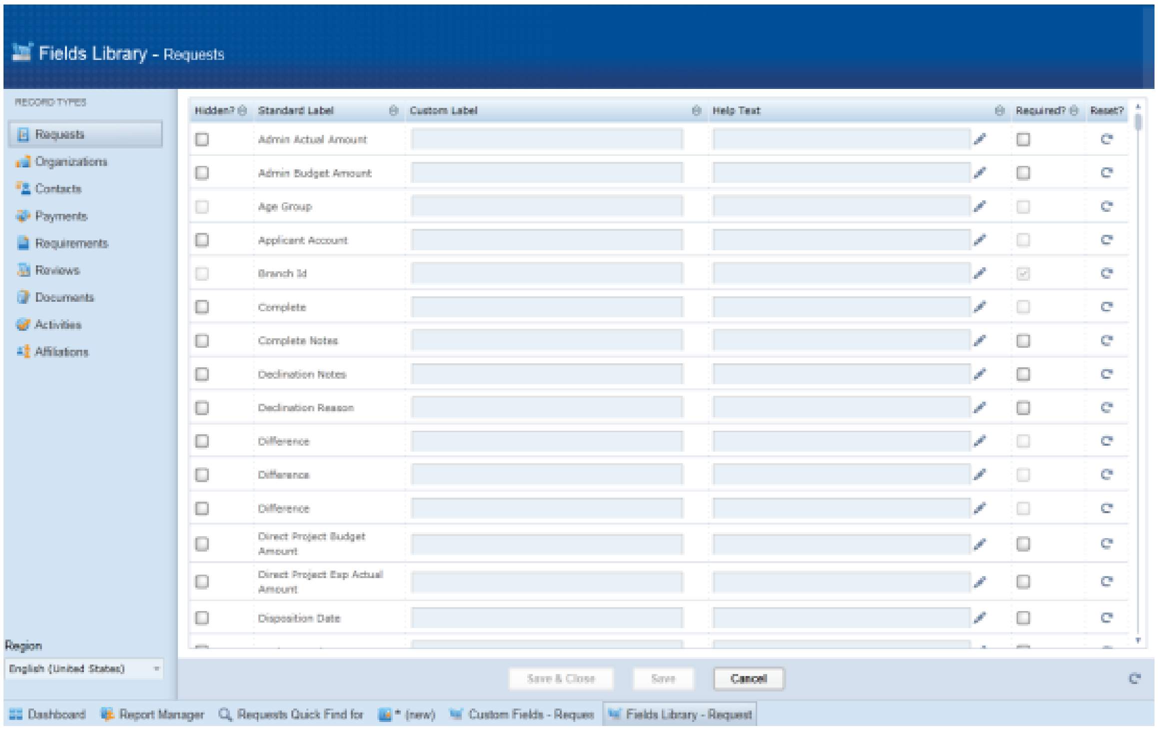
CAUTION:

- Changing the data type of a field may cause loss of data if the data types are incompatible.
- Deleting a custom field will remove the field and all of the historical data stored in the field from the system. There is no undo.

The Fields Library

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

This tool can be opened from the Admin > Blueprint > Fields Library.

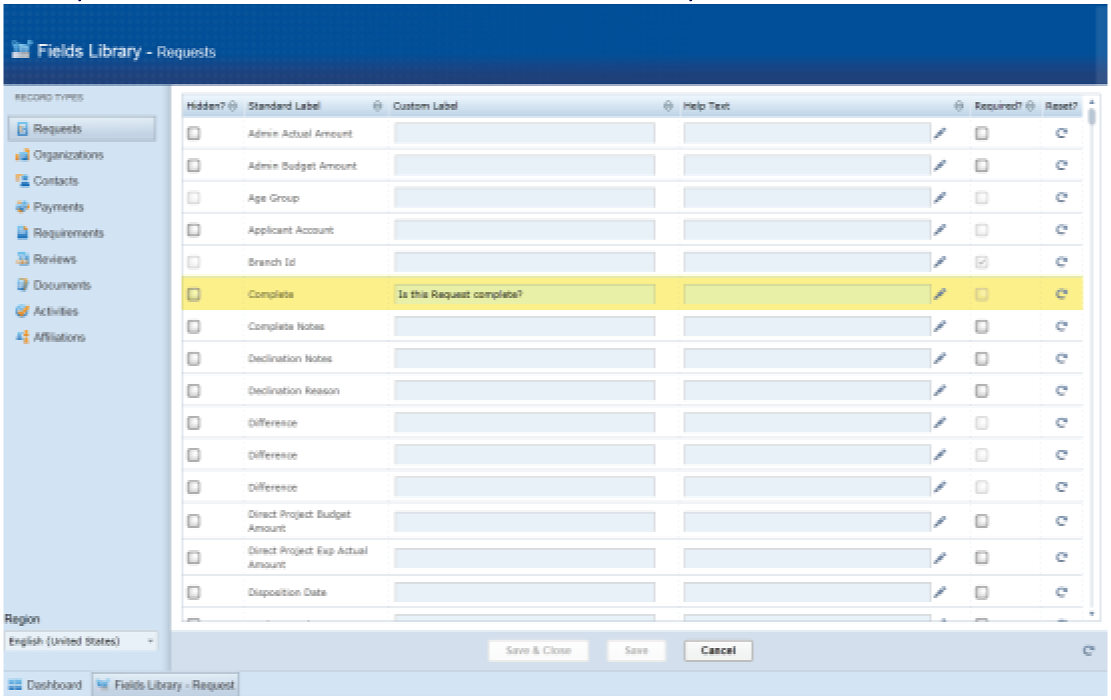


Selecting the Labels to Personalize

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

1. Select the Record Type on the left panel for the field you wish to customize.
2. Optionally, the **Region** menu can be used to set this session's changes for a specific region of the world.
3. Scroll down the list until you find the standard label for the field you wish to change.

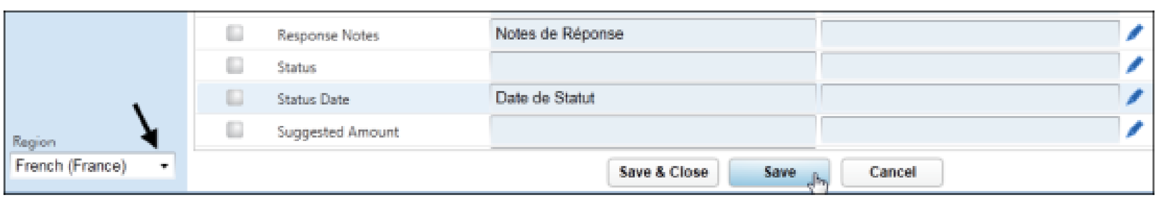
4. Enter your desired custom label in the **Custom Label** entry field.



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

Configuring Different Region Sets

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



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

- When first accessed, the user's current region will be the selected Region.
- On subsequent visits, the system will remember the last Region used.

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

Hiding a Field

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

Simply check the Hidden checkbox and click Save.

NOTES:

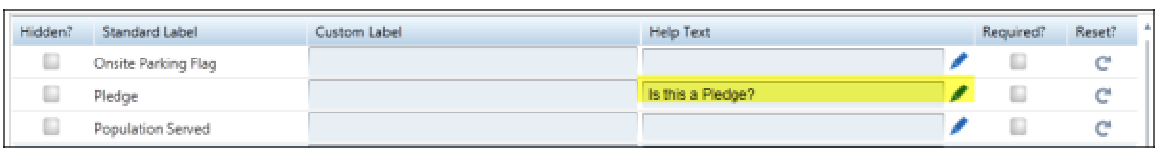
- If the field is currently flagged as Hidden, the Custom Label entry field will be disabled.
- If the field is made Hidden in the future, all other settings for that field will be reset.

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

- System Required
- Coding Sheet Codes

Adding Tool Tip Style Help Text

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



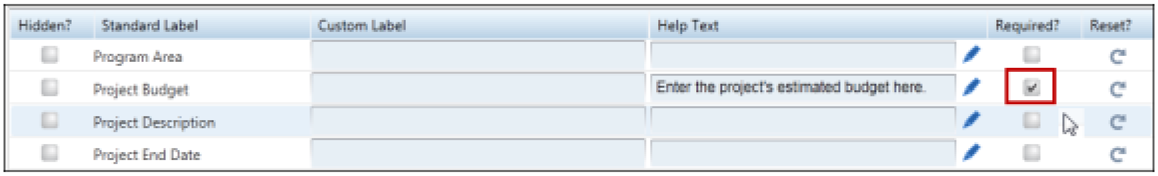
This will display a blue icon next to the field when used in a form.

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

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

Making Specific Fields Required

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

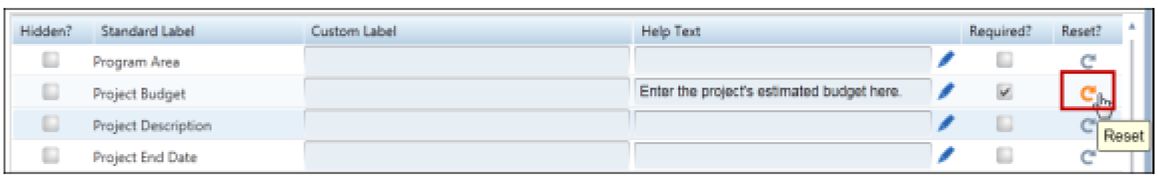


The following field types cannot be made required:

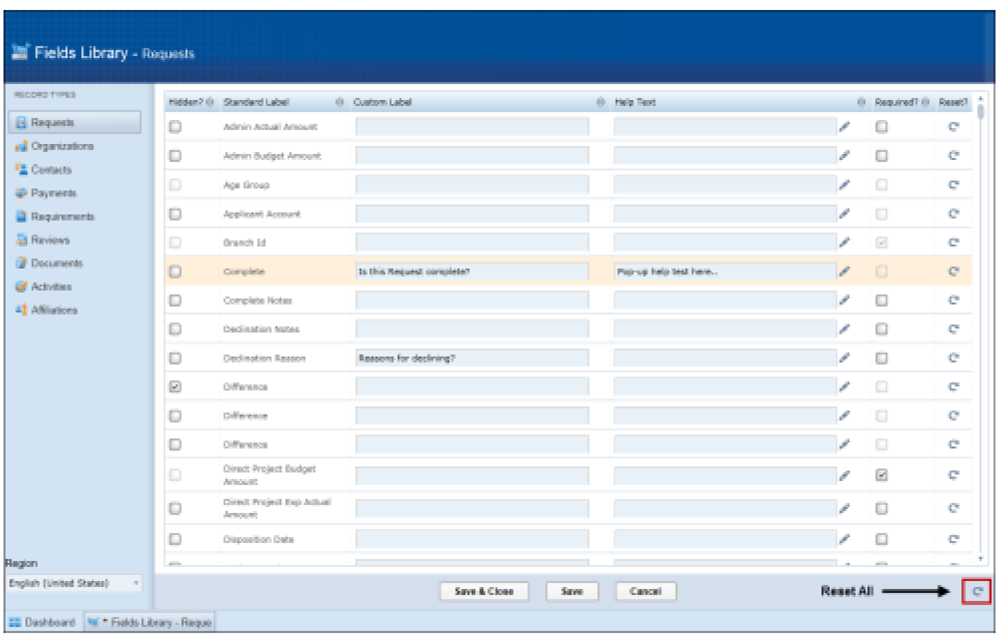
- **System Required** – these fields will be checked but disabled.
- **Boolean** (True/False)
- **Web Clippings**
- **Calculated Custom Fields**
- **Coding Sheet Codes** - Coding Sheet codes can be made required by contacting services@microedge.com

Resetting One or All Fields

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



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



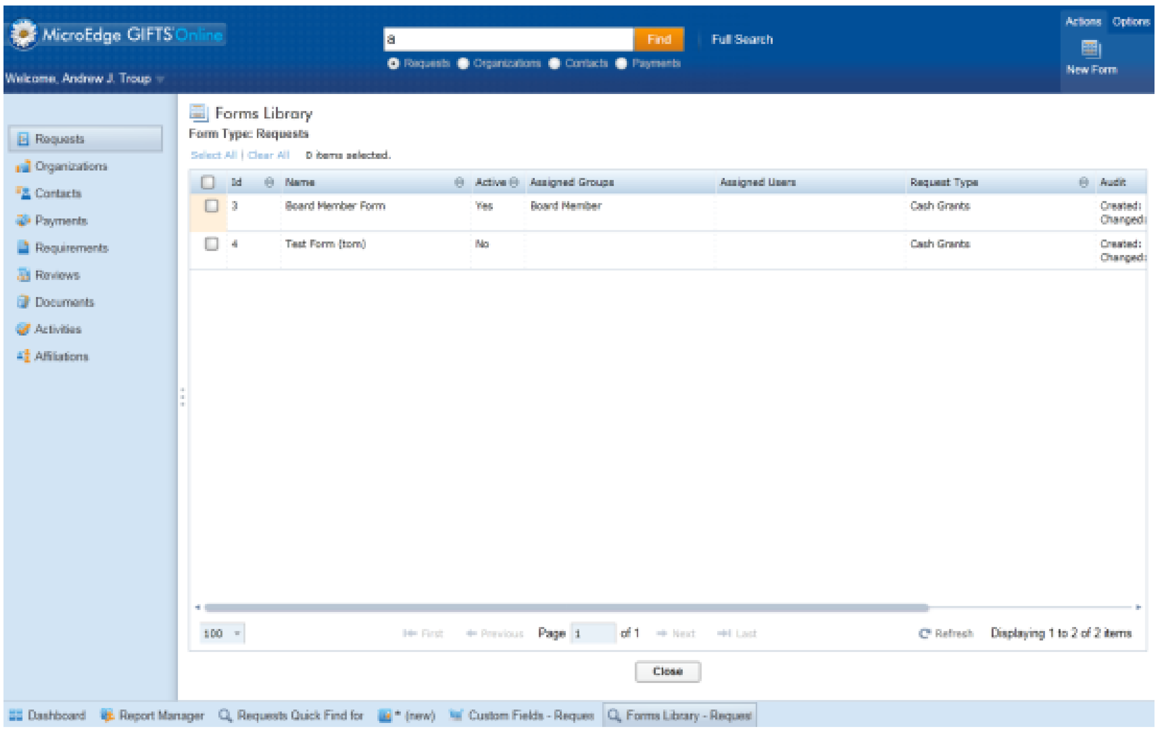
The Forms Library

The Forms Library is where you will create new Record Forms (Data Entry Forms) or modify existing forms.

Custom Record Forms can be created and assigned to individual users, groups of users, or for different giving programs (Request Types), allowing the data entry/processing experience to be personalized to meet each user's needs.

This tool will be launched from the **Admin > Blueprint** ribbon menu item.

After selecting Blueprint, select *Forms Library* from the popup menu displayed to open the Forms Library.



Ribbon Menu Options

The **Actions** menu will vary depending on whether a form is selected or not.

Menu option	Description
New Form	This option is always visible. Will open the new form selection popup asking for a Name, Record Type, Request Type (if Request record type is selected), and a form to base the initial design on. System-default forms are available as an option when creating a new form to use as a base. NOTE: Modifications to system forms must be saved to a new form name.

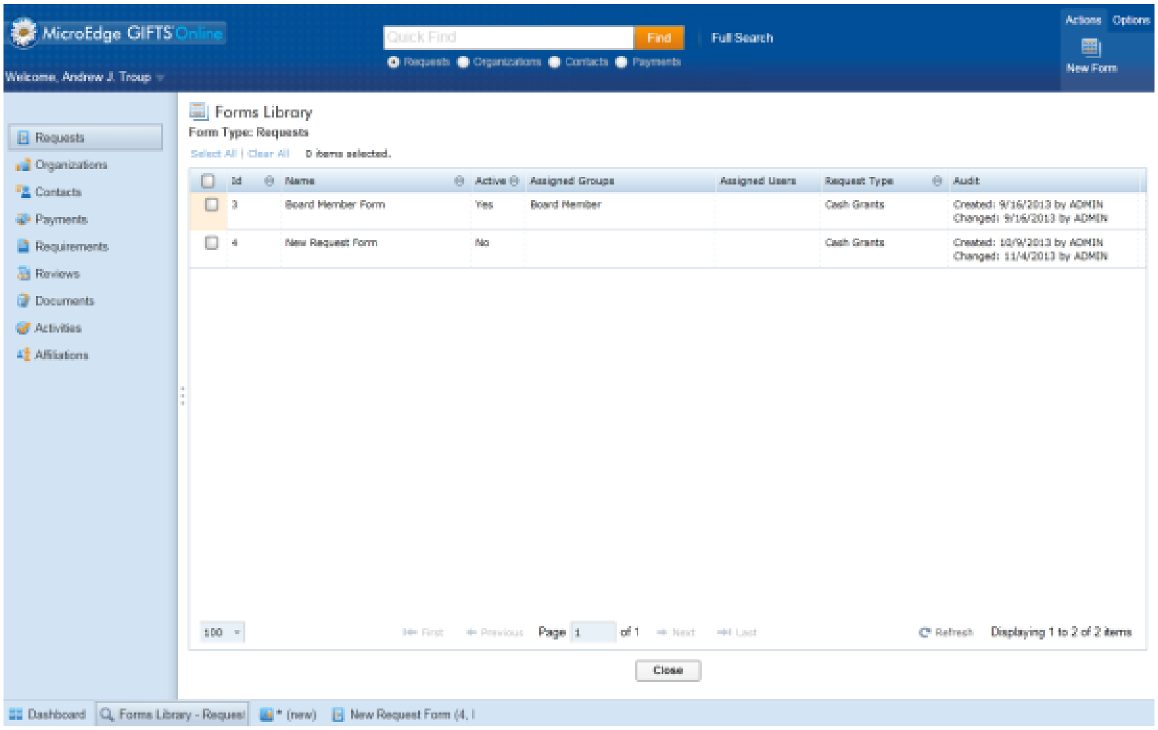
	Your other options are to start with a Blank form or another existing custom form as a base.
Open	If one or more forms are selected, this option will be visible. Click this will open the form(s) selected in edit mode.
Assign To	If one form is selected, this option is visible. This option allows you to assign the form to specific users or groups of users.

There are several selections available in the **Options** menu:

Menu option	Description
Export or Print	Export the currently displayed columns on the screen to an Excel spreadsheet.
Print	Displays the currently displayed columns in a new browser window which can then be printed.
Add to Dashboard	Set the form to be displayed on a specific dashboard.
Report	Takes you to the Report Designer with the current columns from the screen already defaulted into the report.

The Forms List

The main area of the Forms Library displays a list of existing forms dependent on the Record Type selected:



Column	Description
Select Box	Check the box to select the form.
ID	Displays the form's ID number.
Name	Displays the name of the form.
Active	Displays the form's status. Inactive forms will state No.
Assigned Groups	Displays the groups assigned to the form.
Assigned Users	Displays the individual users assigned to the form.
Request Type	Only displayed if the Request record type is selected.
Review Stage	Only displayed if the Review record type is selected.
Audit	Displays the Created and Last Changed Date along with the username.

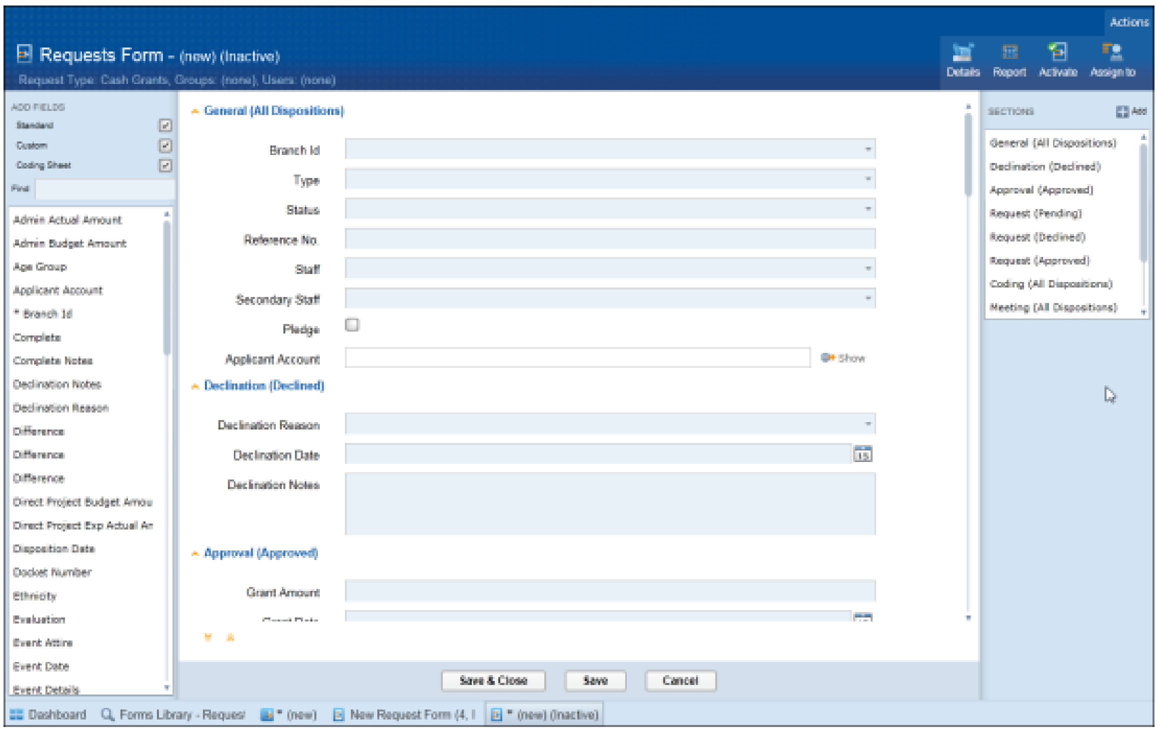
How Do I Modify an Existing Form?

To modify an existing form, do the following:

1. Go to the Blueprint Forms Library. (Blueprint > Forms)
2. Click on the Record Type for the form.
3. Locate the form you wish to modify in the main list and select it.
4. Double-click the form listed or go to Actions>Open to open the form in edit mode.
5. Make the modifications necessary and click Save and Close.

The Form Design Window

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



Header Information

The header area in the upper left shows the following information:

- Record Type
- Name of Form – will say (new) if the new form has not been saved yet.
- Status of form – Active or Inactive
- Request Type – only on Request forms
- Assigned Groups/Users

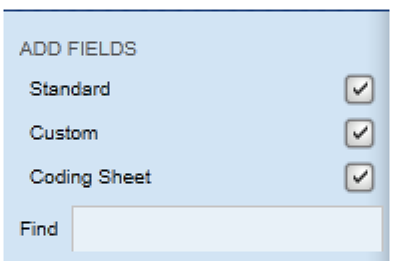
Actions Menu

Actions Menu	Description
Details	Clicking on this will open a form displaying the name of the form. It will allow you to change the name if necessary.
Activate	To make the form usable by other users, you must Activate the form.
Deactivate	You can also Deactivate a form if you wish to take it off-line.
Assign To	Assign the form to one or more Users or one or more Groups.
Report	Generates a report for the currently open form showing all fields, custom labels, and standard labels used.
Delete	Deletes the form if the popup confirmation is accepted.

The Add Fields List

On the right side of the form edit page is the Add Fields List.

To limit the fields which are listed, you can uncheck one or more of the three filter checkboxes at the top. Default is for all three to be selected.



The Find field can be used to quickly find a field you want to add to the form.

Once a desired field is found, simply drag it from the list to the main form area and drop it on a designated drop point or gold line underneath an existing field. See Moving a Field section for more details.

The Main Form Area

The main form area in the middle displays your form exactly as it will appear to users in GIFTS Online.

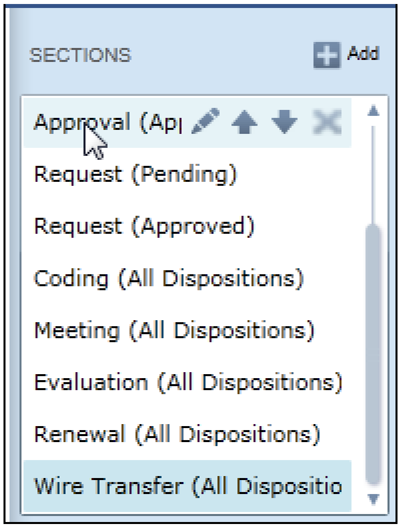
In this area, you can:

- Add new fields from the fields list
- Modify existing labels and fields on the form
- Move existing fields as needed
- Remove existing fields from the form
- Expand or Collapse fields

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

The Sections List

The right panel contains options for adding new sections, editing existing sections, moving sections up or down, and removing sections.



Adding a Section

Use the +Add button to add a new section to your form.

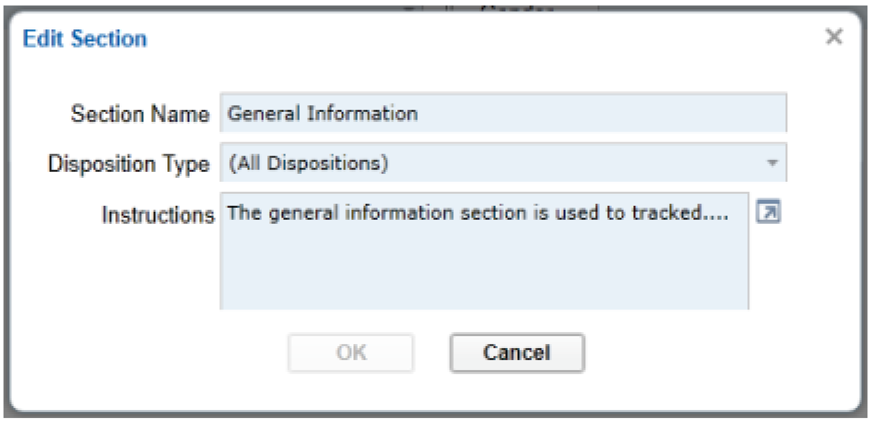
Section Action Icons

Each section listed will have the following action icons next to it.

Icon	Name	Description
	Edit Section	Click this icon to open the section’s edit form.
	Move Section Up/Down	Sections can be re–ordered by clicking the up or down arrows associated with the section. The up arrow is disabled for the first section on the form; likewise, the down arrow is disabled for the last.
×	Delete Section	You can remove a section at any time. All Labels and Prompts are removed along with the section. You will be required to confirm your intentions and will be warned that there is no undo for this action.

The Edit Section Form

- The **Disposition Type** menu allows you to designate specific sections on Request Forms for a specific disposition or all dispositions.
- **Instructional text** can be included at the top of each section.



Adjusting the Field Width

The default number of columns in GIFTS Online is one column. This means each field is displayed on its own row.

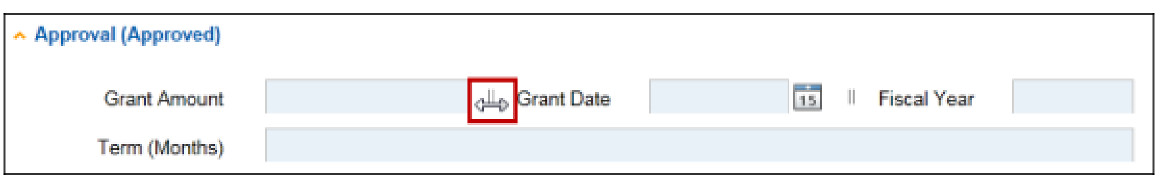
With a Blueprint custom form, this can be modified so that a specific row has multiple fields on it.

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

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

NOTE: It is recommended to have a maximum of three fields in a row.

The width of a field can be adjusted by moving your mouse cursor over the double line between two fields. When the cursor turns into a double arrow, click and hold the left mouse button and drag the column side to the desired width.

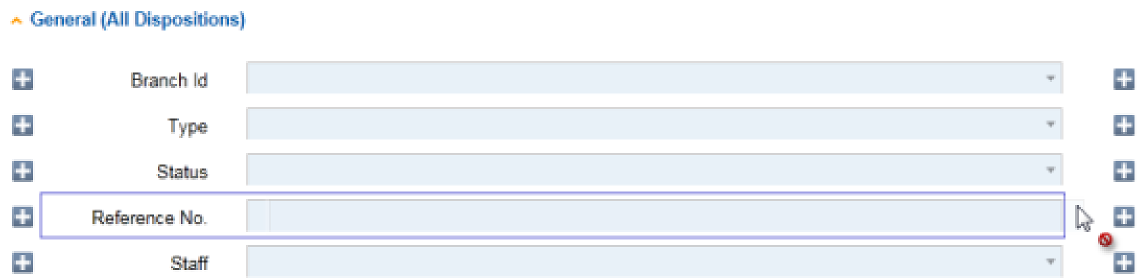


NOTE: The actions of adding and removing fields will change the widths of the fields remaining to distribute them evenly, so a good tip is to make manually adjusting the column widths the last thing done.

Moving a Field

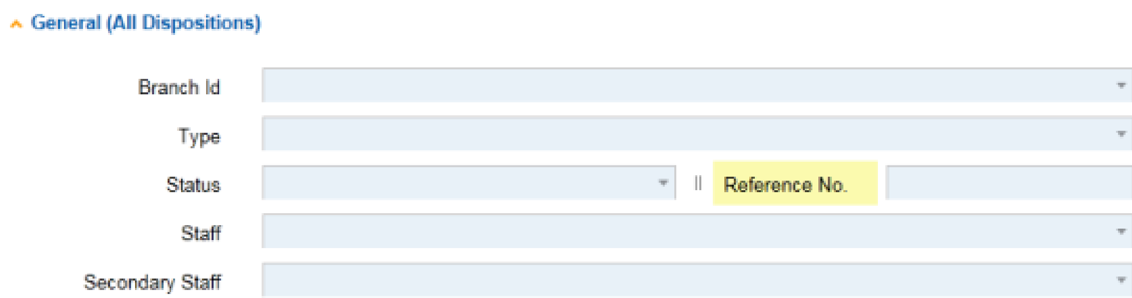
Existing fields can be moved by dragging and dropping. Simply click on a field and slowly drag it to the desired location.

As you start to drag a field away from its current location the form displays drop location markers to the left and right of all the current fields on the form.



If you drop the field onto one of these markers, the field will be placed in that location on the same row.

In the example below, Reference No was placed to the right side of the Status field.



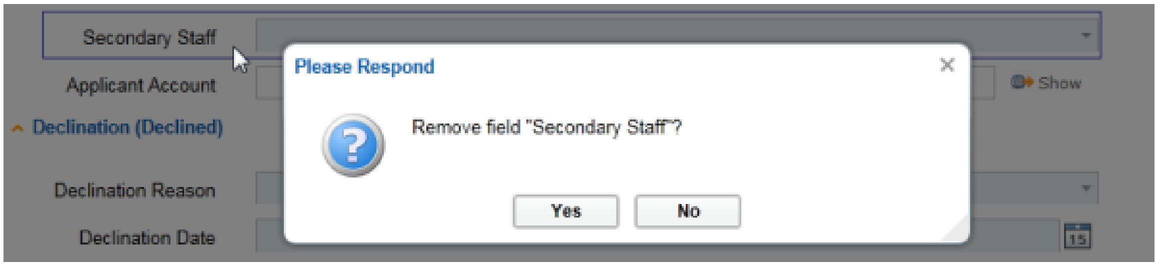
To move a field so it takes up an entire new row by itself, drag the field to the space between two existing rows. A gold bar will become visible to show where the field will be placed.

In the example below, the Status field is being moved between Branch ID and Type.

Removing a Field from a Form

To delete a field, simply click on the field and then press the **Delete** button on your keyboard.

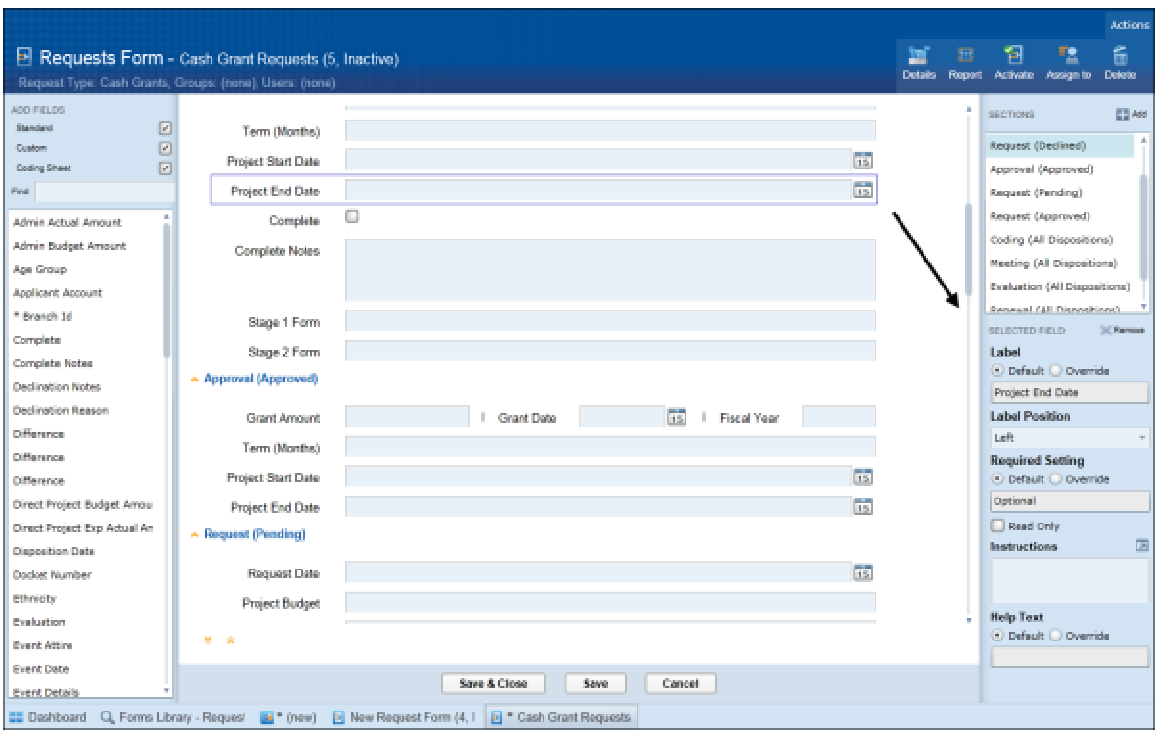
A confirmation message will be displayed. Click **Yes** and the field is removed.



Editing a Field

Editing a field with Blueprint is easy.

Simply select the field in the form and all of the related settings are displayed for modification on the lower right panel.



IMPORTANT: Changes are not permanent until you **SAVE**. If you don't like the changes you've made to a form, click **Cancel** and then select *No* on the prompt to Save.

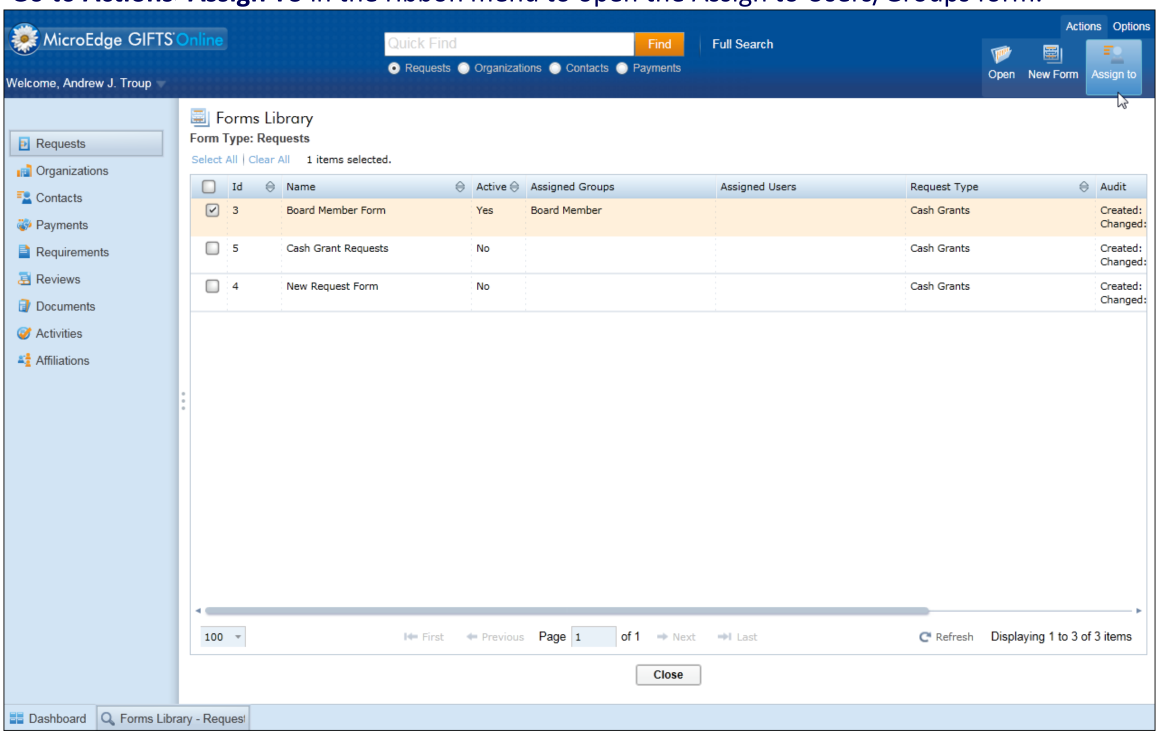
Assigning Custom Forms to Users

Once you have custom forms built for your GIFTS Online users, it is a very simple process to assign them to specific users.

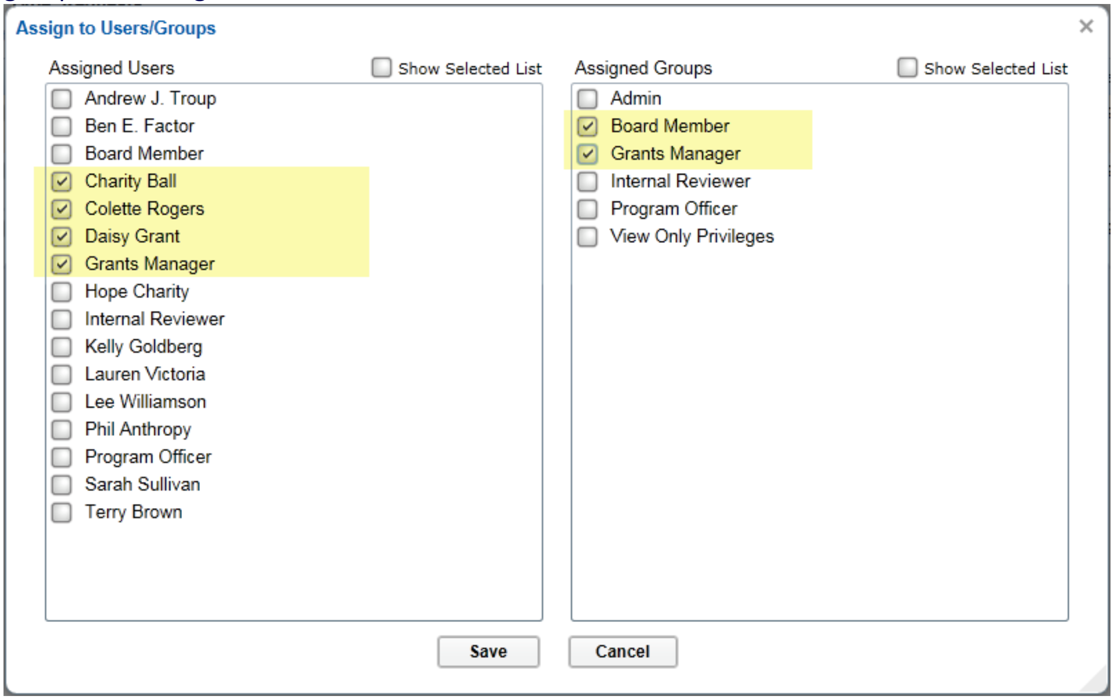
The same process is also used to remove custom forms from specific users.

To modify existing form assignments, do the following:

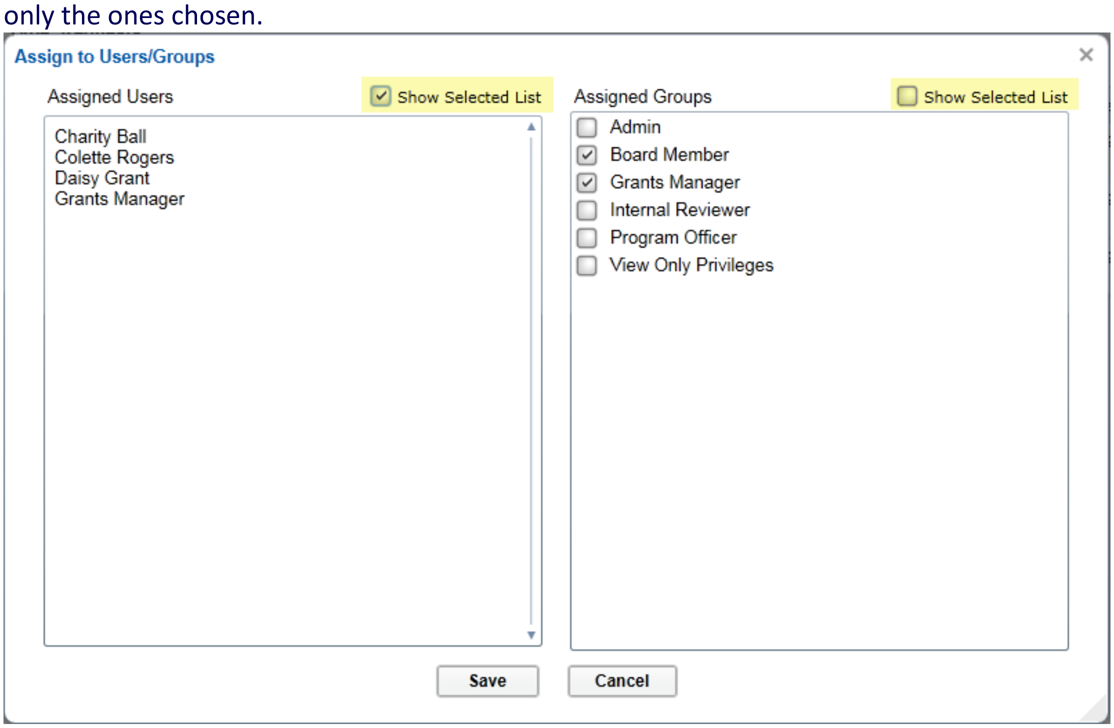
1. Open the Forms Library.
2. Select the form you wish to assign to or unassign from a user.
3. Go to **Actions>Assign To** in the ribbon menu to open the Assign to Users/Groups form.



4. On the Assign to Users/Groups form, select either individual users on the left side list or groups on the right side list.



5. Optionally. you can uncheck specific users or groups that no longer need access to the custom form.
6. Checking the **Show Select List** box on top of either panel will limit the displayed list to only the ones chosen.



7. Click **Save**.

The Budget Module

If your organization works on one or more annual budgets, the optional GIFTS Online Budget Module allows you to enter your pre-planned giving budget at the beginning of each year and then track your actual giving against this budget as the year progresses.

NOTE: The GIFTS Online Budget module is optional; your GIFTS Online system may not include the features described in this and the following help topics.

Each annual budget, like that of most grant makers, is arranged in a series of tiers. At the top tier you have your total budget amount, which gradually breaks down into further and further detail. Some grantmakers may have simple budgets with only one or two tiers; others may have more complex budgets with five or six tiers.

If you need to take time to review key terms in managing and using Annual Budgets in GIFTS Online, click here for definitions of key terms.

If you're ready to review the budgeting process, it is summarized below:

- Before the new fiscal year starts, you set up your annual budget according to the allocations approved by your board or company.
- Once your allocation is complete and the fiscal year begins, you will open the budget. Users may now appropriate funds from the budget to cover Payments.
- During the year, you can track progress toward budgetary goals right on your GIFTS Online home page.
- Annual Budgets offer flexibility during the giving year, allowing you to review and make changes as needed.
- At year's end, you can close the budget to prevent further appropriations.

Budget Module Glossary

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

GIFTS Online Annual Budgets are designed to reflect real-world budgeting processes. However, because terminology may vary from organization to organization, we provide this glossary to help you understand the major concepts and important terms used in GIFTS Online.

Annual Budget Stages

There are three stages in the life cycle of one year's Annual Budget. In each stage, there are different key activities and tasks.

Planning Stage

If you are like most grant makers, you probably begin planning next year's budget two to four months before the current fiscal year ends.

During this time, you get estimates on how much you'll have to give, then work to determine how that money will be distributed to different programs, geographic areas, regional offices, and so on.

When you add a new Annual Budget, it starts in Planning stage. The main activity at this time is called *allocating* the budget. By allocating, we mean specifying the amount that will go to each division, each program, and each grant you already know you will give during the year.

We call the records which capture these specifications "budget items." More information about the different types of budget items follows in this glossary.

Open Stage

When the allocation is complete and the fiscal year starts, you will *open* the Annual Budget for the year.

Once the budget is in Open stage, GIFTS Online users can *appropriate* funds from the budget to cover Payments. "Appropriate" here means taking money from a specific budget item for use to cover a specific Payment. Those funds can no longer be used to cover a different Payment.

Budget appropriation is the main activity during the Open stage of a budget. Additional tasks involve maintaining budget accuracy, allowing you to record the changes that often happen *during* a giving year.

Closed Stage

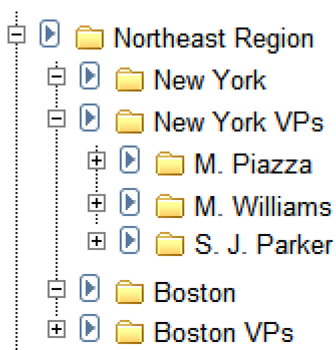
Once the fiscal year ends and you have appropriated funds for all the Payments you have made during the year, you will close the Annual Budget.

Once a budget is closed, no one can appropriate funds for additional Payments. This preserves your record of how you met your budgetary and giving goals during that year.

Budget Structure Terms

In Annual Budgets, you can allocate funds to very broad categories, then further allocate each category to more specific categories, and so on.

This creates a budget structure which we refer to as *hierarchal*. For example, in this budget excerpt, we see a budget hierarchy with three *levels*.



Northeast Region is on the top level. The money in for that region has been further allocated to four items on the next level: New York, New York VPs, Boston, and Boston VPs. Further, New York VPs total has been allocated to the three vice presidents themselves.

In addition to talking about a budget having a *hierarchy* and *levels*, GIFTS Online will refer to *child* and *parent* items. The budget item labeled "M. Piazza" is a child of New York VPs. By the same token, Northeast Region is the parent of the four items below it in the hierarchy.

Budget Item Types

The Annual Budget total amount is allocated to *budget items* during Planning stage. There are three different types of budget items in GIFTS Online. Understanding the purpose of each is key to using the budget.

Category

A Category is an amount of money allocated to a specific fund, program, or purpose, but not to any specific organization.

Users do not appropriate funds directly from Categories; Categories must always have child Line Items and Reserve Funds for that purpose.

Categories may also have child Categories. In fact, this is the main purpose of Categories; they are how you build your budget hierarchy. In our screen shot above, all the items shown are Categories.

It may help to think of each Category as a budget in itself. It seems in our example that each VP gets his or her own giving budget for the year. Categories in the budget hierarchy mirror how funds are really distributed in this corporate structure, and the total amount for each VP Category reflects how much Piazza, Williams, and Parker have to give respectively.

Line Item

A Line Item is a dollar amount assigned to a specific Organization. Only Payments to the Line Item's specified Organization can be appropriated from the Line Item.

Typically, you will add a Line Item and allocate funds to it with a specific grant in mind. Many corporate giving programs, for example, give to many of the same organizations year after year. Adding Line Items during Planning stage sets aside budget funds for each such grant.

Reserve Fund

A Reserve Fund is often a “left over” dollar amount in a given Category that is not allocated to a specific Organization.

Throughout the year, users appropriate these funds to cover Payments for new discretionary grants. Reserve Funds can be added to the top level of an Annual Budget, or as the children of Category at any level of the hierarchy.

Viewing Budgets

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

In order to access your Annual Budgets, simply go to **Launch > Budget** in your GIFTS Online main menu.

The Annual Budgets page opens, listing all Annual Budgets and, for each budget, its top level Categories and Reserve Funds:

Annual Budgets

Add Annual Budget

Year	Description	Status	Current	Paid	Committed	Balance
2012		Planning	$46,350,000.00	$0.00	$0.00	$46,350,000.00
	Corporate HQ		$4,500,000.00	$0.00	$0.00	$4,500,000.00
	Foundation		$10,350,000.00	$0.00	$0.00	$10,350,000.00
	Northeast Region		$4,500,000.00	$0.00	$0.00	$4,500,000.00
	Capital Region		$2,250,000.00	$0.00	$0.00	$2,250,000.00
	Southeast Region		$4,500,000.00	$0.00	$0.00	$4,500,000.00
	Midwest Region		$4,500,000.00	$0.00	$0.00	$4,500,000.00
	Northwest Region		$6,750,000.00	$0.00	$0.00	$6,750,000.00
	Southwest Region		$9,000,000.00	$0.00	$0.00	$9,000,000.00
2011		Open	$94,305,000.00	$11,111.00	$78,333.00	$94,215,556.00
	Corporation		$50,150,000.00	$0.00	$36,111.00	$50,113,889.00
	Foundation		$43,785,000.00	$11,111.00	$22,222.00	$43,751,667.00
	Small Reserve Fund		$20,000.00	$0.00	$20,000.00	$0.00
	CEO Discretionary Fund		$350,000.00	$0.00	$0.00	$350,000.00
2010		Open	$725,000.00	$62,500.00	$140,777.00	$521,723.00
	Top Category 1		$250,000.00	$37,500.00	$81,944.00	$130,556.00
	ToP Level RF		$390,000.00	$25,000.00	$25,000.00	$340,000.00
	RF 3		$35,000.00	$0.00	$33,333.00	$1,667.00
	Top 2		$50,000.00	$0.00	$500.00	$49,500.00
2009		Closed	$200,000.00	$0.00	$0.00	$200,000.00
	Corporation		$80,000.00	$0.00	$0.00	$80,000.00
	Foundation		$120,000.00	$0.00	$0.00	$120,000.00

Actions on This Page

Here you can:

- Click **Add Annual Budget** to set up a new Annual Budget for another fiscal year.
- Click the print icon to print the list of Annual Budgets.
- View the closed, open, or planning stage budget by clicking its year in the Year in column.

Annual Budget Information

The body main body of the page provides information about all your Annual Budgets.

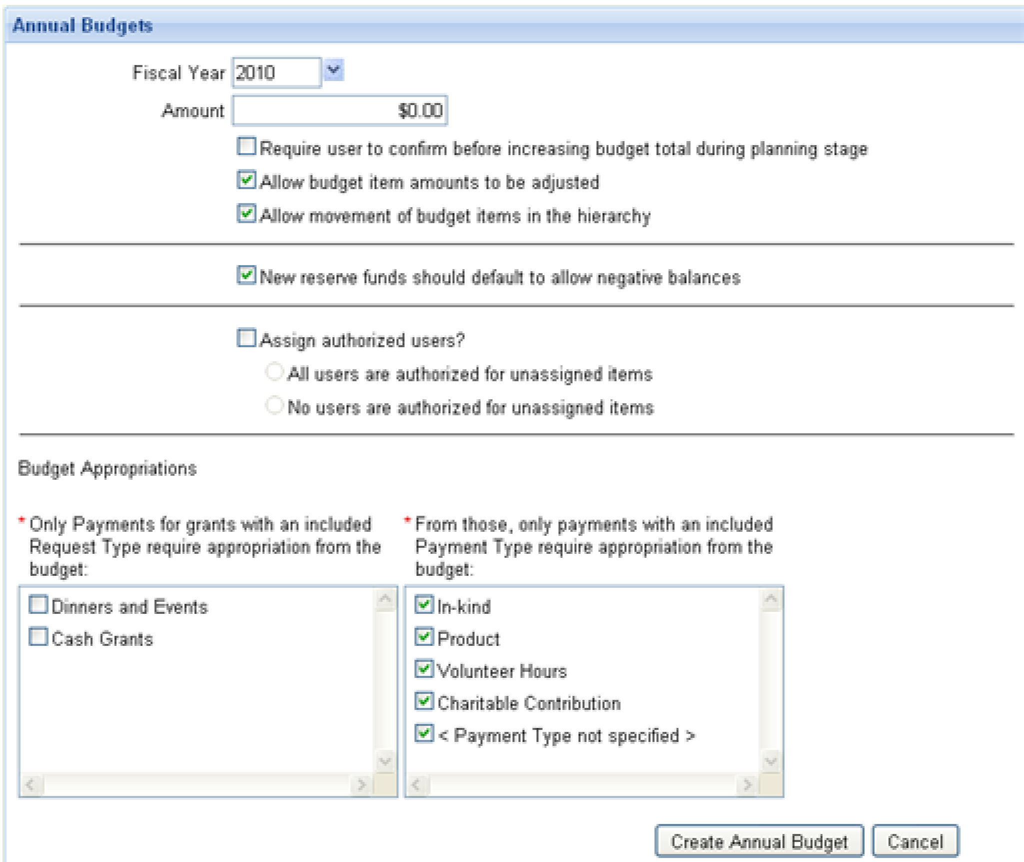
Year	The fiscal year of the Annual Budget. The color of the font in each year row indicates the Budget's status: Red for closed budgets, green for open, blue for budgets in planning.
Description	The Description of each top level Category or Reserve Fund in the year's Annual Budget.
Status	Indicates whether the budget is closed, open, or in planning stage.

Current	The current amount of the Annual Budgets and each top level Category and Reserve Fund. Hover your mouse pointer over this icon to see a budget or item's original amount. The "original" amount is the amount of the budget or Category when the budget was initially opened; the total can change later if budget items are adjusted or added.
Paid	This is the total of Payments for approved Requests which have 1) been appropriated from the top level item and/or its descendants and 2) have a status of Paid, Void, or Refund.
Committed	This is the total of scheduled/contingent/hold Payments for pending and approved Requests which have had funds appropriated from the top level item and/or its descendants.
Balance	Available balance of the budget or top-level item. The formula follows: Current – Paid – Committed = Balance

Setting Up a Budget

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

To add a new budget, navigate to the Annual Budgets list and click the link to **Add Annual Budget**. The new Annual Budget page opens:



NOTE: During planning and open stages, you can modify some of the budget settings you enter here.

To add the new budget, enter the settings described below and click **Create Annual Budget**. The Annual Budget planning page opens.

Fiscal Year

Select the fiscal year for which you want to set up an Annual Budget.

NOTE: You can only have one Annual Budget for a fiscal year.

Amount

Enter the total of the year's budget (required).

Planning and Open Budget Options

The following options affect how the budget works during planning and open statuses:

Require user to confirm before increasing budget total during planning stage	Select this check box if you have a firm idea what your total annual budget will be. During allocation, users won't be able to increase the total without first confirming the change. This allows you to do "bottom up" budgeting; you can enter the amounts of different Categories and have it add up to see what the total budget is.
Allow budget item amounts to be adjusted	Select this check box to allow budget items' amounts to be adjusted during open stage. Allowing Moving Budget Items allows the total budget amount to be increased or decreased during the giving year.
Allow movement of budget items in the hierarchy	If cleared, you cannot move budget items from one parent item to another when the Annual Budget is open. **Note:** Moving items around in budget tiers is always allowed during planning stage.

Reserve Fund Allocation Setting

Each Reserve Fund in an Annual Budget can be set either to allow a negative balance or not.

During budget allocation, when "New reserve funds should default to allow negative balances" is selected, new Reserve Funds are set to allow this. It can be changed in each case; this sets the default.

Assign Authorized Users?

Select this check box if you want to employ authorized user permissions during the budget year.

Authorized users can be established for Categories and Reserve Funds. (Each Line Item takes its authorized users from its parent Category.) Only authorized users assigned to a budget item will be able to access the item for Payment appropriation and funds transfers, affording a higher level of control and security. The Budget Summary dashboard part will only display budget items to which the user is authorized.

If you choose to use the feature, you must then decide how it should be employed:

All users are authorized for unassigned items	This option works well if you have a relatively small number of budget items you need to restrict to certain users. By default, new budget items you add during allocation or open stage will be open to all users. Only if you specify authorized users will all other users become unauthorized.
No users are authorized for	If you plan to keep tight control on all or most of your budget,

unassigned items	specifying in each case who may use an item, select this option. No one will be able to use a budget item until you add them as authorized users.

TIP: Assign authorized users to Categories *before* adding child items. By default, a new Category or Reserve Fund will take on its parent Category's authorized users. (Line Items *always* assume their parent Category's authorized users.) If you have a branching budget and a clear delineation of who may use each branch, enter the authorized users first, then allocate further.

Budget Appropriations

Many grantmakers have several giving programs, not all of which are tracked within the budget. For instance, you may have a Cash Grants program that is part of the budget, but also an In Kind program for non-monetary gifts that are not tracked within the budget.

GIFTS Online allows you to exclude those Payments that are not relevant to your budget. In order for a Payment to require budget appropriation, both its Request's Type *and* its Payment Type must be selected here.

1. First, select the Request Types whose Payments may hit the budget.
2. Then, of those Payments, clear any Payment Types that you do not want to hit the budget.

Setting Authorized Users

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

Each annual budget may be set up to use the authorized users feature. The authorized users feature allows you to establish authorized users for Categories, Line Items, and Reserve Funds. Only authorized users assigned to a budget item will be able to access the item for Payment appropriation and funds transfers, affording a higher level of control and security. The Budget Summary dashboard part will only display budget items to which the user is authorized.

- Assigning authorized users for Categories is a help with data entry. By default, a new Category or Reserve Fund will take on its parent Category's authorized users. (Line Items *always* assume their parent Category's authorized users.) If you have a branching budget and a clear delineation of who may use each branch, enter the authorized users to Categories as you add them, then allocate further.
- Each Reserve Fund you add defaults to having the same authorized users as its parent Category (except when adding top level Reserve Funds). However, you can add or remove authorized users, making each Reserve Fund's list different if needed.
- Line Items take the authorized users assigned to their parent Categories. The list cannot be modified in different Line Items.

Assigning Users to Categories and Reserve Funds

When adding or editing a Category or Reserve Fund, click **+ Authorized Users** to expand the section.

The panel on the left lists GIFTS Online users with permission to appropriate funds for Payments. To specify someone as an authorized user, select his or her user name and click **Add**. The user name moves to the right panel, which lists authorized users.

You can remove someone from the list as well; select them in the right panel and click **Remove**.

TIP: If you have a long list of users, use the search box to narrow it down. Enter part or all of the user name and click the binoculars icon; the list of users in the left panel is filtered to users who match.

Effect of Adding Authorized Users

The authorized user option in the Annual Budget setup has two settings; the effect of adding a first authorized user depends on that setting:

Setting	Result
All users are authorized for unassigned items	By selecting authorized users, you prevent all other users from appropriating or transferring the funds. If you don't add any authorized users, everyone can appropriate these funds.
No users are authorized for unassigned items	Only the authorized users you add can appropriate or transfer these funds. When you use this setting in your budget setup, it's important to add authorized users to all items. **TIP:** You will probably want to make sure to add them to top-level Categories before further allocating those Categories, to save time.

Budget Module Branch Security

NOTE: This feature is only available to Budget Module customers with Branch Security enabled.

GIFTS Online checks the group(s) the current user is assigned to in order to determine which branches they have full or read-only access to, which in turn affects what is displayed on the pages.

• When the default <All> branch menu open is selected, only categories and funds for which the current user has full or read-only branch access will be displayed.

• The branch menu options will be limited as well to only those branches the current user has full or read-only access to.

• When creating child reserve funds or line items, the branch field will be limited to the parent sub-category.

Budget Summary Dashboard Part

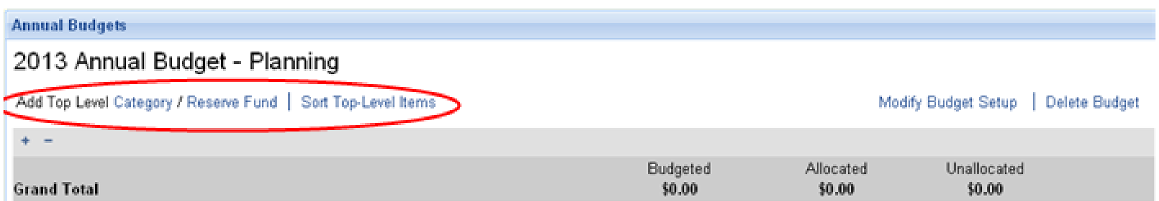
This change in how budget items are displayed is also reflected in the Budget Summary dashboard part. Users will only be able to view the items for which they have full or read-only branch access.

Allocating the Budget

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

Once you have created a new budget, you can distribute funds among your various Categories, Line Items, and Reserve Funds. Categories allow you to build the hierarchy of your budget tiers. Reserve Funds and Line Items are used to cover Payments during the budget year.

Since the GIFTS Online Annual Budget is organized into a series of tiers, you must begin allocating funds at the top tier of your budget, and work downwards:



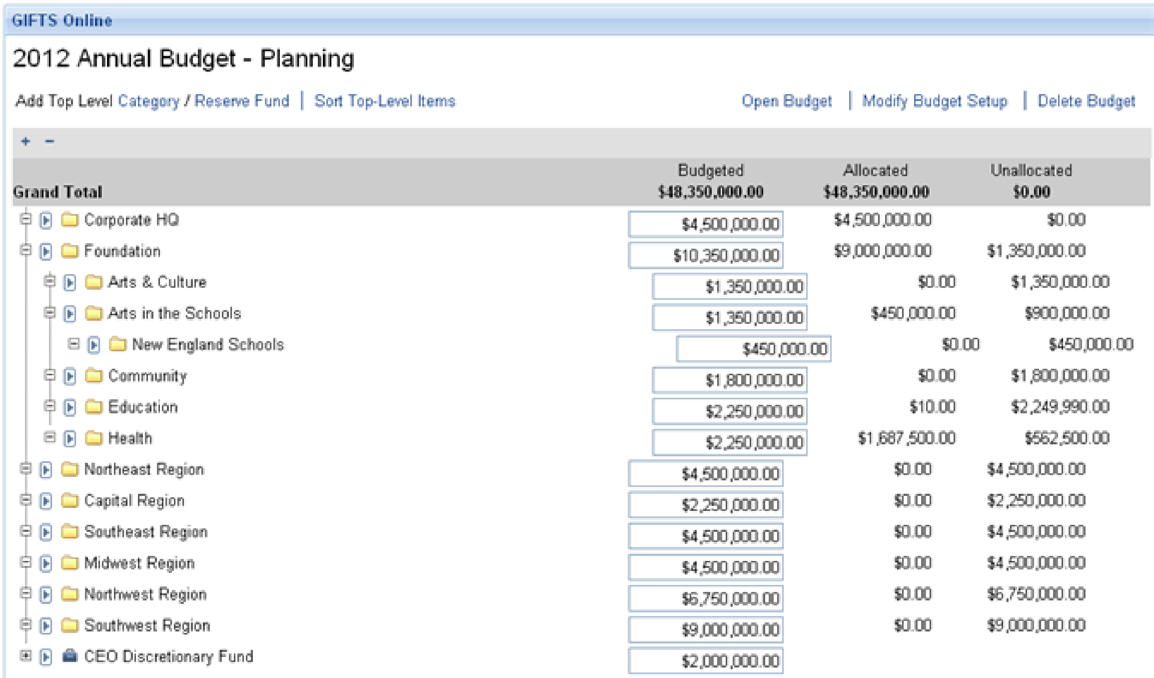
Topics in this section:

The Annual Budget Planning Page

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

When you first add a new budget, this page appears blank - after all, you haven't had a chance to allocate the budget to any Categories or other budget items.

However, to understand what you see on this page, we'll start with budget allocation already in progress:



Actions from This Page

The following actions can be taken from this screen.

Add a Top Level Category / Reserve Fund	You can add new top-level Categories and Reserve Funds. **NOTE:** Line Items cannot be added to the top level of an Annual Budget. To add sub-Categories, Reserve Funds, or Line Items under a particular Category, access its Category menu and select the correct option. These are described below.
Sort Top Level Items	Sorts top level items: First, all top level Categories are listed in alphabetical order, followed by Reserve Funds in alphabetical order.
Open Budget	Once budget planning is complete and you have allocated the budget total to Categories, Reserve Funds, and Line Items, you must open the budget. Once the Annual Budget is open, users can begin appropriating funds from it to cover the Payments scheduled for that fiscal year.
Modify Budget Setup	You can change the settings you put in place when adding the Annual Budget.
Delete Budget	You can delete an Annual Budget while it's in planning status.
+ −	Clicking these icons will (respectively) expand or collapse all Categories in the body of the page below.

	Clicking this icon will export the budget to Excel.

Budget Information on This Page

The body of the page shows all Categories in the budget, showing each one's place in the budget hierarchy. Top level Reserve Funds are also shown.

This view allows you to see the "big picture" of your Annual Budget as you plan and allocate it. Under each Category, you can drill down to view and edit child Line Items and Reserve Funds you've already added.

Description **(No label)**	The Description of each Category or top level Reserve Fund. Note that each Category can be expanded to show its child Categories. In addition, clicking this icon grants you access to the Category or Reserve Fund actions, listed below.
Budgeted	Total amount allocated to the Category (or top level Reserve Fund). This field is editable. During planning stage , you can change the Category or top level Reserve Fund amount without opening the budget item edit form.
Allocated	Shows the amount from the Category's budgeted amount that has been further allocated to Line Items, Reserve Funds, or sub-Categories. This column (and the next) are blank for top level Reserve Funds; Reserve Funds cannot be allocated to child items.
Unallocated	Shows the amount left in the Category for child Categories, Reserve Funds, or Line Items. It is the Budgeted amount minus the Allocated amount.

Category Actions

You can work with Categories in a planning budget by clicking to open its menu. In the menu you will find the following options:

Edit	Opens the Category edit form.
Delete	Deletes the Category (and all its child items).
Add Child Category	Click to add a Category as a child of the selected Category. Moving Budget Items
Add Child Reserve Fund	Click to add a Reserve Fund as a child of the selected Category.

Add Child Line Item	Click to add a Line Item as a child of the selected Category.
Sort Child Items	Sorts the Category's child items: First, all child Categories are listed in alphabetical order, followed by Line Items, then Reserve Funds.
View Details	Opens the Category details window, allowing you to view and edit the Category's child Line Items and Reserve Funds.

Reserve Fund Actions

You can work with top level Reserve Funds in a planning budget by clicking ▶ to open its menu. In the menu you will find the following options:

Edit	Opens the Reserve Fund edit form.
Delete	Deletes the top level Reserve Fund.

Adding a Category

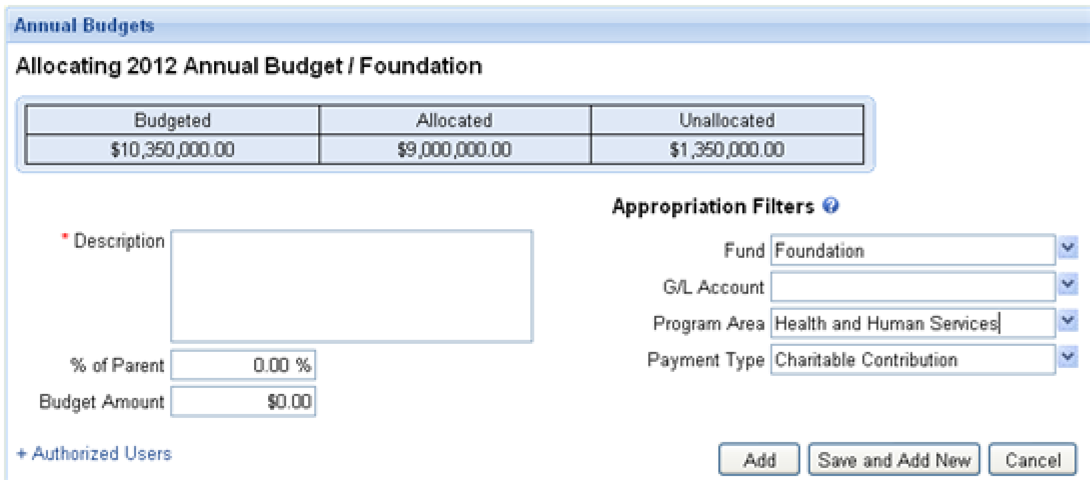
NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

A Category is an amount of money allocated to a specific fund, program, or purpose, but not to any specific organization. Categories are further allocated at the next level of the budget. Users cannot appropriate funds from Categories to cover Payments; rather, they allow you to build the hierarchy of your budget tiers, then add child Reserve Funds and Line Items to cover Payments.

To add a Category:

1. Open the new Category page by:
    - Clicking the **Add Top Level Category** link on the planning or open budget page.
    - Selecting the **Add Child Category** menu item next to the would-be parent Category.

   The new Category page opens:



2. Enter a **Description** for the Category.
3. Enter either an **Amount** or a **% of Parent** Category (or budget total). GIFTS Online will recalculate the second field when you edit the first.

   NOTE: When the budget is open, a new Category amount is $0.00 and cannot be edited here. This is because GIFTS Online does not allow unallocated amounts in open budgets. (Unallocated amounts in an open budget can't be used to cover payments and risk being forgotten rather than given.) If you need to add a Category to an open budget, add it with an amount of zero and then add Reserve Funds and Line Items to it as needed. The total of those child items will become the Category amount.

4. Enter **Appropriation Filter** codes, which default from the parent Category. When appropriating funds for Payments, users can narrow their choices of budget items by these filters. (Since users don't appropriate directly from Categories, these settings will serve as the default for child Reserve Funds and Line Items you add.)

   NOTE: If your GIFTS Online system employs the optional Branch Security feature and this is a second level Category, you will be required to select a Branch. Children of the Category will all inherit the same branch. If the Category is being added to a lower level of the budget hierarchy, it will inherit its parent Category's branch.

5. Click **+ Authorized Users** to assign authorized users to the Category. This link will not appear if your Annual Budget was not set up to employ the authorized users feature. Click here for more information on adding and using authorized users.
6. To save the new Category, you can click **Add** and return to the Annual Budget page. If you want to add another sibling Category under the same parent, click **Save and Add New**: The Category is saved, and the form refreshes, allowing you enter details for the next Category.

Adding a Reserve Fund

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

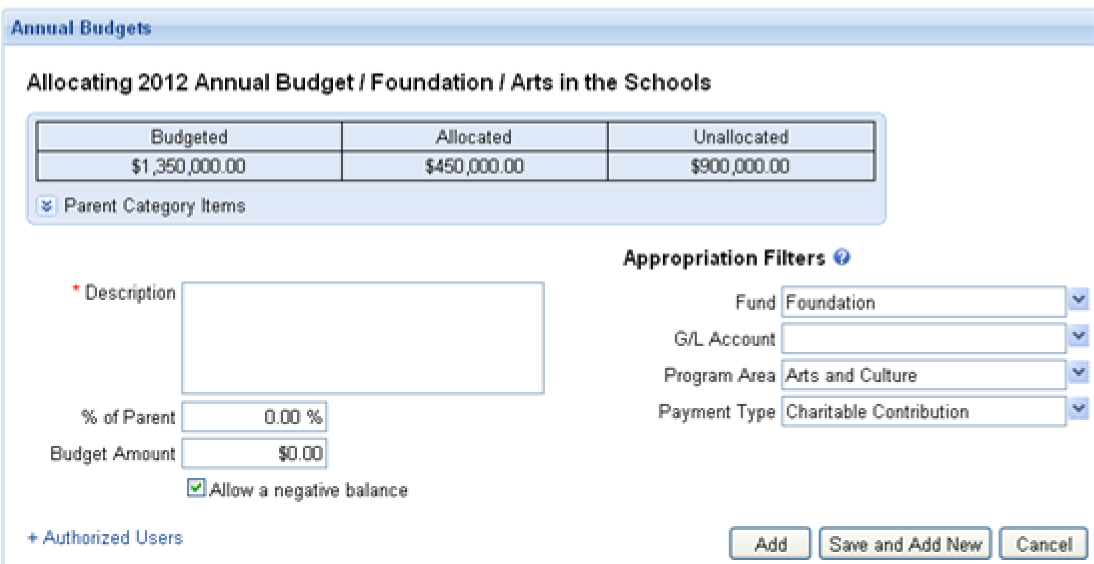
A Reserve Fund is often a "leftover" dollar amount in a given Category that is not allocated to a specific Organization. Throughout the year, users appropriate these funds to cover Payments for new discretionary grants. Reserve Funds can be added to the top level of a budget, or as the children of Category at any level of the hierarchy.

To add a Reserve Fund:

1. Open the new Reserve Fund page by:

   - Clicking the **Add Top Level Reserve Fund** link on the planning or open budget page.
   - Selecting the **Add Child Reserve Fund** menu item next to the would-be parent Category.

   The new Reserve Fund page opens:



2. Enter a **Description** for the Reserve Fund.
3. Enter either an **Amount** or a **% of Parent** Category (or budget total). GIFTS Online will recalculate the second field when you edit the first.

4. Select **Allow a negative balance** if you want to give users the option of appropriating amounts for Payments greater than the Reserve Fund's available balance. This will cause the Reserve Fund's balance to "go negative."
5. Enter **Appropriation Filter** codes, which default from the parent Category. When appropriating funds for Payments, users can narrow their choices of budget items by these filters. For example, the Reserve Fund in our example will not be available for appropriation if the user 1) chose to filter by Program Area and 2) the Request's Program Area (level 1) was other than Arts and Culture.

NOTE: If your GIFTS Online system employs the optional Branch Security feature and this is a first or second level Reserve Fund, you will be required to select a Branch. If the Reserve Fund is being added to a lower level of the budget hierarchy, it will inherit its parent Category's branch.

6. Click **+ Authorized Users** to assign authorized users to the Reserve Fund. If authorized users were set up for the parent Category, those users are set here by default, but change be changed.

   NOTE: This link will not appear if your Annual Budget was not set up to employ the authorized users feature. Click here for more information on adding and using authorized users.

7. To save the new Reserve Fund, you can click **Add** and return to the Annual Budget page. If you want to add another sibling Category under the same parent, click **Save and Add New**: The Category is saved, and the form refreshes, allowing you enter details for the next Category.

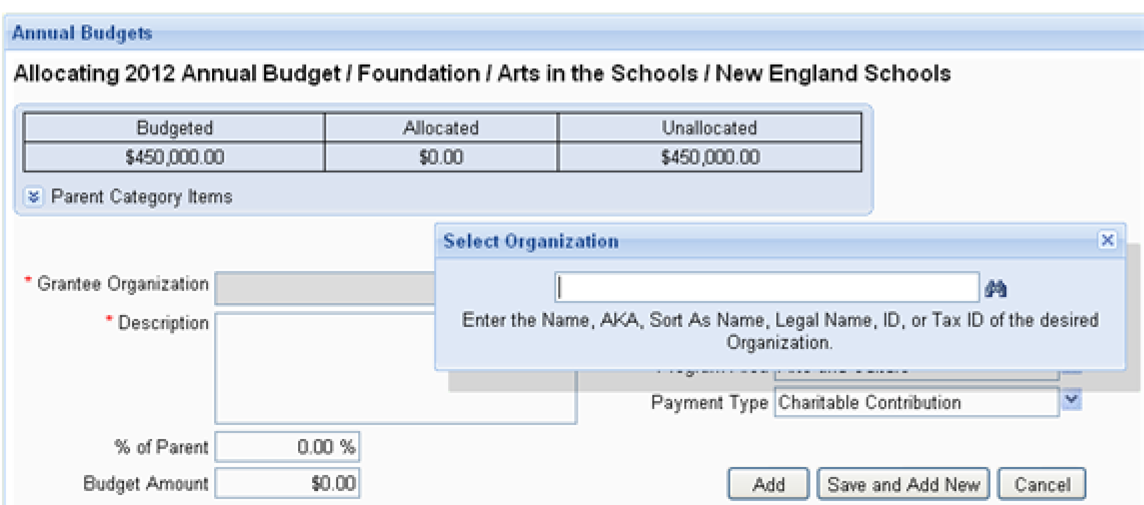
Adding a Line Item

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

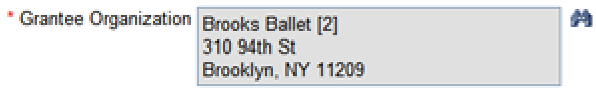
A Line Item is a dollar amount assigned to a specific Organization, often used for grants that are given annually. Throughout the year, users appropriate these funds to cover Payments for those planned grants, or even new grants for the Organization. Line Items can be added as the children of Category at any level of the hierarchy.

To add a Line Item:

1. Select the **Add Child Line Item** menu item next to the would-be parent Category. The new Line Item page opens:



2. Each Line Item must be linked to single payee Organization; enter search criteria in the Select Organization window and in the search results click the name of the payee Organization. The Organization information appears in the form:



3. Enter a **Description** for the Line Item.
4. Enter either an **Amount** or a **% of Parent** Category. GIFTS Online will recalculate the second field when you edit the first.

5. Enter **Appropriation Filter** codes, which default from the parent Category. When appropriating funds for Payments, users can narrow their choices of budget items by these filters. For example, the Line Item in our example will not be available for appropriation if the user 1) chose to filter by Payment Type and 2) the Payment Type was other than Charitable Contribution.
   NOTE: If your GIFTS Online system employs the optional Branch Security feature and this is a second level Line Item, you will be required to select a Branch. If the Line Item is being added to a lower level of the budget hierarchy, it will inherit its parent Category's branch.
6. To save the new Line Item, you can click **Add** and return to the budget page. If you want to add another sibling Line Item under the same parent, click **Save and Add New**: The Line Item is saved, and the form refreshes, allowing you enter details for the next Line Item.

NOTE: If your Annual Budget is set up to employ the authorized users feature, you may note that there is no opportunity on Line Items to assign those users. In GIFTS Online, Line Item authorized users are set in the parent Category. That is, Line Items which are all children of the same parent Category will share the same authorized users, which were set when you added the parent Category.

NOTE: Click here for more information on adding and using authorized users.

Moving Budget Items

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

Budget Categories, Line Items, and Reserve Funds can be moved from one parent Category in the budget hierarchy to another during planning stage.

When the budget is open, these same movements can be made *if* your budget setup allows it. The preference to "Allow movement of budget items in the hierarchy" must be turned on or budget items are locked into their place during open status.

NOTE: Once the Annual Budget is closed, the budget hierarchy is locked and you can no longer move items.

You can move budget items by dragging and dropping them. Position the mouse point over the Category icon, hold down the mouse button, drag it to its new location, and release the mouse button.

If you want to move a Reserve Fund or a Line Item to a different parent Category, you will need to view the budget item under its current parent first; then you can drag the Line Item icon or Reserve Fund icon to the a different Category. (Reserve Funds you can also drag to the top level.)

Opening a Budget

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

When your budget planning is done, you are finished allocating Categories to Line Items and Reserve Funds, and the new fiscal year is ready to start, you will open the Annual Budget.

When the Annual Budget is open, users can appropriate funds for Payments scheduled for the budget year.

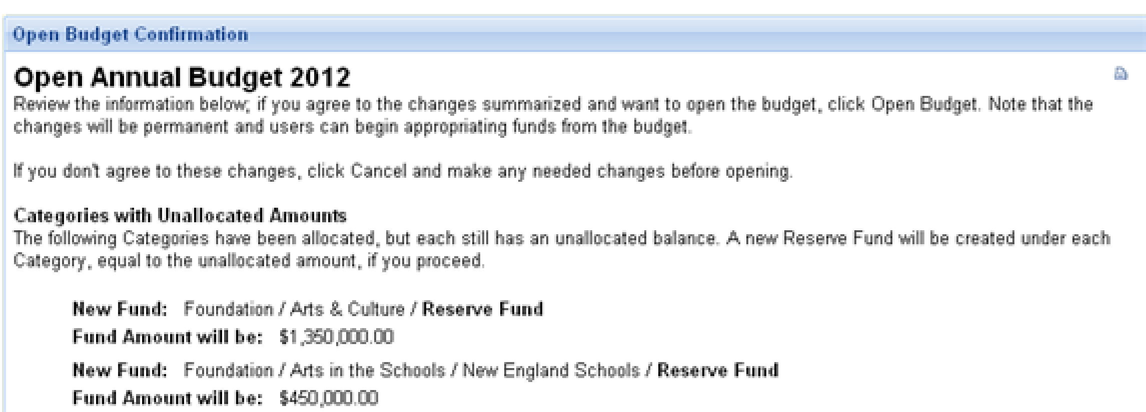
IMPORTANT: Review your budget allocations carefully before opening the Annual Budget. You can bring an open budget back to planning status, but only if no Payments were appropriated from it while open.

To open the Annual Budget:

1. On the Annual Budget planning page, click **Open Budget**.

   GIFTS Online checks to make sure all funds in the budget total and in all Categories is further allocated to Reserve Funds and Line Items. (Unallocated amounts are not allowed in open budgets: They can't be used to cover payments and risk being forgotten rather than given.)

2. If unallocated funds in Categories or in the budget total are found, GIFTS Online will create a Reserve Fund for the unallocated amount (within that Category, or at the top level of the budget hierarchy). GIFTS Online first summarizes these potential changes:



Review this information carefully before proceeding.

TIP: Click the icon to print this page for further offline review. Click **Cancel** here if you want to consider any changes before proceeding.

3. Click **Open Budget** to proceed. Any Reserve Funds summarized above are created, and the open Annual Budget page for the year opens.

Maintaining the Open Budget

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

During the budget year, you and other GIFTS Online users are appropriating funds for Payments and tracking progress toward giving goals. But your budget may change during the year, and to keep an accurate record of what's happening with your giving, there are several tweaks and changes you may need to make during the year.

The following topics are covered in this section:

The Annual Budget Open Page

Viewing Line Items and Reserve Funds

Viewing Appropriations

Editing Budget Items

Adding New Budget Items

Transferring Funds

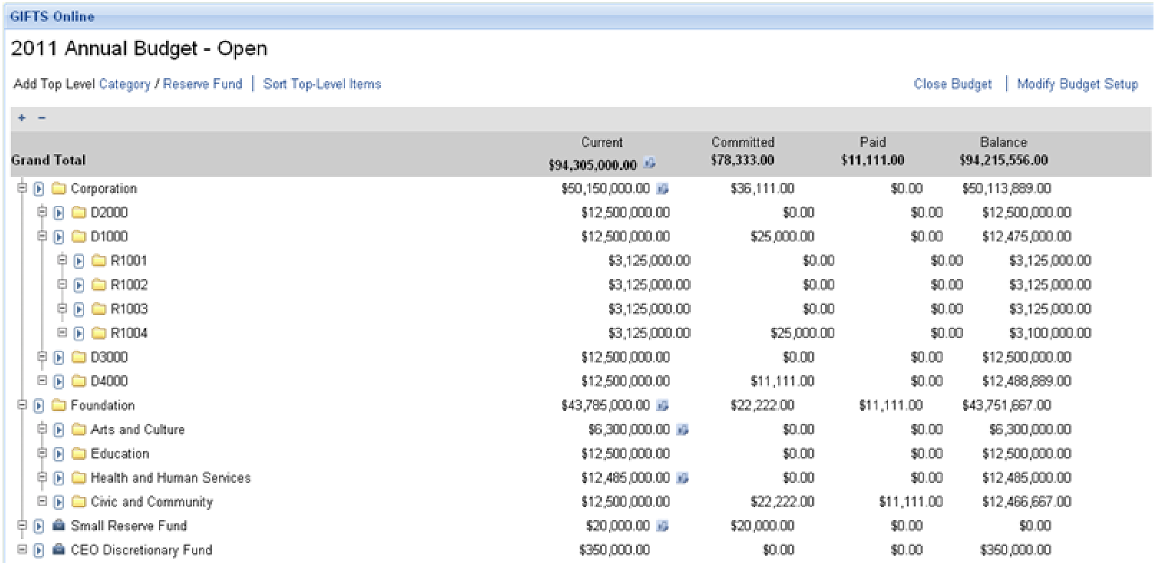
Adjusting Budget Item Amounts

The Annual Budget Open Page

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

You can access an open budget from the Annual Budgets list by clicking the budget year.

Budget maintenance tasks during the open budget year start from this page. You can also get a summary or detailed view of the current state of your budget, specific items, and so on.



GIFTS Online

2011 Annual Budget - Open

Add Top Level Category / Reserve Fund | Sort Top-Level Items

Close Budget | Modify Budget Setup

+ −

Grand Total	Current $94,305,000.00	Committed $78,333.00	Paid $11,111.00	Balance $94,215,556.00
Corporation	$50,150,000.00	$36,111.00	$0.00	$50,113,889.00
D2000	$12,500,000.00	$0.00	$0.00	$12,500,000.00
D1000	$12,500,000.00	$25,000.00	$0.00	$12,475,000.00
R1001	$3,125,000.00	$0.00	$0.00	$3,125,000.00
R1002	$3,125,000.00	$0.00	$0.00	$3,125,000.00
R1003	$3,125,000.00	$0.00	$0.00	$3,125,000.00
R1004	$3,125,000.00	$25,000.00	$0.00	$3,100,000.00
D3000	$12,500,000.00	$0.00	$0.00	$12,500,000.00
D4000	$12,500,000.00	$11,111.00	$0.00	$12,488,889.00
Foundation	$43,785,000.00	$22,222.00	$11,111.00	$43,751,667.00
Arts and Culture	$6,300,000.00	$0.00	$0.00	$6,300,000.00
Education	$12,500,000.00	$0.00	$0.00	$12,500,000.00
Health and Human Services	$12,485,000.00	$0.00	$0.00	$12,485,000.00
Civic and Community	$12,500,000.00	$22,222.00	$11,111.00	$12,466,667.00
Small Reserve Fund	$20,000.00	$20,000.00	$0.00	$0.00
CEO Discretionary Fund	$350,000.00	$0.00	$0.00	$350,000.00

Actions on This Page

The following actions can be taken from this screen.

Add a Top Level Category / Reserve Fund	You can add new top-level Categories and Reserve Funds during open status.
Sort Top Level Items	Sorts top level items: First, all top level Categories are listed in alphabetical order, followed by Reserve Funds in alphabetical order.
Return to Planning	An open Annual Budget can be taken back to planning status if no Payments have appropriated funds from it. Once a Payment has been appropriated from the budget, this link will not appear.
Close Budget	At the end of the giving year, you can close the budget to prevent further appropriations from it.
Modify Budget Setup	You can change the settings you put in place when adding the Annual Budget.
	Clicking these icons will (respectively) expand or collapse all Categories in the body of the page below.
	Clicking this icon will export the budget to Excel.

NOTE: For each Category, there are additional actions you can take by opening the Category menu ; these options are described below in **Category Actions**.

Budget Information on This Page

The body of the page shows all Categories in the budget, showing each one's place in the budget hierarchy. Top level Reserve Funds are also shown.

This view allows you to see the "big picture" of your open Annual Budget, and your progress toward giving goals. You can drill down to the see the Line Items and Reserve Funds of any given Category, then see the payment appropriations for each of those in turn.

Description **(No label)**	The Description of each Category or top level Reserve Fund. Note that each Category can be expanded to show its child Categories. In addition, clicking this icon grants you access to the Category actions, listed below.
Current	The current amount of the Category (or top level Reserve Fund). Hover your mouse pointer over this icon to see a item's original amount. The "original" amount is the amount of the Category or top level Reserve Fund when the budget was initially opened; the total can change later if budget items are adjusted or added.
Paid	This is the total of Payments for Requests which have 1) been appropriated from the top level item and/or its descendants and 2) have a status of Paid, Void, or Refund.
Committed	This is the total of scheduled/contingent/hold Payments for pending and approved Requests which have had funds appropriated from the top level item and/or its descendants.
Balance	Available balance of the budget or top-level item. The formula follows: Current – Paid – Committed = Balance

Category Actions

You can work with Categories in an open budget by accessing the Category menu icon.

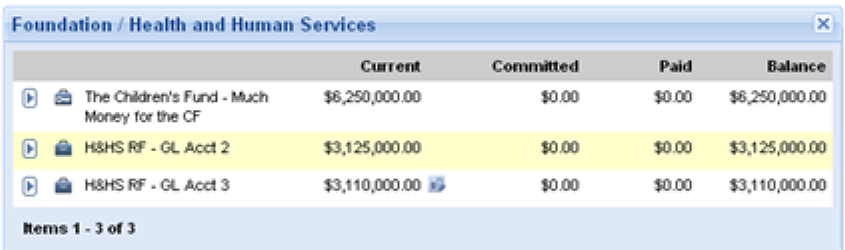
Edit	Opens the Category edit form.
Add Child Category	Click to add a Category as a child of the selected Category.
Add Child Reserve Fund	Click to add a Reserve Fund as a child of the selected Category.
Add Child Line Item	Click to add a Line Item as a child of the selected Category.

Sort Child Items	Sorts the Category's child items: First, all child Categories are listed in alphabetical order, followed by Line Items, then Reserve Funds.
View Details	Opens the Category details window, allowing you to view the Category's child Line Items and Reserve Funds.

Viewing Reserve Funds and Line Items

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

To view a Category's child Line Items and Reserve Funds, open the Category menu and select **View Details**. The window opens:



TIP: When this window is open, you can select a different Category in the main budget page in the background; the details window will update to show children of the newly selected Category.

Description **(No label)**	For Reserve Funds, the Description is listed; for Line Items, the Organization Name and Description appear. Clicking grants you access to the budget item actions, listed below.
Current	The current amount of the Category (or top level Reserve Fund). Hover your mouse pointer over to see a item's original amount. The "original" amount is the amount of the item when the budget was initially opened; the total can change later if budget items are adjusted.
Paid	This is the total of Payments for Requests which have 1) been appropriated from the item and 2) have a status of Paid, Void, or Refund.
Committed	This is the total of scheduled/contingent/hold Payments for pending and approved Requests which have had funds appropriated from budget item.
Balance	Available balance of the budget item. The formula follows: Current – Paid – Committed = Balance

Budget Item Menu

During open stages, actions which can be taken on Reserve Funds and Line Items are shown in the budget item menu, accessed by clicking this icon: During open stage you can:

- Edit the budget item.
- Adjust Budget Item Amount
- Transfer Funds to or from the budget item
- View Appropriations made for Payments

TIP: Line Items and Reserve Funds can also be viewed by drilling down in the Budget Summary dashboard part.

Viewing Appropriations

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

When the budget is open or closed, you can drill down and see individual appropriations made against each Line Item or Reserve Fund in your budget.

1. Open the budget page for the open year.
2. Find the Category which is the parent of the Line Item or Reserve Fund you want review. In the Category menu , select **View Details** to see its child budget items. The budget details window opens.
3. Now open the menu for the budget item you want to review and click **View Appropriations**. The appropriations window opens.

The following data about each appropriation is provided:

Organization	The name of the payee Organization.
Project Title	The Project Title of the Request associated with the Payment.
Amount	The appropriation amount (which equals the payment amount).
Date/Time	The date and time on which the appropriations was made.

TIP: Appropriations can also be viewed by drilling down in the Budget Summary dashboard part.

Editing Budget Items

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

Categories, Line Items, and Reserve Funds can be edited. To access budget items for editing during open status:

- For Categories, navigate to the planning or open budget page and select Edit from the Category menu.
- For Line Items and Reserve Funds, you need to identify their parent Category, then open the budget details for that Category. In the budget details window, you can then open the menu for the item and select Edit.

Adding New Budget Items

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

During the budget year, you may want to add new budget items. For example, you belatedly decide to fund a particular organization this year; while waiting for their proposal, you may want to add a new Line Item linked to their Organization record.

NOTE: Budget items cannot be deleted from an open budget.

Adding a Category, a Line Item, or a Reserve Fund works the same way during open status as during planning.

Moving Budget Items

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

Budget Categories, Line Items, and Reserve Funds can be moved from one parent Category in the budget hierarchy to another during planning stage.

When the budget is open, these same movements can be made *if* your budget setup allows it. The preference to "Allow movement of budget items in the hierarchy" must be turned on or budget items are locked into their place during open status.

NOTE: Once the Annual Budget is closed, the budget hierarchy is locked and you can no longer move items.

You can move budget items by dragging and dropping them. Position the mouse point over the Category icon, hold down the mouse button, drag it to its new location, and release the mouse button.

If you want to move a Reserve Fund or a Line Item to a different parent Category, you will need to view the budget item under its current parent first; then you can drag the Line Item icon or Reserve Fund icon to the a different Category. (Reserve Funds you can also drag to the top level.)

Transferring Funds

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

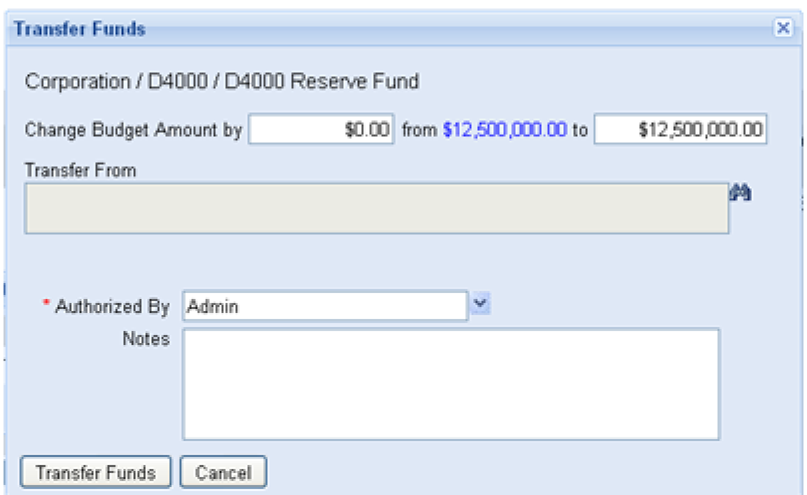
Even grantmakers with the strictest of budgets often have to move funds within their annual budget during the course of a fiscal year. For instance, more or less money may be needed in a Line Item than anticipated. To address these changes, users with access to the Annual Budgets can transfer money between items in a budget.

NOTE: Funds can only be transferred within a budget year; you cannot transfer funds from one year to another.

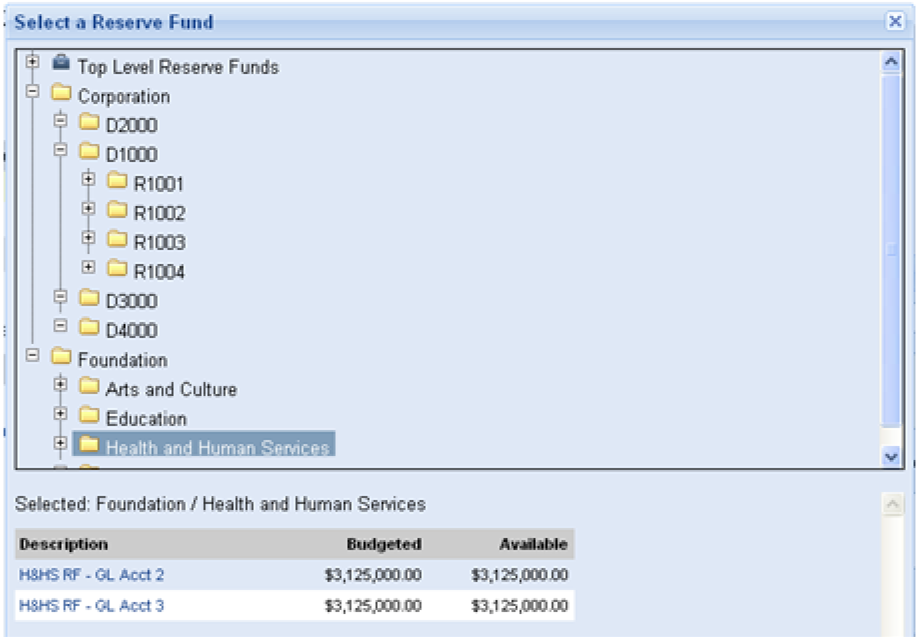
You will select two budget items - a source and destination for the funds - and the amount to transfer. This will not affect the overall budget total; you're moving money, but within the established total.

To transfer funds:

1. Go to open Annual Budget page for the year in which you want to transfer funds.
2. Open the budget details of the Category which is the parent of either the source ("from") budget item or the destination ("to") item.
3. In the budget item's menu, select **Transfer Funds**. The Transfer Funds window opens:



4. Determine the amount to transfer by either entering the amount in the first currency field (negative numbers are allowed) or by entering the new total you want for the first item in the second currency field. Each field will recalculate automatically based on what you type in the other.
5. Click the binoculars to search for the Reserve Fund you want to transfer funds from. The Select a Reserve Fund window opens:



The top panel shows the budget hierarchy. Select a Category and its child Reserve Funds are listed in the lower panel. Click the link for the Reserve Fund or Line Item to serve as the second budget item. The item is then shown in the second position in the Transfer Funds window.

6. Enter the staff person who is authorizing this transfer (your user name is the default). You can add Notes as well.
7. Click **Transfer Funds** to complete the transfer.

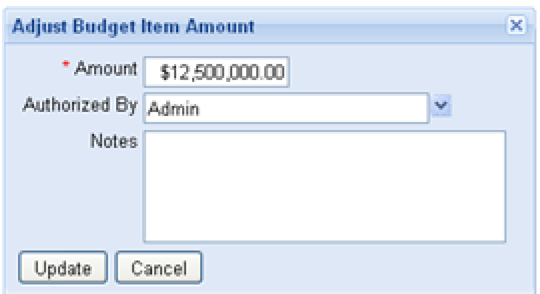
Adjusting Budget Item Amounts

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

During planning stage, the amounts of budget items can be edited at will. When the budget is open, increasing or decreasing a Line Item or Reserve Fund's amount needs to be audited more carefully.

To adjust a budget item's amount during open stage:

1. Go to open budget page for the year in which you want to adjust an item.
2. Open the budget details of the Category which is the parent of the Line Item or Reserve Fund you want to increase or decrease.
3. In the budget item's menu, select **Adjust Budget Item Amount**. The Adjust Budget Item Amount window opens:



4. Enter the new Amount for the budget item.

   NOTE: The new Amount cannot be lower than zero, or the Appropriated amount, whichever is greater.

5. Enter the staff person who is authorizing this transfer (your user name is the default). You can add Notes as well.
6. Click **Save**. GIFTS Online will ask you to confirm that you want to adjust the amount, which it notes will affect the overall budget total. You can continue or cancel.

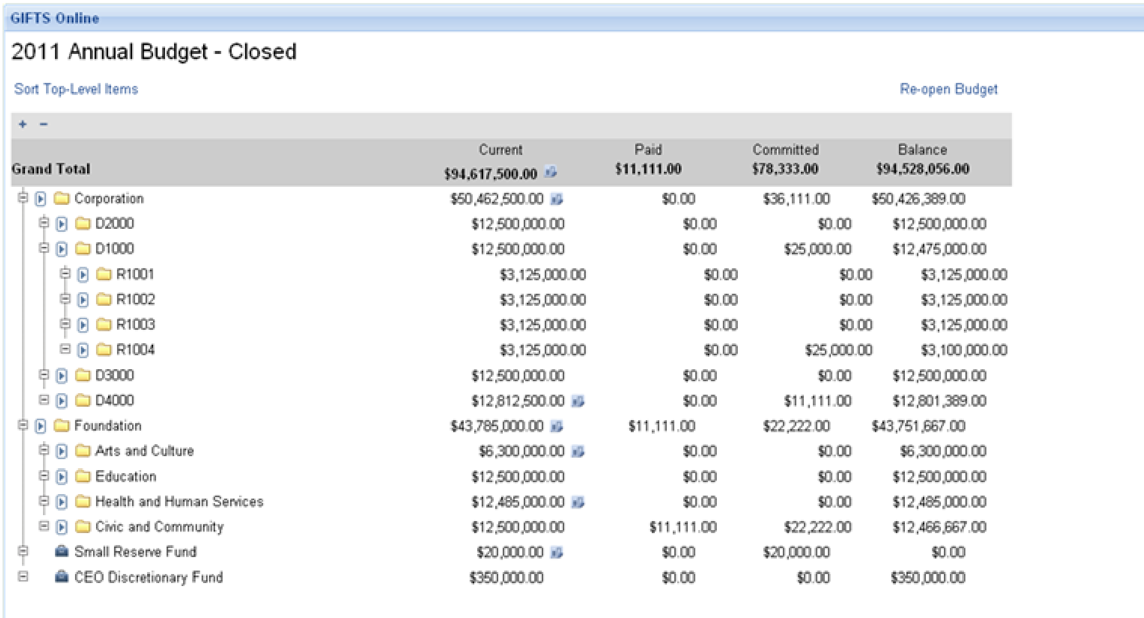
Closing the Budget

NOTE: This help topic describes features found in the optional Budget Module. If your GIFTS Online system does not include the Budget, you may disregard this information.

At the end of the fiscal year, once your payout for the year is complete, you can close the Annual Budget.

After the budget is closed, users will no longer be able to appropriate funds for payments from it. Make sure your Payments scheduled for the fiscal year have already been appropriated before closing the Annual Budget.

The close the budget, click the **Close Budget** link on the open budget page. GIFTS Online asks you to confirm; click **Yes** and the closed budget page opens:



GIFTS Online

2011 Annual Budget - Closed

Sort Top-Level Items | Re-open Budget

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Grand Total	Current $94,617,500.00	Paid $11,111.00	Committed $78,333.00	Balance $94,528,056.00
Corporation	$50,462,500.00	$0.00	$36,111.00	$50,426,389.00
D2000	$12,500,000.00	$0.00	$0.00	$12,500,000.00
D1000	$12,500,000.00	$0.00	$25,000.00	$12,475,000.00
R1001	$3,125,000.00	$0.00	$0.00	$3,125,000.00
R1002	$3,125,000.00	$0.00	$0.00	$3,125,000.00
R1003	$3,125,000.00	$0.00	$0.00	$3,125,000.00
R1004	$3,125,000.00	$0.00	$25,000.00	$3,100,000.00
D3000	$12,500,000.00	$0.00	$0.00	$12,500,000.00
D4000	$12,812,500.00	$0.00	$11,111.00	$12,801,389.00
Foundation	$43,785,000.00	$11,111.00	$22,222.00	$43,751,667.00
Arts and Culture	$6,300,000.00	$0.00	$0.00	$6,300,000.00
Education	$12,500,000.00	$0.00	$0.00	$12,500,000.00
Health and Human Services	$12,485,000.00	$0.00	$0.00	$12,485,000.00
Civic and Community	$12,500,000.00	$11,111.00	$22,222.00	$12,466,667.00
Small Reserve Fund	$20,000.00	$0.00	$20,000.00	$0.00
CEO Discretionary Fund	$350,000.00	$0.00	$0.00	$350,000.00

NOTE: The screen shot above is a bit unrealistic - you will certainly have a much lower balance left at the end of each budget year! If you do close the budget year with a balance still available, you can re-open the budget and use the funds, but only for payments within the same budget year. Otherwise the balance will remain unused.

Actions on This Page

Sort Top Level Items	Sorts top level items: First, all top level Categories are listed in alphabetical order, followed by Reserve Funds in alphabetical order.
Re-open Budget	After closing the Annual Budget, you may discover Payments schedule for the budget year which you didn't appropriate funds for. You can re-open the budget; the Annual Budget goes back to open status, allowing further appropriations or changes to appropriations.
\+ −	Clicking these icons will (respectively) expand all Categories in the body of the page below, or collapse all.
	Clicking this icon will export the budget to Excel.

Viewing Budget Details

Categories and top level Reserve Funds are displayed on the closed Annual Budget page; you can view each Category's child Reserve Funds and Line Items by open the Category menu and selecting **View Details**.

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