Welcome to GIFTS 6.5 and IGAM 5.5

This document contains a summary of interface changes and fixes to known issues included in the GIFTS 6.5 and IGAM 5.5 released on September 30, 2013.

Content

Revision 12/31/2013:
A new issue has been resolved in the latest GIFTS 6.5 build. See page 27 for case details.
To get the new GIFTS 6.5 build, please send an email to upgrade_inquiries@microedge.com.

How do I get the GIFTS 6.5 and IGAM 5.5 Upgrade?

The GIFTS 6.5 and IGAM 5.5 upgrade are free to all current GIFTS 6.4/IGAM5 users.

If you are interested in upgrading to GIFTS 6.5, please send an email to upgrade_inquiries@microedge.com.

Will GIFTS 6.5 require upgrading GIFTS CONNECTION Server, Plus Pack, and IGAM as well?

If you have any previous version of GCS, Plus Pack, or IGAM currently installed, they will need to be upgraded to the latest versions included with the GIFTS 6.5 download in order to ensure compatibility with the stronger login security features, Office 2013 Professional, 64-bit Windows and other new features.

- GIFTS Connection Server 3.6 (including Job Manager)
- GIFTS Plus Pack 5.2.1 (including Links Plus and Reminders)
- IGAM 5.5 (will automatically be updated with GIFTS 6.5)

NOTE: Job Manager, Links Plus, and Reminders Plus must be installed separately from the main setup files. Please refer to the *GIFTS 6.5 Upgrade Guide* for more details.

GIFTS Support

The GIFTS_6.5.zip you download contains all setup files and all user documentation. Refer to the Docs folder in this zip file for the *GIFTS Installation and Technical Reference Guide*, which will lead you through the upgrade process.

Please contact Technical Support if you have additional questions about the updating of your installation to GIFTS 6.5.

Telephone: (877)704-3343
Email: Helpdesk@microedge.com

New Features for GIFTS 6.5

The following new features have been added with the GIFTS 6.5 upgrade.

Office 2013 and 64-bit Windows Compatibility

GIFTS 6.5 is now compatible with Office 2013 Professional and 64-bit Windows operating systems.

Percentage Coding for Access Database Users

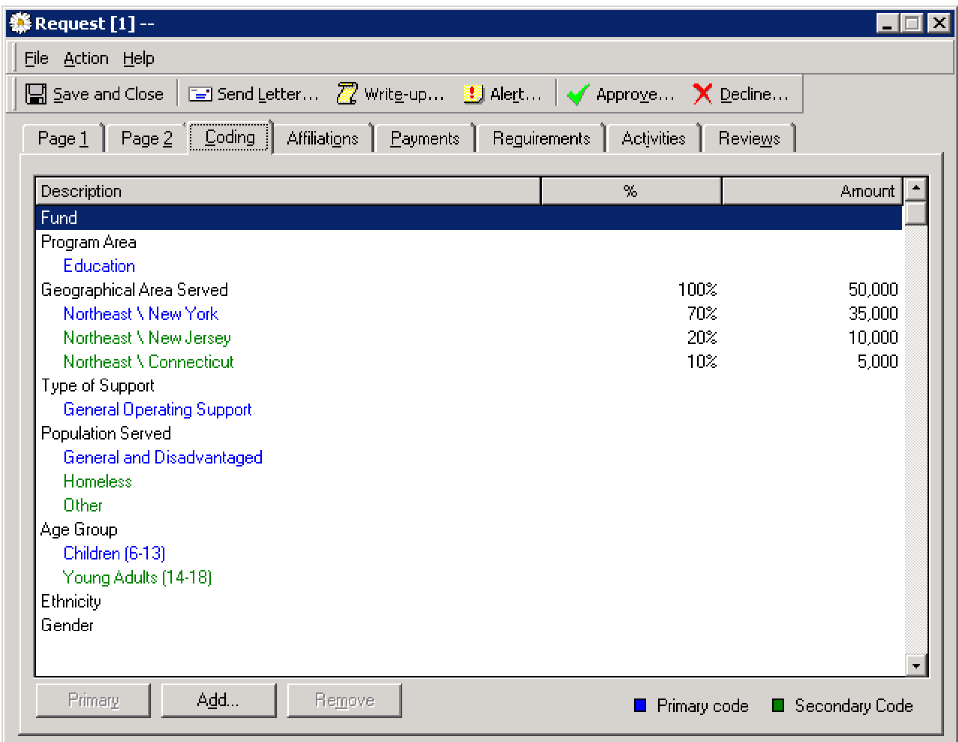
Previously, percentage coding was only supported in GIFTS 6.4 for Oracle and SQL database users. GIFTS 6.5 will now support percentage coding for users with Access databases.

NOTE: If you have either MyGIFTS/ReviewerCONNECT or GIFTS Plus Pack installed, you must upgrade to versions 3.6 and 5.2.1 respectively for Request Amount Percentage Allocation to be enabled.

Percentage Coding on Requests

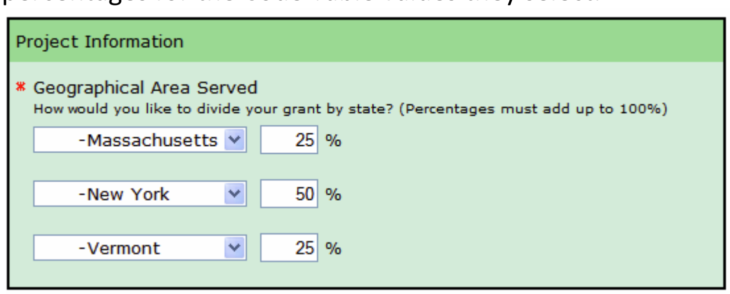
With this feature enabled you will be able to assign percentages on the Request Coding tab in both GIFTS and MyGIFTS to enabled code table values such as Geographical Area Served or Type of Support. These percentages will automatically be reflected in the Request/Grant amounts assigned to each code value.

Percentage tracking can be enabled in the Administrator's module for each table. Please refer to the *GIFTS Administrator's Module Guide* for more details.



Percentage Coding for IGAM Applications

If designed into the application form in IGAM, applicants will also be able to assign initial percentages for the Code Table values they select.



Along with this change are changes to take advantage of this new data in Organizer Charting, Organizer Views, Ad Hoc Reports, and Correspondence.

Stronger Passwords

In earlier versions of GIFTS, password strength was limited to a minimum number of characters and only alpha or numeric characters.

With GIFTS 6.5 installed, a number of additional security options will be available for configuration. Passwords will now support **uppercase, lowercase** and **special characters** as well as higher encryption strength standards.

IMPORTANT: During the upgrade, all current passwords will be converted to lowercase. Users will need to enter their current passwords as all lowercase until they change their passwords to reflect case sensitivity (depending on current preferences). **NOTE: This must also be communicated to external reviewers.**

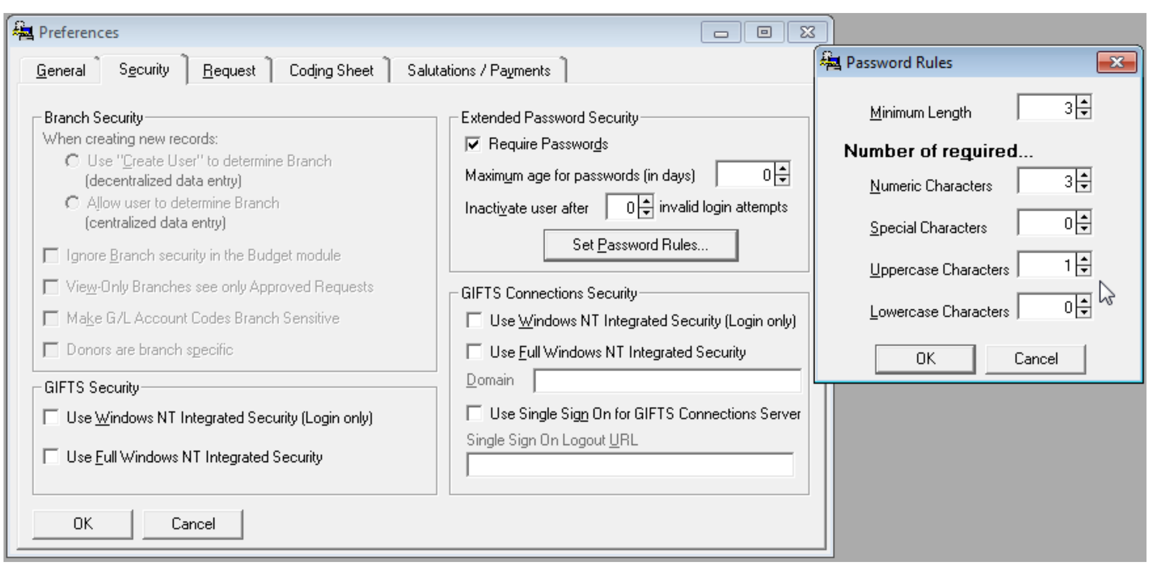
In addition, an option will be available to track the number of attempts before locking out a user if the number of unsuccessful attempts exceeds the preference.

Accessing the Password Preferences

Access to security preferences is through the Administrator Module **Setup > Preferences > General Preferences > Security** tab.

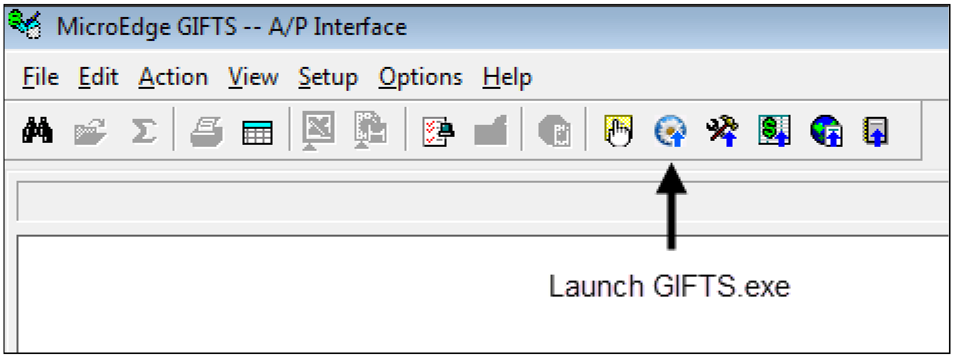
- Once the **Require Passwords** box is checked, the other setting in that section will be enabled.
- **Maximum age for passwords (in days)** – Controls how long a user can keep the same password before being prompted to change it.
- A new **Inactivate user after (#) invalid login attempts** option lets you set the number of times a user can attempt to login before their account is deactivated. If deactivated, the user will need to contact and administrator to reactivate their account and reset the password.
- When you click **Set Password Rules,** a Password Rules form will launch. This form includes numeric entry fields for minimum length and number of required numeric characters, special characters, upper and lowercase characters.

See next page for an example of the Password options now available.



New GIFTS.exe Menu Icon

Please note that the Launch GIFTS.exe icon on the menu of GIFTS 6.x modules such has changed.



New Features for IGAM 5.5

Security Enhancements

Stronger Passwords

Previously in IGAM 5, passwords were required to be 5-25 characters in length, with any combination of alphanumeric characters (no spaces).

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

NOTE: All existing account passwords will be changed to lowercase until the applicant changes it.

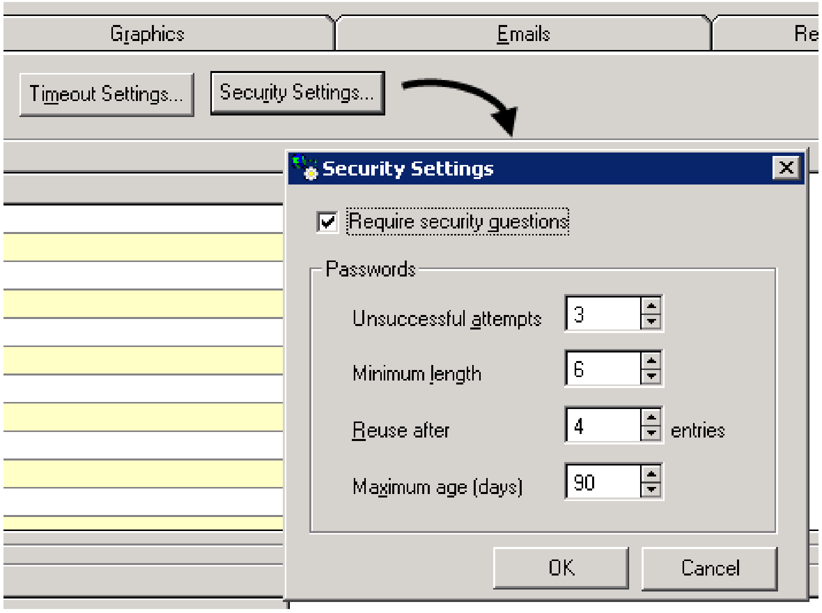
Security Settings in the IGAM Global Preferences will allow the configuring of several options as described in the *New Security Settings in Preferences* section below.

In addition, the following rules will be enforced for all accounts:

- The password must not be the same as the account login (e-mail address).
- The password must be a combination of letters and numbers.

New Security Settings in Preferences

An additional security form will be available in the global preferences form for the selected IGAM account. This form will be launched from a **Security Settings** button and will include the following fields:



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

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

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

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

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

New Security Options in the Links Tab

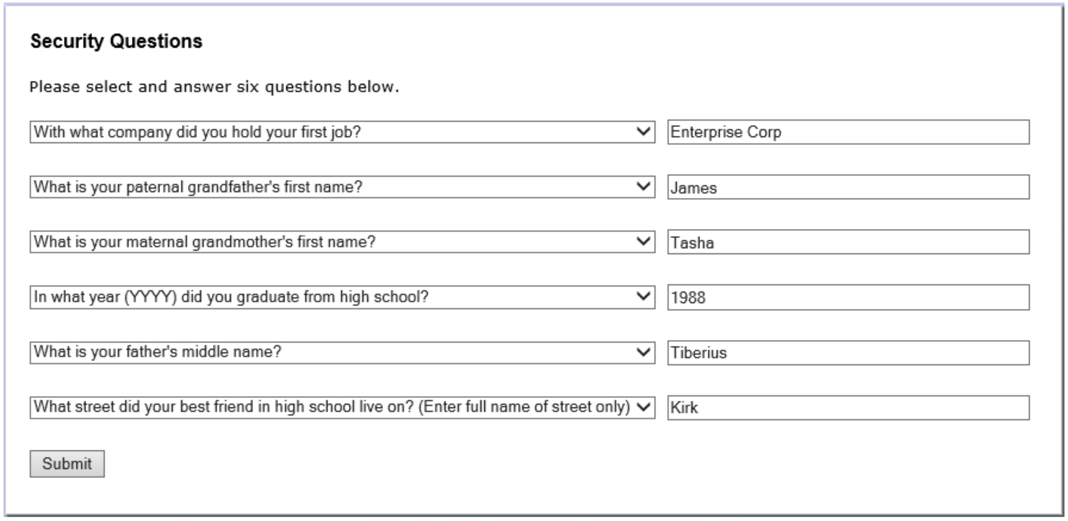
The **Links** tab of the global preferences form will contain three additional entries in the Messages section:

- **Initial Account Lockout.** The default entry will be ‘Your account is not accessible at this time. Please click the Forgot Password link to reset your password.’ This will be configurable and will use the Error Message design element in the Design tab of the GAM account preferences for text size, color, font and style.
- **Final Account Lockout.** The default entry will be ‘Your account is not accessible at this time. Please contact us for further assistance.’ This will be configurable and will use the Error Message design element in the Design tab of the GAM account preferences for text size, color, font and style.
- **Security Question Page Instructions.** The default entry will be ‘Please provide answers to the questions below.’ This will be configurable and will use the Error Message design

element in the Design tab of the GAM account preferences for text size, color, font and style.

Security Questions Setup

Upon account creation, the applicant will be directed to a page with the default title of Security Questions.



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

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

Account Lockout

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

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

- If an applicant answers the three security questions correctly, the applicant will be sent a temporary password.
- If the applicant cannot answer security questions correctly, the applicant may contact the IGAM user so that the user may reset the password for the applicant's account email.

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

Logout Functionality

The **Exit URL** link, if enabled in the Links tab, will now end the current session as well as take the applicant to the specified URL.

The applicant will not be able to return to the previous application or account pages using their browser's Back button. The applicant will need to login to their My Account page again.

One way to use this option could be to set the label to 'Logout' and the URL to your site's login page.

Last Known Login

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

- My Account
- Change E-mail/Password

Account: jptest01@ME.org | Change E-mail/Password Logout
Last Log in: 9/12/2013 6:27 PM GMT-05:00

Password Setup for Existing Accounts

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

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

- The applicant will be brought to the Change Password page and must enter a new password. The new password requirements will be applied.
- If no security question responses have been previously provided, the applicant will be brought to the Security Questions page.
- Once provided, the applicant will be directed to the page that required login.

File Upload Validation

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

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

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

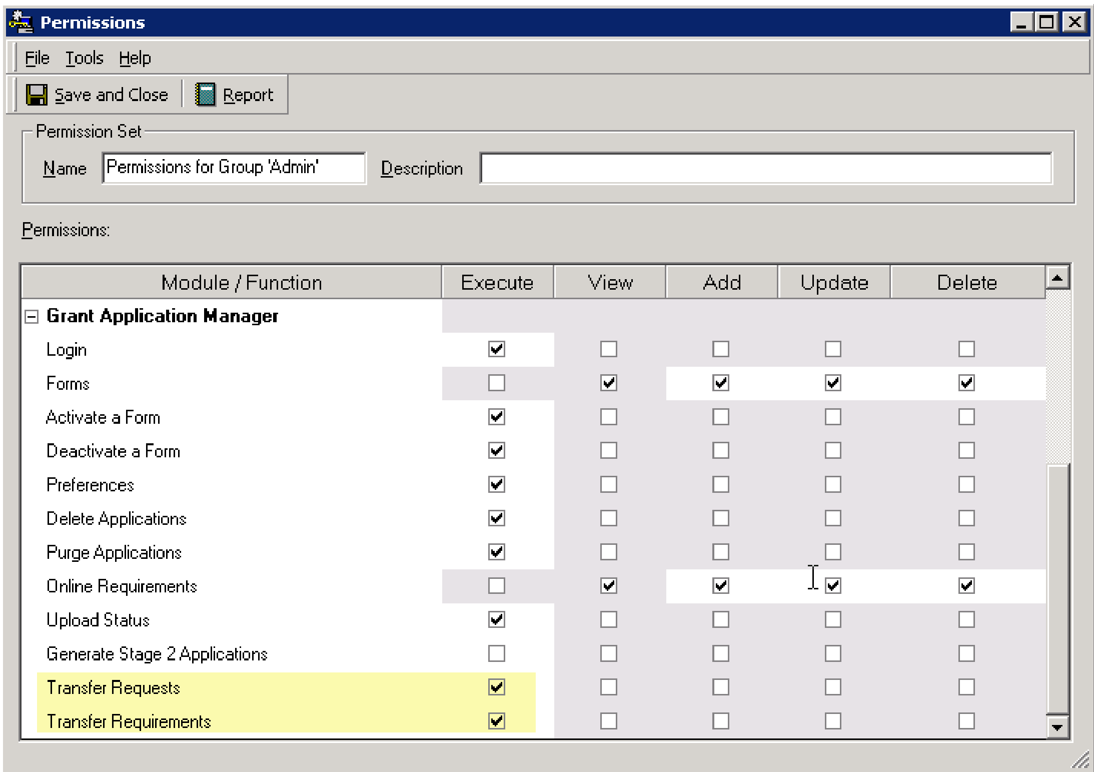
Share Applications and Requirements

IGAM 5.5 includes several enhancements on the My Account pages of applicants in order to allow them to share applications and requirements with others.

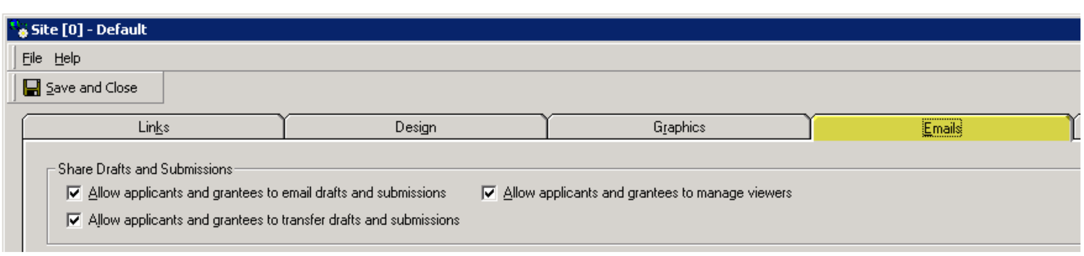
Enabling Sharing of Applications and Requirements

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

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

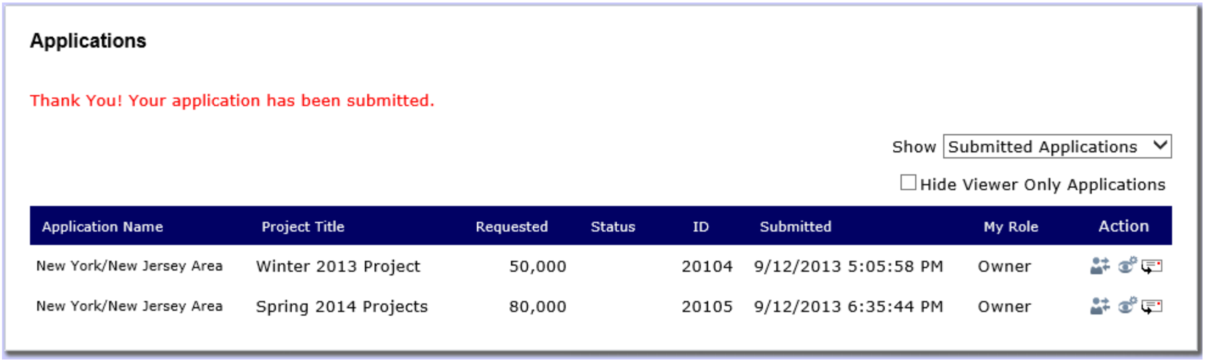


2. All three options on the top of the **Emails** tab in the Site Preferences must be checked.
   - Allow applicants and grantees to email drafts and submissions
   - Allow applicants and grantees to manage viewers
   - Allow applicants and grantees to transfer drafts and submissions



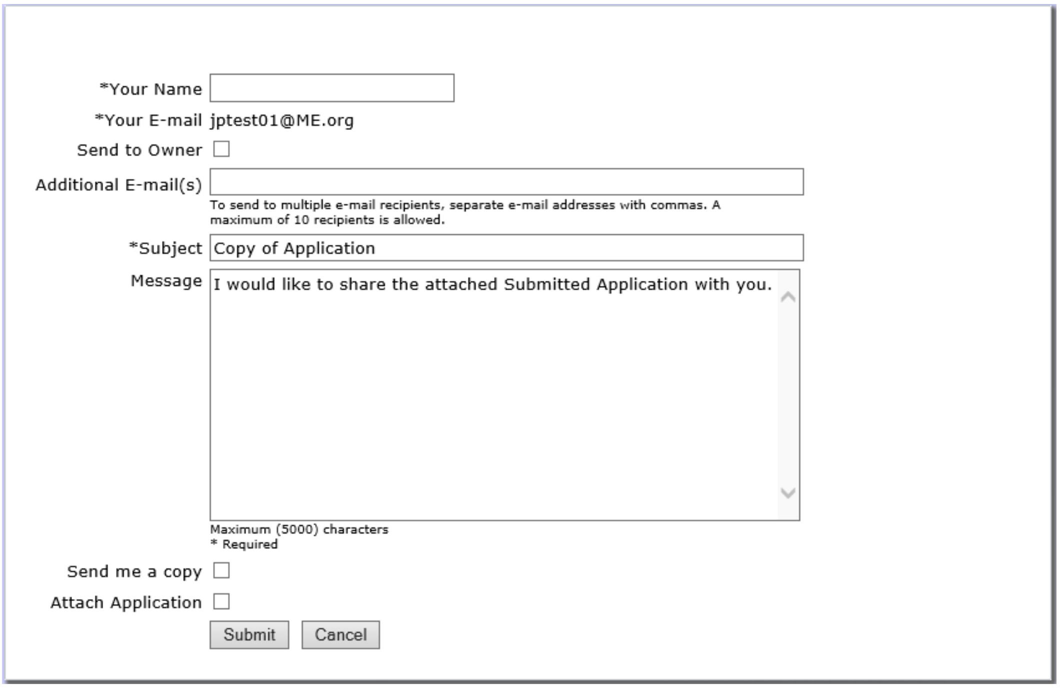
New Options/Actions

On the Applications and Requirements pages the applicant will notice the following new options.



Once	Description
Hide Viewer Only Applications	Checking this box will immediately hide all applications for which the current user is a Viewer.
My Role	This column will be added to the Applications & Requirements pages. • If the current user is the owner of the Application/Requirement, it will display ‘Owner’. • If the current user is a Viewer of the Application/Requirement, it will say ‘Viewer’.
Actions	The following options will be available under the Actions column: - **Transfer to new owner** – Enabled only if the current user is the Owner. Tooltip will state ‘Transfer to new owner’. Clicking this icon will open the Transfer Ownership form. - **Manage Viewers** – Enabled only if the current user is the Owner. Tooltip will state ‘Manage Viewers. Clicking this icon will open the Manage Viewers form. - **Email a Copy** – Tooltip will state ‘Click to email a copy of this application.’ Clicking this icon opens a new email form. Viewers will have an option to **Send to Owner** and additional email recipients if desired as well as attach a copy of the application to the email. Owners will have an option to **Send to Viewers** instead.

Sample ‘Email a Copy’ form:


*Your Name
*Your E-mail jptest01@ME.org
Send to Owner
Additional E-mail(s)
To send to multiple e-mail recipients, separate e-mail addresses with commas. A maximum of 10 recipients is allowed.
*Subject Copy of Application
Message I would like to share the attached Submitted Application with you.
Maximum (5000) characters
* Required
Send me a copy
Attach Application
Submit Cancel

New Grantee Concepts

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

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

- The current owner will be allowed to transfer each application or requirement to a different owner. The new owner must accept the transfer.
- The owner can grant View-only rights to any number of other grantees; a read-only version of the application or report will be listed on the others’ My Account pages.
- The owner can see a list of all “viewers” and take view rights away from any of them.

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

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

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

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

Deleting Applications

Clicking the trashcan icon will cause the system to prompt the user for a confirmation. Once the user clicks **Yes**, the application is deleted and will no longer be visible to assigned Viewers. Current viewers will be notified of the application deletion by email.

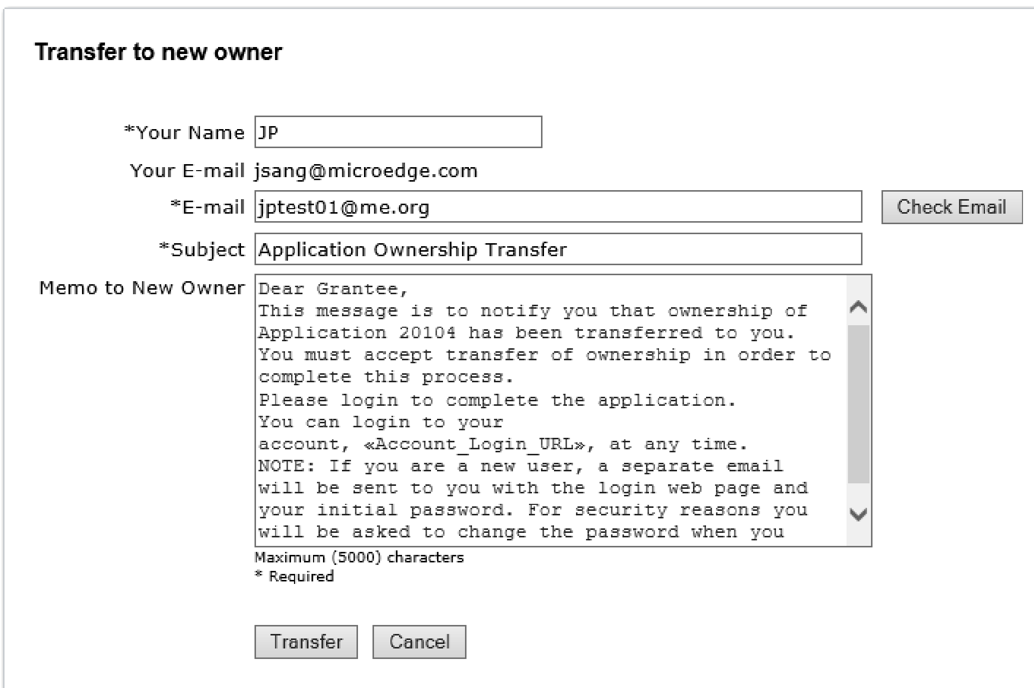
Decline All Transfers

If the **Decline All Transfers** or **Decline Transfer** icon is selected, a prompt will appear to confirm the choice.

If the user clicks **Decline**, the system will email the current owner(s) that the application transfer has been declined.

Transferring Ownership

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

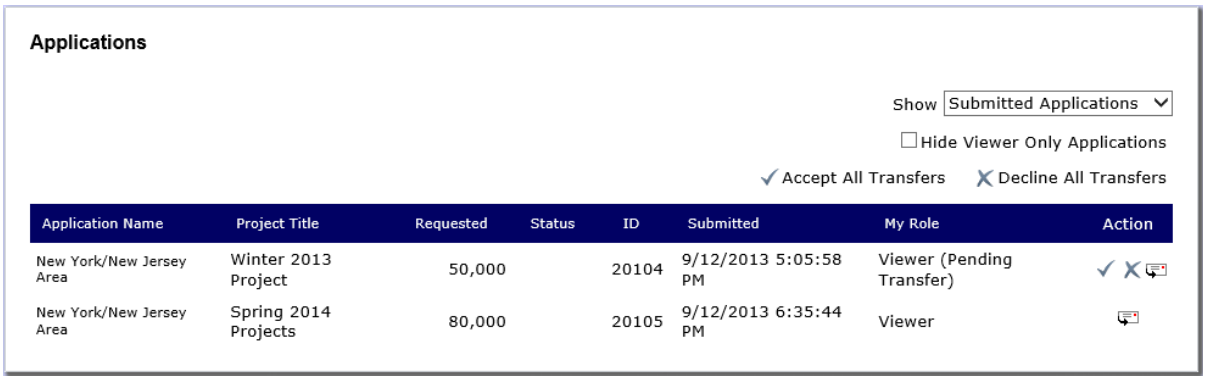


You can enter an email address and then click the **Check Email** button to see if the account already exists or not. Click **Transfer** to immediately send the transfer request to the new owner.

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

- If the account exists, a notification of ownership transfer will be sent to the new owner.
- If the account does not exist, a new IGAM account will be created and notification will be sent to the new owner using the current Create Account email type. In addition, the notification of ownership transfer email will be sent separately.
- The current owner retains ownership when s/he clicks **Transfer** until the new owner accepts the transfer. On the My Account page, under the column My Role, the application is updated to 'Owner (Pending Transfer)' and on mouse-over of the text 'Pending Transfer' with the new email address is displayed as a tooltip.
- When there is a Pending Transfer, the email that the ownership is being transferred to will be displayed to the right of the title 'Transfer Owner', in the form of 'To xxx@email.com'. If there is no pending transfer, there will be no email displayed to the right of the title.

- If the current owner clicks **Transfer** while the status is still on Owner (Pending Transfer), the new transfer will overwrite the previous transfer. The application is removed from that owner's my account page and the process continues with the newer owner.
- The **Save and Finish Later, Next/Previous page,** and **Submit** buttons will validate if the current user is still an owner or viewer of the application. If not, an error will need to be displayed to this user. This will prevent problems in the situation where an application is opened and either an ownership transfer is accepted or the owner removes view access for a user.
- The new owner of the application will see the application/requirement listed next time they log in to their My Account page with a Check icon (Accept) or X icon (Reject). During the time before accepting, the new owner is made a Viewer of the application.
- If accepted by the new owner, no confirmation is displayed. The old owner becomes a Viewer of the Application or Requirement.



Cancel and Cancel Current Transfer

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

Manage Viewers

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

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

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

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

Viewers of Stage-1 applications will carry over to Stage-2 applications when they are generated.

Adding Viewers

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

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

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

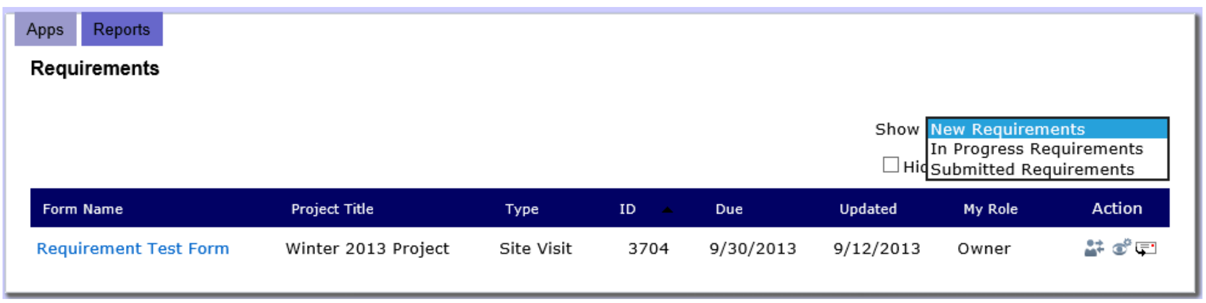
Removing Viewers

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

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

New Published Requirements

With IGAM 5.5, new Requirements that are published to web will be displayed in the main table area.



The Show menu options have been expanded to three choices:

- New Requirements
- In-Progress Requirements
- Submitted Requirements

New Requirements will be the default selection for the Reports tab.

If there are currently no new requirements, the list will be blank.

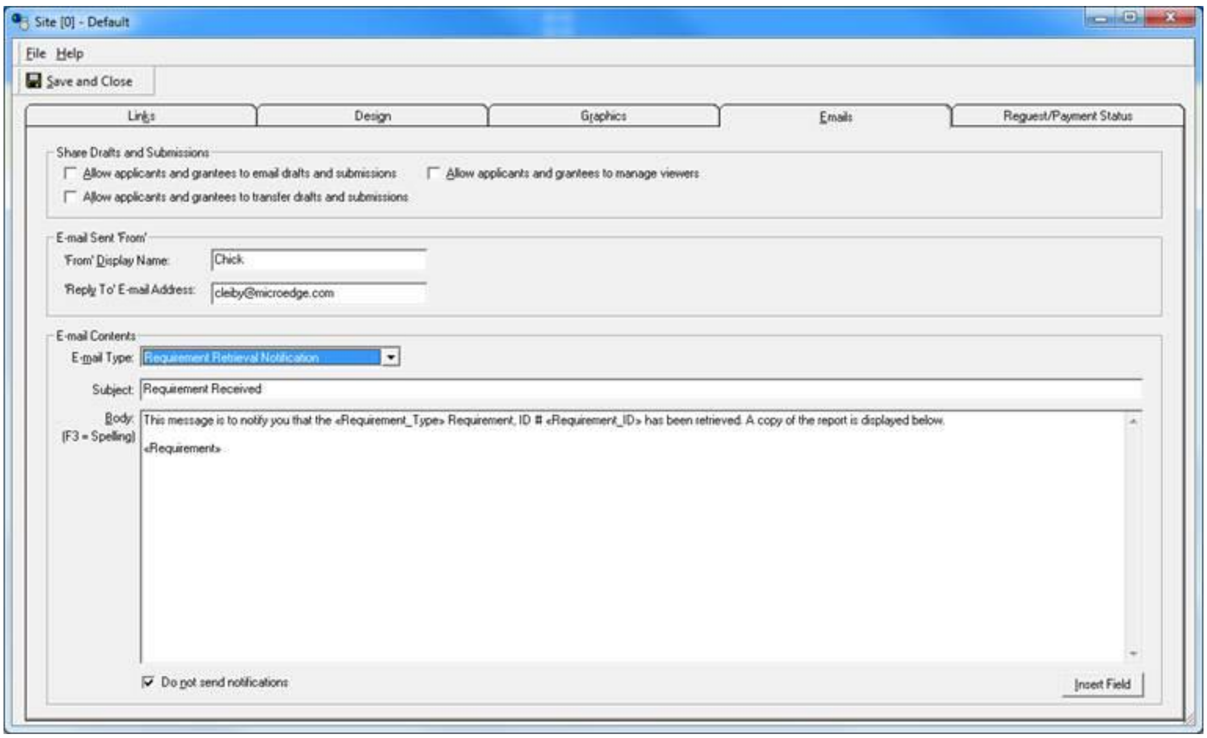
Send Requirement Retrieval Notifications

A new option in the Site Edit Preferences > Emails tab will allow you to enable the

The option can be accessed by selecting the Requirement Retrieval Notification email type.

A **Do not send notification** checkbox will be available at the bottom of the form. By default this option will be checked, meaning no email notification is sent.

To enable the notification, uncheck this box.

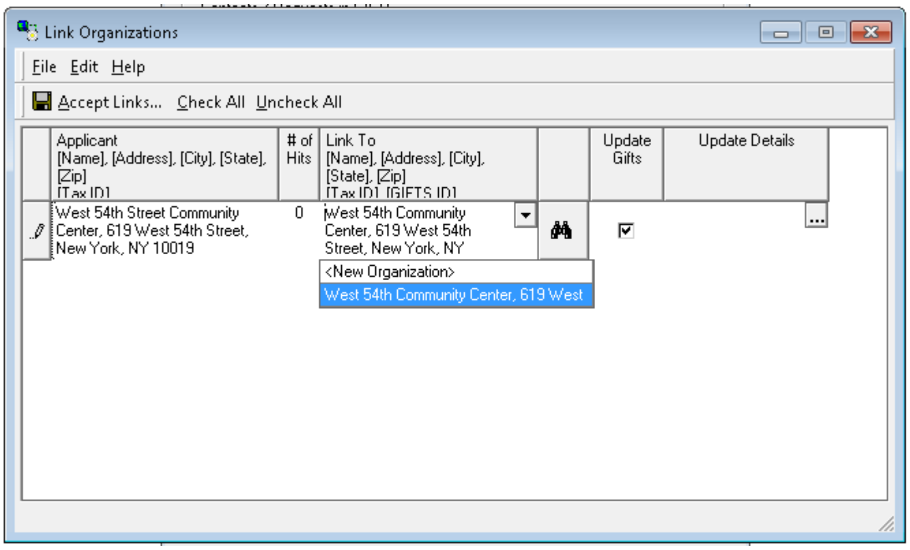


NOTES:

- Subject/Body must not be blank. The upgrade will add default text/merge fields.
- When this function is used with Outlook, for each requirement retrieved, a standard security warning will pop up before sending the email. This does not occur with SMTP email services.

Improved Linking to Organizations and Contacts

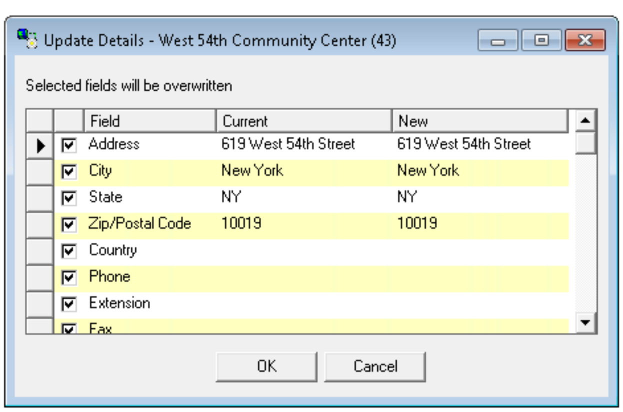
Previously, when Organizations were being linked in the Link Organization window, there were two different columns in the link grid, one for **Match Options** and one for **Link To** (where the search option is). This caused confusion for some users who did not know which one to use to link the Organization.



- There will no longer be a column for **Match Options**.
- The **Link To** column will have a drop down button as well as a Quick Find button.
- The button that opens the Quick Find window has been changed to use the Quick Find binoculars used in GIFTS 6.x.
- When an Organization is selected through the Quick Find, it will be added to the top of the drop down list in the **Link To** column.
- In the **Update Details** column you can click the button to display the Update Details form.

Update Details Form

Clicking the **Details** button opens the following form which lets the user review the current and new information before actually updating the data.



Update GIFTS Defaults

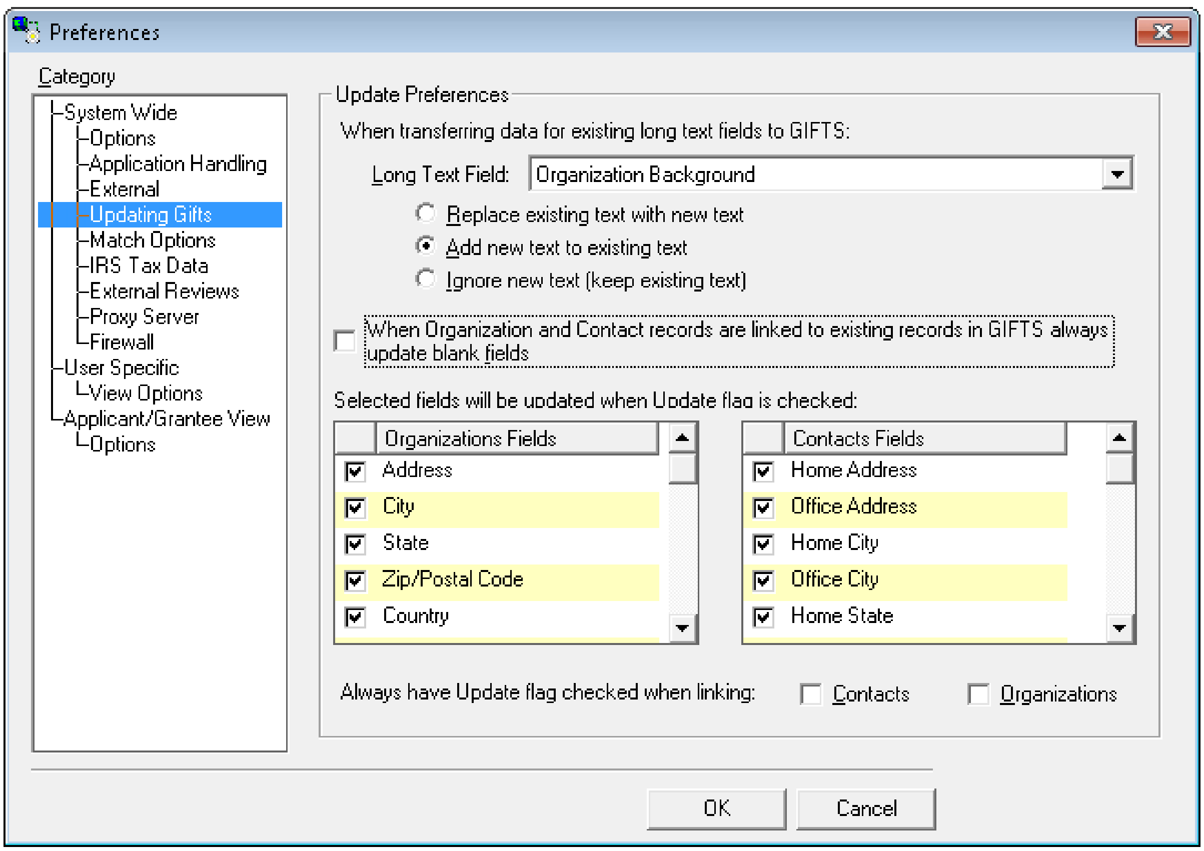
A new section will be available under **Tools>Preferences / System Wide** called **Update Gifts**.

The first setting in the Update Preferences area lets you decide how you want new text in certain long text fields to be managed during the update process.

A check box below that tells IGAM if it should always update blank fields.

Next are two lists which allow you to select which fields are set to update by defaults for both Contacts and Organizations. Available updatable fields will be shown with a checkbox next to each field. By default, all fields are checked. A checked box indicates the default selected options when the Update Details form is open, and the fields to overwrite when **Update GIFTS** is checked.

Additional preferences on the bottom determine if the **Update** checkbox is checked by default when linking records.



Match Options

Previously, matching showed 'hits' when linking Organizations and Contacts based on combinations of criteria.

For Organizations, you needed to have a combination of Name, City, State and Postal Code with or without a Tax ID in order to have a match.

This resulted in the search being too restrictive at times.

To provide you with more flexibility, in IGAM 5.5 new section will be available under **Tools>Preferences / System Wide** called **Match Options**.

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

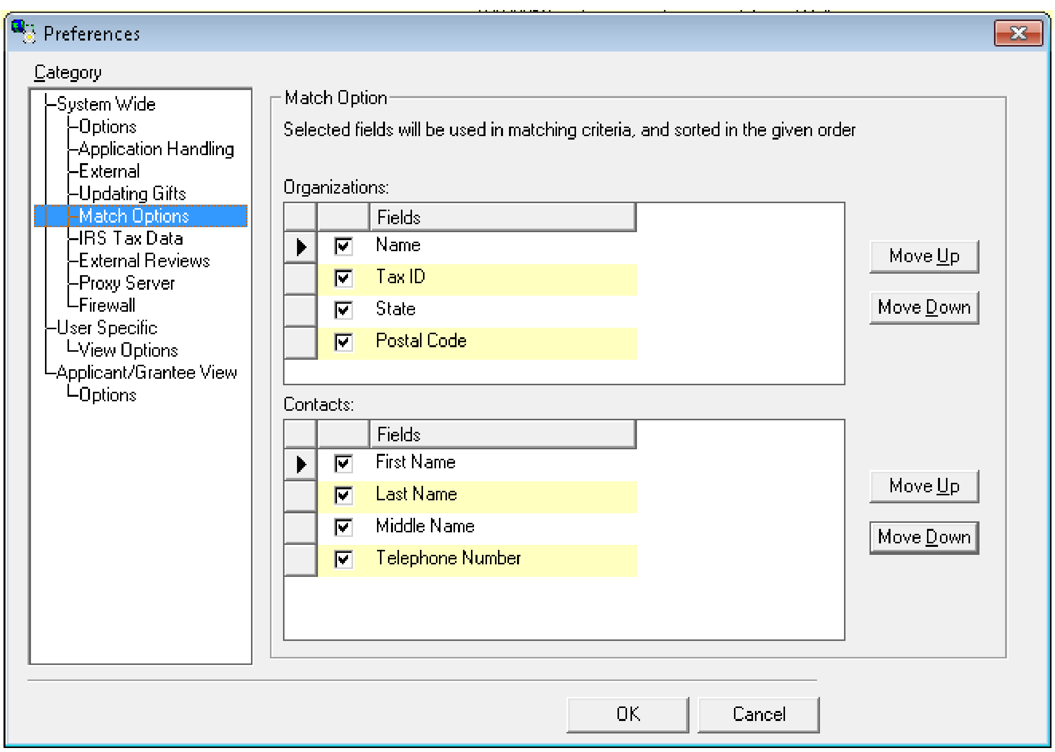
The new preferences allow you to basically expand the search results by excluding criteria.

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

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

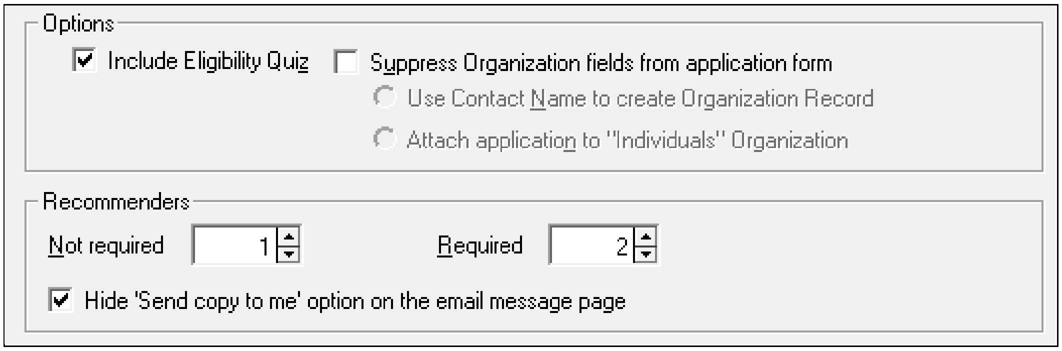
Finally, the **Move Up/Down** buttons determine the sort order of results.

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

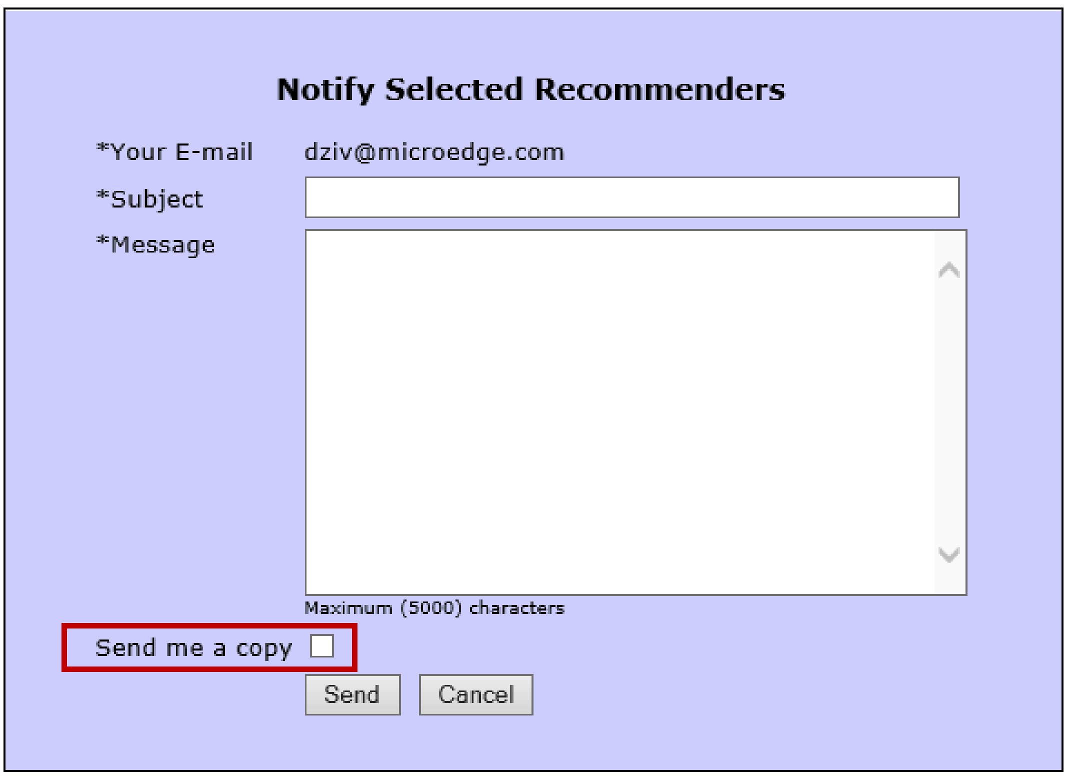


Hide the 'Send copy to me' Option

To prevent applicants from sending themselves a copy of the request email sent to recommenders, a 'Hide **Send copy to me** option on the email message page' has been added to the **Properties** tab of the Form Design Wizard.



Below is an example of the notify recommenders page with the **Send me a copy** option showing.



Duplicate Links to Top of Form

When working on applications, applicants do not find it intuitive for certain buttons to be at the bottom of the page.

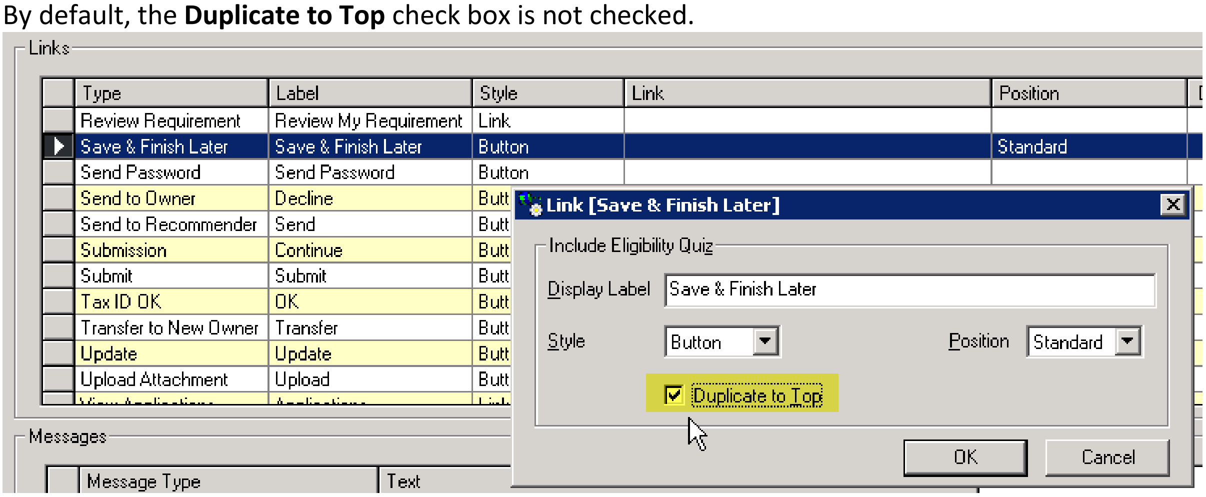
A **Duplicate to Top** option is now available for the following links/buttons so they will appear on the top of the page as well as the bottom.

- Next
- Save & Finish Later
- Review & Submit
- Update
- Submit
- Continue

In the Links section, double-click one of the buttons listed above to open its settings form.

With the **Duplicate to Top** box checked, the button will be displayed at the top as well as the bottom of the application/requirement form.

By default, the **Duplicate to Top** check box is not checked.



Delete Unused Forms

Previously, clients had no way of deleting forms in the IGAM Forms Manager with associated applications/requirements. This causes an issue, because it created clutter in the Forms Manager with forms that were no longer used.

However, we still needed to keep an audit of these forms and not completely delete them, as well as give clients the ability to restore deleted forms on their own in the rare case that they need to.

Therefore, we have given clients the ability to delete forms with associated application/requirements, and place those forms in a separate window where clients can look through deleted forms and choose to restore forms if needed. Restoring a deleted form will bring them back to the Inactive folder in the Forms Manager.

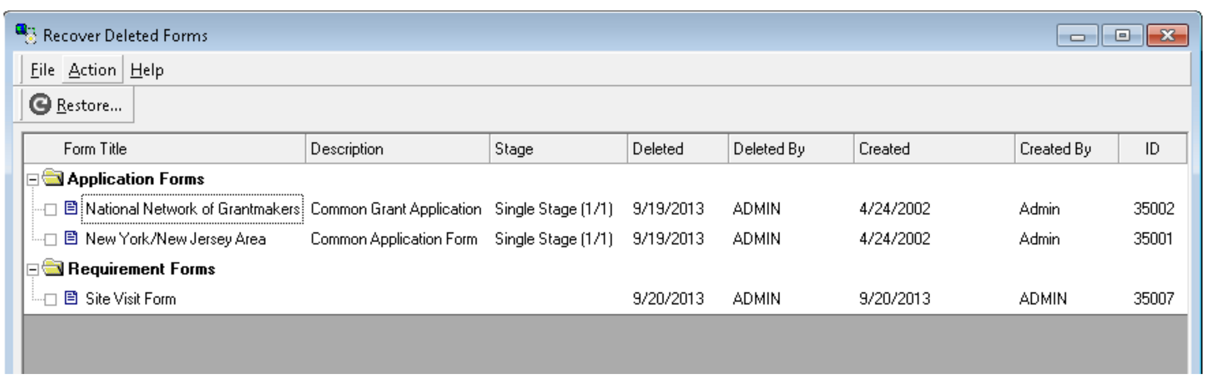
The Delete action in the Forms Manager will now be available for Inactive forms with associated applications/requirements.

NOTE: When Reports are run on forms in the GAM, Deleted forms will not be available to run Reports on. A deleted form will first have to be restored before running a report on it.

When any Inactive form is deleted, it will be stored as a deleted form, where it can be accessed and restored using the **Tools>Recover Deleted Forms** menu option.

Deleted forms will be stored chronologically by the last updated date.

To restore a deleted form, simply click on the form and then click the Restore button. At the confirmation prompt, click **Yes**. Restored forms will be moved back to the Inactive forms list.



WCAG 2.0 Compliance

IGAM 5.5 was developed according to WCAG 2.0 standards and meets WCAG 2.0 criteria for accessibility.

New *Transfer IGAM Account* Action in GIFTS

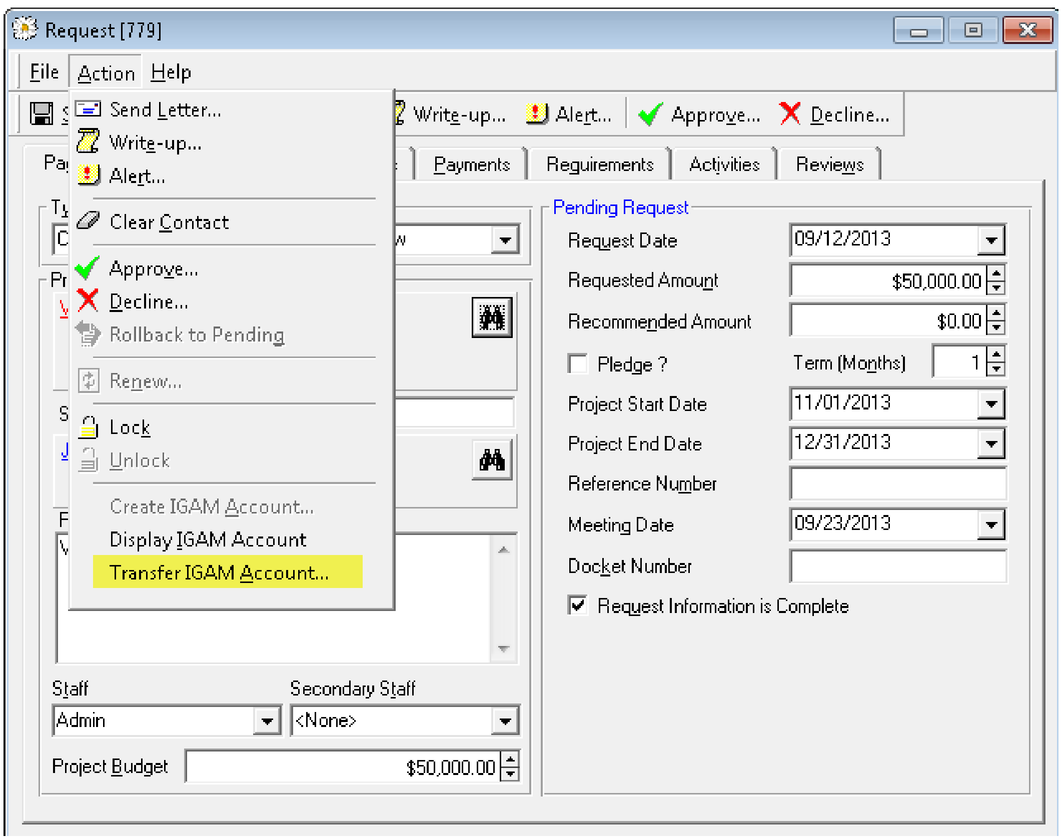
A new action, similar to the Create IGAM Account action has been added to the Action menu for both Requests and Requirements.

NOTE: This action is unavailable if the request does not have an account associated.

Transferring a Request

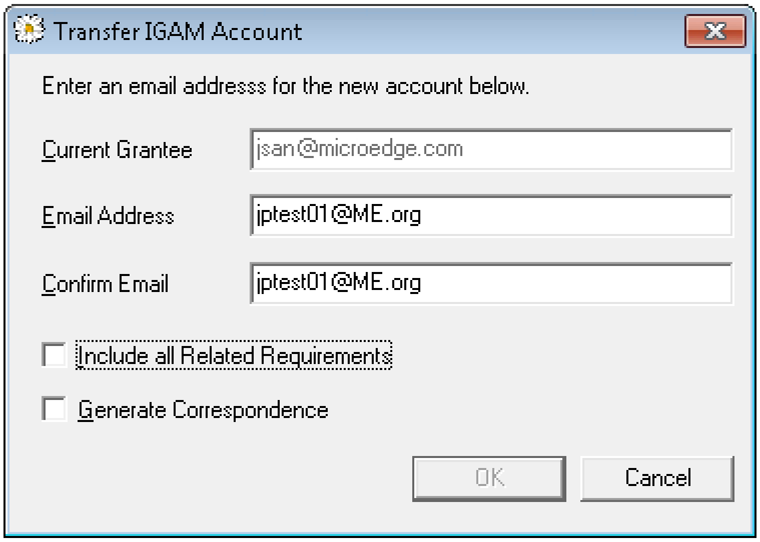
In order to transfer a Request to another owner, the user must have the record opened and use the Action menu on the Request window.

Action> Transfer IGAM Account.



NOTE: Batch transferring of multiple Requests will not be available in IGAM 5.5.

When the user chooses the option, a form similar to the one below opens:



The current IGAM Account owner will be displayed in the Current Grantee's Email Address field. This is a read only field and cannot be edited.

The user will enter, and then confirm, a new e-mail address. Ownership of the selected requests 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 Request Approval templates.

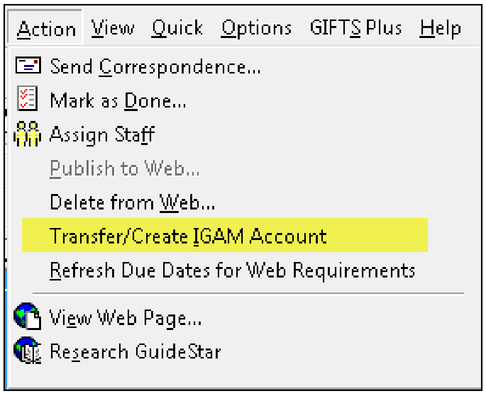
The primary contact for the organization will be the default recipient. The main purpose of this is to notify the primary contact of the organization that ownership is being transferred for one of the Requests/Requirements within their organization.

If an email template is chosen, additional existing contacts/affiliations in GIFTS may be included.

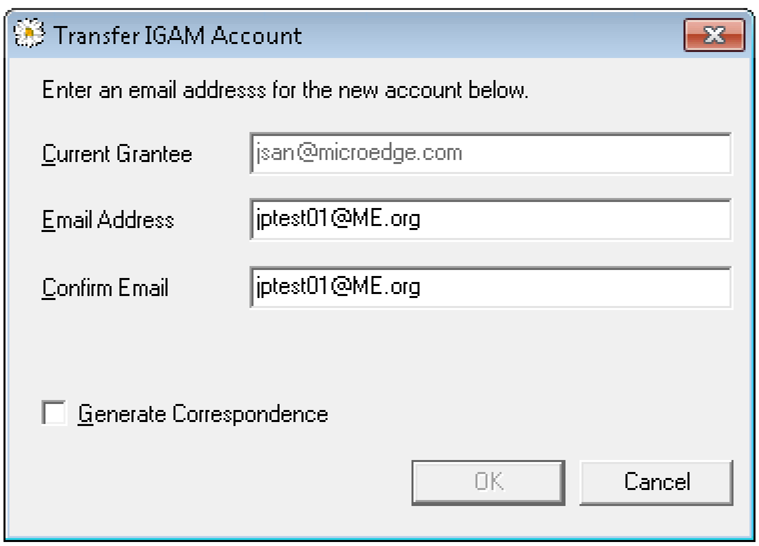
NOTE: It is recommended that a 'Transfer' correspondence template be created in the Administrator's module for both the Request Approvals and Requirements categories with the intention to be sent to an organization's primary contact or other contacts/affiliations notifying them of the transfer.

Transferring One or More Requirements

In order to transfer a Requirement to another owner, the user must select it, or have the record opened before accessing the Transfer option. Multiple Requirements can be selected.



When the **Transfer IGAM 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, or if they are not associated with an account.

A Process Monitor screen will display with all successes, errors and details provided.

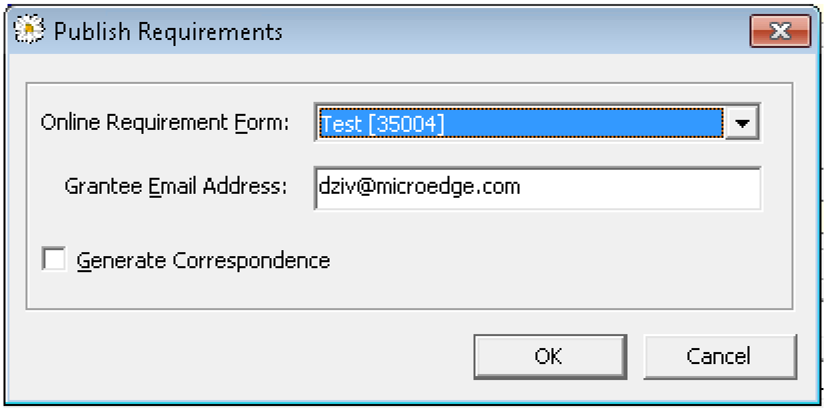
If **Generate Correspondence** is checked, after clicking **OK** the Generate Correspondence Wizard will open where you can select from one of the available Requirements templates.

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 may be included.

Updated Publish Requirements Form in GIFTS

Since Requirements now have the ability to be associated with a different account than the Request, a new field will be available to confirm the account that the Requirement should be associated with.



The Grantee Email Address will display the email address of the current Request owner.

To send the Requirement to a different IGAM account user, enter their email address in the Grantee Email Address field.

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 may be included.

Known Issues Fixed in GIFTS 6.5

The following **GIFTS 6.x known issues** have been fixed in this GIFTS 6.5 release:

Case #	Description
61514	An error was received when the client tries to send an email correspondence from the 'Affiliation' window.
61521	The totals in an ad hoc summary report would double if a client tried to edit the report.
61575	A SQL error was received when using the Budget Tab after adding the 'Parent Budget Item: Available' column.
61749	Client encountered an error in Payments Plus in the Request tab. Error occurred while generating payment schedule: *Error occurred while loading existing payment schedule. Object reference not set to an instance of an object.*
61895	Client was unable to create budget line items without specifying an organization name.
62214	Client was receiving Error #4 when sending emails through GIFTS.
84949	Client was not able to get the Organization info on Guidestar after clicking on Research Organization in Guidestar icon.
127600	Client received a message indicating no Activity could be created when using E-Mail Plus.
136311	During an upgrade to GIFTS 6.4/IGAM 5, client received the following error. *Error 'not registering file' MSVBVM50.DLL*
153428	Organization coding sheet data was not appearing on reports via the Documents tab.
166319	A discrepancy in the calculated value was noted when displayed in a Request view versus as it appeared in the Request record.
179049	Client was having difficulty voiding a payment related to request. Voiding the payment led to an error *"The functional amount must be less than zero."*
188323	Request Payment schedule table did not populate with Headers & borders when merged even though the template setup had the boxes checked.
189878	Received error #9 with Application IDs field was added to a Requirement template.
193514	Multi-level codes in ad-hoc reports did not display correctly.
207199	An error occurs on Amend Grant Amount when % coding is used.
217390	When deleting the Parent Organization, a Request linked to the Subsidiary would show (under the Project section on Page 1) that the Organization was a Subsidiary of (then it's blank).
219407	Reminders set not to create Activities were creating activities in GIFTS after Reminders Plus was run.

Revision 12/31/2013: The following issue has been resolved in the latest GIFTS 6.5 build.
To get the new GIFTS 6.5 build, please send an email to upgrade_inquiries@microedge.com.

Case #	Description
257810	Client searches for Requests from multiple Organizations, but on export to Excel it is exporting the Request History for just one of the Organizations.

Known Issues Fixed in IGAM 5.5

The following **IGAM known issues** have been fixed in this IGAM 5.5 release:

Case #	Description
00071895	Requested increased password strength for IGAM.
00134097	The "Send me a copy" option when using Recommender's blind email function in IGAM 5 introduced a security loophole.
00140391	Requested IGAM currency fields to be right justified.
00144150	Requested IGAM to have the ability to accept negative numbers.
00151483	Requested IGAM account passwords be case sensitive.
00151793	The **Browse** button failed to appear on an Application form.
00158203	Nested lists allowed for "Code at lowest level" to be bypassed unintentionally.
00159263	Requested ability to 'delete' application forms.
00160665	Blank attachment fields in Requirement forms created blank document records in GIFTS.
00163082	Application Submission emails displayed " " between classification values.
00167958	An error occurred when starting a new application if the Program/Project Information page is selected.
00170530	Using "http://" in the Exit link in IGAM resulted in an incorrect site address error.
00181944	Requested IGAM be modified so that deactivation time no longer is stamped on application XML's but is instead checked against Form XML.
00185458	Requested Deactivation Date field in the FDW allow past dates.
00188637	The first field on new forms overlapped the field's label.
00188803	Requested IGAM functionality to allow account transfers of single applications.
00188813	Custom Fields that used Number with Decimal could handle negative values, but when they were brought in from IGAM the negative was stripped from the field making it a positive value.
00190778	Some clients could not create multiple affiliations where the contact name is the same.
00202570	Requested the ability to assign Requirements to different accounts other than the Grantee Account on the Request.
00210119	The IGAM application CONTACT links were updating Contacts without the "update GIFTS" option being checked when linking.
00219508	Hidden fields at the top or bottom of a group caused that border to disappear.
00222931	Some clients were unable to clear out the Min Date and Max Dates of the Request Term field.
00224132	The Geographical Area column for Pending Applications was not pulling in data from

	IGAM applications.
00226437	Setting Width for Attachments FIELDS in IGAM to more than 85 caused the **Browse** button and the rest of the field (if the width is long enough) to get cut off.
00226515	Requested the ability to update the Organization's Primary Contact when linking and considering IGAM applications.
00228151	Commas in email names caused emails to not send.
00237369	Fields that have been changed to "Right" position revert to "Below" (default value) when the field type was changed to "Read-only".
00240662	Client was unable to change Labels for Application and Requirement Links in IGAM.
00247305	After entering the First name field, when an applicant pressed **Enter**, the browser created a new tab for the Printer Friendly version of the application.
00248634	Stage 1 (Single Stage) Form Title was not available for sorting in IGAM.
00249992	IGAM Applications were showing hidden fields in confirmation emails.