**GIFTS ON-LINE NOTES**

2/9/11 MicroEdge Gifts On-Line Webinar

* Hosted on-line solution
* Access anytime, anywhere via Internet
* Set up and maintained by MicroEdge
* Test with our own data!
* Do not need to use their IGAM online application with the hosted solution
* Will use our codes and terms
* We need to choose the reports we use and they will customize
* Continue security levels currently in place
* They also backup our data
* Historical codes brought in for reporting
* Cannot change codes ourselves; will need MicroEdge staff (will be changing)
* Cannot update templates; will need MicroEdge staff (will be changing)

8/19 10:30 am meeting

* Searches – one click report, customized
* 300 canned reports
* @ 8weeks
* Data carries over & verified
* References – yes
* 25 page scan – keep in file folder
* 3-5-7 year options
* Annual subscription fee: per user, level, modules
* No in-house IT
* 24-7 access from any web access
* Easier for day to day ops
* Reviewer module, may not need?

9/4/11 3:00 pm meeting

* Reference: teleconference with Matt Carpenter, Sr. VP-grants, El Pomar Foundation, staff of 60; 50% annual turnover do to interns and fellowships – required a lot of administration for each person
* No IT staff needed
* Need only web access
* 4 months from signing agreement to up and running
* Noticeable loss of control and capability of creating and changing letter templates & codes
* Adjusted well due to excellence of MicroEdge staff
* Level of staff use (amount of access allowed) contributes to annual fee
* Ad-hoc reports available to some staff, depend on level
* Current codes carry over
* Old documents and attached scanned docs will carry over; able to open & view
* No binoculars for search; less search criteria available
* Org: search by name, Req: search by ID