MICRO EDGE®

VERSION 5

GIFTS® Plus Pack .NET Extension

User's Guide

Solutions for Effective Giving®

Contents

NOTICE

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Welcome to the GIFTS Plus Pack .NET Extension

Congratulations on your purchase of the Plus Pack .NET extension for GIFTS, and welcome to the Plus Pack utilities for increased productivity. This manual describes how to configure and use these utilities.

In This Chapter

About the GIFTS Plus Pack

The GIFTS Plus Pack is a set of .NET add-on utilities that integrate seamlessly into GIFTS to offer extensive options for updating batches of records, verifying tax status information, verifying watchlist information, updating and adding organizations, batch requirement and payment scheduling, enhanced charting, and enhanced e-mail capabilities. The utilities are built on the Microsoft .NET platform, and are accessed from within GIFTS for a seamless user experience.

The Plus Pack includes the following ten utilities:

- GIFTS Batch Plus
- GIFTS Requirements Plus
- GIFTS Payments Plus
- GIFTS Reminders Plus
- GIFTS Charts Plus
- GIFTS Email Plus
- GIFTS Tax Status Plus
- GIFTS Watchlists Plus
- GIFTS Outcomes Plus
- GIFTS Link Plus for use with Outlook

The features of these utilities are summarized in the sections that follow.

GIFTS Batch Plus

Batch Plus provides the following capabilities for modifying batches of records in GIFTS:

- **Create or change classification codes:** Batch coding allows you to revise and refine your coding system as your organization grows and evolves.

GIFTS Batch Plus is a powerful and convenient method for altering the coding for multiple records in a single step.

- ❖ **Assign staff:** You can change the member of your staff associated with batches of Request records, and specify whether the Activities associated with the Requests are transferred to the new staff member.
- ❖ **Modify Request Type:** You can change the Request Type and Request Status for batches of GIFTS Requests.
- ❖ **Modify Project Descriptions:** You can add text to the beginning or end of the Project Description for a batch of Requests, or overwrite the existing descriptions with a new one.
- ❖ **Assign Meeting Dates:** You can assign or change the meeting dates for batches of Requests. This allows fast and easy updates to GIFTS as your grant review meetings evolve.

GIFTS Requirements Plus

Requirements Plus provides the following capabilities for working with GIFTS Requirements:

- ❖ **Schedule requirements:** You can schedule requirements for multiple Requests or Payments at any stage of your workflow. This flexible requirement-scheduling tool allows you to select groups of Request or Payment records based on a fixed or relative date, project start dates or end dates, Payment Schedule Date, Paid Date, or other relevant dates.
- ❖ **Automatically schedule payment contingencies:** For groups of records, you can schedule Payment Requirements and make the payments contingent on completion of those requirements.
- ❖ **Delete requirements:** You can maintain the integrity of your data and more effectively manage staff resources by deleting groups of requirements that are no longer valid.

GIFTS Payments Plus

Payments Plus extends the payment scheduling capabilities of GIFTS with the following features and capabilities:

- **On-demand Schedule Creation:** You can create payment schedules for Pending and Approved Requests *at any time* (provided that no payments have already been created), not just during the Approval process.
- **Updating Existing Schedules:** You can modify the payment schedule for a Request from a single screen. This saves keystrokes, and as you're working you can see how the changes you make affect the total amount scheduled.
- **Batch Processing:** You can create payment schedules for batches of Requests.
- **Greater Flexibility When Creating Schedules:** Many of the defaults and restrictions that apply when scheduling payments in GIFTS do not apply to Payments Plus. For example, you can divide different percentages of the grant amount among payments, schedule payments outside of the Start Date or End Date of a grant, and specify whether payments that fall on a weekend are moved to a weekday.

GIFTS Reminders Plus

Reminders Plus provides the following capabilities for sending reminders:

- **Automatically send reminders:** You can schedule a reminder to be sent relative to the due date of any GIFTS Activity and Requirement type. For example, you can set up a reminder on Progress Reports to be sent one week prior to the due date, and GIFTS will automatically send out emails to the recipient/s you selected. Reminders Plus runs on a daily basis at a time specified by you.

GIFTS Charts Plus

This advanced charting utility allows you to transform GIFTS data into presentation-ready charts and graphs, and improves your ability to select the data to be included in your charts.

GIFTS Email Plus

Extends GIFTS email capabilities by allowing you to attach GIFTS documents or other files to your messages, and to easily retrieve the e-mail addresses of Contacts affiliated with the information you are sharing.

GIFTS Tax Status Plus

Tax Status Plus allows you to verify and update tax status information for Organizations in GIFTS. It also describes how to search for tax exempt organizations in MicroEdge's Tax Exempt Organization Database.

GIFTS Watchlists Plus

Watchlists Plus helps you comply with your own internal compliance programs by checking Organizations and/or Contacts against specific Watchlists, such as those provided by OFAC, the FBI, INTERPOL, and the European Union, among others.

GIFTS Outcomes Plus

Outcomes Plus automatically facilitates the creation and setup of the fields you need to track outcomes data, allowing you to be more efficient when tracking the success of your giving programs.

Outcomes Plus fields and tabs were designed by MicroEdge based on the framework, concepts, tools, and templates defined by MicroEdge's outcome partner, The Rensselaerville Institute (TRI), a non-profit group that has been dedicated to measuring and improving outcomes in all fields of human achievement for more than 45 years. Before employing Outcomes Plus, we recommend that you consult with The Rensselaerville Institute to define your outcomes framework, and then work with a MicroEdge Product Specialist to plan the best way to implement this framework into the GIFTS database using the Outcomes Plus tool.

GIFTS Link Plus for use with Outlook

GIFTS Link Plus for use with Outlook allows you to send Outlook email to GIFTS as a Mail Activity. If you have Document Manager, you can store the email and/or email attachments as documents. Please note that Essential GIFTS users cannot use GIFTS Link Plus.

Setting Up Plus Pack Security

This chapter describes how to configure GIFTS Plus Pack security using the Plus Pack Configuration utility. For information about installing or upgrading the Plus Pack, please refer to the *Installing and Configuring GIFTS Plus Pack 5* or *Upgrading to GIFTS Plus Pack 5*.

In This Chapter

About Security and the Configuration Utility

Batch Plus, Requirements Plus, Payments Plus, Reminders Plus, Tax Status Plus, Watchlists Plus, Outcomes Plus, and Link Plus for use with Outlook have the ability to change large amounts of data in a single operation. Since these changes cannot be undone, it is important to restrict the use of these utilities to qualified members of your staff. There are no security restrictions for Charts Plus and E-mail Plus, which are available to all users.

You can use the Plus Pack Configuration utility to determine which GIFTS users have access to these utilities, and which features of the utilities are available to your users. When you assign permissions, you can grant access to entire GIFTS user groups or to individual GIFTS users. For information about installing or upgrading the Plus Pack, please refer to the *Installing and Configuring GIFTS Plus Pack 5* or *Upgrading to GIFTS Plus Pack 5*.

Note: Users can access a utility if you grant permission to their user account *or* to their user group.

Accessing the Configuration Utility

The Plus Pack Configuration utility runs automatically at the conclusion of the Plus Pack installation or upgrade process. If you would like to run the utility at any other time, double-click PlusConfigurationTool.exe from the Config folder of the setup files you downloaded when you installed the Plus Pack on your GIFTS file server.

Note: The utility must be run from a GIFTS workstation with version 2 of the Microsoft .NET Framework. If your network security policies do not allow you to run .NET applications over your network, you need to install the Config folder locally (on the workstation from which PlusConfigurationTool.exe will be run).

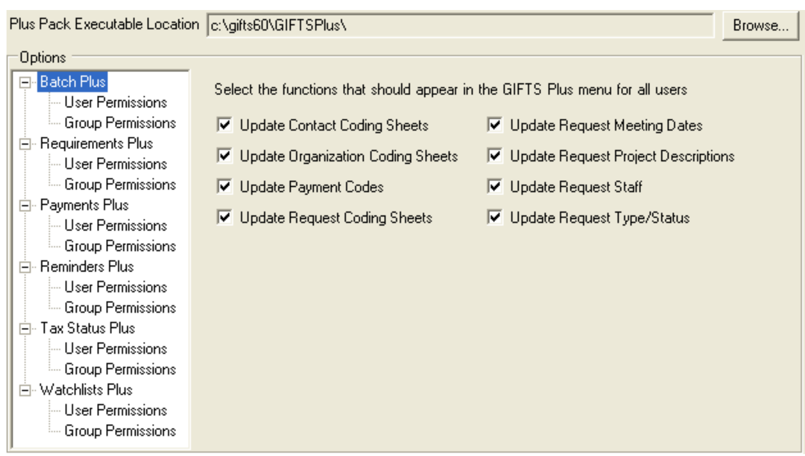
Caution: The Plus Pack Configuration utility does not require an administrative login. If you copy the utility to your network, be sure to copy it to a location where only the GIFTS Administrator can open it. You can also use Windows security to deny the "execute" permission to unauthorized users. For information about Windows security, please refer to your Windows documentation.

Setting Up Batch Plus Security

To set up the menus and security for Batch Plus:

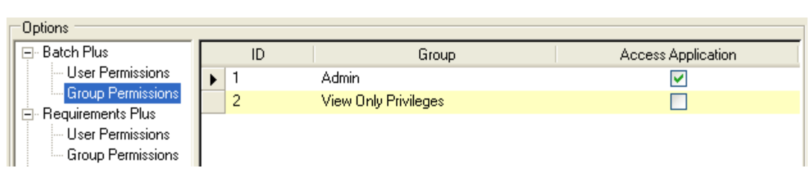
1 Open the Plus Pack Configuration utility, as described in "Accessing the Configuration Utility" on page 2. The Plus Pack configuration options are displayed.

2 In the Options list to the left, highlight Batch Plus. A list of Batch Plus functions is displayed.



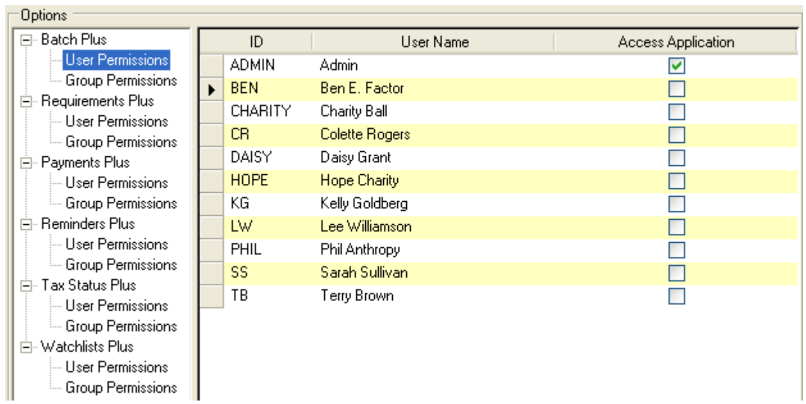
3 Choose which of the functions should be displayed to Batch Plus users. If a function is not selected, no users will have access to it.

4 Click the Group Permissions option for Batch Plus. A list of your GIFTS user groups is displayed.



5 Click the Access Application checkbox for user groups that should have access to Batch Plus. All users within the groups you select are granted permission to use Batch Plus.

6 If there are any additional users who should have access to Batch Plus, click the User Permissions option. A list of GIFTS users is displayed.



7 Click the Access Application checkbox for users who should have access to Batch Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

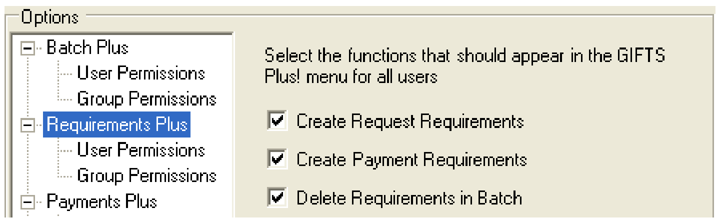
At this point, you can click OK to save your security settings or—if you want to set up security for Requirements Plus, Payments Plus, Reminders Plus, Tax Status Plus, Watchlists Plus, or Link Plus for use with Outlook—go to "Setting Up Requirements Plus Security" on page 5 or "Setting Up Payments Plus Security" on page 6, "Setting Up Reminders Plus Security" on page 8, "Setting Up Tax Status Plus Security" on page 10, "Setting Up Watchlists Plus Security" on page 14, or "Setting Up Link Plus Security" on page 19 to continue using the configuration utility.

Setting Up Requirements Plus Security

To set up the menus and security for Requirements Plus:

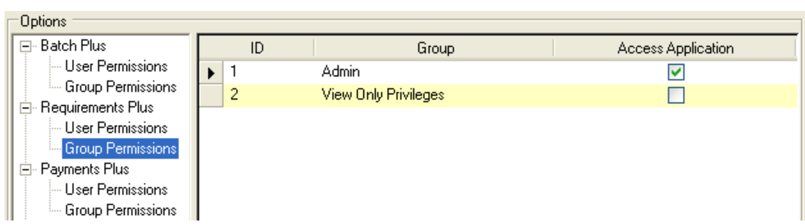
1 Open the Plus Pack Configuration utility, as described in "Accessing the Configuration Utility" on page 2. The Plus Pack configuration options are displayed.

2 In the Options list to the left, highlight Requirements Plus. A list of Requirements Plus functions is displayed.



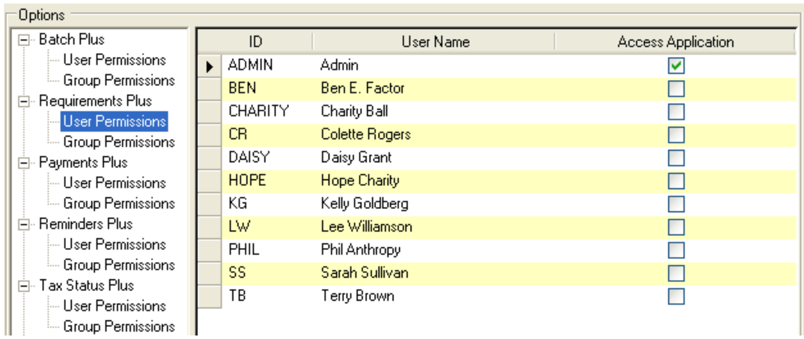
3 Choose which of the functions should be displayed to Requirements Plus users. If a function is not selected, no users will have access to it.

4 Click the Group Permissions option for Requirements Plus. A list of your GIFTS user groups is displayed.



5 Click the Access Application checkbox for the user groups that should have access to Requirements Plus. All users within the groups you select are granted permission to use Requirements Plus.

6 If there are any additional users who should have access to Requirements Plus, click the User Permissions option. A list of GIFTS users is displayed.



7 Click the Access Application checkbox for users who should have access to Requirements Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

At this point, you can click OK to save your security settings or—if you want to set up security for Batch Plus, Payments Plus, Reminder Plus, Tax Status Plus, Watchlists Plus, or Link Plus for use with Outlook—refer to "Setting Up Batch Plus Security" on page 3 or "Setting Up Payments Plus Security" on page 6, "Setting Up Reminders Plus Security" on page 8, "Setting Up Tax Status Plus Security" on page 10, "Setting Up Watchlists Plus Security" on page 14, or "Setting Up Link Plus Security" on page 19 to continue using the configuration utility.

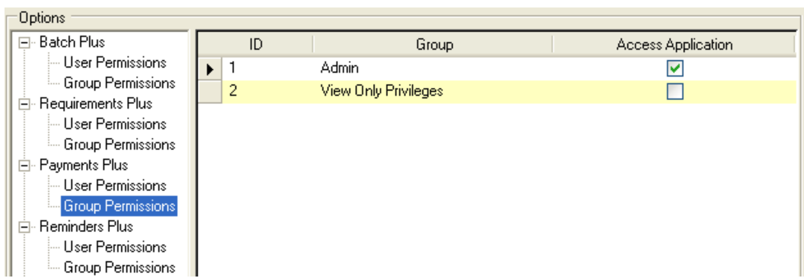
Setting Up Payments Plus Security

To set up the menus and security for Payments Plus:

1 Open the Plus Pack Configuration utility, as described in "Accessing the Configuration Utility" on page 2. The Plus Pack configuration options are displayed.

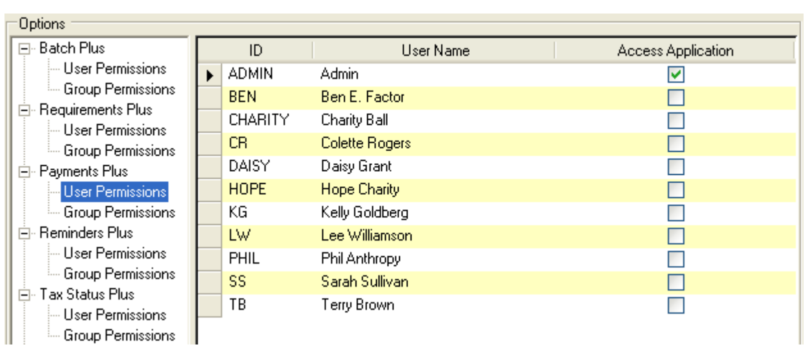
2 In the Options list to the left, open the Payments Plus options (if necessary).

3 Click the Group Permissions option for Payments Plus. A list of your GIFTS user groups is displayed.



4 Click the Access Application checkbox for the user groups that should have access to Payments Plus. All users within the groups you select are granted permission to use Payments Plus.

5 If there are any additional users who should have access to Payments Plus, click the User Permissions option. A list of GIFTS users is displayed.



6 Click the Access Application checkbox for users who should have access to Payments Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

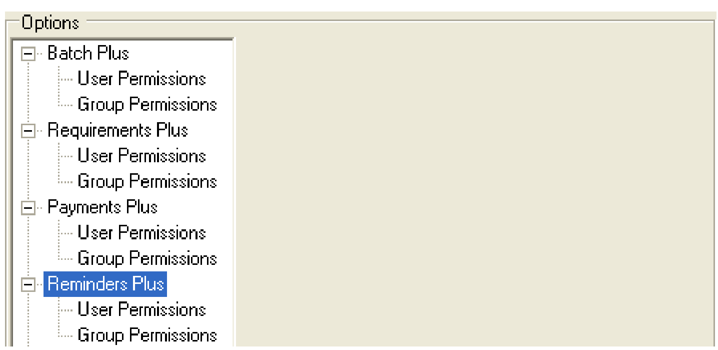
At this point, you can click OK to save your security settings or—if you want to set up security for Batch Plus, Requirements Plus, Reminders Plus, Tax Status Plus, Watchlists Plus, or Link Plus for use with Outlook—refer to “Setting Up Batch Plus Security” on page 3 or “Setting Up Requirements Plus Security” on page 5, “Setting Up Reminders Plus Security” on page 8, “Setting Up Tax Status Plus Security” on page 10, “Setting Up Watchlists Plus Security” on page 14, or “Setting Up Link Plus Security” on page 19 to continue using the utility.

Setting Up Reminders Plus Security

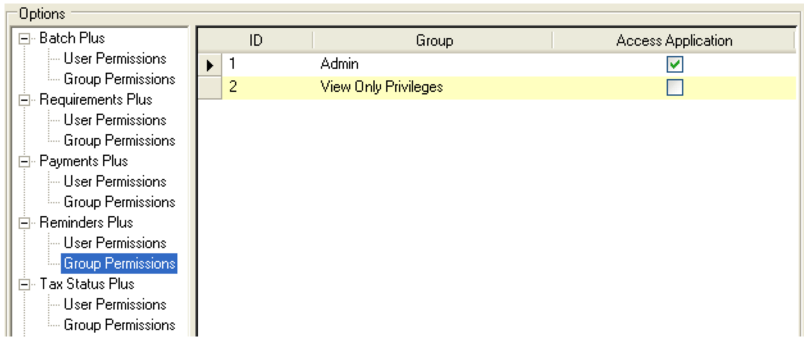
To set up the menus and security for Reminders Plus:

1 Open the Plus Pack Configuration utility, as described in “Accessing the Configuration Utility” on page 2. The Plus Pack configuration options are displayed.

2 In the Options list to the left, open the Reminders Plus options (if necessary).

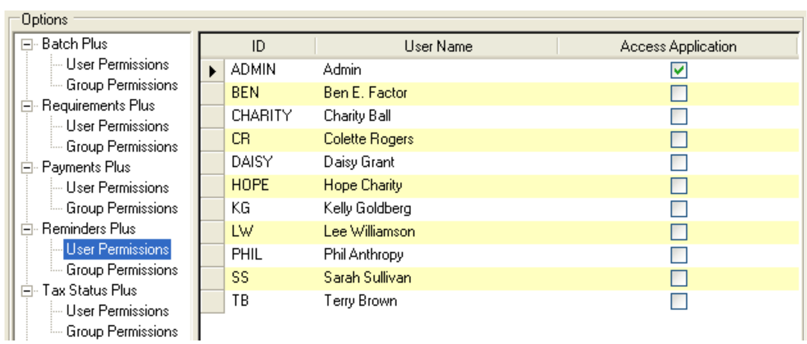


3 Click the Group Permissions option for Reminders Plus. A list of your GIFTS user groups is displayed.



4 Click the Access Application checkbox for the user groups that should have access to Reminders Plus. All users within the groups you select are granted permission to use Reminders Plus.

5 If there are any additional users who should have access to Reminders Plus, click the User Permissions option. A list of GIFTS users is displayed.



6 Click the Access Application checkbox for users who should have access to Reminders Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

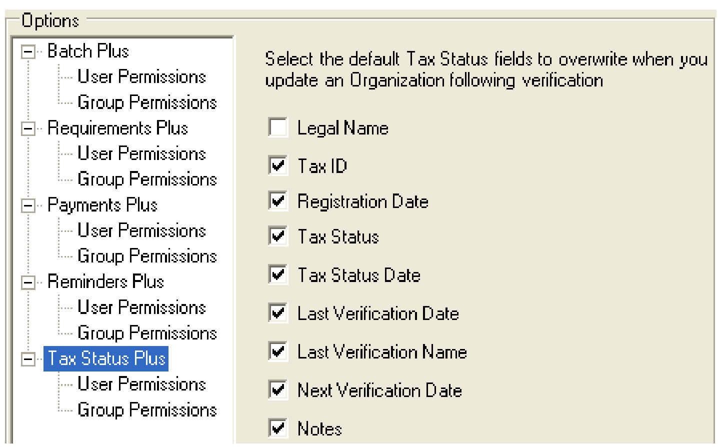
At this point, you can click OK to save your security settings or—if you want to set up security for Batch Plus, Requirements Plus, Payments Plus, Tax Status Plus, Watchlists Plus, or Link Plus for use with Outlook—refer to "Setting Up Batch Plus Security" on page 3, "Setting Up Requirements Plus Security" on page 5, "Setting Up Payments Plus Security" on page 6, "Setting Up Tax Status Plus Security" on page 10, "Setting Up Watchlists Plus Security" on page 14, or "Setting Up Link Plus Security" on page 19 to continue using the utility.

Setting Up Tax Status Plus Security

To set up the default selected tax status fields and security for Tax Status Plus:

1. Open the Plus Pack Configuration utility, as described in "Accessing the Configuration Utility" on page 2. The Plus Pack configuration options are displayed.

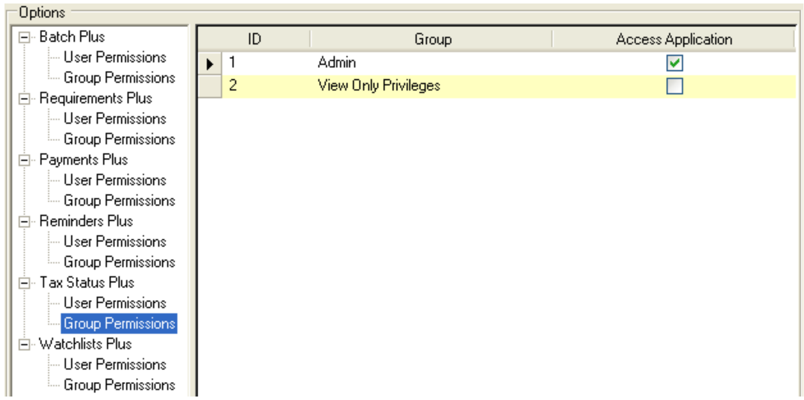
2. In the Options list to the left, highlight Tax Status Plus. A list of default selected Tax Status Plus fields are displayed.



3. Click the check box next to the tax status fields that will be selected by default to overwrite current organization information when a user updates an organization.

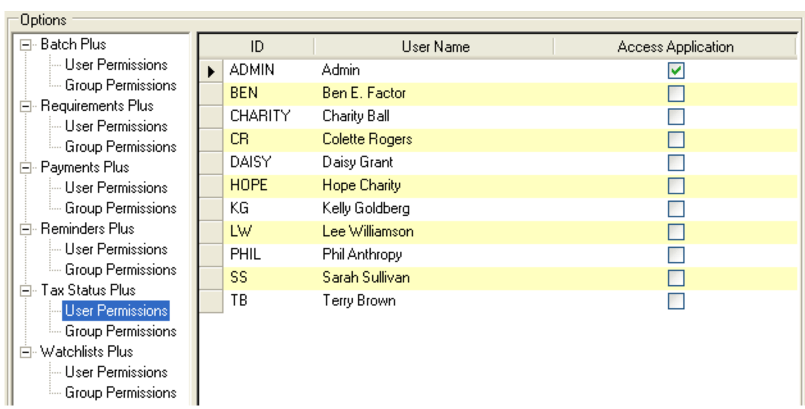
   Note: The Web Service URL is a link to the MicroEdge web service that retrieves information from MicroEdge's Tax Exempt Organization Database. Leave this field blank if you want to use MicroEdge's default Web Service URL.

4 Click the Group Permissions option for Tax Status Plus. A list of your GIFTS user groups is displayed.



5 Click the Access Application checkbox for the user groups that should have access to Tax Status Plus. All users within the groups you select are granted permission to use Tax Status Plus.

6 If there are any additional users who should have access to Tax Status Plus, click the User Permissions option. A list of GIFTS users is displayed.



7 Click the Access Application checkbox for users who should have access to Tax Status Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

Entering Proxy Server Information for Tax Status Plus

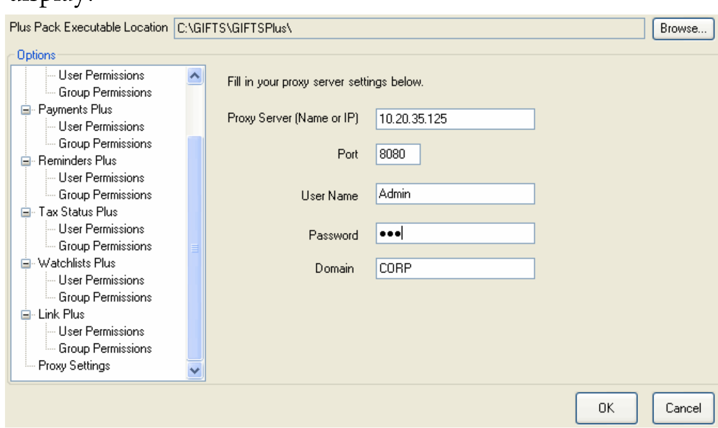
Since Tax Status Plus uses a web service to access information from MicroEdge's Tax Exempt Organization Database, you can enter proxy server information in the Proxy Settings section of the Plus Pack Configuration utility. This is only needed if your organization uses a proxy server. This allows Tax Status Plus to retrieve this information using the web service.

Tip: If your organization does not use a proxy server, you do not need to complete this task.

Note: This is the same information that is located in the Preference's tool's GIFTSConnections section in the GIFTS Administrator Module. Whatever you enter here overwrites the information entered there.

To enter proxy server information:

1 In the Options list to the left, highlight Proxy Settings. Your proxy settings display.



2 Enter the following information, if necessary:

Proxy Server (Name or IP): [URL or IP address of proxy server]
Port: [port on which proxy server is running]

User Name: [Windows username that allows access to proxy server]
Password: [Windows password that allows access to proxy server]
Domain: [user domain]

Important: The Windows password you enter in the Password field will be encrypted in the Preferences tool, unless it is the same as the current password. If you want to use the same password as the one entered in the Preferences tool, you must first delete it from the Preferences tool and enter it here. If you do not, the web service will not be able to successfully connect to the proxy server.

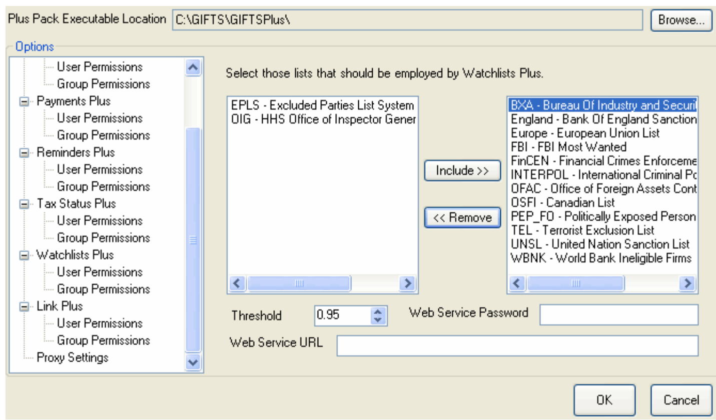
At this point, you can click OK to save your security settings or—if you want to set up security for Batch Plus, Requirements Plus, Payments Plus, Reminders Plus, Watchlists Plus, or Link Plus for use with Outlook—refer to “Setting Up Batch Plus Security” on page 3, “Setting Up Requirements Plus Security” on page 5, “Setting Up Payments Plus Security” on page 6, “Setting Up Reminders Plus Security” on page 8, “Setting Up Watchlists Plus Security” on page 14, or “Setting Up Link Plus Security” on page 19 to continue using the utility.

Setting Up Watchlists Plus Security

To set up the default Watchlists, threshold, and security for Watchlists Plus:

1. Open the Plus Pack Configuration utility, as described in “Accessing the Configuration Utility” on page 2. The Plus Pack configuration options are displayed.

2. In the Options list to the left, highlight Watchlists Plus. A list of default selected Watchlists are displayed.



Note: As of September 14, 2007, the following Watchlists are included in this list:

- OFAC - Office of Foreign Assets Controls
- BXA - Bureau of Industry and Securities
- FBI - FBI Most Wanted
- PEP_FO - Politically Exposed Persons
- England - Bank of England Sanctions
- OSFI - Canadian List
- Europe - European Union List
- UNSL - United Nations Sanctions List

- ❖ WBNK - World Bank Ineligible Firms
- ❖ Interpol - International Criminal Police
- ❖ TEL - Terrorist Exclusion List

3 If you do not want to include certain Watchlists when Watchlists Plus performs a search, highlight one or more Watchlists from the right field, and click Remove.

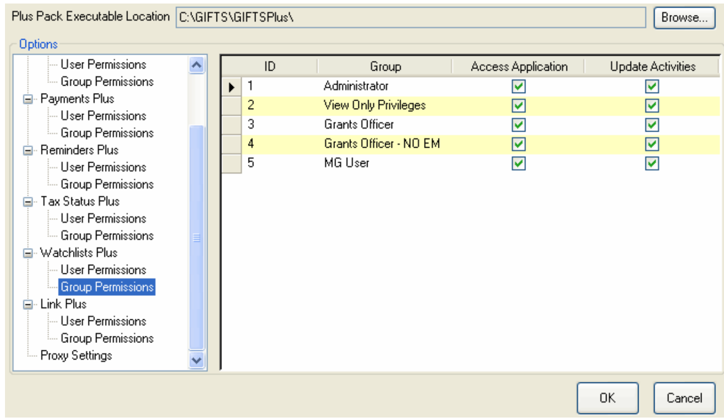
Note: To add a removed watchlist, highlight it in the left field and click Include.

4 Edit the Threshold, if necessary.

Important: This field defines how close the record information from GIFTS must match the information on a watchlist in order for a "hit", or acknowledgement of a matching record, to be registered in Watchlists Plus. You can have a threshold between .75 and 1. If you use a high threshold, such as .95 and above, information must be closely matched for a hit to occur. If you use a lower threshold, information does not have to be so closely matched for a hit to occur. Generally, a low threshold returns more hits, and a high threshold returns fewer hits. The default threshold is .95.

Note: The Web Service URL is a link to a web service, which provides the Watchlists Plus functionality. The Web Service Password is the password to this web service. Leave both of these fields blank, unless instructed otherwise by MicroEdge.

5 Click the Group Permissions option for Watchlists Plus. A list of your GIFTS user groups is displayed.

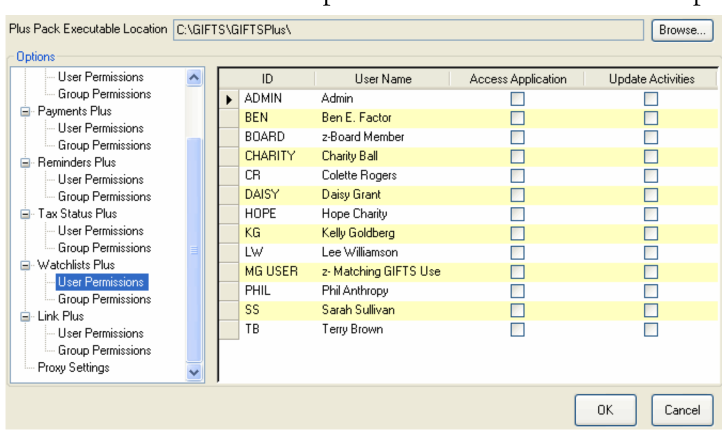


6 Click the Access Application checkbox for the user groups that should have access to Watchlists Plus. All users within the groups you select are granted permission to use Watchlists Plus.

Note: In order to keep compliance records accurate, it is important to restrict the use of the utility to qualified members of your staff.

7 Click the Update Activities checkbox for the user groups that will be able to mark Watchlists Plus Activities as false positives, or Done.

8 If there are any additional users who should have access to Watchlists Plus, click the User Permissions option. A list of GIFTS users is displayed.



9 Click the Access Application checkbox for users who should have access to Watchlists Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

10 Click the Update Activities checkbox for the users that will be able to mark Watchlists Plus Activities as false positives, or Done.

Note: Users must also have the Update/Delete System Activities permission in order to mark Watchlists Plus Activities as false positives. For more information, please refer to the "Managing Permission Sets" section in Chapter 4 of the *GIFTS 6 Administrator's Guide* (Article #8773 in the MicroEdge Solutions Knowledgebase).

Entering Proxy Server Information for Watchlists Plus

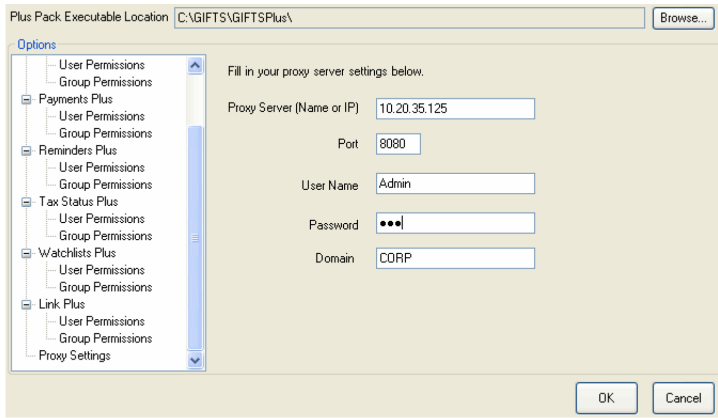
Since Watchlists Plus uses a web service to access information, you can enter proxy server information in the Proxy Settings section of the Plus Pack Configuration utility. This allows Watchlists Plus to retrieve Watchlists information using this web service. You do not need to repeat this task if you have already performed it for Tax Status Plus.

Tip: If your organization does not use a proxy server, you do not need to complete this task.

Note: This is the same information that is located in the Preference's tool's GIFTSConnections section in the GIFTS Administrator Module. Whatever you enter here overwrites the information entered there.

To enter proxy server information:

1 In the Options list to the left, highlight Proxy Settings. Your proxy settings display.



2 Enter the following information, if necessary:

Proxy Server (Name or IP): [URL or IP address of proxy server]
Port: [port on which proxy server is running]
User Name: [Windows username that allows access to proxy server]
Password: [Windows password that allows access to proxy server]
Domain: [user domain]

Important: The Windows password you enter in the Password field will be encrypted in the Preferences tool, unless it is the same as the current password. If you want to use the same password as the one entered in the Preferences tool, you must first delete it from the Preferences tool and enter it here. If you do not, the web service will not be able to successfully connect to the proxy server.

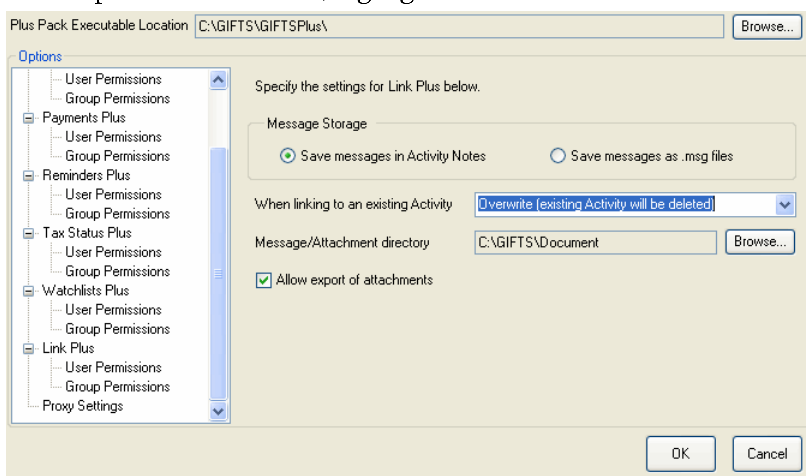
At this point, you can click OK to save your security settings or—if you want to set up security for Batch Plus, Requirements Plus, Payments Plus, Reminders Plus, Tax Status Plus, or Link Plus for use with Outlook—refer to “Setting Up Batch Plus Security” on page 3, “Setting Up Requirements Plus Security” on page 5, “Setting Up Payments Plus Security” on page 6, “Setting Up Reminders Plus Security” on page 8, “Setting Up Tax Status Plus Security” on page 10, or “Setting Up Link Plus Security” on page 19 to continue using the utility.

Setting Up Link Plus Security

To set up the security for Link Plus, including how email messages are stored, how to treat existing Email Activities in GIFTS, where email messages are to be stored, and whether or not to include email attachments in GIFTS:

1 Open the Plus Pack Configuration utility, as described in "Accessing the Configuration Utility" on page 2. The Plus Pack configuration options are displayed.

2 In the Options list to the left, highlight Link Plus.



3 In the Message Storage section, select one of the following options:

- Save messages in Activity Notes: This radio button saves the body of the Outlook email in the Long Notes section of the associated Mail Activity.
- Save messages as .msg files: If you have Document Manager, this radio button saves the Outlook message file (.msg) as a document which is linked to the Mail Activity.

Note: This field only displays if you have the Document Manager.

4 In the When linking to an Existing Activity section, select one of the following options. These options determine how existing Mail Activities in GIFTS will be handled.

- ❖ Overwrite (existing Activity will be deleted): The existing Mail Activity (and associated .msg file), as well as any External Document attachments will be overwritten with the new Outlook email.
- ❖ Create new (existing Activity will remain): The existing Mail Activity (and associated .msg file), as well as any External Document attachments will not be overwritten with the new Outlook email.
- ❖ Ask user (user chooses to delete existing or not): The user can choose whether or not to delete the existing Mail Activity (and associated .msg file), as well as any External Document attachments.

5 In the Message/Attachment directory section, click the Browse button to change the location where email attachments and Outlook message files (.msg) are stored.

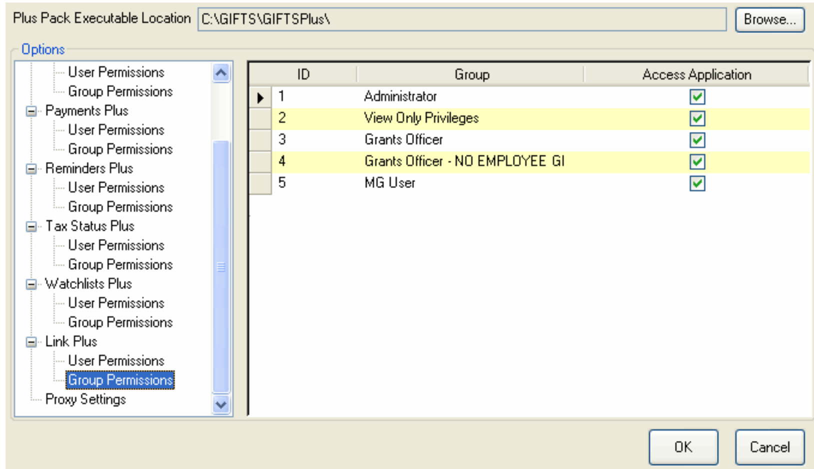
Note: The default location for this field is pulled from the Document path field of the GIFTS External Preferences. Since this is a global setting for all Link Plus users, this must be a location that all users can access. For more information about GIFTS External Preferences, see "External Preferences" on page 66 of the *GIFTS Administrators Guide*.

Note: This field only displays if you have the Document Manager.

6 Select the Allow export of attachments checkbox if you want users to have the option of creating separate External Document Activities for any email attachments when linking an Outlook email. If you deselect this checkbox, users will not have this option, and no email attachments will be imported into GIFTS when linking an Outlook email.

Note: This field does not display if you do not have the Document Manager.

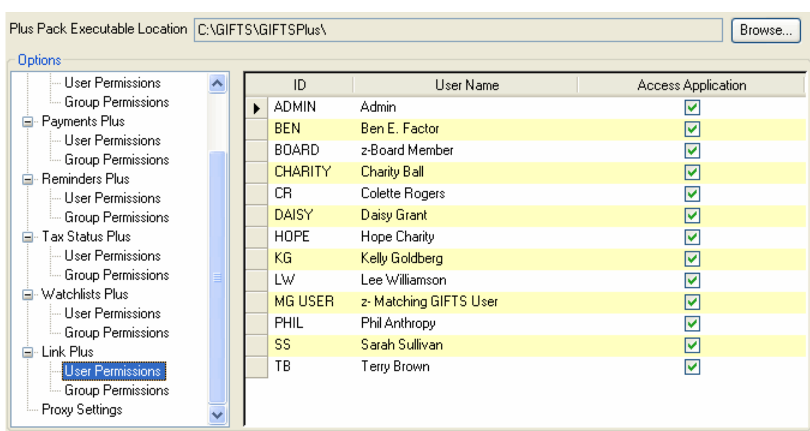
7 Click the Group Permissions option for Link Plus. A list of your GIFTS user groups is displayed.



8 Click the Access Application checkbox for the user groups that should have access to Link Plus. All users within the groups you select are granted permission to use Link Plus.

Note: In order to keep compliance records accurate, it is important to restrict the use of the utility to qualified members of your staff.

9 If there are any additional users who should have access to Link Plus, click the User Permissions option. A list of GIFTS users is displayed.



10 Click the Access Application checkbox for users who should have access to Link Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

Using Batch Plus

This chapter provides an overview of Batch Plus features and describes how to update batches of records with the Batch Plus utility.

In This Chapter

About Batch Plus

Batch Plus allows you to update the following types of data for numerous database records in a single step:

- **Coding Sheets** - You can modify, add, or remove codes for Organization, Contact, Payment, and Request records.
- **Request Staff Assignments** - You can assign a batch of Requests to a member of your staff, or change the staff assignment for a batch of Requests.
- **Request Types** - You can change the Request Type and Request Status codes for a batch of GIFTS Requests.
- **Project Descriptions** - You can overwrite the Project Description for selected Requests, or add text to the beginning or end of each Project Description.
- **Meeting Dates** - You can update the Meeting Date for batches of GIFTS Requests.
- **Payment Information** - You can modify the Fund, GL Account, Type, and Support Type for batches of GIFTS Payments.

Note: Your Administrator can set up Batch Plus to prevent the use of some of these features; not all of these options may be available on your system. In addition, all GIFTS security permissions apply to operations that you perform with Batch Plus. If you do not have permission to make a change in GIFTS, you also cannot make that change with Batch Plus.

Updating Coding Sheets

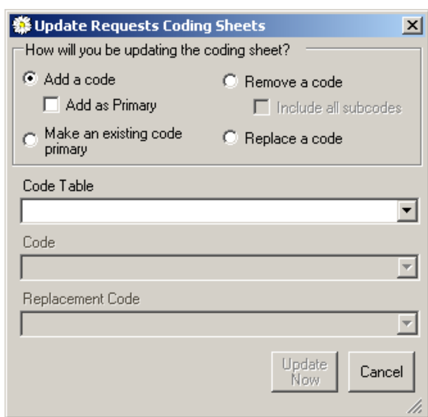
With Batch Plus, you can update the Coding Sheets of your Organization, Contact, Payment, and Request records. You can:

- Add, remove, or replace codes
- Change secondary codes to primary codes

Before You Begin: MicroEdge strongly recommends that you thoroughly plan any changes to your coding structure in advance. The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding. For information about planning code replacements, please refer to the "Replacing Codes" section in Chapter 2 of the *GIFTS Administrator's Guide* (also available as Article 8817 in the Solutions Knowledgebase).

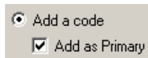
To modify the Coding Sheet for a batch of Requests, Organizations, Contacts, or Payments:

1. In the GIFTS Organizer, select the records you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)
2. From the Main menu, select GIFTS Plus ➤ Update ➤ Coding Sheet if you are in the Requests folder, or GIFTS Plus ➤ Update Coding if you are in the Organizations or Contacts folder. The options for updating Coding Sheets are displayed.

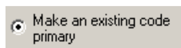


3 Choose an option:

To add a new code: select Add a code. If you would like to make the new code the primary code, select the option to Add as Primary; any pre-existing primary codes will become secondary codes.

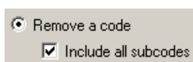


To make an existing code a primary code: Select Make an existing code primary.



To replace a code: Select Replace a code.

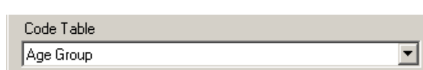
To remove a code: select Remove a code. If you are removing a code from a table with multiple levels, you can select Include all subcodes to remove all codes below the code that you specify.



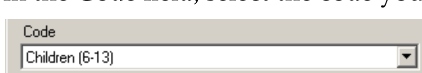
Example: You are updating the Program Area codes for three records. They are coded as Culture/Performing Arts/Music, Culture/Performing Arts/Theater, and Culture/Performing Arts.

If you choose to remove the Culture/Performing Arts code and *do not* select the option to Include all subcodes, only the Culture/Performing Arts code for the last record is removed because it is the only exact match. The codes for Music and Theater are not removed. If you *do* select the option to Include all subcodes, then the Performing Arts codes for all three records are removed.

4 In the Code Table field, select the Code Table that you want to modify.

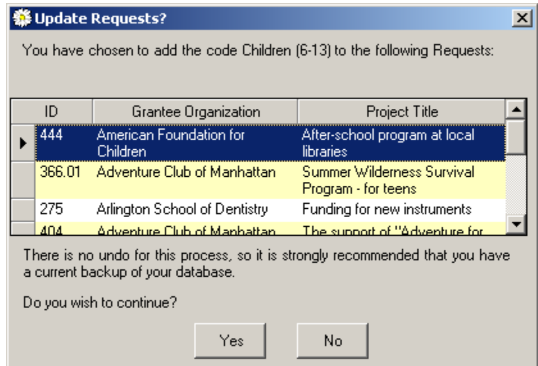


5 In the Code field, select the code you want to add, change, or remove.



6 If you are replacing a code, select a replacement code in the Replacement Code field. Otherwise, this field is not available.

7 Click the Update Now button. Batch Plus displays a list of the records that will be updated, and prompts for confirmation that you wish to continue.



8 Click Yes to continue. Batch Plus displays a log of the processing results and a confirmation message, which gives you the option of making more changes to the records you selected.

9 In response to the confirmation message, click Yes if you want to make additional changes to the records you selected in the Organizer, or No to view a log of the changes made to your data.

You can click Print Log or Save Log to print or save a copy of the log. When you are finished reviewing the log, click Close to end your Batch Plus session.

Updating Request Staff Assignments

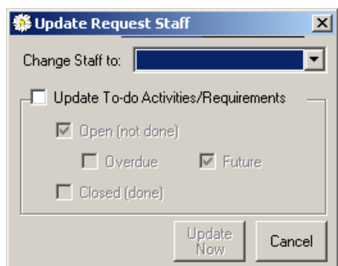
You can change the Staff member assigned to a group of Requests, and also update the To-Do Activities and Requirements associated with those Requests.

Before You Begin: The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding.

To update the Staff member assigned to a batch of Requests:

1 In the GIFTS Organizer, select the Requests that you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, select GIFTS Plus ➤ Update ➤ Staff. The options for updating staff assignments are displayed.



3 In the Staff field, select the member of your staff to whom the records should be assigned.

Note: Staff members are listed alphabetically.

4 Select Update To-Do Activities/Requirements to update the To-Do Activities and Requirements associated with the Request so that they are the responsibility of the new staff member.

Note: Only the Activities and Requirements assigned to the Request's current staff member are updated; items assigned to other staff members are not changed.

- Select Open (not done) to update Open Activities and Requirements. Check Overdue to update items that are overdue, and Future to update items that are due in the future (including the current day's items).
- Select Closed (done) to update closed Activities and Requirements so that they are shown in GIFTS as being the responsibility of the new

staff member; GIFTS will not change the name of the staff member who marked the Activity as Done.

5 Click the Update Now button. Batch Plus displays a list of the records that will be updated, and prompts for confirmation that you wish to continue.

6 Click Yes to continue. Batch Plus displays a log of the processing results and a confirmation message.

7 Click OK to close the confirmation message. The process log remains open.

8 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, click Close to end your Batch Plus session.

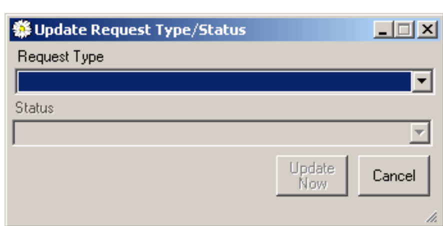
Updating Request Type and Request Status

Before You Begin: The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding.

To change the Request Type and/or Status assigned to a group of Requests:

1 In the GIFTS Organizer, select the Requests that you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, select GIFTS Plus ➤ Update ➤ Request Type/ Status. The options for updating are displayed.

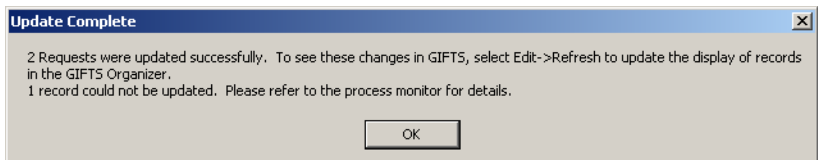


3 In the Request Type field, select the Request Type that you would like to apply to the Requests.

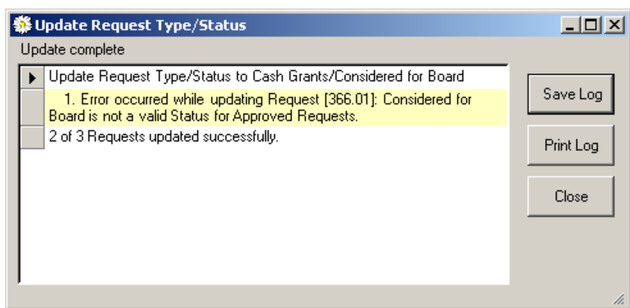
4 In the Status field, select the Request Status that you would like to apply to the Requests. Note that only the Statuses for the Request Type you chose in Step 3 are available.

5 Click the Update Now button. Batch Plus displays a list of the records that will be updated, and prompts for confirmation that you wish to continue.

6 Click Yes to continue. Batch Plus displays a log of the processing results and a confirmation message.



7 Click OK to close the confirmation message. The process log remains open.



Example: In the log shown here, an Approved Request was not updated because the Request Status selected was valid only for Pending Requests.

8 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, click Close to end your Batch Plus session.

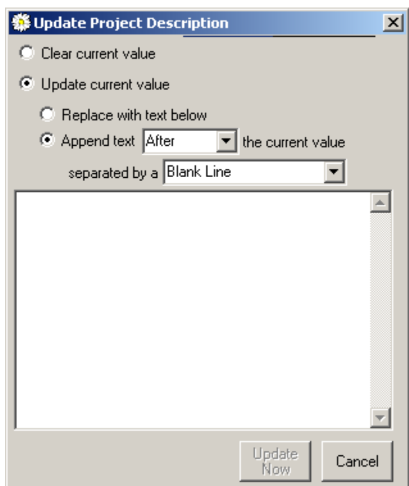
Updating Project Descriptions

Before You Begin: The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding.

To change the Project Description assigned to a group of Requests:

1 In the GIFTS Organizer, select the Requests that you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, select GIFTS Plus ➤ Update ➤ Project Description. The options for updating are displayed.



3 Select the options for updating or clearing the Project Descriptions for the Requests you selected:

❖ To ***clear*** the Project Description for the Requests, select the Clear current value option.

❖ To ***replace*** the existing Project Description text with new text, select the Update current value option and then the Replace with text below option. Enter the new text in the field.

- To ***append*** text to the beginning or end of the existing Project Descriptions without clearing the existing text, select the options to append text either above (before) or below (after) the existing text. You can specify whether the new and existing text are separated by a blank line, carriage return, space, or tab. Then enter the new text in the field.

4 Click the Update Now button. Batch Plus displays a list of the records that will be updated, and prompts for confirmation that you wish to continue.

5 Click Yes to continue. Batch Plus displays a log of the processing results and a confirmation message.

6 Click OK to close the message. The process log remains open.

7 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, click Close to end your Batch Plus session.

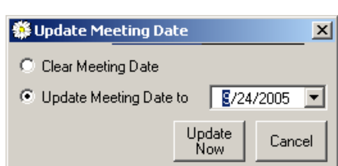
Updating Meeting Dates

Before You Begin: The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding.

To change the Meeting Date assigned to a group of Requests:

1 In the GIFTS Organizer, select the Requests that you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, select GIFTS Plus ➤ Update ➤ Meeting Date. The options for updating are displayed.



3 Specify the changes you would like to make:

- To ***clear*** the Meeting Date for all of the selected Requests, select the Clear Meeting Date option.
- To ***update*** the Meeting Date for all of the selected Requests, select the Update Meeting Date option and enter the new Meeting Date for the Requests.

4 Click the Update Now button. Batch Plus displays a list of the records that will be updated, and prompts for confirmation that you wish to continue.

5 Click Yes to continue. Batch Plus displays a log of the processing results and a confirmation message.

6 Click OK to close the message. The process log remains open.

7 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, click Close to end your Batch Plus session.

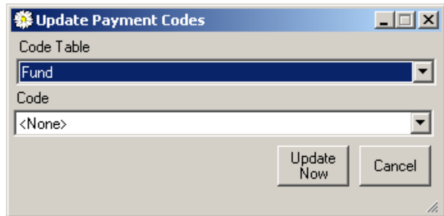
Updating Payment Information

Before You Begin: The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding.

With Batch Plus, you can update the Fund, G/L Account, Payment Type, and Support Type codes for batches of Payments. To update these codes:

1 In the GIFTS Organizer, select the Payments that you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, select GIFTS Plus ➤ Update Codes. The options for updating codes are displayed.



3 In the Code Table field, select the code that you would like to change.

4 In the Code field, select the new code for the Payments. If you want to clear the codes, select <None>.

5 Click the Update Now button. Batch Plus displays a list of the records that will be updated, and prompts for confirmation that you wish to continue.

6 Click Yes to continue. Batch Plus displays a log of the processing results and a confirmation message.

7 Click OK to close the message. The process log remains open.

8 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, click Close to end your Batch Plus session.

Using Requirements Plus

This chapter describes how to use Requirements Plus to create or delete batches of Requirements for your Requests and Payments.

In This Chapter

About Requirements Plus

Requirements Plus allows you to update the following types of data for numerous database records in a single step:

- **Schedule Requirements:** Schedule requirements for multiple records, at any stage of your workflow. This flexible requirement-scheduling tool allows you to schedule requirements for groups of Request and Payment records that you can select based upon a fixed or relative date, Project start dates or end dates, Payment Schedule Date, Paid Date, or other relevant dates.
- **Automatically schedule payment contingencies:** For groups of records, you can schedule Payment Requirements and make the payments contingent on completion of those requirements.
- **Delete requirements:** You can maintain the integrity of your data and more effectively manage staff resources by deleting groups of requirements that are no longer valid.

Note: Your Administrator can set up Requirements Plus to prevent the use of some of these features; not all of these options may be available on your system. In addition, all GIFTS security permissions apply to operations that you perform with Requirements Plus. If you do not have permission to make a change in GIFTS, you also cannot make that change with Requirements Plus.

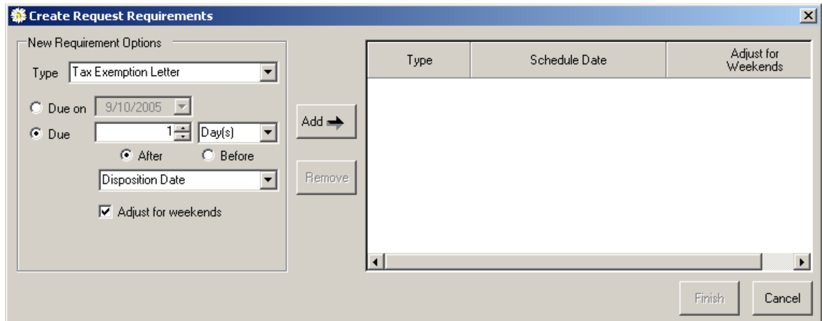
Creating Batches of Grant Requirements

Before You Begin: The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding.

To create Grant Requirements for a batch of Requests:

1. In the Requests folder of the GIFTS Organizer, select the records that you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, select GIFTS Plus ➤ Create Requirements. The options for creating Grant Requirements are displayed.



3 In the Type field, select the type of Requirement you would like to add.

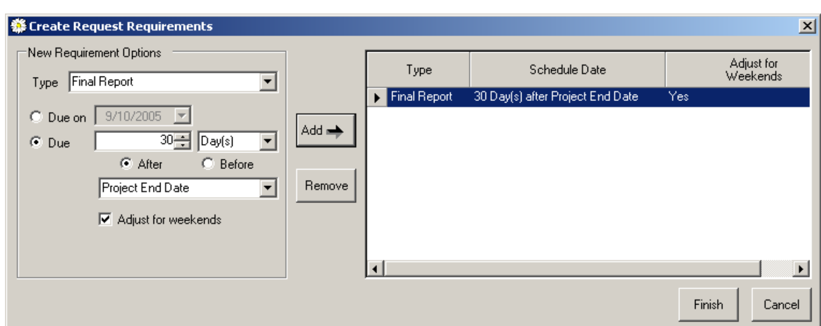
4 Specify the date on which the Requirements will be due. You can choose a specific date, or a date relative to the workflow of each Request.

Example: If you are setting up requirements for final reports, you can specify that they be due 30 days after the Project End Date. GIFTS sets the due dates based on the Project End Date of each Request.

5 If you specified a relative date and you do not want any requirements to be due on a weekend, select the Adjust for weekends option.

Example: If the 30th day after the End Date of a project falls on a Saturday, GIFTS will move the due date to the preceding Friday. If it falls on a Sunday, GIFTS will move it to the following Monday.

6 Click Add to create the Requirement. It is displayed in the grid.



7 Repeat Steps 3-6 to add any additional Requirements for the Requests.

Note: If you decide not to create one of the Requirements in the grid, you can highlight it and click Remove.

8 Click the Finish button. Requirements Plus displays a list of the Requirements that will be created, and prompts for confirmation that you wish to continue.

9 Click Yes to continue. Requirements Plus displays a log of the processing results and a confirmation message

10 Click OK to close the confirmation message. The process log remains open.

11 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, click Close to end your Requirements Plus session.

Creating Batches of Payment Requirements

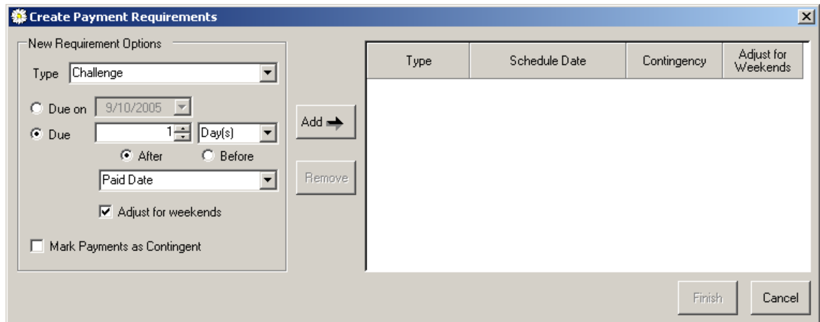
Before You Begin: The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding.

When you create Requirements for your Payments, you have the option of making the Payments contingent upon the completion of their Requirements. Contingent Payments cannot be made until their contingent Requirements have been marked as Done in GIFTS.

To create Requirements for a batch of Payments:

1 In the Payments folder of the GIFTS Organizer, select the records that you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, select GIFTS Plus ➤ Create Requirements. The options for creating Payment Requirements are displayed.



3 In the Type field, select the type of Requirement you would like to add.

4 Specify the date on which the Requirements will be due. You can choose a specific date, or a date relative to the workflow of each Payment.

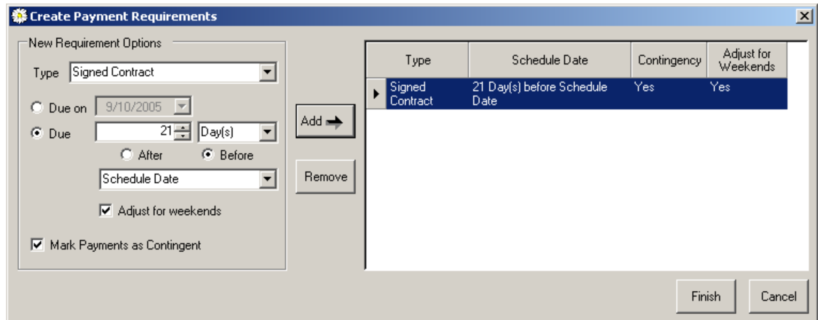
Example: If you are setting up requirements for signed contracts, you can specify that they be due 21 days before each Payment's Schedule Date. GIFTS sets the due dates based on the Schedule Date of each Payment.

5 If you specified a relative date and you do not want any requirements to be due on a weekend, select the Adjust for weekends option.

Example: If the 21st day before a Payment's Schedule Date falls on a Saturday, GIFTS will move the due date to the preceding Friday. If it falls on a Sunday, GIFTS will move it to the following Monday.

6 Select the Mark Payments as Contingent option if you want to ensure that the Payment will not be Paid until the Requirements have been marked as Done.

7 Click Add to create the Requirement. It is displayed in the grid.



8 Repeat Steps 3-7 to add any additional Requirements for the Payments.

Note: If you decide not to create one of the Requirements in the grid, you can highlight it and click Remove.

9 Click the Finish button. Requirements Plus displays a list of the Requirements that will be created, and prompts for confirmation that you wish to continue.

10 Click Yes to continue. Requirements Plus displays a log of the processing results and a confirmation message

11 Click OK to close the confirmation message. The process log remains open.

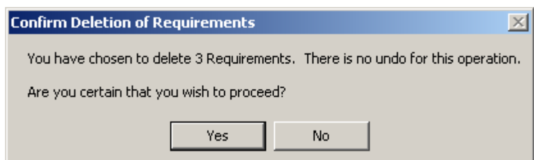
12 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, click Close to end your Requirements Plus session.

Deleting Batches of Requirements

Before You Begin: The changes you make to the database are permanent, and cannot be undone. Make sure that you have a current and valid backup of your database before proceeding.

To delete a batch of Grant Requirements or Payment Requirements:

1. In the Requirements folder of the GIFTS Organizer, select the records that you want to update. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)
2. From the Main menu, select GIFTS Plus ➤ Delete Requirements. GIFTS prompts for confirmation that you wish to continue.



3. Click Yes to continue. Requirements Plus displays a log of the processing results and a confirmation message
4. Click OK to close the confirmation message. The process log remains open.
5. You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, click Close to end your Requirements Plus session.

Using Payments Plus

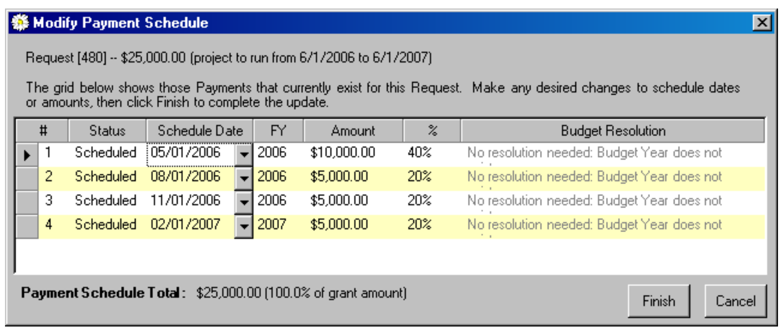
This chapter describes how to use Payments Plus to create or modify payment schedules for GIFTS Requests.

In This Chapter

About Payments Plus

The standard GIFTS software provides options for automatically creating a payment schedule for a Request during the Approval process. Payments Plus enhances your ability to create and modify payment schedules with the following features:

- **On-demand Schedule Creation:** You can create payment schedules for Pending and Approved Requests *at any time* (provided that no payments have already been created), not just during the Approval process.
- **Updating Existing Schedules:** You can modify the payment schedule for a Request from a single screen. This saves keystrokes, and as you're working you can see how the changes you make affect the total amount scheduled.



- **Batch Processing:** You can create payment schedules for batches of Requests.
- **Greater Flexibility When Creating Schedules:** Many of the defaults and restrictions that apply when scheduling payments in GIFTS do not apply to Payments Plus. For example, you can divide different percentages of the grant amount among payments, schedule payments outside of the Start Date or End Date of a grant, and specify whether payments that fall on a weekend are moved to a weekday.

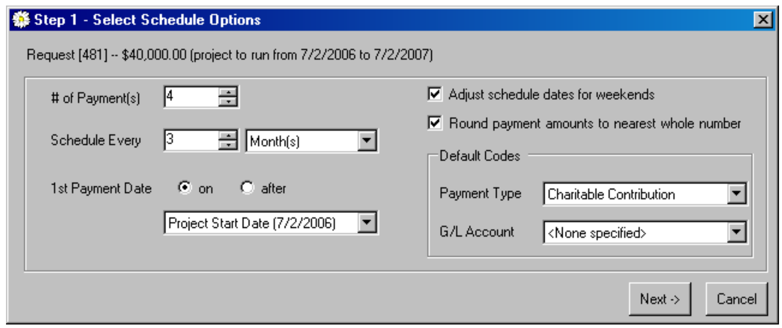
Note: GIFTS security permissions—as well as branch restrictions, if your organization has branch security—apply to operations that you perform with Payments Plus. If you do not have permission to make a change in GIFTS, you also cannot make that change with Payments Plus.

Creating a Payment Schedule for a Request

To create a payment schedule for a Pending or Approved Request:

1 In the Requests folder of the GIFTS Organizer, select the Request.

2 From the Main menu, select GIFTS Plus ➤ Create / Update Payments. The options for creating a payment schedule are displayed.



3 Select the number of Payments you wish to schedule and the interval between each payment (in days, weeks, months, or years).

4 From the list of dates, specify the date that will be used as the basis for scheduling the first Payment. Your options for choosing a date vary according to the Disposition of the Request and by the available data.

Examples: The Approval Date and Project End Date are only available for Approved Requests. Likewise, the Request's Meeting Date is provided as an option only when one has been specified for that Request.

5 Select whether the first Payment falls "on" or "after" the date you chose in the preceding step.

Example: If the Payments are scheduled *every three months* and you choose to start the Payments "after" the Project Start Date, the first Payment will be scheduled *three months* after the Start Date.

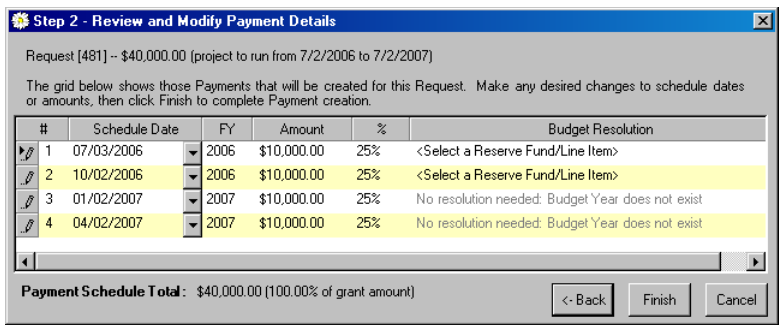
6 If you do not want any Payments to be scheduled on a weekend, select the "Adjust schedule dates for weekends" option.

Example: If a Payment's date falls on a Saturday, GIFTS will move it's schedule date to the preceding Friday. If it falls on a Sunday, GIFTS will move it to the following Monday.

7 Select the "Round payment amounts to nearest whole number" option if you want to ensure that all of your Payments are made in whole numbers—even as you edit payment amounts based on percentages.

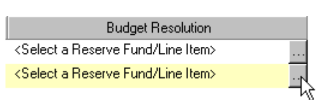
8 Select the default Payment Type and General Ledger Account codes to be applied to all of the Payments.

9 Click Next. You are prompted to review and modify the payment schedule:



❖ You can edit the Schedule Date, Fiscal Year (FY), or amount of the scheduled Payments. Note that you can change the amount of the Payments by either editing their amounts or their percentages. As you change amounts, the Payment Schedule Total at the bottom of the window is updated to reflect the changes you make.

❖ If you have the optional Budget Module, you may be required to resolve the Payments against your Budget. You can resolve the Payments against line items for the grantee organization or from a reserve fund. To resolve a Payment, click the icon at the right edge of the Budget Resolution column and choose a Budget item.



For more information about the conditions under which Payments must be resolved, please refer to the "When Payments Need to be Resolved" section of the *Budget Module User's Guide.*

10 Click Finish. If the payment creation is successful, a confirmation message is displayed after the GIFTS Payment records are created. If any of the Payments cannot be created, the entire process is cancelled and a message explaining the cause of the cancellation is displayed.

11 Click OK to close the confirmation message.

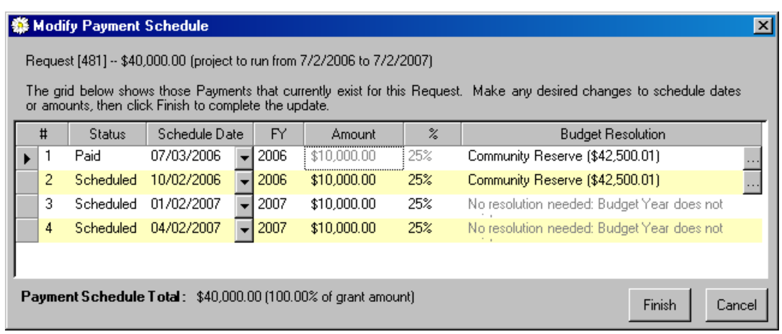
If the process ran successfully, the payment schedule for the Request has been created. You can make further changes by either editing the Payments individually in GIFTS, or by using Payments Plus to re-open the Request's payment schedule, as described in the next section.

Modifying the Payment Schedule for a Request

To modify the dates, amount, or resolution of payments for a Pending or Approved Request:

1 In the Requests folder of the GIFTS Organizer, select the Request.

2 From the Main menu, select GIFTS Plus ➤ Create/Update Payments. The Request's payment schedule is displayed.



Note: Voided and Cancelled Payments are not displayed.

3 You may edit the Schedule Date, Fiscal Year (FY), Amount, and Budget Resolution of the Payments. Note that some data may be read-only ("grayed out") if any of the following restrictions apply:

- ❖ You cannot edit the Schedule Date or Amount for Paid or Refunded Payments.
- ❖ Your GIFTS security permissions may prevent you from changing the Fiscal Year assigned to Payments.
- ❖ If you have the Budget Module, you cannot edit Payments resolved against a Closed Budget Year or against line items that you do not have permission to access.

4 Click Finish. If the payment modification is successful, a confirmation message is displayed after the Payments are updated. If any of the Payments cannot be updated, the entire process is cancelled and a message explaining the cause of the cancellation is displayed.

5 Click OK to close the confirmation message.

If the process ran successfully, the payment schedule for the Request has been updated.

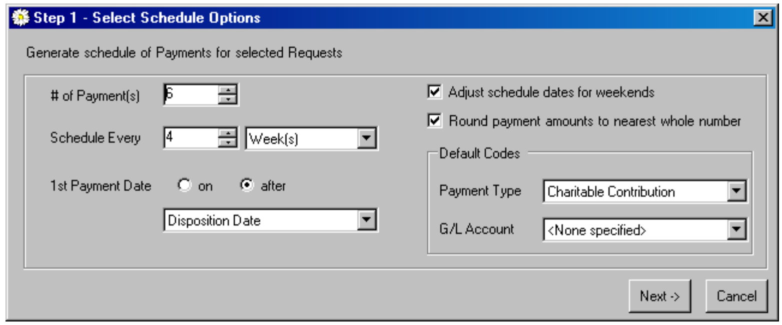
Scheduling Payments for a Batch of Requests

To create a payment schedule for a batch of Pending or Approved Requests:

1 In the Requests folder of the GIFTS Organizer, select the Requests. You can select a mix of Pending and Approved Requests, as long as your GIFTS permissions allow you edit all of the Requests that you select.

Tip: To select a group of Requests in the Organizer, hold down the SHIFT or CTRL key as you click on them.

2 From the Main menu, select GIFTS Plus ➤ Create / Update Payments. The options for creating a payment schedule are displayed.



3 Select the number of payments you wish to schedule and the interval between each Payment (in days, weeks, months, or years).

4 From the list of dates, specify the date that will be used as the basis for scheduling the first Payment. Be sure to choose a date that is valid for all of the Requests you selected.

Example: If you select Meeting Date and a Request in the batch does not have a Meeting Date, Payments Plus will not create Payments for that Request because there is no date on which to base the payment schedule.

5 Select whether the first Payment for each Request falls "on" or "after" the date you chose in the preceding step.

Example: If the Payments are scheduled *every four weeks* and you choose to start the payments "after" the Disposition Date, the first Payment for each Request will be scheduled *four weeks* after its Disposition Date.

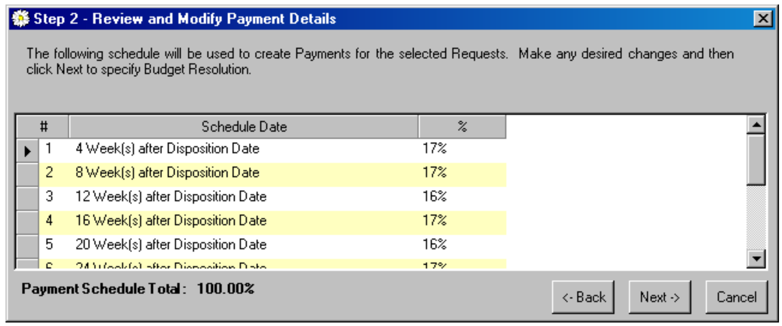
6 If you do not want any Payments to be scheduled on a weekend, select the "Adjust schedule dates for weekends" option.

Example: If a Payment's date falls on a Saturday, GIFTS will move it's scheduled date to the preceding Friday. If it falls on a Sunday, GIFTS will move it to the following Monday.

7 Select the "Round payment amounts to nearest whole number" option if you want to ensure that all of your Payments are made in whole numbers—even as you edit Payment Amounts based on percentages.

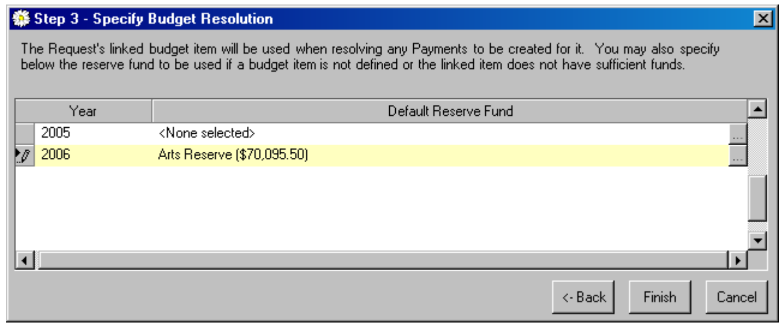
8 Select the default Payment Type and General Ledger Account codes to be applied to all of the Payments.

9 Click Next. You are prompted to review and modify the payment schedule:



- ❖ You can edit the amount of the scheduled Payments by changing the percentage allocated to each one. Since the grant amount for each Request is different, you can not edit specific payment values. As you change the percentages, the Payment Schedule Total at the bottom of the window is updated to reflect the changes you make.
- ❖ If you chose a specific date in the previous step (instead of a date relative to each Request, such as the Disposition Date), you can edit the Schedule Date of each Payment.

10 If you do not have the optional Budget Module, please proceed to Step 12. If you have the Budget Module, click Next. Payments Plus displays a list of the Open Budget Years for your system.



Budget resolution is required for all payments that are created for Approved Requests; funds for Pending Requests are not committed.

For each Approved Request, Payments Plus will attempt to resolve Payments against the Budget item to which the Request is linked. Payments Plus can attempt to draw funds from a default reserve fund that you specify if any of the following conditions apply:

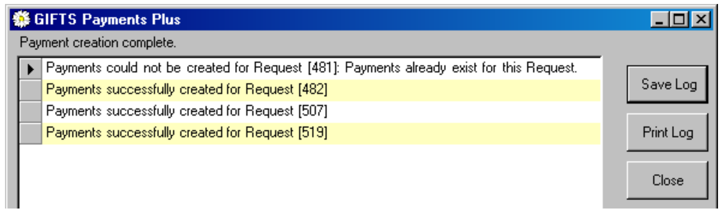
- ❖ There is no Budget item linked to the Request
- ❖ The linked Budget item has insufficient funds
- ❖ A Payment falls in a different Budget Year than the linked Budget item

11 If you would like to specify a default reserve fund for a Budget Year, click the icon at the right edge of the Default Reserve Fund column to select a reserve fund. This reserve fund will be used only for Payments that fall within that year. Repeat this step for each Budget Year that should have a default reserve fund.

Note: Selection of default reserve funds is not required; however, Payments Plus does not create payments if their funds cannot be resolved against a Budget Item.

12 Click Finish. A process log is displayed as the Payments are created. A confirmation message is displayed at the end of the process, which indicates whether any Payments could not be created.

13 Click OK to close the confirmation message. The process log remains open.



14 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, close it to end your Payments Plus session.

You can make further changes by either editing the Payments individually in GIFTS or by using Payments Plus to re-open the payment schedule for individual Requests, as described in "Modifying the Payment Schedule for a Request" on page 47.

Using Reminders Plus

This chapter describes how to use Reminders Plus to create or modify reminders for GIFTS Activities and Requirements.

In This Chapter

About Reminders Plus

Sending reminders with the standard GIFTS software entails running regular searches for upcoming or overdue items and using the correspondence feature to manually send reminders. Reminders Plus automates this process, saving you a significant amount of time and ensuring that reminders are never mistakenly forgotten.

With Reminders Plus you can:

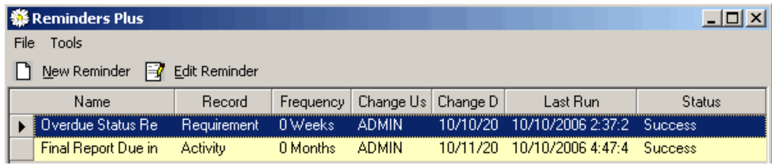
- **Schedule automated reminders:** You can schedule a reminder to be sent for any GIFTS Activity or Requirement type that does not have a Done date or Received date, respectively. For example, you can set up a reminder on Progress Reports to be sent one week prior to the due date and GIFTS will automatically 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 database, you can manually enter additional email addresses. You can even send reminders to mobile phones with SMS capability. You also have the ability to exclude 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.
- **Specify a time to send the reminders:** Reminders Plus can be set up to run on a daily basis at a time specified by you using the Windows Task Scheduler.

Creating a Reminder

To create a new reminder for an Activity or a Requirement:

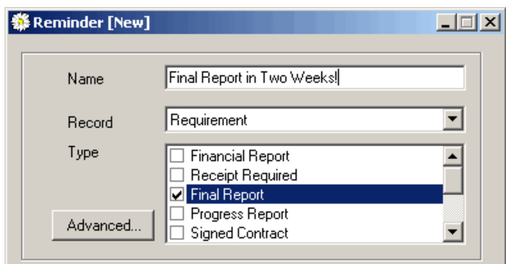
1. From the GIFTS Organizer Main menu, select GIFTS Plus ➤ Reminders Plus. (You do not need to have an Activity or Requirement selected.) The

Reminders Summary form opens. If you have any existing reminders, they are displayed here.



2 From the File menu or the toolbar, select New Reminder. The New Reminder form opens.

3 Enter a Name for your reminder. The name is used to recognize your reminder within GIFTS only and does not display to recipients.



4 In the Record field, select Activity or Requirement.

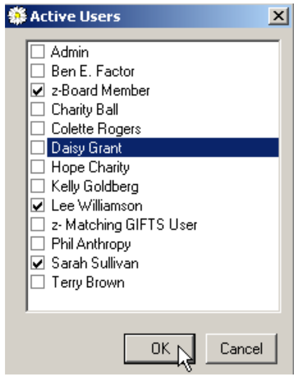
5 In the Type field, select all the record types for which you want this reminder to be sent. You can create a very generic reminder and use it for all record types, or you could create a different reminder for each type.

Note: The Advanced button is for creating reminders based on criteria other than Activity and Requirement due dates, using SQL queries. An example could be if you only wanted a reminder sent for Requests within a specific Program Area. If you are interested in custom advanced functionality, please contact MicroEdge Custom Programming Services for more information.

6 In the Recipients section of the form, select To, Cc, or Bcc for any contact and staff options you want. If you leave a field blank, the corresponding recipient will not receive an email.

Note: Inactive contacts and staff will not receive reminders.

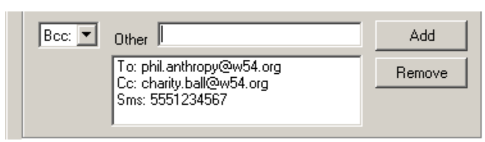
7 If you have selected to remind staff but there are certain staff who never want reminders, you can block them by clicking Exclude. This opens a separate window with a list of active staff users.



8 Select any users you want to exclude from the reminder and click OK. Note that Exclude settings override any other Recipient selections you have made.

9 For Other, select To, Cc, Bcc, or SMS.

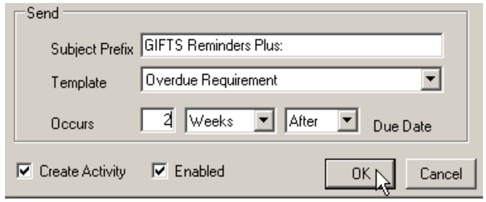
- ❖ For To, Cc, and Bcc, enter an email address.
- ❖ For SMS, enter a 10-digit mobile phone number with SMS (short message service) messaging capability.



10 Click Add.

11 Repeat for each ‘other’ contact you want to add. To remove an ‘other’ contact, select the address and click Remove.

12 In the Subject Prefix field, enter any text you want to display as a prefix on the subject line of your message. (The subject line of your message is determined by your mail template.) You can leave this field blank if you prefer.



13 From the Template drop-down menu, select the email template you want to use for the reminder. You must use an existing GIFTS email correspondence template; if nothing displays in the drop-down menu, you do not have any templates set up in GIFTS. Please refer to *Creating a New Correspondence Template* (Article #8796 in the MicroEdge Solutions Knowledgebase) for instructions.

14 In the Occurs fields, specify the date on which you want the reminder sent relative to the due date of the Activity or Requirement. You can have reminders sent *X* days, weeks, or months before or after a due date. If you want a reminder sent on the due date, set it to be sent 0 days before or after the due date.

Note: If you set your reminder to be sent 0 weeks or months before or after the due date, and you send reminders on a daily basis, your recipients will get a reminder every day of the week or month in which their Activity or Requirement is due.

15 If you want an Activity to be created for your reminder, select the Create Activity check box. If created, Activity notes include the recipient names and addresses and also the body text of reminders, providing a full record of all correspondence.

16 By default, new reminders are Enabled, meaning they are active and will be sent. To disable your reminder, clear the Enable box. Disabled reminders are not sent when Reminders Plus runs.

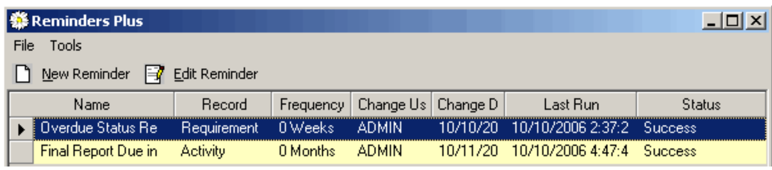
Creating reminders does not mean they will be sent; you need to schedule the Reminders Plus Engine to run and send them. For instructions on sending reminders, please see "Scheduling and Running Reminders Plus" on page 60.

Editing Reminders

Reminders are edited using the same form with which they are created.

To edit a reminder:

1 From the GIFTS Organizer Main menu, select GIFTS Plus ➤ Reminders Plus. The reminders Summary form opens. Your existing reminders are displayed.



2 Double-click the reminder you want to edit. The Edit Reminder form opens.

The Edit Reminder form has the same fields as the New Reminder form. For an explanation of the fields, please see "Creating a Reminder" on page 54.

3 Make any changes you want to the reminder and click OK at the bottom of the form. Your reminder is edited.

Specifying Email Settings

Reminders Plus uses the same email program as GIFTS, but in some cases GIFTS prompts for additional information when sending email. Since Reminders Plus is run on an automated, scheduled basis, any such additional information needs to be stored as a setting.

If your GIFTS system is set up to use Lotus Notes API, VIM, or SMTP/POP, you need to specify email settings. If your GIFTS system is set up to use MAPI, you do not need to specify settings.

Note: If you are not sure what your GIFTS email settings are, you can verify them from the GIFTS Administrator Module. Go to Setup ➤ Preferences, and look at "E-Mail Program Used" on the External tab.

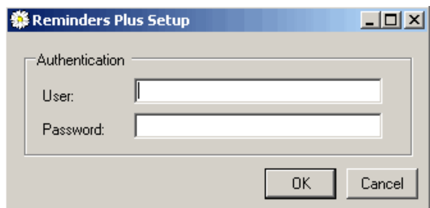
To specify email settings:

1 From the Summary form of Reminders Plus, go to Tools ➤ Email Settings.

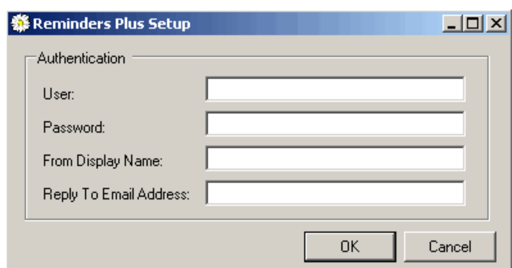
Note: If Email Settings is disabled (greyed out) on the Tools menu, your GIFTS system is set up to use MAPI and you do not need to specify settings.

Depending on your email settings, one of the following forms appears.

❖ Lotus Notes API



❖ VIM or SMTP/POP



2 Enter a User name and Password. Note that these should come from your mail system and not GIFTS.

3 For VIM or SMTP/POP, enter a From Display Name (the name that will display as the sender of the reminder) and a Reply To Email Address (the address which will display as the 'from' address and to which recipients' replies will be sent).

4 Click OK. These settings will be used for all messages sent from Reminders Plus until changed.

Scheduling and Running Reminders Plus

The part of Reminders Plus that actually generates and sends the reminders you create is called the Reminders Plus Engine. It can be scheduled to run automatically via a task scheduler or it can be run manually. The following sections describe how to run the Reminders Plus Engine.

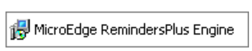
Although you can create reminders from any GIFTS workstation, you can only schedule and send reminders from a workstation on which you have run the Reminders Plus Engine Setup. For information on the running the Reminders Plus Engine Setup, please see your GIFTS Plus Pack 3 Installation or Upgrade documentation.

If you are not sure whether the Reminders Plus Engine Setup has been run on your workstation, you can verify that through your Control Panel.

To verify that the Reminders Plus Engine Setup has been run:

1 Go to the Start menu and choose Control Panel ➤ Accessories ➤ Add or Remove Programs. A list of all the programs installed on your workstation appears.

2 Scroll down the list to look for:



If you do not see the MicroEdge RemindersPlus Engine, it has not been set up on your workstation and you cannot schedule and run reminders from this machine. If you think you should have this capability, please contact the administrator who installed or upgraded your GIFTS Plus Pack.

Scheduling Automated Reminders

The workstation sending reminders does not need to have a user logged in to send reminders, but it must be turned on. Be sure to schedule automated reminders on a machine that will be left on.

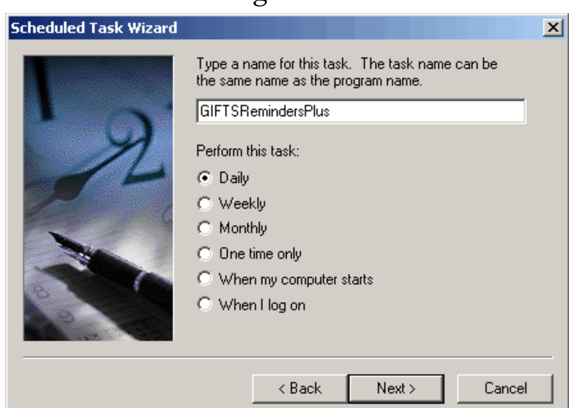
Important: If you are running Windows Vista on your workstation, refer to the instructions located on page 63.

To schedule the Reminders Plus Engine to run as an automated task:

1. From the workstation on which you have run the Reminders Plus Engine Setup, go to the desktop Start menu and choose All Programs ➤ Accessories ➤ System Tools ➤ Scheduled Tasks. The Scheduled Tasks Control Panel open.

   Note: If you are using Windows 2000, the path is Start ➤ Settings ➤ Control Panel ➤ Scheduled Tasks.

2. Double-click Add Scheduled Task. The Scheduled Task Wizard opens.
3. Click Next. You are prompted to select the program you want to run.
4. Click Browse and select the GIFTSRemindersPlus.exe file located in your GIFTSPlus directory.
5. Click Open to select the GIFTSRemindersPlus.exe file. You are prompted to enter the name and frequency of the task.
6. Enter a description, and select whether you are scheduling Reminders Plus to run once or on a regular basis.



7. Click Next. You are prompted to enter the time and day on which you want the program to run.
8. Enter a starting day and time.
9. Click Next. You are prompted to enter the login information for the Windows user account that will be used to run the Reminders Plus Engine.

10 Enter the login and password for your Windows user account. Remember that to schedule the Reminders Plus Engine, you must have permission for Reminders Plus.

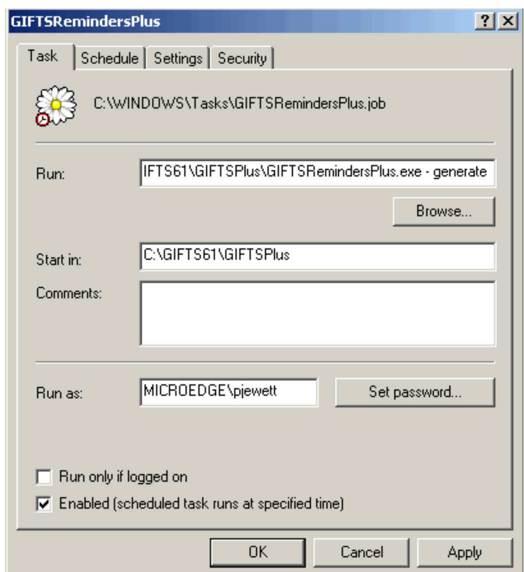
11 Click Next. The Wizard displays the options you selected.

Select the "Open advanced properties for this task when I click Finish" option.

12 Click Finish. The task properties are displayed.

Note: If Windows displays an "access denied" message, the user ID you entered does not have permission to use Reminders Plus, or the password you entered was not correct.

13 In the Run field, at the end of the path to GIFTSRemindersPlus.exe, type a blank space and then type "-generate" (do not type a blank space after "-generate"). This parameter indicates that the Reminders Plus Engine should run, generating and sending reminders.



14 Click OK to save your changes. If you are prompted to re-enter your Windows login information, re-enter it and click OK.

To schedule the Reminders Plus Engine to run as an automated task from a workstation running Windows Vista:

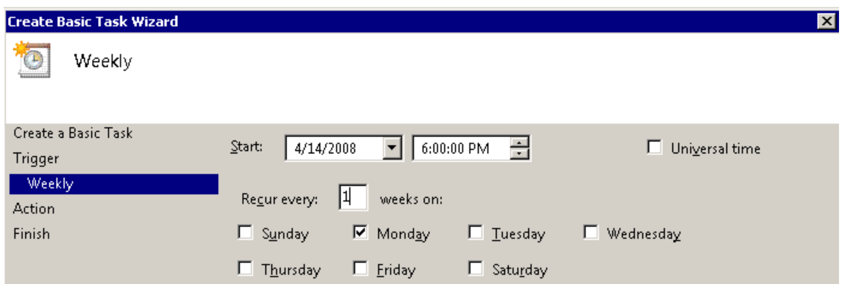
1 From the Windows Start menu, choose All Programs ➤ Accessories ➤ System Tools ➤ Task Scheduler. The Task Scheduler Window appears.

2 Click Create Basic Task from the Actions section. The Create Basic Task Wizard appears.

3 Enter the Name and Description for the batch, and then click Next.

4 Select when you want the batch to run, either once or on a reoccurring basis, and then click Next.

5 Enter a starting date and time, and the frequency, if needed. Then click Next.



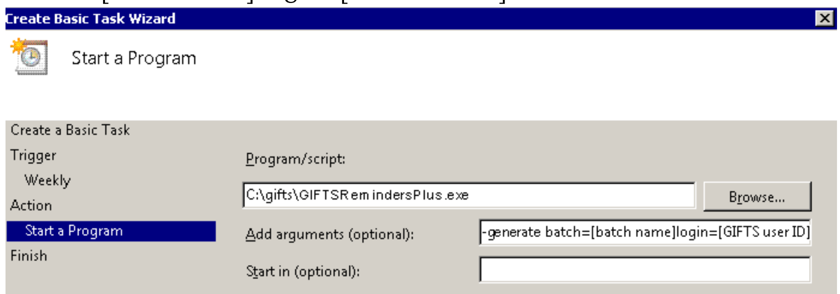
6 Select Start a program, and then click Next.

7 Click Browse and select the GIFTSRemindersPlus.exe file located in your GIFTSPlus directory.

8 Click Open.

9 In the Add arguments field, enter "-generate". This instructs the scheduler to run the batch in silent mode.

10 In the same field after the "-generate", add the name of the batch and the name of the GIFTS user who created the batch in the following format: batch=[batch name] login=[GIFTS user ID].



11 Click Next.

12 To configure advanced settings, select the Open the Properties dialog for this task when I click Finish checkbox.

Note: This step is optional and launches the Properties window after you click Finish which allows you to enter advanced settings.

13 Click Finish.

The Reminders Plus Engine and Window Scheduled Tasks are now set up to run at the time you specified, without any further user intervention. When the Reminders Plus Engine runs, any reminders scheduled for that day are sent out and—for any reminders that were set up to create an Activity—an Activity is created in GIFTS.

Running Reminders Plus Manually

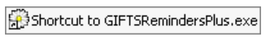
The Reminders Plus Engine can also be run manually at any time from a workstation on which the Reminders Plus Engine Setup has been run.

The Reminders Plus Engine is run via the GIFTSRemindersPlus.exe located in your GIFTSPlus directory. However, because this executable also runs Reminders Plus, if you double-click the GIFTSRemindersPlus.exe, it will open the Plus Pack feature, exactly as if you had selected it from your GIFTS menu. In order to tell the GIFTSRemindersPlus.exe to run the Reminders Plus Engine to generate and send reminders, you need add certain parameters to the command. This is done by creating and modifying a shortcut to the GIFTSRemindersPlus.exe.

To create a shortcut to run the Reminders Plus Engine:

1 Locate GIFTSRemindersPlus.exe in your GIFTSPlus directory.

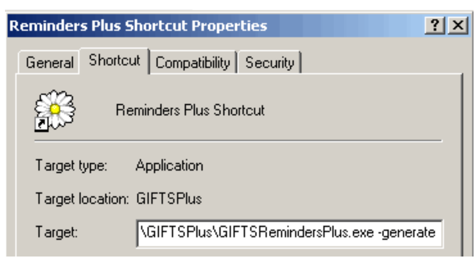
2 Right-click on GIFTSRemindersPlus.exe and select Create Shortcut. A shortcut is created in the same folder. You can move this shortcut, for example to your desktop, after creating it.



3 Right-click on the shortcut and select Rename. Rename your shortcut Reminders Plus Engine, or something else you will remember easily. You do not need to include .exe in the name.

4 Right-click on the shortcut and select Properties. The Properties window appears.

5 In the Target field, at the end of the path to GIFTSRemindersPlus.exe, type a blank space and then type "-generate" (do not type a blank space after "-generate"). This parameter indicates that the Reminders Plus Engine should run, generating and sending reminders.



6 Click Apply.

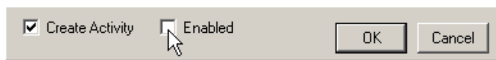
Your shortcut is now set up to run the Reminders Plus Engine. You can double-click this shortcut to generate and send reminders manually at any time.

Disabling and Deleting Reminders

You can disable or delete a reminder at any time. A disabled reminder will not be sent, but its settings are saved and it can be enabled again to be sent in the future. A deleted reminder is permanently removed from your system.

To disable a reminder:

1. From the Summary form of Reminders Plus, double-click on a reminder to open the Edit form.
2. At the bottom of the form, clear the Enabled check box.



3. Click OK. The reminder is disabled and will not be sent unless it is enabled again.

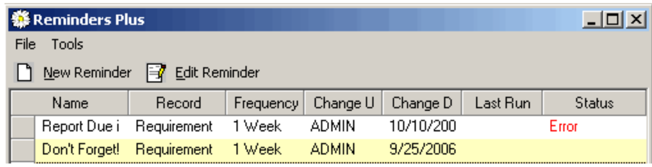
To delete a reminder:

1. From the Summary form of Reminders Plus, click on a reminder to select it.
2. Go to File ➤ Delete Reminder. A confirmation message appears.
3. Click Yes to delete the reminder. This action cannot be undone.

Viewing the Error Log File

If Reminders Plus encounters any errors when it runs (either scheduled or manually), it generates an error log file where you can view information about the error/s that occurred. Error logs are text files, created on a daily basis (when errors occur) and named in the following format: Reminder MM-DD-YYYY. If more than one reminder encounters errors in a day, all the error messages for that day are included in a single log file.

You can quickly see if a reminder had any errors by looking at the Status column of the Summary form.



If a reminder's status is Error, an error log file has been created. Note that if no errors occur, a log file is not created. A status of Error does not necessarily mean that your reminder has not been sent. It can indicate a partial error, for example, that one of three recipients was missing an email address. The log file contains these details.

To view the error log file:

1. From the Summary form of Reminders Plus, go to Tools ➤ View Error Log. The directory where your error logs are written opens in a separate window. The default location is the Logs\Reminders Plus folder in your GIFTS directory.
2. Select the log file you want and double-click to open it and view error details.
3. When you are finished reviewing errors, you can close the log file and log file directory windows.

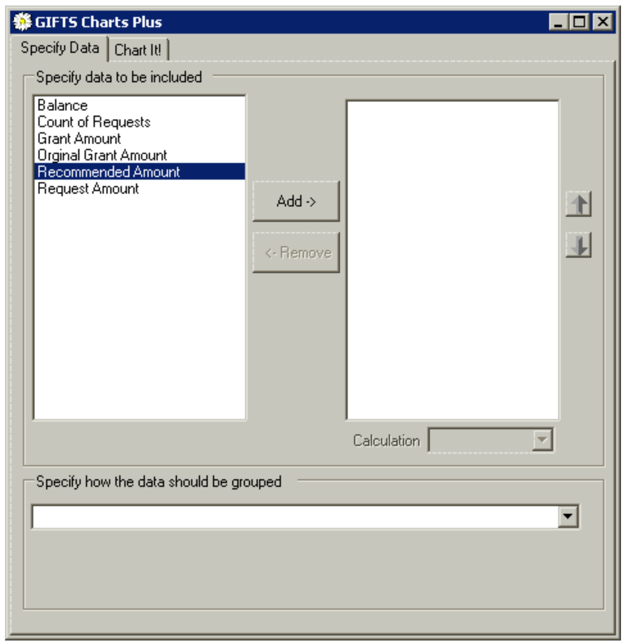
Using Charts Plus

This chapter describes the new charting features found in GIFTS Charts Plus. You can chart more kinds of Payment and Request data by an expanded list of categories, and use powerful charting tools to format charts to meet your organization's needs.

In This Chapter

About Charts Plus

GIFTS Charts Plus is available for charting both Requests and Payments. To access the Charts Plus feature, log in to GIFTS, select either the Requests or Payments folder in the Organizer, then choose GIFTS Plus ➤ GIFTS Charts Plus from the main menu:



When setting up your chart, there are two main determinations you will make:

❖ *Which data do you want to chart?* — In both Requests or Payments charting, you have a selection of data available. For example, if you want a chart that shows the total of Grant Amounts your organization gave away in each Fiscal Year, Grant Amount is the data you want to chart.

Note: You can select more than one data field for a single chart.

❖ *How do you want the chart to group the data?* — Once you know which data you want to chart, you will decide how you want it grouped in the chart.

In our first example, we described a simple chart that shows total of Grant Amounts per Fiscal Year. In GIFTS Charts Plus, this means the data (Grant Amount) is grouped by Fiscal Year.

The next two sections of this chapter describe selecting data to chart, and how to use the grouping options of GIFTS Charts Plus.

When You're Ready to View Your Chart

The options in the next two sections are found in the Specify Data tab of GIFTS Charts Plus. When you're ready to see the chart you've created there, click the Chart It! tab to open it:

Options found in the Chart It! tab are described in "Formatting and Other Chart Options" on page 85.

Selecting the Data You Want to Chart

This section of the chapter discusses which fields you can chart data from, how to add and remove the fields, and the options available for calculating the selected data.

Selecting Requests or Payments to Chart

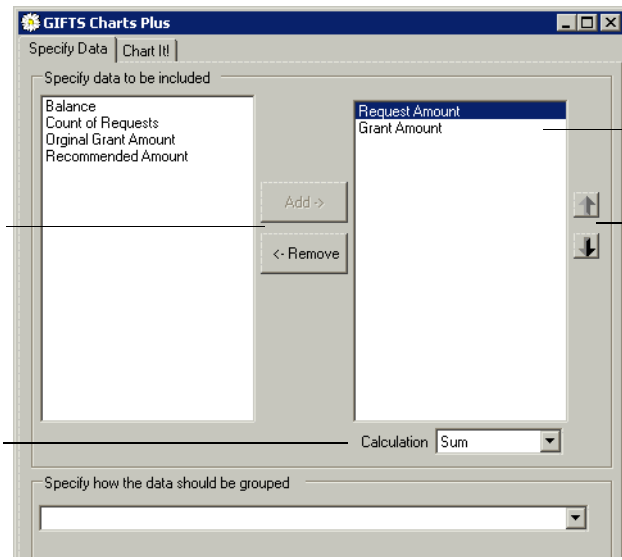
The first step is to display the Requests or Payments you want to chart in the GIFTS Organizer. Use standard GIFTS functionality (such as searching or zooming) to display the records you want to chart data from.

Once you have displayed the desired Requests or Payments in the Organizer, highlight the ones you want to chart. If you want to chart all records currently displayed in the Organizer, you can press CTRL+A in the folder to select all.

Once you have selected the records you want to chart data from, choose GIFTS Plus ➤ GIFTS Charts Plus from the main menu to begin setting up your chart.

Selecting the Fields You Want to Chart

After you have selected the Requests or Payments you want to chart in the GIFTS Organizer, you can use Charts Plus to specify exactly which data from those records the chart should measure and display:



The Add and Remove buttons are used to add or remove the highlighted field from the chart.

The Calculation options are described in “Calculation Options for Charted Data” on page 75.

For this Requests chart, we have selected to chart both Request Amount and Grant Amount.

Use these arrow keys to change the order of the fields selected.

For example, if you creating a bar chart and want the bars for Grant Amount to appear to the left of the bars for Request Amount, you can highlight Grant Amount and click the up arrow to move it.

On the left of the “Specify data to be included” section of the Specify Data tab is a complete list of fields you can chart data from. (For more information on the kinds of fields available, please see “Which Fields Can I Chart?” on page 74.)

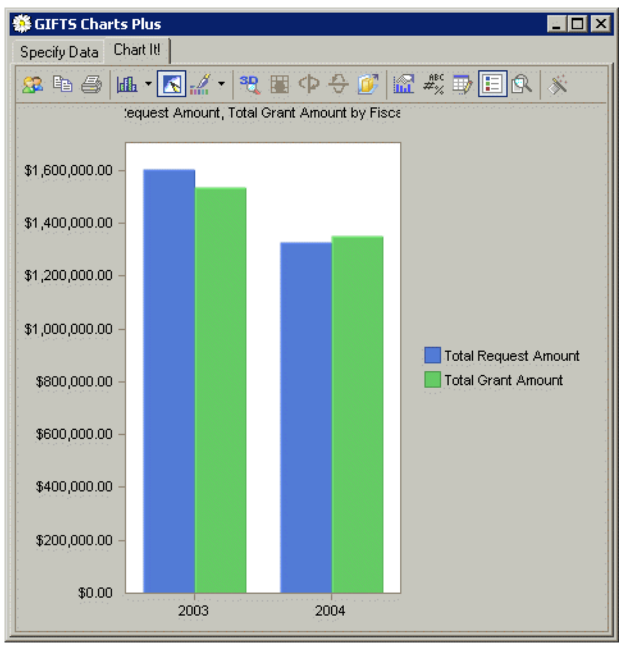
If you want to chart data from a field, select the field in the left list and click Add. The field will move to the right list, and the data from the field will be charted.

Selecting Multiple Fields to Chart

In the screen shot above, we selected two fields to chart data from: Request Amount and Grant Amount. How does this appear once we chart this data?

It depends on which kind of chart you choose. (For more information on choosing chart types, please see "Series Properties" on page 98.) In general, however, when you choose more than one data field to chart, data for each field will appear next to each other *within* each grouping.

For example, let's chart Request Amount and Grant Amount, grouped by Fiscal Year. In the following bar chart, we see the two amounts charted next to each other within each Fiscal Year:



For each Fiscal Year—that is, within each grouping—two bars appear: one for Total Request Amount, one for Total Grant Amount.

Which Fields Can I Chart?

Fields available for charting in Requests and Payments are limited to those with numerical values. By default, these include all currency (or amount) fields in the Requests and Payments. Also, you can chart by record count—that is, the number of selected Request or Payment records which fall within each grouping.

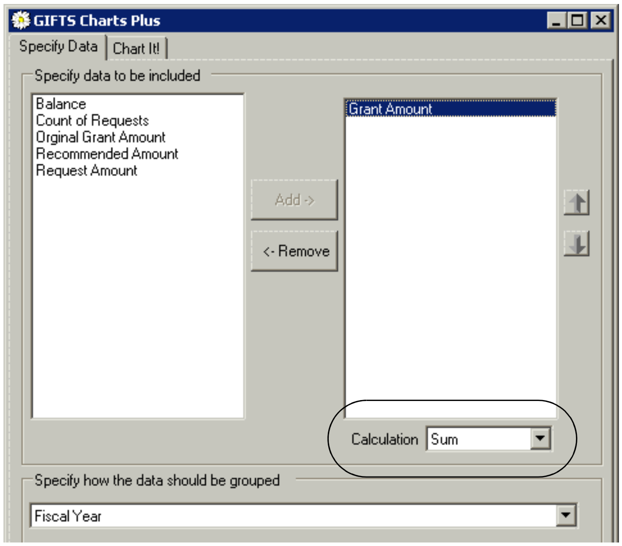
GIFTS Customizer GIFTS Customizer fields with numerical values can also be charted. If you use the GIFTS Customizer, you can chart Request or Payment custom fields of the following types:

Small Number, no Decimal	Currency
Medium Number, no Decimal	Number, with Decimal
Large Number, no Decimal	

Multi-currency If you use GIFTS multi-currency features to track Request and Payment amounts using exchange rates, these currency fields can be charted as well. For example, working with multi-currency Payments, you could chart both functional and local/other Payment Amounts.

Calculation Options for Charted Data

Below the list of selected fields in the Specify Data tab, you can select how you want the chart to calculate data from the fields:



Select from the following Calculate options:

Option	Description
Sum	For the charted field, the total from all selected Requests or Payments within each grouping.
Average	For the charted field, the average of all selected Requests or Payments within each grouping.
Maximum	For the charted field, the single highest amount or number from the selected Requests or Payments within each grouping.
Minimum	For the charted field, the single lowest amount or number from the selected Requests or Payments within each grouping.

Note: The Calculate options are not available for record counts such as Count of Payments or Count of Requests.

Selecting How to Group Your Data

Once you have selected the Request or Payment field(s) you want to chart, you next choose how to group them. GIFTS Charts Plus provides a great number of different categories to group by, and grouping options let you specify how broad or narrow each group will be.

Tip: Explore the different grouping options to see what works well for you. You may find a useful way to group data in a chart that you haven't thought of before.

Different grouping categories are available for charting Requests than for charting Payments. Different kinds of categories have different grouping options. We will discuss these different aspects of grouping in the following order:

- **Request Grouping Categories** — This topic provides an overview of the fields and categories by which you can group charted Request data.
- **Payment Grouping Categories** — This topic provides an overview of the fields and categories by which you can group charted Request data.
- **Grouping Options Based on Group Type** — After you choose a category by which to group charted data, you may have grouping options to choose. Different grouping category types have different options, described in this topic.

Request Grouping Categories

The following categories provide a general overview of Request details by which you can group chart data:

Category	Description
Request Type, Status, or Disposition	These categories allow you to group Request amounts and numbers into different stages of your workflow.

Category	Description
Request amounts	Group data by Recommended, Request, or Grant Amount, or by calculated amounts like Balance. For example, you could choose “Count of Requests” as your data, then group that data by ranges of grant Amount ($0.00-$50,000.00, $50,001-$100,000, etc.) to see how many grants of each size you have given. NOTE: Multi-currency users can group chart data using either the local/other or functional amount. *For information on options for grouping by amount and number, please see “Grouping Options Based on Group Type” on page 80*
Request dates	Select a date range for Disposition Date, Request Date, Project Start or End Date, and so on. *For information on options for grouping by date fields, please see “Grouping Options Based on Group Type” on page 80*
Request Coding Sheet Categories	You can select a Code Table from the Request Coding Sheet and the chart will break down Request data by code. Example: Chart Grant Amount by Program Area and see how much you are giving to each kind of project. *For information on options for grouping by Coding Sheet categories, please see “Grouping Options Based on Group Type” on page 80*
Grantee Organization’s Coding Sheet	You can select a Code Table from the Grantee Organization’s Coding Sheet and the chart will break down Request data by code. For example, you could chart Request Amount by Geographical Area Served to see which regions of the country may be less aware of your charitable organization. *For information on options for grouping by Coding Sheet categories, please see “Grouping Options Based on Group Type” on page 80*
Grantee Organization details	Your chart can break down Request data by Grantee Organization, or by the Grantee Organizations’ countries, states, or Zip codes.
Other Request details	Group by Request Primary Contact or other Request details found in the GIFTS Charts Plus options.

GIFTS Customizer — Certain GIFTS Customizer fields are also available for grouping data in charts. When you are charting Request data, custom fields from the the following records are available:

- Requests
- Request Grantee Organizations

Request custom fields and custom fields from Grantee Organizations can be used as chart groups if the custom fields are of the following types:

Small Number, no Decimal	Currency
Medium Number, no Decimal	Number, with Decimal
Large Number, no Decimal	Date
Values	

For information on grouping options for date, currency, and number fields, please see “Grouping Options Based on Group Type” on page 80.

Payment Grouping Categories

The following categories provide a general overview of Request details by which you can group chart data:

Category	Description
Payment Status	These categories allow you to group Payments data into categories like Paid, Hold, and so on.
Payment Amount	Chart Payments data in groups based on ranges of Payment Amount. NOTE: If you use GIFTS multi-currency options, you can chart by a range of local/other or functional amounts. *For information on options for grouping by amount, please see “Grouping Options Based on Group Type” on page 80*
Payment dates	Select a date range for Schedule Date, Paid Date, and so on. *For information on options for grouping by date fields, please see “Grouping Options Based on Group Type” on page 80*

Category	Description
Request Coding Sheet Categories	You can select a Code Table from the Coding Sheet of the Payment's Request and the chart will break down Payment data by code. Example: Chart Payment Amount by Request's Program Area and see how much you are giving to each kind of project. *For information on options for grouping by Coding Sheet categories, please see "Grouping Options Based on Group Type" on page 80*
Grantee Organization's Coding Sheet	You can select a Code Table from the Grantee Organization's Coding Sheet and the chart will break down Payment data by code. For example, you could chart Count of Payments by Geographical Area Served to see which regions of the country have received the most Payments. *For information on options for grouping by Coding Sheet categories, please see "Grouping Options Based on Group Type" on page 80*
Payee Organization's Coding Sheet	You can select a Code Table from the Payee Organization's Coding Sheet and the chart will break down Payment data by code. *For information on options for grouping by Coding Sheet categories, please see "Grouping Options Based on Group Type" on page 80*
Other Payment details	Group by Request Primary Contact or other Payment details like G/L Account, Fund, or Fiscal Year.

GIFTS Customizer — Certain GIFTS Customizer fields are also available for grouping data in charts. When you are charting Payments data, custom fields from the the following records are available:

- Payments
- Requests
- Grantee Organizations
- Payee Organizations

Payment, Request, and Organization custom fields can be used as chart groups if the custom fields are of the following types:

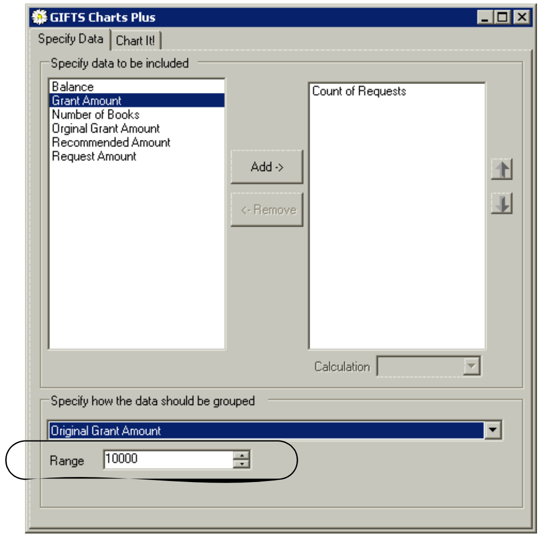
Small Number, no Decimal	Currency
Medium Number, no Decimal	Number, with Decimal
Large Number, no Decimal	Date
Values	

For information on grouping options for date, currency, and number fields, please see “Grouping Options Based on Group Type” below.

Grouping Options Based on Group Type

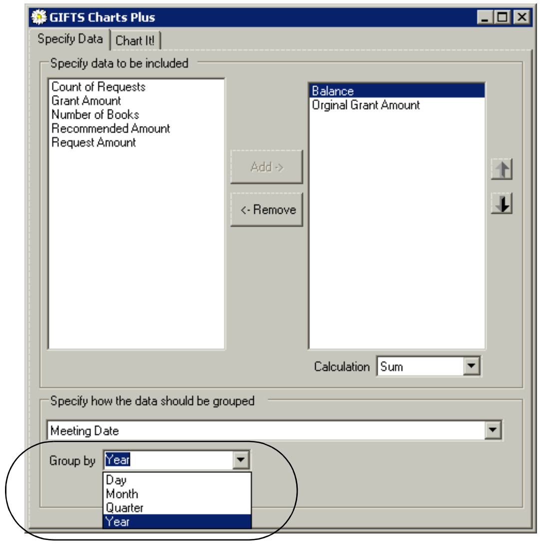
When you select certain types of categories by which to group data in a chart, GIFTS Charts Plus provides different grouping options particular to that group type.

Amount and Number Categories For example, Recommended Amount (when charting Requests) or Payment Amount (when charting Payments):



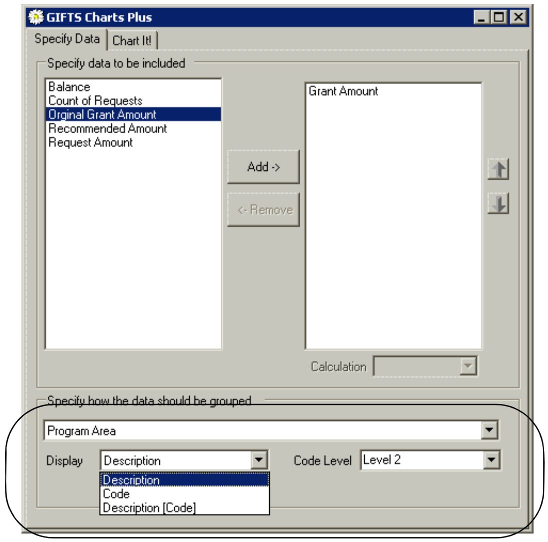
Option	Description
Range	When you group data by amount or number, you need to provide a range. In this field, enter a number indicating the size of the range. In the example above, we have selected to group by Original Grant Amount using a range of 10,000. This chart will show us the number of selected Requests for which the Original Grant Amounts were: ❖ $0.00 - $10,000.00 ❖ $10,000.01 - $20,000.00 ...and so on.

Date Categories For example, Project Start Date (when charting Requests) or Paid Date (when charting Payments):



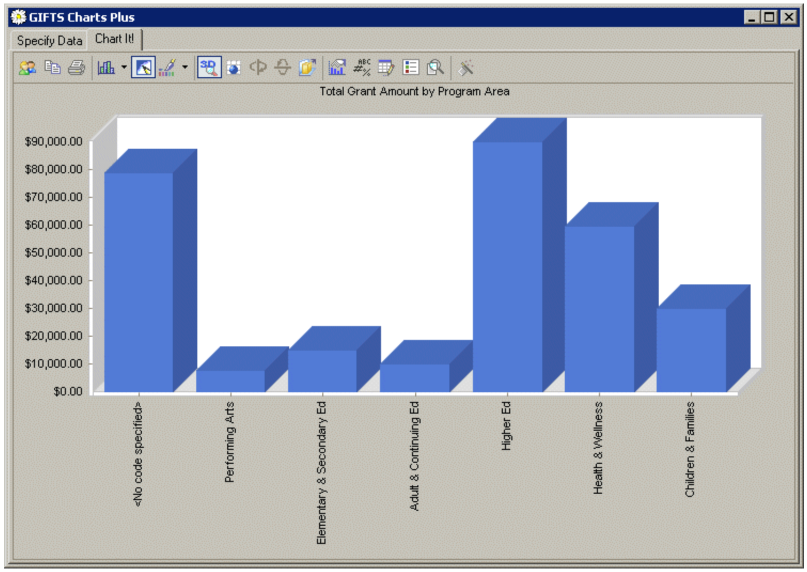
Option	Description
Group by	When you group data by a date, you determine the range of dates to comprise each category by choosing grouping by day, month, quarter, or year. In the example above, we have chosen to group by Meeting Date. We can group Requests data by the year (Requests with Meeting Dates within the same year will be grouped together), quarter, month, or day. NOTE: If your Fiscal Year is not the same as the calendar year—for example, your Fiscal Year as specified in the GIFTS system runs from October 1-September 30—you will have six options here: You can group by Fiscal Year, Calendar Year, Fiscal Year Quarter, Calendar Year Quarter, Month, or Day.

Coding Sheet Entries When charting Request data, you can group data by code, breaking down amounts by classifications in the Request's Coding Sheet or the Grantee Organization's Coding Sheet:



Option	Description
Display	This selection determines how the chart labels each group of data. You can choose to label your chart using each classification's Description, Code, or both.
Code Level	This option is available if you select a multi-level Code Table by which to group data. Select the level at which you want to break down data in your chart. This option is not shown if you choose a single-level Code Table.

In the illustration above, we have chosen to chart Grant Amount by different Program Areas specified in the Request Coding Sheet. We are breaking down data at Level 2 Program Area, to get a little more detailed view:



Contact and Organization Names You can chart Request data by Grantee Organization or by the Grantee Organization's Primary Contact. Payments can be charted using those groupings, as well as by Payee Organization and Payee Organization's Primary Contact. GIFTS Charts Plus provides options on how to label these groups in your chart:

Group Type	Description
Organization	When you group data by Organization, the chart can label groups using the following Organization details: ❖ AKA ❖ ID ❖ Legal Name ❖ Name ❖ Sort As Name

Group Type	Description
Contact	When you group data by Contact, the chart can label groups using the following Contact details: ❖ Full Name ❖ ID ❖ Last Name, First Name

Viewing Your Chart

When you're ready to see the chart you've created, click the Chart It! tab to open it:

The next section describes the options you can use to format the chart you've created.

Formatting and Other Chart Options

Charts Plus allows you to create many different kinds of charts—bar charts, pie charts, and many others—and to format the charts and its labels a number of different ways.

Once you have created a chart you like, you can save the chart settings and apply them to new charts you create. You can also print your chart, or copy the chart as a graphic and paste it into word processing documents and other files.

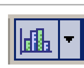
This section provides an overview of these and other options available in GIFTS Charts Plus.

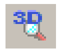
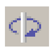
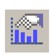
Tip: GIFTS Charts Plus is a powerful and dynamic tool, and the possibilities and variations the Charts Plus options provide are too numerous be detailed here. We encourage you to try different things to find charts that suit your needs best.

The Charts Plus Toolbar

In the Chart It! tab, the Charts Plus toolbar provides a quick way to access most chart options.

Note: Many of these options are more easily shown than described; several items in the table below will refer you to later topics to get full information about them.

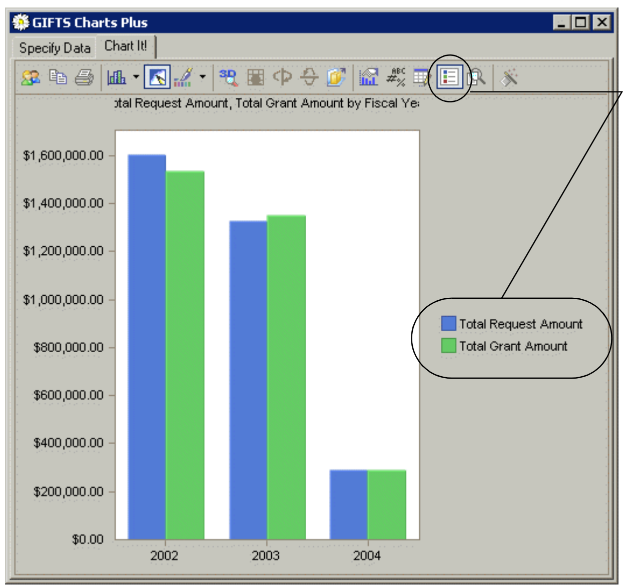
Icon	Name	Description
	Personalized Charts	Options under this selection allow you to save chart settings, apply your saved settings, and to restore your chart to the Charts Plus default settings. Note that you can only save one set of chart settings. These settings will be saved and available to you until you save another set.
	Copy to Clipboard	If you want to paste your chart into a word processing document or other files, click this icon and choose to copy an image of the chart as either a Bitmap or a Metafile. Then go to the other file and press CTRL+V to paste the chart in. You can also choose to copy only chart data to the clipboard. This table of data can be pasted in spreadsheet programs such as Excel, or other files.
	Print	Print your chart by clicking this icon.
	Gallery	The Gallery allows you to change your chart to another type, such as a bar chart, horizontal bar chart, pie chart, and many others.
	Palette Selector	Click this icon to select a different color scheme for your chart.

Icon	Name	Description
	3D/2D	You can toggle this icon to switch your chart between two-dimensional and three-dimensional views. If you choose a 3D chart, the next option, Rotate View, is available. This and other 3D options are described in “Working with Three-Dimensional Charts” on page 88.
	Rotate View	These four options—Rotate View, Rotate Around Y Axis, Rotate Around X Axis, and Clustered (Z-Axis)—can be used with three-dimensional charts. For more information on how these options work, please see “Working with Three-Dimensional Charts” on page 88.
	Rotate Around Y Axis	
	Rotate Around X Axis	
	Clustered (Z-Axis)	
	Axes Settings	Axes Settings are available for bar charts, line charts, and point charts. They allow you to add grid lines to the chart, change labels, and so on. For details, please see “Working with Axes Settings” on page 91.
	Point Labels	If you click this icon to add point labels, the chart will label each chart element—for example, each “slice” of a pie chart—with the amount or number the element represents. Please see “Displaying Point Labels” on page 94 for more details.
	Data Editor	After you have created a chart, you can edit the data shown by clicking the Data Editor icon. For more information, please see “Editing Chart Data” on page 95.
	Legend Box	Clicking this icon toggles the legend box on and off. The legend box is useful if you have selected more than one amount or number to chart.
	Zoom	Toggle Zoom on and you can select an area of the chart and zoom in on it. Toggle the Zoom icon off and the full chart is displayed again.

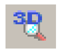
Icon	Name	Description
	Properties	Click here to open the Properties menu. Many options in the Properties menu can be accessed using other icons in the Charts Plus toolbar. For more information on chart Properties, please see “Working with Chart Properties” on page 96.

Working with Three-Dimensional Charts

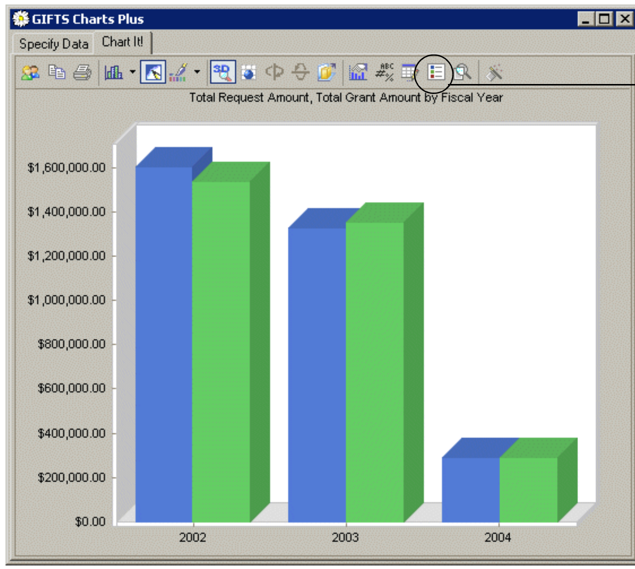
In the illustration below, we selected several Requests and created a simple chart of their total Request and Grant Amounts, grouped by fiscal year:



Here we have toggled the Legend Box icon on. The legend appears, allowing us to see what each color bar in our bar chart represents.



This is a two-dimensional chart; this is the default setting when you first create a new chart in GIFTS Charts Plus. Click the 3D/2D icon in the Charts Plus toolbar to change this into a three-dimensional chart:



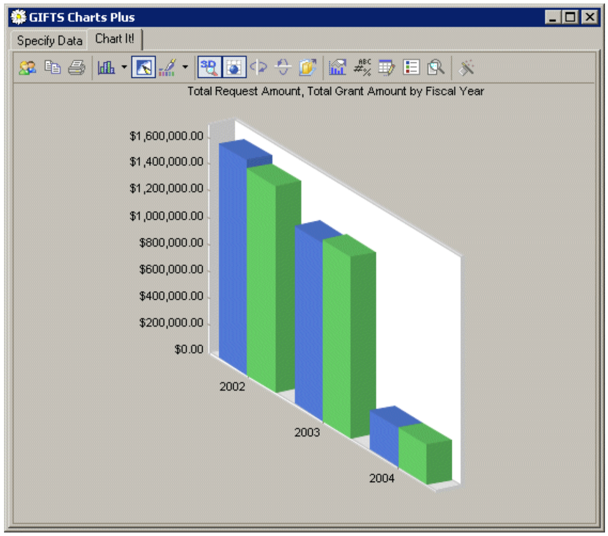
Here we have turned the legend box off.

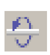
After you have changed your chart to a 3D chart, the other 3D chart options will allow you to rotate the chart to create different dynamic effects.

Rotate A three-dimensional chart can be rotated around its X axis (the horizontal base of a bar chart) and/or its Y axis (the vertical side). Before you can perform these rotations, you must first toggle the Rotate icon on.

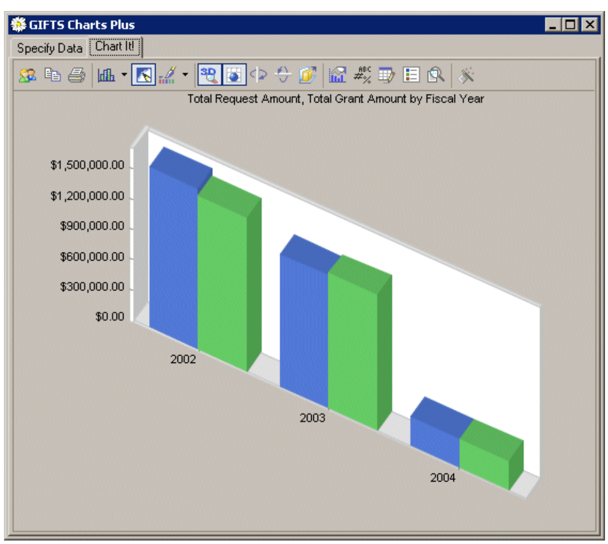
Note: 3D chart rotation settings can also be found in the Charts Plus Properties window, as described in “Working with Chart Properties” on page 96.

Rotate Around Y Axis Click this icon to rotate your 3D chart around its Y axis. In the illustration below, this is our original 3D chart after clicking twice:

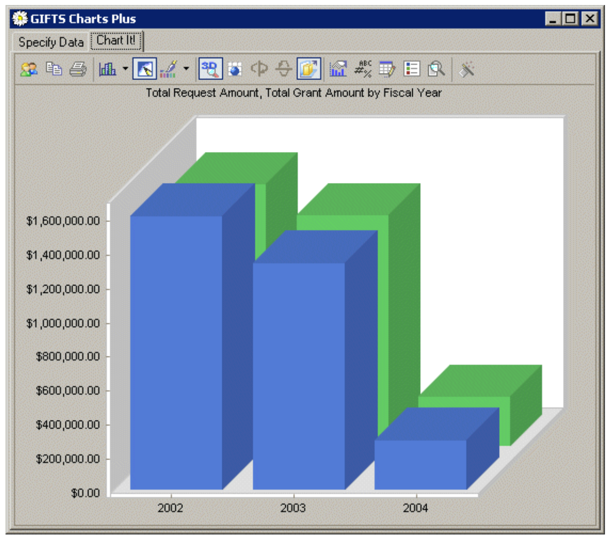




Rotate Around X Axis Click this icon to rotate your 3D chart around its X axis. In the illustration below, this is our original 3D chart after clicking twice:



Clustered (Z-Axis) In the 3D charts we've tried so far, the two chart elements—Total Request Amount and Total Grant Amount—have been shown side by side. By clicking the Clustered (Z-Axis) icon, we can show them one behind another:

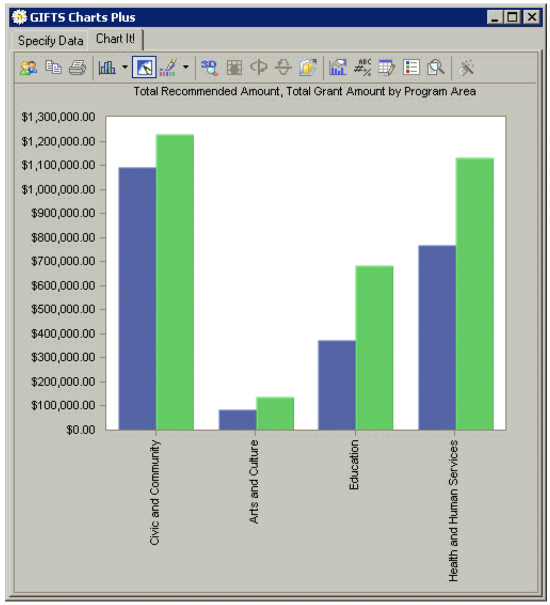


Note: The Clustered (Z-Axis) icon is available for 2D charts as well. However, if the second element is less than the first element in front of it, that first element won't be seen in the chart.

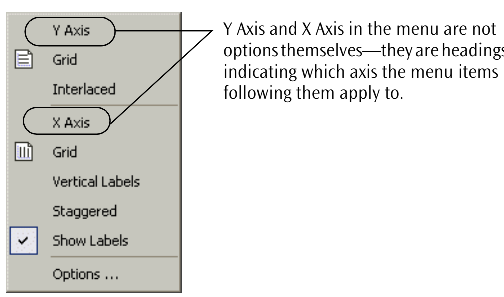
Working with Axes Settings

Axes Settings provides you with options for both the X and Y axes when working with bar, line, gantt, and point charts.

Tip: One of the more useful GIFTS Charts Plus options—to use vertical labels for the X axis—appears in this menu. This option changes the chart labels along the bottom of your chart to read up-and-down. If you are charting by a grouping category with a long label, this will prevent the labels from overlapping one another, thus rendering some invisible in the chart:



When you click the Axes Settings icon, the following menu is displayed:



Note: More detailed options for customizing the Y axis can be found in the Charts Plus properties, as described in “Working with Chart Properties” on page 96.

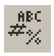
The following options are available for the Y axis:

Option	Description
Grid	Select this option to display horizontal grid lines behind the chart elements. For example, if you are charting Total Payment Amount, grid lines might be placed to indicate multiples of $1,000.00.
Interlaced	Select this option, and instead of horizontal grid lines, horizontal bands of alternating shading will appear behind the chart elements. For example, if you are charting Request Amount, alternating bands representing intervals of $10,000.00 will appear behind chart elements.

The following options are available for the X axis:

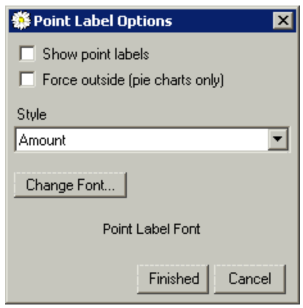
Option	Description
Grid	Select this option to display vertical grid lines behind the chart elements. For example, if you are charting Total Payment Amount grouped by a Range of 1,000, grid lines will be placed to indicate multiples of $1,000.00.
Vertical Labels	In a bar chart, for example, labels for each bar appear along the X axis below the chart. These labels indicate the grouping that the chart element is in. If you are charting by a grouping with long labels—for example, by Program Area or other Coding Sheet classification—horizontal text labels may overlap and render some labels invisible. Choose this option to change the labels to read up-and-down rather than horizontally.
Staggered	Another option for long X axis grouping labels is to stagger them. Select this option, and labels will alternate position, each appear one line above or below the last: 
Show Labels	At the same time, you can choose not to show group labels at all by toggling the Show Labels option off.

Displaying Point Labels



Use the Point Labels icon to have the chart label each chart element—for example, each “slice” of a pie chart—with the amount or number the element represents.

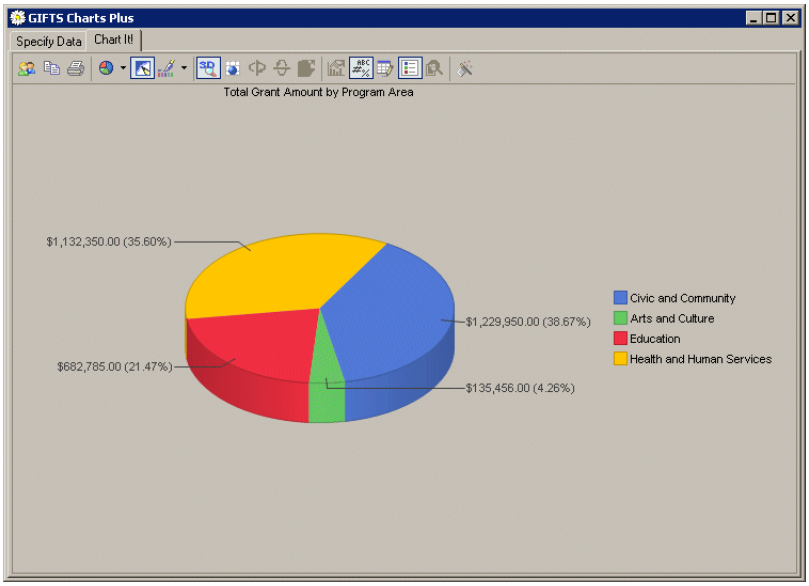
Click the icon to open the Point Label Options:



Option	Description
Show point labels	Select this option to show point labels in your chart.
Force outside (pie charts only)	If you are creating a pie chart, and do not want point labels to appear in the “slices” of the pie, select this option. NOTE: The illustration following this table shows an example of a pie chart with this option turned on.
Style	Since your chart elements—the “points” you are labeling—are numbers and amounts, you have options on what the label calculates and displays. ❖ Amount—Example: $12,340.00 ❖ Amount (Percentage)—Example: $12,340.00 (34.12%) ❖ Amount of Total—Example: $281,102.00 of $1,899,300.00 ❖ Amount of Total (Percentage)—Example: $281,102.00 of $1,899,300.00 (14.80%) ❖ Percentage—34.12% ❖ Percentage (Amount)—34.12% ($12,340.00) ❖ Percentage (Amount of Total)—14.80% ($281,102.00 of $1,899,300.00)

Option	Description
Change Font	Select this option to choose a different font for your point labels.

When you have set your options, click Finish to display your chart with point labels:



Editing Chart Data

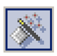
After you have created a chart, you can edit the data shown. Click the Data Editor icon on the chart toolbar. The data table opens within the chart window:

	Civic and Community	Arts and Culture	Education	Health and Human Services
Total Request Amount	$1,244,950.00	$135,456.00	$635,785.00	$1,206,475.00
Total Grant Amount	$1,229,950.00	$135,456.00	$682,785.00	$1,132,350.00

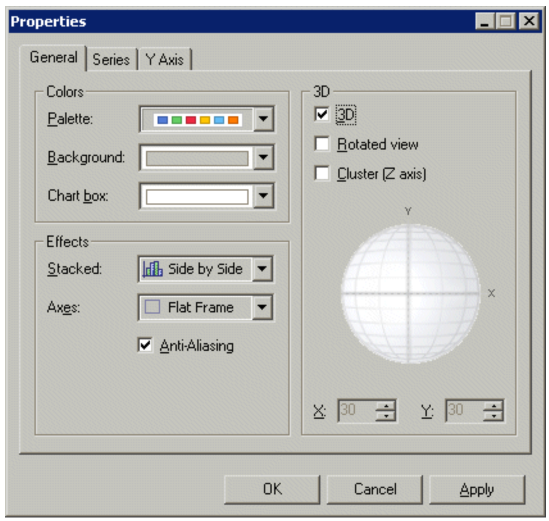
Double click on the data value you want to edit. Your cursor now appears in that table cell, allowing you to change the value. (You can edit the data labels as well.) Then press ENTER to refresh the chart to reflect the new data.

Note: Adjusting data in the chart's Data Editor *will not* affect the data stored in GIFTS. If you make changes in the Data Editor, close the chart, then recreate the same chart, your previous changes to the data will not appear.

Working with Chart Properties



Click the Properties Icon to open the chart Properties window:



Many of the properties repeat features found in the Charts Plus toolbar. The selections here in some cases provide more detailed options.

Tip: Many properties described below are accessible in other ways in Charts Plus. Accessing certain options using an alternate method (rather than working through the Properties window detailed here) can be more intuitive. These alternate ways to get to a preference are noted where appropriate.

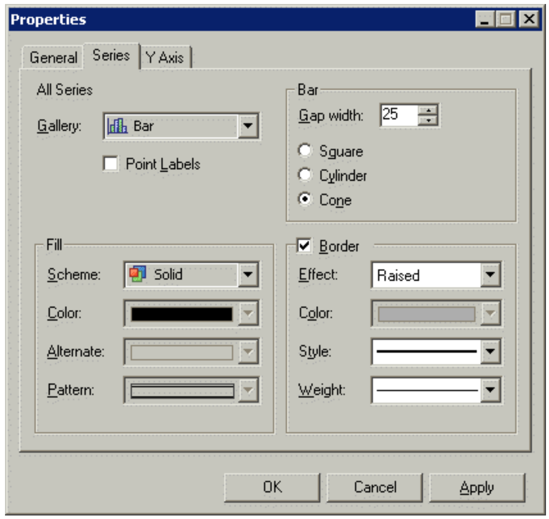
General Properties

In the General Properties tab, you can select chart colors, choose effects like stacked bar charts, select the way the chart axes are displayed, and use the 3D chart features described in "Working with Three-Dimensional Charts" on page 88.

Option	Description
In the Colors section of the General tab:	
Palette	Here you can select a different color scheme for your chart.
Background	Change the color of the screen behind the chart.
Chart Box	Change the color of the chart box. The chart box in bar, line, point, and other charts is the background within the chart (as opposed to background behind the whole chart, set using the previous option).
In the Effects section of the General tab:	
Stacked	When creating bar charts where more than one data selection is charted, you can choose to show the amounts stacked instead of side-by-side.
Axes	This menu provides options on how you want the chart to display the X and Y axes (or the "frame" of the chart).
In the 3D section of the General tab:	
3D	Select this check box to switch your chart from a two-dimensional to a three-dimensional view.
Rotated View	Select this option to create a rotated 3D chart, as described in "Working with Three-Dimensional Charts" on page 88.
Clustered (Z-Axis)	Select this check box to show multiple data elements within a grouping one behind the other, rather than side-by-side, as shown in "Working with Three-Dimensional Charts" on page 88.
X and Y settings	If you are working with a rotated-view 3D chart, use these settings to enter the degree (0-360) to which the chart should be rotated against each axis. When you change the X or Y settings, the globe above will indicate the current position.

Series Properties

In the Series tab of chart Properties, you can change your chart type, and select colors, shading, shape, and borders of chart elements (e.g., slices in a pie chart or bars in a bar chart).



All Series In the All Series section of the Series tab, you can select a different chart type. These are the same options found using the Gallery icon, as described in "The Charts Plus Toolbar" on page 86.

The option to display point labels in your chart is also found here. For point label font and formatting options, however, you should set up point labels from the Charts Plus toolbar, as described in "Displaying Point Labels" on page 94.

Fill Fill properties determine the color and appearance of bars and lines in chart types that use those markers.

Important: The color options provided in this section of the Charts Plus properties—except the first, Gradient—can only be used if you access properties the right way. If you want to change the color of bars or lines in the chart, close Properties, right-click in the chart on the data element you want to change, then select Properties in the menu. Then you will be able to change its color.

Bar/Marker Options in the top right corner of the Series tab change depending on the type of chart you choose in the Gallery menu to the left.

- No options are available for area, pie, surface, doughnut, bubble, contour, or area-curve charts.
- The following Bar options are available for bar, high-low-close, cube, pyramid, open-high-low-close, candlestick, and gantt charts:

Option	Description
Gap width	Set the width of the gap the chart will show between bars in your chart.
Square/Cylinder/Cone	Select the shape the chart should use for data elements in the chart.

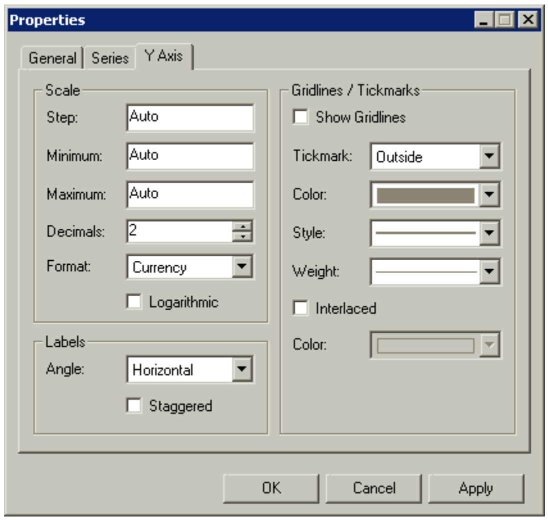
- The following Marker options are available for line, scatter, curve, pareto, step, and radar charts:

Option	Description
Shape	Select the shape that the chart should use to show the data points in the chart. If you are creating a line chart and do not want to show points, select the blank option here.
Size	Select the size of the data points in your chart.
Same color lines	Select this check box to make the lines in the charts above the same color as the related data elements it measures. This is used in pareto and other charts which show both bars (like in a bar chart) as well as lines to show amounts.

Border The options here allow you to modify the borders around each data element (for example, the borders of the cylinders in a 3D bar chart).

Y Axis Properties

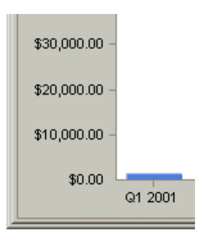
You have many options to customize the Y axis, or left side of your bar or line charts:



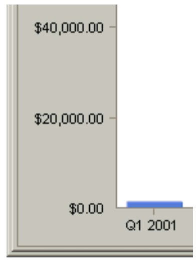
Some of the most useful here are Step and Minimum:

❖ **Step**—Step determines the interval between each amount or number label shown along the outside of the Y Axis.

For example, depending on the range of amounts in the chart's groupings, GIFTS Charts Plus might automatically label every $10,000.00:



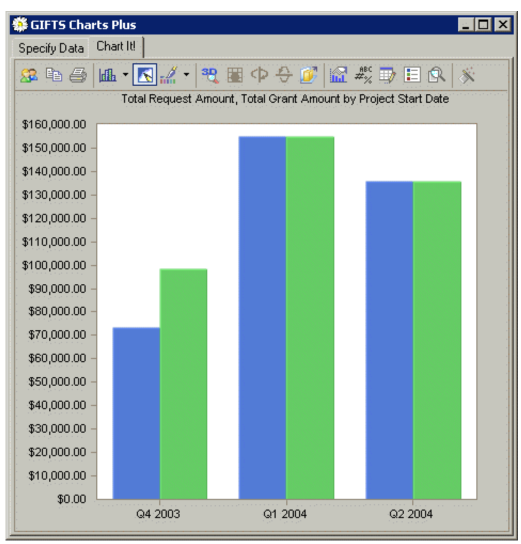
Here in the Y Axis properties, you can specify another Step (for example, $20,000.00 instead), and the chart will change the Y Axis interval to that number.



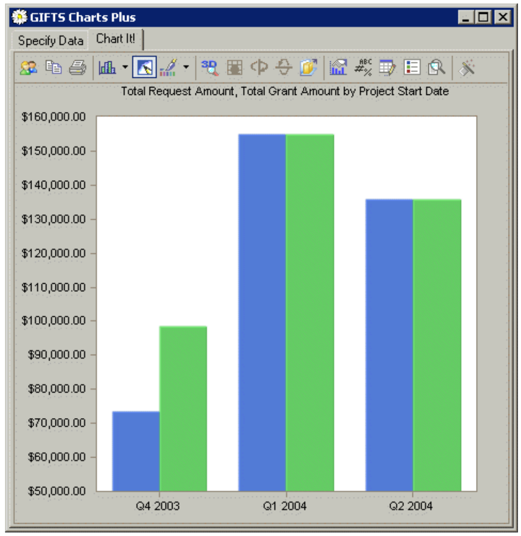
❖ **Minimum**—By default, the chart will display all amounts from the minimum group amount to the maximum group amount. If you enter a number in this field, the chart will only display a range from that number to the maximum group amount.

This can be useful if group amounts vary within a fairly small range. To accentuate the differences between the group amounts, set a higher minimum and the differences will be more readily visible.

For example, here are Request and Grant Amounts grouped by Project Start Date (grouped by quarter), using the default Y axis minimum (i.e., zero):



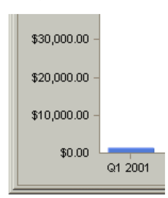
By setting the Minimum to $50,000.00, we can see the show the differences in quarters yet more vividly:



The following table details all Y Axis properties options:

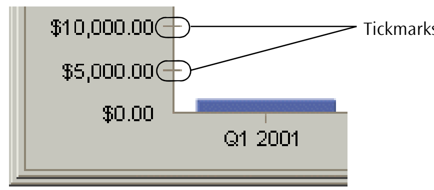
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td colspan="2">In the Scale section of the Y Axis tab:</td></tr>
<tr><td>Step</td><td>Step determines the interval between each amount or number label shown along the outside of the Y Axis.

For example, depending on the range of amounts in the chart’s groupings, GIFTS Charts Plus might automatically label every $10,000.00:



Here in the Y Axis properties, you can specify another Step (for example, $20,000.00 instead), and the chart will change the Y Axis interval to that number.</td></tr>
</table>

Option	Description
Minimum	By default, the chart will display all amounts from the minimum group amount to the maximum group amount. If you enter a number in this field, the chart will only display a range from that number to the maximum group amount. This can be useful if group amounts vary within a fairly small range. To accentuate the differences between the group amounts, set a higher minimum and the differences will be more readily visible.
Maximum	Enter a number here, and the chart will not show group amounts above it.
Decimals	Enter the number of decimal places you want to display for the numbers marking off the Y axis intervals.
Format	Select the format you want to use for the numbers marking off the Y axis intervals. Currency is the default setting, and appropriate for most Payments and Requests charts (which mostly deal with monetary amounts).
Logarithmic	This check box displays the numbers along the Y axis in logarithmic terms. (This is unlikely to have much use when charting Grant Amounts and Numbers of Payments.)
In the Labels section of the Y Axis tab:	
Angle	You can change the angle of the labels marking the Y axis intervals from horizontal to vertical or 45 degrees.
Staggered	Select this check box to stagger the Y axis labels.
In the Gridlines/Tickmarks section of the Y Axis tab:	
Show Gridlines	Select this option to show horizontal gridlines marking each Y axis interval.

Option	Description
Tickmark	Choose the kind of tickmark you want to use to mark each interval or step along the Y axis: none, inside, outside, or across. Here we have chosen across: 
Color	These three options allow you to change the color, style, and weight (or thickness) of the Y axis tickmarks.
Style	
Weight	
Interlaced	Select this option, and instead of horizontal grid lines, horizontal bands of alternating shading will appear behind the chart elements. For example, if you are charting Request Amount, alternating bands representing intervals of $10,000.00 will appear behind chart elements.
Color	This selection determines the color of the bands created when you choose the Interlaced option above.

Using E-Mail Plus

This chapter describes how to use E-Mail Plus to send e-mail messages to Contacts and members of your staff. Messages sent from E-mail Plus can include GIFTS documents or other files as attachments.

In This Chapter

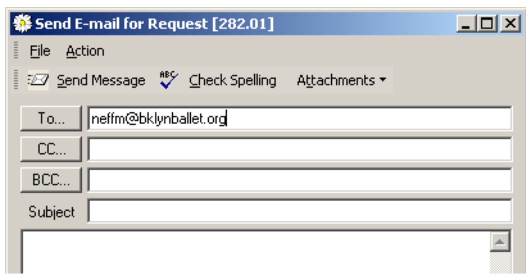
Using E-Mail Plus

E-mail Plus allows you to send e-mail messages from GIFTS that include file attachments, and to easily select the e-mail addresses of your staff and of the Contacts affiliated with the information you are sharing.

To send a message with E-mail Plus:

1 In the GIFTS Organizer, select the Request, Organization, or Contact records associated with the contacts to whom you wish to send a message.

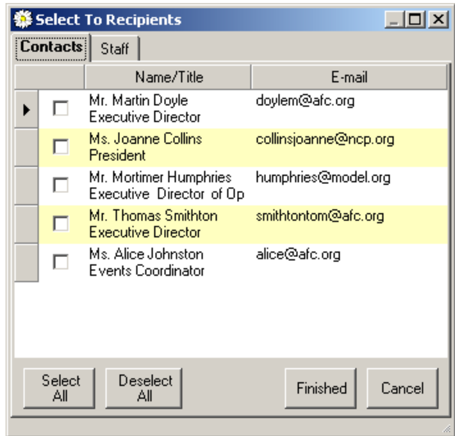
2 From the Main menu, choose GIFTS Plus ➤ GIFTS E-Mail Plus. The E-Mail Plus window is displayed.



By default, the recipient of the message is the Contact you had selected in the Organizer; if you selected a Request or Organization, the recipient is the Primary Contact of the Request or Organization.

Note: If you selected more than one record in the Organizer, the options for specifying the message recipients are different; please refer to “Sending Batch E-Mails with E-Mail Plus” on page 109 for more information.

3 To add or change the message recipients, click the To button. E-Mail Plus displays a list of Contacts affiliated with the record you selected.



- ❖ Select the Contacts you would like to add as recipients. You can click Select All to select all of the Contacts listed, or Deselect All to deselect all of them.
- ❖ If you would also like to send the message to members of your staff, click the Staff tab and select the users you would like to include. Note that only users with an e-mail address on file are displayed.
- ❖ When you have selected the people to be added as recipients, click Finished to return to the E-Mail Plus window.

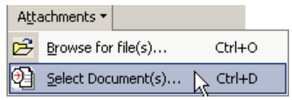
4 If you would like to send copies of the message to CC or BCC recipients, you can click CC or BCC to add those recipients.

5 Enter the Subject and body text of the message. If you want to spell check your message, click Check Spelling or press the F3 key.

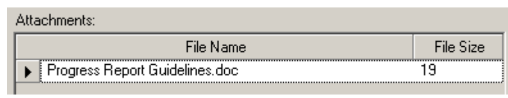
Note: Click the right mouse button and choose the appropriate selection to cut, copy, paste or select all text in the Body text field.

6 If you would like to attach files to the message:

❖ Click the Attachments button or choose Action ➤ Attachments from the E-Mail Plus menu. GIFTS displays two options: to select a GIFTS document or to browse for files on your computer.



❖ If you choose the option to Browse for file(s), the standard Windows dialog for file browsing is displayed. Select the file from your computer or network, and click Open. The filename is displayed in the grid.



❖ If you choose the option to Select Document(s), GIFTS displays a list of associated GIFTS documents. You can use the options in the Show menu to filter the list, and select the External Documents Only option to restrict the list to documents attached with the optional Document Manager. Click Finished to return to the E-Mail Plus window, where the document's filename is now displayed.

❖ To add another attachment, you can click the Attachments button again. To remove an attachment, select it in the grid and press the DELETE key.

7 Set the options for tracking the message:

Option	Description
Log Mail Activity	If this option is on, GIFTS creates an Activity record indicating that the message was sent. The Activity record includes "E-Mail" as its Title, the Subject that you specified for the message, and "Sent E-Mail" in the Notes field.
Save Message in Activity	Enable this option to save the text of the message in the Long Notes field of the Activity record.
Read Receipt	Requests a message from the recipient's e-mail system to confirm that the message was received. Your GIFTS user account must include an e-mail address to which the receipt can be sent. Not all e-mail systems will send a receipt.

8 Click Send Message or choose File ➤ Send Message from the E-Mail Plus menu to send the message. E-Mail Plus displays a log showing the progress of the e-mail.

9 When the process is complete, E-Mail Plus displays a confirmation message.

10 Click OK to close the confirmation message. The process log remains open.

11 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, close the process monitor to end your E-Mail Plus session.

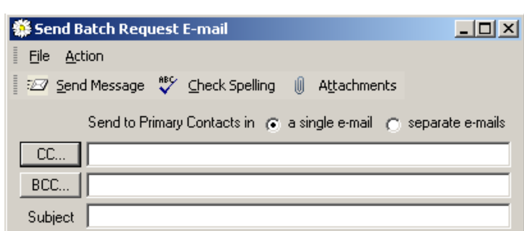
Sending Batch E-Mails with E-Mail Plus

The procedure for sending batch e-mails with E-Mail Plus is nearly identical to the procedure for sending a message regarding a single record. However, the choices for specifying the message's recipients and file attachments are different.

To send batch e-mail using E-Mail Plus:

1 In the GIFTS Organizer, select a batch of Requests, Organizations, or Contacts. (To select a group of records in the Organizer, hold down the SHIFT or CTRL key as you click on records.)

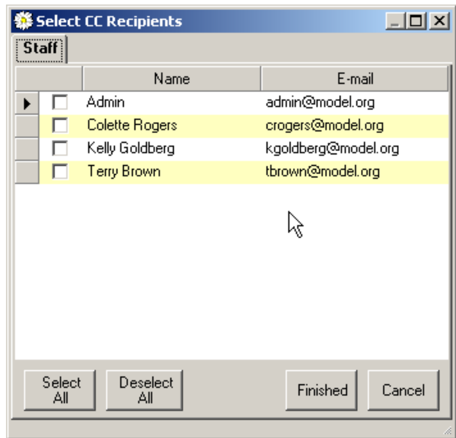
2 From the Main menu, choose GIFTS Plus ➤ GIFTS E-Mail Plus. The E-Mail Plus window is displayed.



The recipients of the message are the Primary Contacts of each record you selected; you cannot edit the recipients of batch messages.

3 Specify whether you want to send a single e-mail (with all recipients listed in the “To:” field), or separate messages to each recipient.

4 If you would like to send copies of the message(s) to members of your staff, you can click the CC or BCC buttons to add those recipients.



❖ Select the users you would like to add as recipients. Note that only users with an e-mail address on file are displayed. You can click Select All to select all of the users listed, or Deselect All to deselect all of them.

❖ When you have selected the users to be added as recipients, click Finished to return to the E-Mail Plus window.

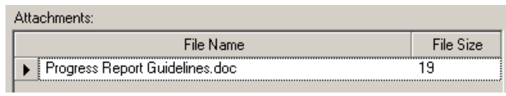
If you are sending a single message, each CC or BCC recipient receives a copy of the message you send. If you are sending separate e-mails, each CC or BCC recipient will receive a copy of each message sent.

Note: In batch mode, GIFTS Contacts are not listed when you click the CC or BCC buttons. If you would like to send a copy or your message (or messages) to a specific person, you can manually enter their e-mail address in the CC or BCC field.

5 Enter the Subject and body text of the message. If you want to spell check your message, click Check Spelling or press the F3 key.

6 If you would like to attach files to the message:

- ❖ Click the Attachments button or choose Action ➤ Attachments from the E-Mail Plus menu. The standard Windows dialog for file browsing is displayed.
- ❖ Select the file from your computer or network, and click Open. The filename is displayed in the grid.



- ❖ To add another attachment, you can click the Attachments button again. To remove an attachment, select it in the grid and press the DELETE key.

7 Set the options for tracking the message(s):

Option	**Description**
Log Mail Activity	If this option is on, GIFTS creates an Activity record indicating that the message was sent. The Activity record includes “E-Mail” as its Title, the Subject that you specified for the message, and “Sent E-Mail” in the Notes field.
Save Message in Activity	Enable this option to save the text of the message in the Long Notes field of the Activity record.
Read Receipt	Requests a message from the recipient’s e-mail system to confirm that the message was received. Your GIFTS user account must include an e-mail address to which the receipt can be sent. Not all e-mail systems will send a receipt.

8 Click Send Message or choose File ➤ Send Message from the E-Mail Plus menu to send the message. E-Mail Plus displays a log showing the progress of the batch e-mail.

9 When the process is complete, E-Mail Plus displays a confirmation message.

10 Click OK to close the confirmation message. The process log remains open.

11 You can click Print Log or Save Log to print or save a copy of the results log. When you are finished reviewing the log, close the process monitor to end your E-Mail Plus session.

8 Using Tax Status Plus

This chapter describes how to use Tax Status Plus to verify and update tax status information for Organizations in GIFTS. It also describes how to search for tax exempt organizations in MicroEdge's Tax Exempt Organization Database.

In This Chapter

About Tax Status Plus

Tax Status Plus allows you to verify the tax status of one or more Organizations in GIFTS against MicroEdge's Tax Exempt Organization Database. After verifying the tax status of one or more Organizations, you can update GIFTS with current tax status information.

You can also use Tax Status Plus to look up tax exempt organizations not in GIFTS.

For more information on Organization tax status data, please refer to the "Tax Status" section in Chapter 8 of the *GIFTS 6 User's Guide* (Article #8587 in the MicroEdge Solutions Knowledgebase).

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 can only be updated with tax status codes that are found in its tax status code table. Before you use Tax Status Plus, your GIFTS Administrator must be sure that the tax status code table is up-to-date.

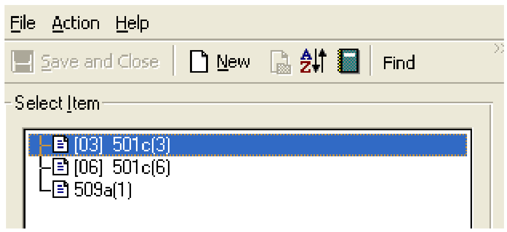
When you verify an Organization's tax status, a search is done on the tax status, and if found, the tax status codes of the Organization in GIFTS and MicroEdge's Tax Exempt Organization Database are compared.

Whenever you make an attempt to update GIFTS with a code not found in GIFTS, you will be notified. Your GIFTS Administrator can add the missing code using the steps below, and you can then repeat the update.

To set up tax status codes in the GIFTS Administrator Module:

1 Select Setup ➤ Code Tables from the Administrator menu. The Table Maintenance window is displayed.

2 Go to the System tab and double click Tax Status. The Code Maintenance [Tax Status] window is displayed.



3 Do one of the following:

- ❖ To add a new tax status code, click New.
- ❖ To update a tax status code already in the table, double-click the code.

4 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 "Appendix: Tax Status Codes" on page 145.

5 Enter the description for the tax status.

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.

6 Repeat this process until all tax status codes are set up.

Note: For more information about adding and editing codes in the Administrator Module, please refer to "Adding Codes" and "Editing Codes" in Chapter 2 of your *GIFTS Administrator's Guide*. (Article #8834 and #8836 in the MicroEdge Solutions Knowledgebase).

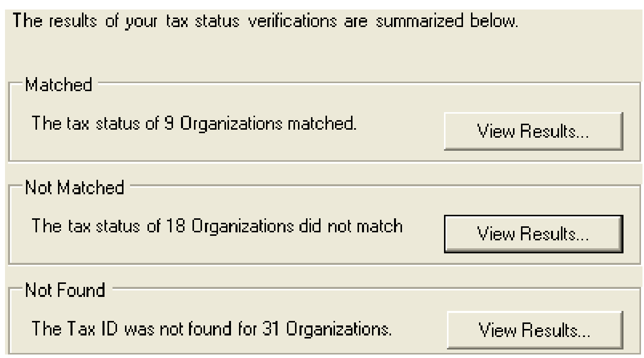
Verifying an Organization’s Tax Status

You can verify the tax status an Organization to ensure that GIFTS contains the most current tax status information. You can then update GIFTS with this current information.

To verify an Organization’s tax status:

1 In the Organizations folder of the GIFTS Organizer, select the records that you want to verify. (To select a group of records, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, choose GIFTS Plus ➤ Tax Status Plus Verify. The GIFTSPlus Verification utility searches for the Organization’s Tax ID in MicroEdge’s Tax Exempt Organization Database, and if the Tax ID is found, compares the tax status code for the Organization in the two databases. The Tax Status Plus - Verification Summary window is displayed.



The Tax Status Plus - Verification Summary window contains three sections:

- ❖ Matched: This section displays the Organizations whose GIFTS Tax ID and tax status matched the information in MicroEdge’s Tax Exempt Organization Database. For more information, please refer to “Viewing Matched Organizations” on page 117.

- ❖ Not Matched: This section displays the Organizations whose GIFTS Tax ID matched the information in MicroEdge’s Tax Exempt

Organization Database, but not the tax status. For more information, please refer to “Viewing Not Matched Organizations” on page 118.

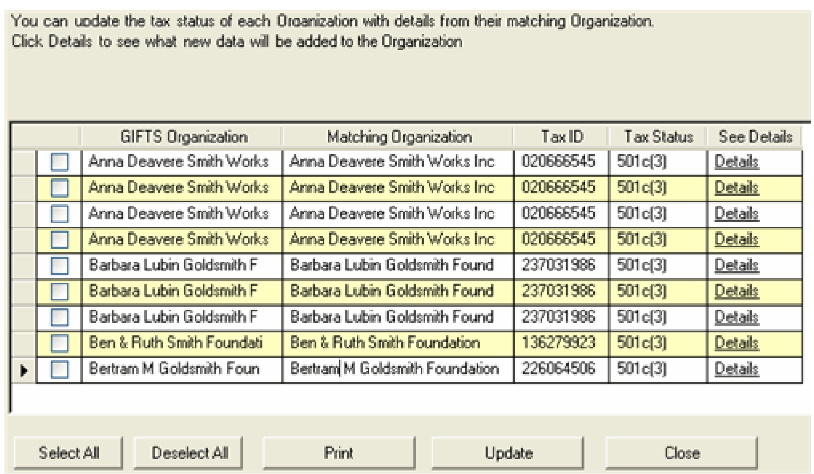
- Not Found: This section displays the Organizations whose GIFTS Tax ID was either missing or not found in MicroEdge’s Tax Exempt Organization Database. For more information, please refer to “Viewing Not Found Organizations” on page 120.

Viewing Matched Organizations

After verifying the tax status of one or more Organizations, you can view information for Organizations whose GIFTS Tax ID’s and tax statuses match the information in MicroEdge’s Tax Exempt Organization Database.

To view matched Organizations:

1 From the Matched section of the Tax Status Plus - Verification Summary window, click View Results. The Tax Status Results - Matched window is displayed.



The Tax Status Results - Matched window contains the following fields:

Field	Description
GIFTS Organization	The name of the Organization in GIFTS.

Field	Description
Matching Organization	The name of the organization in MicroEdge's Tax Exempt Organization Database that shares the same Tax ID.
Tax ID	The Tax ID matched.
Tax Status	The tax status matched.
See Details	Click Details to view which Organization fields can be updated. Please refer to "Updating Organization Information" on page 121 for more information.

2 Choose from the following options on the Tax Status Results window:

Option	Description
Select All	Selects all the Organizations.
Deselect All	Clears all the selected Organizations.
Print	Prints the displayed information.
Update	Updates GIFTS for the selected Organizations. Please refer to "Updating Organization Information" on page 121 for more information.
Close	Closes the window.

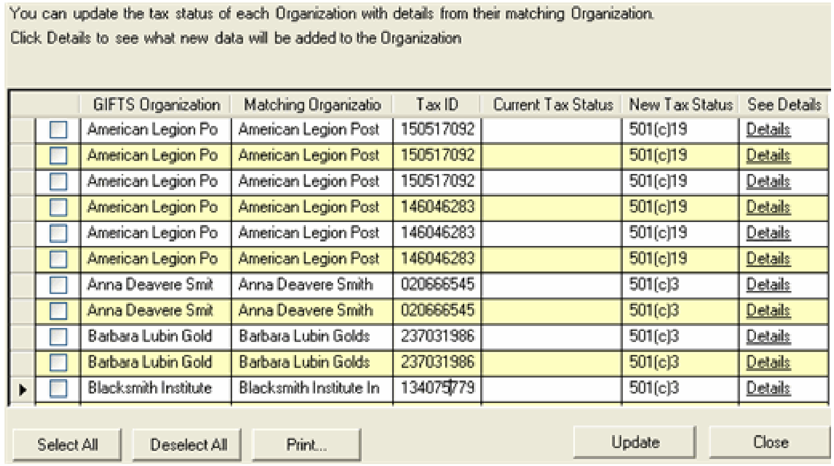
Viewing Not Matched Organizations

After verifying the tax status of one or more Organizations, you can view information for Organizations whose GIFTS Tax ID matched the information in MicroEdge's Tax Exempt Organization Database, but not the tax status.

To view not matched Organizations:

1 From the Not Matched section of the Tax Status Plus - Verification Summary window, click View Results. The Tax Status Results - Not

Matched window is displayed.



GIFTS Organization	Matching Organizatio	Tax ID	Current Tax Status	New Tax Status	See Details
American Legion Po	American Legion Post	150517092		501(c)19	Details
American Legion Po	American Legion Post	150517092		501(c)19	Details
American Legion Po	American Legion Post	150517092		501(c)19	Details
American Legion Po	American Legion Post	146046283		501(c)19	Details
American Legion Po	American Legion Post	146046283		501(c)19	Details
American Legion Po	American Legion Post	146046283		501(c)19	Details
Anna Deavere Smit	Anna Deavere Smith	020666545		501(c)3	Details
Anna Deavere Smit	Anna Deavere Smith	020666545		501(c)3	Details
Barbara Lubin Gold	Barbara Lubin Golds	237031986		501(c)3	Details
Barbara Lubin Gold	Barbara Lubin Golds	237031986		501(c)3	Details
Blacksmith Institute	Blacksmith Institute In	134075779		501(c)3	Details

The Tax Status Results - Not Matched window contains the following fields:

Field	Description
GIFTS Organization	The name of the Organization in GIFTS.
Matching Organization	The name of the organization in MicroEdge's Tax Exempt Organization Database.
Tax ID	The Tax ID matched.
Current Tax Status	The tax status of the Organization in GIFTS.
New Tax Status	The tax status of the Organization in MicroEdge's Tax Exempt Organization Database.
See Details	Click Details to view which Organization's fields can be updated. Please refer to "Updating Organization Information" on page 121 for more information.

2 Choose from the following options on the Tax Status Results - Not Matched window:

Option	Description
Select All	Selects all the Organizations.
Deselect All	Clears all the selected Organizations.
Print	Prints the displayed information.

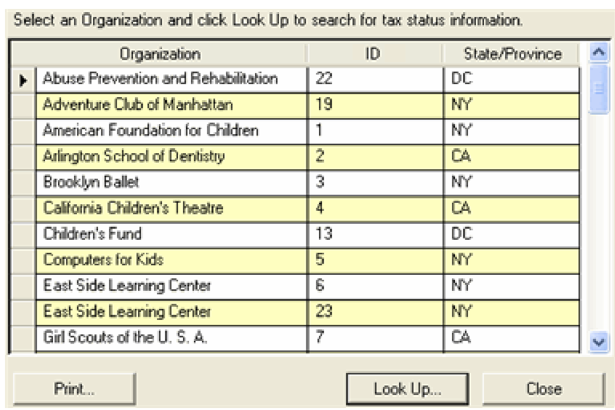
Option	Description
Update	Updates GIFTS for the selected Organizations. Please refer to “Updating Organization Information” on page 121 for more information.
Close	Closes the window.

Viewing Not Found Organizations

After verifying the tax status of one or more Organizations, you can view information for Organizations whose Tax ID was not found in MicroEdge’s Tax Exempt Organization Database.

To view not found Organizations:

1 From the Not Found section of the Tax Status Plus - Verification Summary window, click View Results. The Tax Status Results - Not Found window is displayed.



Organization	ID	State/Province
Abuse Prevention and Rehabilitation	22	DC
Adventure Club of Manhattan	19	NY
American Foundation for Children	1	NY
Arlington School of Dentistry	2	CA
Brooklyn Ballet	3	NY
California Children's Theatre	4	CA
Children's Fund	13	DC
Computers for Kids	5	NY
East Side Learning Center	6	NY
East Side Learning Center	23	NY
Girl Scouts of the U. S. A.	7	CA

The Tax Status Results - Not Found window contains the following fields:

Field	Description
Organization	The name of the Organization in GIFTS.
ID	The Tax ID of the Organization in GIFTS.
State/Province	The state or province where the Organization is located, according to GIFTS.

2 Choose from the following options on the Tax Status Results - Not Found window:

Option	Description
Print	Prints the displayed information.
Look Up	Searches for the selected Organization(s) in the MicroEdge's database using the organization name and the state or province where the Organization is located. Please refer to "Looking Up a "Not Found" Tax Exempt Organization" on page 125 for more information.
Close	Closes the window.

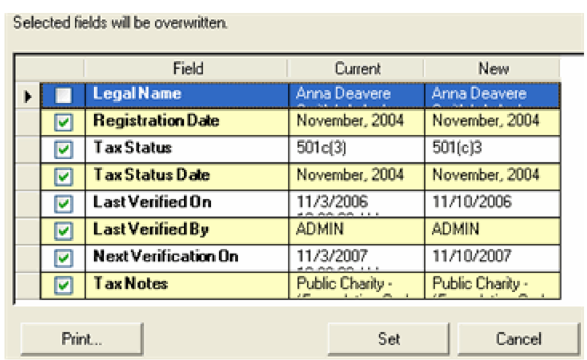
Updating Organization Information

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.

Note: 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:

1 From the Tax Status Results - Matched window or the Tax Status Results - Not Matched window, click Details next to an Organization. The Update Details window is displayed.



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.
New	The field information in MicroEdge's Tax Exempt Organization Database. If you select this field and update GIFTS, the information in this field overwrites the information in GIFTS.

Note: Selected fields will be overwritten in GIFTS if you update this Organization. The fields which are selected by default are determined by your setup preferences. For more information, please refer to "Setting Up Tax Status Plus Security" on page 9.

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 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 Article #10431 in the MicroEdge Solutions Knowledgebase

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 at any time from the Organizations folder or while verifying Organizations' tax status from the Tax Status Plus - Verification Summary window.

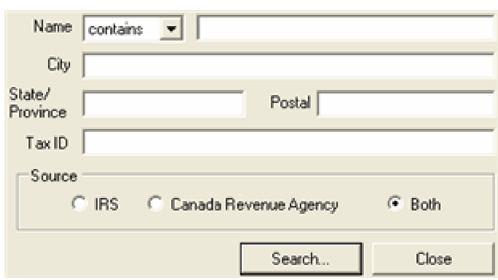
Looking Up New Tax Exempt Organizations

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.

Important: This feature does not check for duplicate or similar Organizations in GIFTS. If you add a tax exempt organization using this feature, make sure it is not already in GIFTS, or a duplicate Organization will be created.

To look up a new tax exempt organization:

1 From the main menu, choose GIFTS Plus ➤ Tax Status Plus Lookup. The Look Up Organization Tax Data window is displayed.

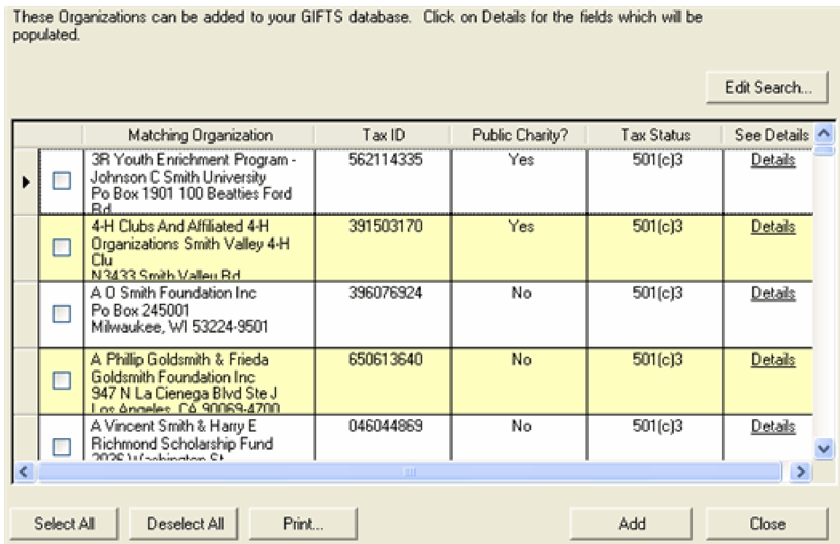


2 Enter search criteria in the following fields:

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.

Field	Description
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 Plus - Search 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.

Note: GIFTS only displays the first 100 organizations found. If you need to refine your search criteria, click Edit Search.

4 Choose from the following options on the Tax Status Plus - Search Results window:

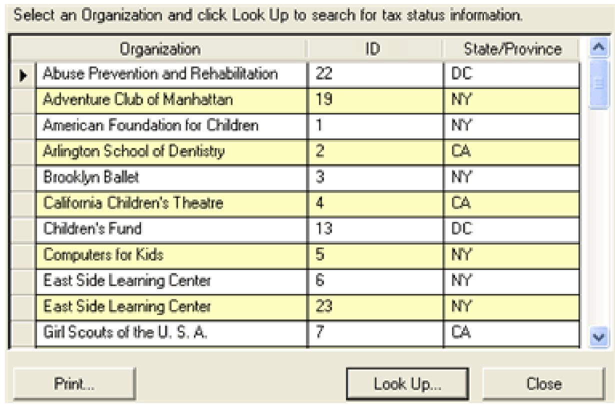
Option	Description
Select All	Selects all the organizations.
Deselect All	Clears all the selected organizations.
Print	Prints the displayed information.
Add	Adds the selected organizations to GIFTS. Before clicking this button, select the check box next to the organizations you want to add. To view the details that will be entered into GIFTS for the new Organization, click Details.
Close	Closes the window.

Looking Up a "Not Found" Tax Exempt Organization

If an Organization appears in the Not Found section of the Tax Status Plus - Verification Summary window, the Organization's Tax ID was not found in MicroEdge's Tax Exempt Organization Database. You can look up the organization and if you find its match, update it in GIFTS with current tax status data.

To look up a tax exempt organization:

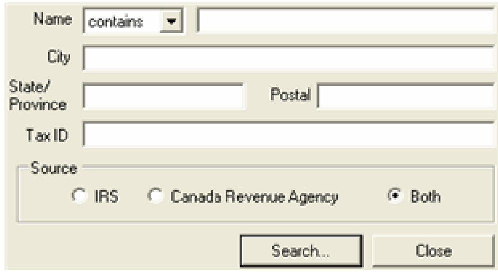
1 Click View Details in the Not Found section of the Tax Status Plus - Verification Summary window. The Tax Status Results - Not Found window is displayed.



Note: For more information, please refer to "Verifying an Organization's Tax Status" on page 116.

2 Select an Organization and click Look Up. If organizations with the same names and states/provinces are found in MicroEdge's Tax Exempt Organization Database, the Tax Status Plus - Search Results window displays these organizations. Go to step 5. If the organization is not found, a message displays that reads "No records found. Would you like to refine the search criteria?"

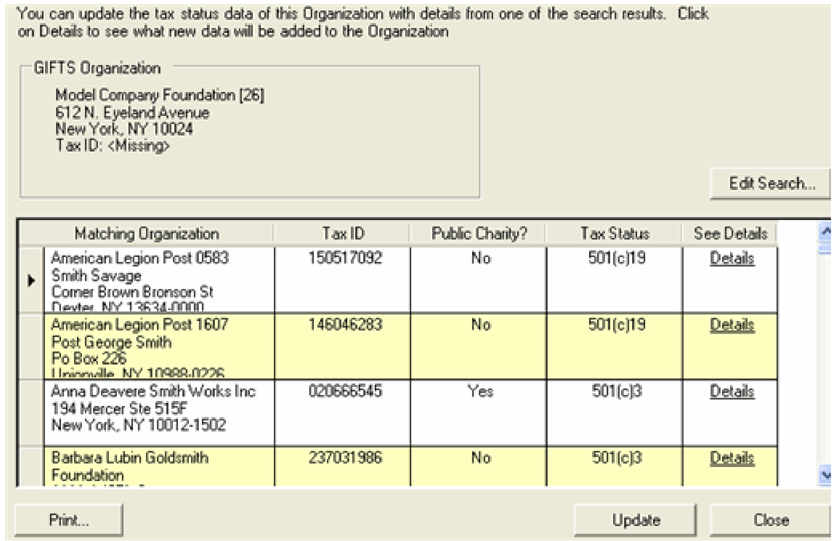
3 Click Yes. The Look Up Organization Tax Data window is displayed.



The Look Up Organization Tax Data window contains 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 database(s) to search, either IRS, Canada Revenue Agency, or both.

4 Click Search. The Tax Status Plus - Search Results window is displayed.



The Tax Status Plus - Search Results window contains the following fields:

Field	**Description**
GIFTS Organization	The Organization information in GIFTS.
Matching Organization	The organization's contact information in MicroEdge's 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 this organization's fields that can be updated. Please refer to ""Updating Organization Information" on page 121 for more information.

5 Choose from the following options on the Tax Status Plus - Search Results window:

Option	**Description**
Edit Search	Allows you to refine your search criteria.

Option	Description
Print	Prints the displayed information.
Update	Adds the selected organization(s) to GIFTS. Before clicking this button, select the organization(s) you want to add. To view what fields will be added, click Details next to a selected organization.
Close	Closes the window.

Using Watchlists Plus

This chapter describes how to install and use Watchlists Plus.

In This Chapter

About Watchlists Plus

Since September 11th, 2001, U.S. government investigations have revealed that terrorist organizations have exploited charitable organizations in order to support their operations. Since this can result in violations of economic sanctions programs, such as the U.S. Department of the Treasury's Office of Foreign Assets Control (OFAC) requirements against doing business with certain countries and individuals, charitable organizations should take steps to ensure that they are in compliance with these programs.

Watchlists Plus helps you comply with your own internal compliance programs by checking Organizations and/or Contacts against specific Watchlists, such as those provided by OFAC, the FBI, INTERPOL, and the European Union, among others. If one of your Organizations or Contacts appears on a watchlist, refer to the watchlist organization's policies and procedures in determining how to proceed.

Note: Your administrator defines the specific Watchlists searched using the Plus Pack Configuration tool. For more information, see "Setting Up Watchlists Plus Security" on page 14 of the *Plus Pack 4 User's Guide*.

You can use Watchlists Plus to check all the Organizations and Contacts in GIFTS against these Watchlists on a semi-regular basis, such as quarterly or yearly.

Watchlists Plus and GIFTS Activities

Each time you use Watchlists Plus to check Organizations or Contacts against Watchlists, an Activity is automatically created in GIFTS for each record. This Activity contains the person conducting the search, the number of "hits" (or appearances) on any Watchlists, and the names of the Watchlists searched.

If the Organization or Contact does not appear on any watchlist, the associated Activity is automatically marked as Done. If any Organization or Contact registers a "hit" on any watchlist (that is, if the watchlist contains similar information about the Organization or Contact), the associated Activity's Due Date is set as five days from the current date. During those five days, you can conduct further research to determine whether or not the

Organization or Contact is the one on the watchlist. If you determine that the Organization or Contact is a “false positive,” or different from the one for which it registered a hit, you can mark the associated Activity as Done, which closes it. The accuracy of hits depends on the Threshold field setting in the Plus Pack Configuration utility. For more information, refer to “Setting Up Watchlists Plus Security” on page 14.

If you determine that the Organization or Contact is the same as the one for which it registered a hit, you do not have to do anything to the associated Watchlist Plus Activity. After five days have passed since the creation of the Activity, it will automatically be marked as Overdue. Any Organizations or Contacts that have an associated Watchlist Plus Activity marked as Overdue can be assumed to be on one or more Watchlists.

Note: If an Organization or Contact is found to be on one or more Watchlists, you can also delete them from GIFTS or create an alert for the Organization or Contact that contains this watchlist information. For more information, see “Using Organization Alerts” on page 199 or “Using Contact Alerts” on page 362 of the *GIFTS 6 User’s Guide* (also available as Article 8493 and as Article 8450, respectively, in the Solutions Knowledgebase).

Watchlist Plus Activities help create an audit trail that shows that your organization ran a compliance check.

Checking the Watchlist Status for Organizations and Contacts

You can use Watchlists Plus to run a query that checks whether Contacts and/or Organizations in GIFTS appear on Watchlists. You can either run a new query or check the current status according to the last query ran for the record.

Note: The Watchlists that are searched are defined in the Plus Pack Configuration tool. For more information, see "Setting Up Watchlists Plus Security" on page 14 of the *Plus Pack 4 User's Guide*.

Running a New Query

You can run a new Watchlists query if one has never been run for certain records, or if you want to check records against current watchlist information.

Note: Every time you run a new query, you create a new Watchlists Plus Activity for every record in your query.

To run a new Watchlists query:

1. In the Organizations or Contacts folder of the GIFTS Organizer, select the records that you want to check. (To select a group of records, hold down the SHIFT or CTRL key as you click on records.)

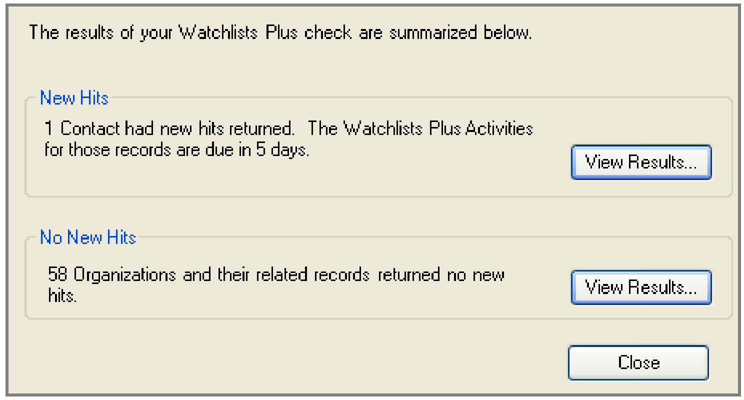
2 From the Main menu, choose GIFTS Plus ➤ GIFTS Watchlists Plus. The Watchlists Plus window displays.

3 If you wish to include related records in your query, such as Primary Organization (for Contacts), or Employees (for Organizations), click the checkbox next to the appropriate field on the left side of the Watchlists Plus window.

4 If you wish to include additional search criteria for each record, such as social security numbers and date of birth year (for Contacts), or city, state and country (for both Contacts and Organizations), click the checkbox next to the appropriate field(s) in the Include in Search section.

Important: By default, Watchlists Plus only includes Organization names and/or Contact first and last names in each query.

5 Click Check. The Processing window displays the current number of records processed and the total number of records in the query. After the query is complete, the Watchlist Plus Summary window displays.



Note: At any time in the query process, you can click Cancel in the Processing window, and then click Yes to display the Watchlists Plus Summary window for the current records processed.

The Watchlists Plus Summary window contains two sections:

- New Hits: This section displays the number of records that either are being included in a query for the first time and registered a hit on watchlist(s), or registered a hit on watchlist(s) in a previous query and the most recent Watchlists Plus Activity for that record is still open. For more information, please refer to “Viewing New Hits Record Results” on page 143.
- No New Hits: This section includes the number of records that either did not register a hit on any watchlist(s) or registered a hit on watchlist(s) in a previous query and the most recent Watchlists Plus Activity for that record has been closed. For more information, please refer to “Viewing No New Hits Record Results” on page 145.

Checking the Current Status

Every time you run a new watchlist query, you create a new WatchList Plus Activity for every record in your query. If you have already run a query and only want to view the watchlist status of one or more records, you can simply check the current status.

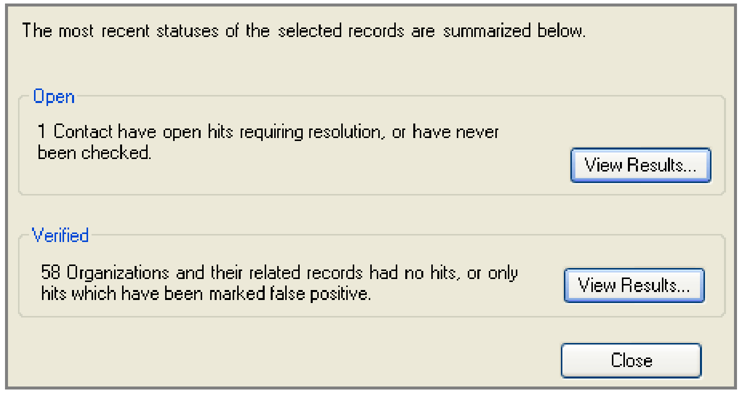
To check the current watchlist status of one or more records:

1 In the Organizations or Contacts folder of the GIFTS Organizer, select the records that you want to check. (To select a group of records, hold down the SHIFT or CTRL key as you click on records.)

2 From the Main menu, choose GIFTS Plus ➤ GIFTS Watchlists Plus. The Watchlists Plus window displays.

3 If you wish to include related records in your query, such as Primary Organization (for Contacts), or Employees (for Organizations), click the checkbox next to the appropriate field(s) on the left side of the Watchlists Plus window.

4 Click Last Status. The Watchlist Plus Summary window displays.



The Watchlists Plus Summary window contains two sections:

- Open: This section displays the number of records that either have never been included in a query or have registered a hit on watchlist(s) in a previous query and the most recent Activity for that record is still open. For more information, please refer to “Viewing Open Record Results” on page 139.
- Verified: This section displays the number of records that either did not register a hit on any watchlist(s) for any previous queries or registered a hit on watchlist(s) in a previous query and the most recent Activity for that record has been closed. For more information, please refer to “Viewing Verified Record Results” on page 141.

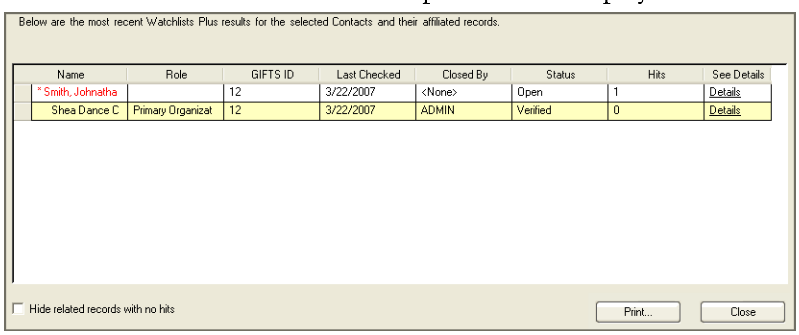
Viewing Detailed Query Results

After checking the current watchlist status of records or running a new query, you can view detailed query results for these records.

Viewing Open Record Results

After checking the current watchlist status for records, you can view detailed query results for records appearing in the "Open" section of the Watchlists Plus Summary window. These are records that either have never been included in a query or have registered a hit on watchlist(s) in a previous query and the most recent Watchlists Plus Activity for that record is still open.

1 From the Open section of the Watchlists Plus Summary window, click View Results. The Watchlists Plus Open window displays.



The Watchlists Plus Open window contains the following fields:

Field	Description
Name	The Organization name or the Contact's first and last name. Names displayed in red text with an asterisk next to them are records that registered hits. Names displayed in black text are records that registered no hits. Names that are not indented are records you specifically selected to include in this query. Indented names are records affiliated with the selected records, and are displayed if you selected to include affiliated records in your query.

Field	Description
Relationship	If this field contains no information, it is a record you specifically selected to include in your query. If this field contains information, it is for an affiliated record, and describes the relationship between it and the selected record. The selected record appears above it and has a name that is not indented. For example, in the screenshot above, the Shea Dance Company is the Primary Organization of Johnathan Smith.
GIFTS ID	The GIFTS ID of the Contact or Organization.
Last Checked	The date of the most recent query which included this record. This is also the Create Date of the most recent Watchlists Plus Activity for this record.
Closed By	The name of the person who marked the record's associated Activity as Done. If this field displays <none>, the associated Activity has not been marked as Done.
Status	This field displays one of the following messages: ❖ Verified: The most recent associated Watchlists Plus Activity has been marked as Done. ❖ Open: The most recent associated Watchlists Plus Activity is still open. ❖ <none>: The record has no Watchlists Plus Activity associated with it, and has therefore never been included in a query.
Hits	The number of Watchlists on which the Organization or Contact registered a hit.
See Details	Click Details to view the watchlist information that registered a hit for this record, and to update information for the Watchlists Plus Activity associated with this record. For more information, please refer to "Viewing Watchlist Information and Updating Activities" on page 147. Note: This link is inactive if the record registered no hits.
Hide related records with no hits	Click this checkbox to hide affiliated records that returned no hits.

2 Choose from the following options on the Watchlists Plus Open window:

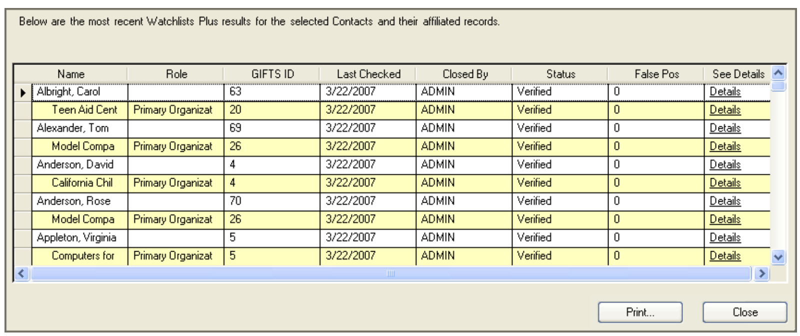
Option	Description
Print	Prints the displayed information.

Option	Description
Close	Closes the window.

Viewing Verified Record Results

After checking the current watchlist status for records, you can view detailed query results for records appearing in the "Verified" section of the Watchlists Plus Summary window. These are records that either did not register a hit on any watchlist(s) in any previous queries or registered a hit on watchlist(s) in a previous query and the most recent Activity for that record has been closed.

1 From the Verified section of the Watchlists Plus Summary window, click View Results. The Watchlists Plus Verified window displays.



Name	Role	GIFTS ID	Last Checked	Closed By	Status	False Pos	See Details
Albright, Carol		63	3/22/2007	ADMIN	Verified	0	Details
Teen Aid Cent	Primary Organizat	20	3/22/2007	ADMIN	Verified	0	Details
Alexander, Tom		69	3/22/2007	ADMIN	Verified	0	Details
Model Compa	Primary Organizat	26	3/22/2007	ADMIN	Verified	0	Details
Anderson, David		4	3/22/2007	ADMIN	Verified	0	Details
California Chil	Primary Organizat	4	3/22/2007	ADMIN	Verified	0	Details
Anderson, Rose		70	3/22/2007	ADMIN	Verified	0	Details
Model Compa	Primary Organizat	26	3/22/2007	ADMIN	Verified	0	Details
Appleton, Virginia		5	3/22/2007	ADMIN	Verified	0	Details
Computers for	Primary Organizat	5	3/22/2007	ADMIN	Verified	0	Details

The Watchlists Plus Open window contains the following fields:

Field	Description
Name	The Organization name or the Contact's first and last name. Names displayed in red text with an asterisk next to them are records that registered hits. Names displayed in black text are records that registered no hits. Names that are not indented are records you specifically selected to include in this query. Indented names are records affiliated with the selected records, and are displayed if you selected to include affiliated records in your query.

Field	Description
Relationship	If this field contains no information, it is a record you specifically selected to include in your query. If this field contains information, it is for an affiliated record, and describes the relationship between it and the selected record. The selected record appears above it and has a name that is not indented. For example, in the screenshot above, the Teen Aid Center is the Primary Organization of Carol Albright.
GIFTS ID	The GIFTS ID of the Contact or Organization.
Last Checked	The date of the most recent query which included this record. This is also the Create Date of the most recent Watchlists Plus Activity for this record.
Closed By	The name of the person who marked the record's associated Activity as Done. If this field displays <none>, the associated Activity has not been marked as Done.
Status	This field displays Verified, which indicates that the most recent associated Watchlists Plus Activity has been marked as Done.
False Pos	The number of false positives for the record. A "false positive" occurs if a record registers a hit on a watchlist, but is determined to not be the one on the watchlist. The record's most recent associated Watchlists Plus Activity has therefore been marked as Done. For more information about Watchlists Plus Activities and false positives, please refer to "Watchlists Plus and GIFTS Activities" on page 132.
See Details	Click Details to view the watchlist information that registered a hit for this record (that was determined to be a false positive), and to update information for the Watchlists Plus Activity associated with this record. For more information, please refer to "Viewing Watchlist Information and Updating Activities" on page 147. Note: This link is inactive if the record registered no hits that were determined to be false positives.

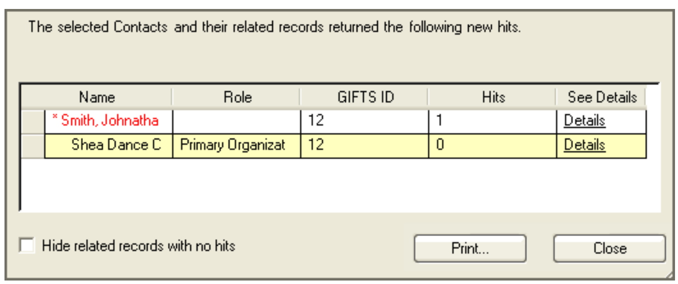
2 Choose from the following options on the Watchlists Plus Verified window:

Option	Description
Print	Prints the displayed information.
Close	Closes the window.

Viewing New Hits Record Results

After running a new query, you can view detailed query results for records appearing in the "New Hits" section of the Watchlists Plus Summary window. These are records included in a query for the first time that registered a hit on watchlist(s), and records that registered a hit on watchlist(s) in a previous query that have the most recent Watchlists Plus Activity still open.

1 From the New Hits section of the Watchlists Plus Summary window, click View Results. The Watchlists Plus New Hits window displays.



The Watchlists Plus New Hits window contains the following fields:

Field	Description
Name	The Organization name or the Contact's first and last name. Names displayed in red text with an asterisk next to them are records that registered hits. Names displayed in black text are records that registered no hits. Names that are not indented are records you specifically selected to include in this query. Indented names are records affiliated with the selected records, and are displayed if you selected to include affiliated records in your query.

Field	Description
Relationship	If this field contains no information, it is a record you specifically selected to include in your query. If this field contains information, it is for an affiliated record, and describes the relationship between it and the selected record. The selected record appears above it and has a name that is not indented. For example, in the screenshot above, the Shea Dance Company is the Primary Organization of Johnathan Smith.
GIFTS ID	The GIFTS ID of the Contact or Organization.
Hits	The number of Watchlists on which the Contact or Organization information registered a hit.
See Details	Click Details to view the watchlist(s) information that registered a hit for this record, and to update information for the Watchlists Plus Activity associated with this record. For more information, please refer to "Viewing Watchlist Information and Updating Activities" on page 147. Note: This link is inactive if the record registered no hits.
Hide related records with no hits	Click this checkbox to hide records that registered no hits.

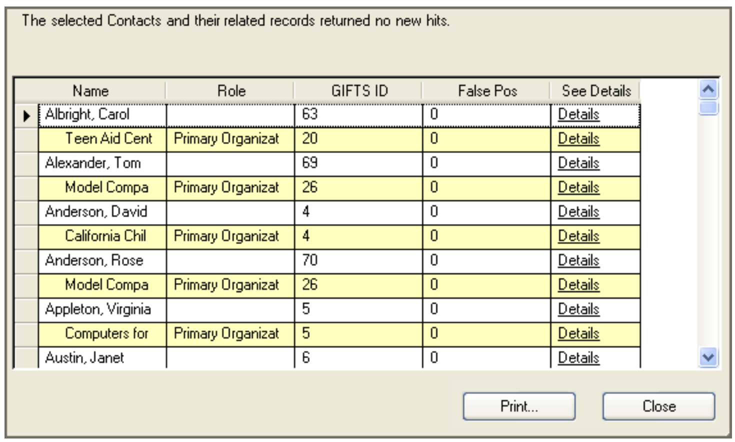
2 Choose from the following options on the Watchlists Plus New Hits window:

Option	Description
Print	Prints the displayed information.
Close	Closes the window.

Viewing No New Hits Record Results

After running a new query, you can view detailed query results for records appearing in the "No New Hits" section of the Watchlists Plus Summary window. These are records which either did not register a hit on any watchlist(s) for this query or registered a hit on watchlist(s) in a previous query and the most recent Watchlists Plus Activity for the record has been closed.

1 From the No New Hits section of the Watchlists Plus Summary window, click View Results. The Watchlists Plus No New Hits window displays.



The Watchlists Plus No New Hits window contains the following fields:

Field	Description
Name	The Organization name or the Contact's first and last name. Names that are not indented are records you specifically selected to include in this query. Indented names are records affiliated with the selected records, and are displayed if you selected to include affiliated records in your query.

Field	Description
Relationship	If this field contains no information, it is a record you specifically selected to include in your query. If this field contains information, it is for an affiliated record, and describes the relationship between it and the selected record. The selected record appears above it and has a name that is not indented. For example, in the screenshot above, the Teen Aid Center is the Primary Organization of Carol Albright.
GIFTS ID	The GIFTS ID of the Contact or Organization.
False Pos	The number of false positives for the record. A “false positive” occurs if a record registers a hit on a watchlist, but is determined to not be the one on the watchlist. The record’s most recent associated Watchlists Plus Activity has therefore been marked as Done. For more information about Watchlists Plus Activities and false positives, please refer to “Watchlists Plus and GIFTS Activities” on page 132.
See Details	Click Details to view the watchlist information that registered a hit for this record (that was determined to be a false positive), and to update information for the Watchlists Plus Activity associated with this record. For more information, please refer to “Viewing Watchlist Information and Updating Activities” on page 147. Note: This link is inactive if the record returned no hits that were determined to be false positives.

2 Choose from the following options on the Watchlists Plus No New Hits window:

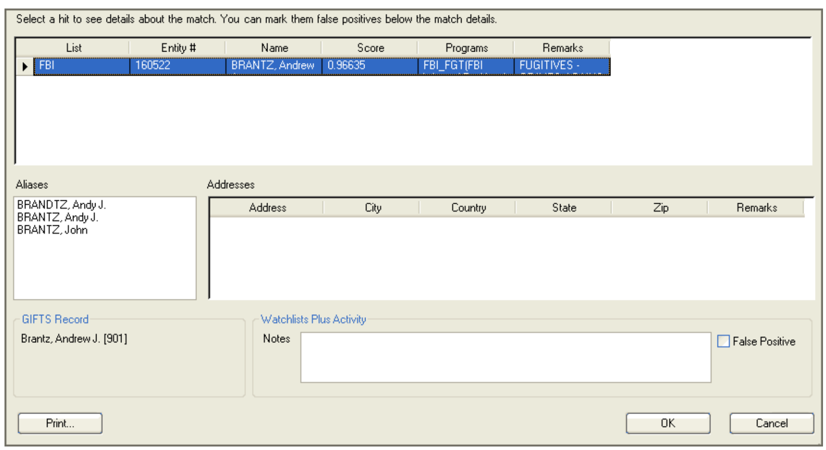
Option	Description
Print	Prints the displayed information.
Close	Closes the window.

Viewing Watchlist Information and Updating Activities

After viewing detailed query results, you can view the watchlist information for which a record registered a hit, and update information for the Watchlists Plus Activity associated with that record.

This watchlist information is downloaded from each watchlist, and allows you to view additional information in order to determine whether or not the hit is a false positive or not.

1 From the See Details column of the Watchlists Plus Open window or the Watchlists Plus New Hits window, click Details. The Watchlists Plus Details window displays.



The Watchlists Plus Details window contains the following fields:

Field	Description
List	The name of the watchlist that registered a hit for the record. Note: The information in the Alias and Addresses sections changes if you select a new watchlist.
Entity #	Proprietary information from the watchlist.
Name	The name of the Contact or Organization.
Score	Proprietary information from the watchlist.
Programs	Proprietary information from the watchlist.

Field	Description
Remarks	Proprietary information from the watchlist.
Aliases	Any aliases for the Contact, if applicable.
Addresses	Address information for the Organization or Contact.
GIFTS Record	The data in GIFTS that registered a hit on the watchlist.
Notes	Enter any information to include as notes in the Watchlists Plus Activity associated with this record.
False Positive	Click this checkbox if this record is not the one for which it registered a hit on the watchlist(s). This marks the Watchlists Plus Activity associated with this record as Done. Note: You must have the appropriate permission in order for this field to be active. For more information, refer to “Setting Up Watchlists Plus Security” on page 14.

2 Choose from the following options on the Watchlists Plus Details window:

Option	Description
Print	Prints the displayed information.
OK	Saves any updated Activity information and closes the window.
Close	Closes the window without saving any updated information.

10 Using Outcomes Plus

This chapter describes how to use Outcomes Plus.

In This Chapter

About Outcomes Plus

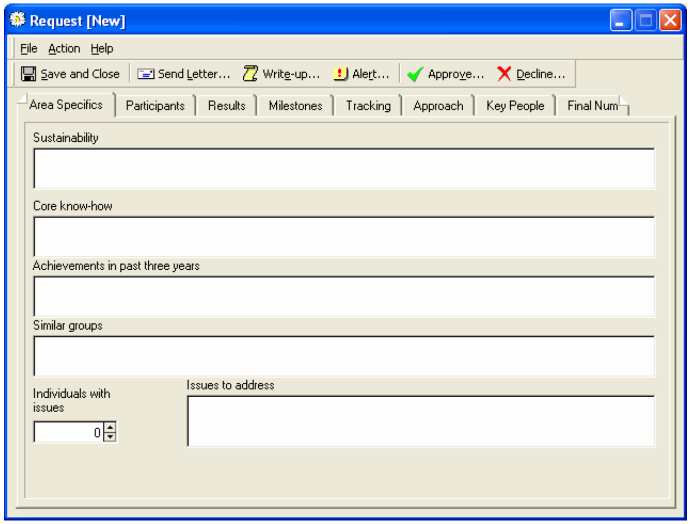
Outcomes Plus automatically facilitates the creation and setup of the fields you need to track outcomes data, allowing you to be more efficient when tracking the success of your giving programs.

The installation process, based on the investment types selected, includes the addition of fields, tabs, views, searches, report templates and a new Outcomes code table. Outcomes Plus is installed separately from the rest of Plus Pack.

When setting up Outcomes Plus, you define the investment types that you would like to track based on your outcomes framework, and select the Request Type with which to associate each investment type you select. This adds pre-selected Customizer fields to Requests with these Request Types, as well as to Requirements, and if you have the Reviewers Module or ReviewerCONNECT, to Review records as well.

Important: Outcomes Plus fields and tabs were designed by MicroEdge based on the framework, concepts, tools, and templates defined by MicroEdge's outcome partner, The Rensselaerville Institute (TRI), a non-profit group that has been dedicated to measuring and improving outcomes in all fields of human achievement for more than 45 years. Before employing Outcomes Plus, we recommend that you consult with The Rensselaerville Institute to define your outcomes framework, and then work with a MicroEdge Product Specialist to plan the best way to implement this framework into the GIFTS database using the Outcomes Plus tool.

The image below shows an example Request updated with Outcomes Plus to track outcomes.



Tip: You can click the dog-eared tab to view other Outcomes Plus tabs for the Request.

Customizer Fields by Investment Type

When you set up Outcomes Plus, you can select to track the following investment types:

❖ Improving Lives (Direct Service) - Direct Service grants are those given to organizations that serve people to help them improve their quality of life. Examples include a healthy cooking class or low-cost inoculations.

❖ Achievement Building - Achievement Building grants are given to organizations to increase the capacity of the programs and services they deliver.

- Advancing Innovation - Advancing Innovation grants are given to organizations that develop and test new approaches to increase the effectiveness of the approach to the program.
- Capital Improvement - Capital Improvement grants are those that help increase efficiency or effectiveness in an organization.
- Policy or Advocacy - Policy or Advocacy grants are those that are used to change the institutional structures, underlying conditions, or policies and practices that influence the likelihood of improved outcomes in their area of interest.
- Applied Research - Applied Research grants are those that are used to generate, analyze, and interpret data to identify problems, causalty, and solutions.

When you select any of these investment types, Customizer fields are automatically added to Requests with a Request Type associated to the investment type, as well as to Requirements and/or Reviews. These Customizer fields appear in separate tabs for Requests based on the Request Types selected during the setup. Additional tabs and fields are associated with Requirements and Reviews. The Area Specifics tab in the image on page 147 is one example.

The Customizer fields that are added to Requests, Requirements, and Reviews are detailed below.

Note: If you have the optional Reviewer Module or ReviewerCONNECT, some fields will be added to the Reviews record instead of the Requests record. These fields are noted below.

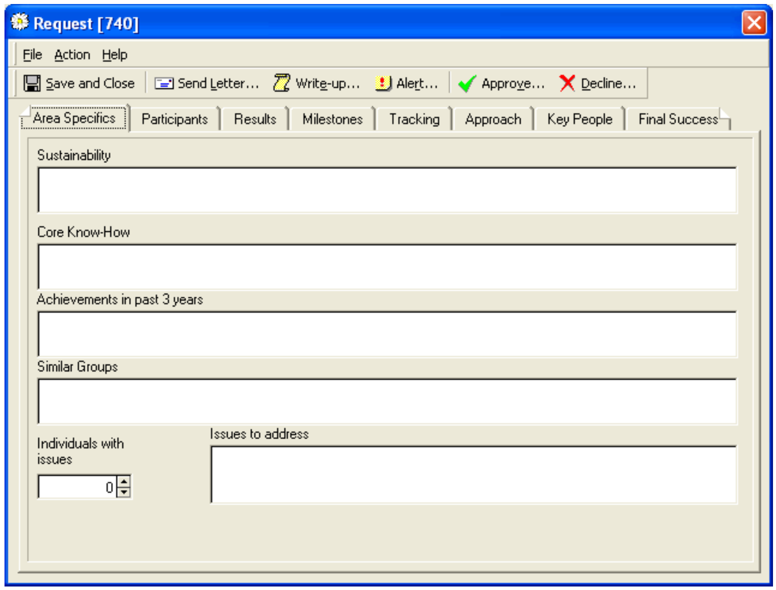
Improving Lives (Direct Service)

Listed below are the fields used to track and report on outcomes data for Direct Service grants, or grants that serve people directly. This Request Type contains the following tabs: Area Specifics, Participants, Results, Milestones, Tracking, Approach, and Key People. These tabs contain fields that are defined in the following section.

Note: This Request Type also contains other tabs, including Final Success, Performance, Results Buying, Chance at Results, Best Use of $, and Final

Num tab. These tabs contain fields that are self-explanatory and thus are not included in this section.

Area Specifics tab

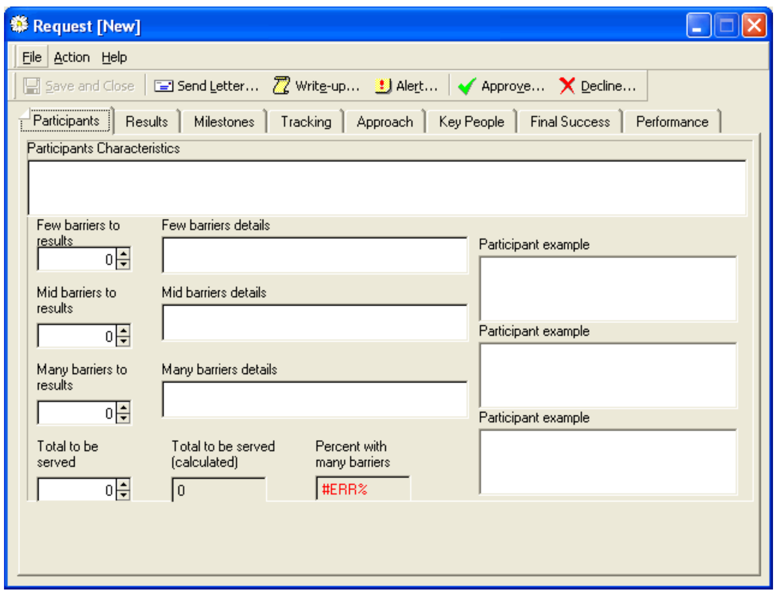


The following information describes what data should be in each field of the Area Specifics tab:

- Sustainability: This field should contain information that addresses finances (such as trends, events, and other factors that influence the organization's financial viability), and leadership (including ability to achieve success and past or anticipated replacement of key people).
- Core Know-How: This field should contain information regarding what the organization does especially well in this area. This can include knowledge, skills, and how well they are able to influence others to change their behavior or conditions.
- Achievements in past 3 years: This field should contain information describing how the organization has successfully served this group of people in the past through other programs.

- Similar Groups: This field should contain information describing how the organization is different from other groups involved in similar programs which would lead you to want to invest in them.
- Individuals with issues: This field should contain the number of individuals or an estimate of individuals that have the issue in the community.
- Issues to address: This field should state the challenge or problem the grantee is trying to address in clear terms as it is experienced by their participants.

Participants Tab

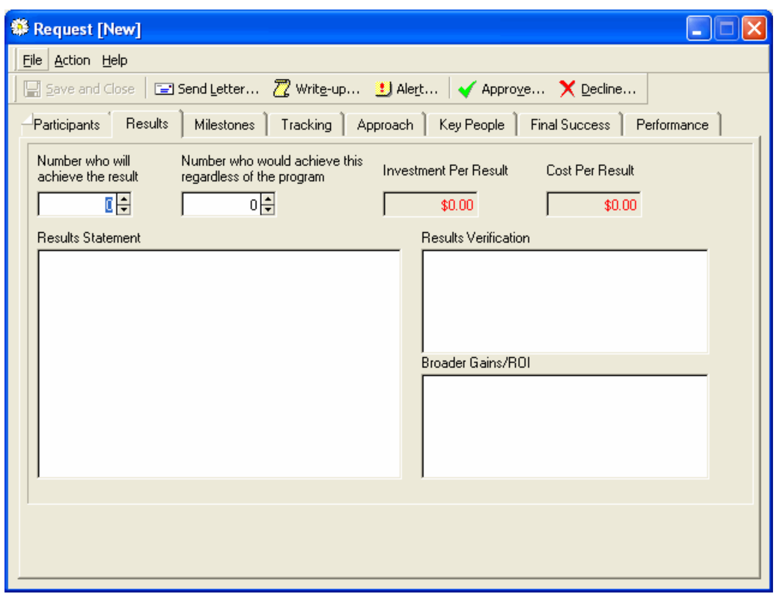


The following information describes what data should be in each field of the Participants tab:

- Participants Characteristics: The information in this field should describe the characteristics of the people who will be involved in the program.
- Few/Mid/Many barriers to results: These fields should contain the projected number who have issues that could affect their success by the severity of the issues. These are the numbers that are expected to have few, middle (mid), or many barriers to achieving success, respectively.

- Few/Mid/Many barriers details: These fields should contain information that describes what some of these barriers are for each group.
- Participant examples: These fields should include examples or details on specific individuals included in the program. It should include information on their specific circumstances and characteristics.
- Total to be served: This field should contain the number of people who the grantee plans to serve with this program.
- Total to be served (calculated): This is a calculated field that displays the total of the numbers in the Few/Mid/Many barriers to results fields and should be used to verify the accuracy of the 'Total to be served' field.
- Percent with many barriers: This is a calculated field that displays the percentage of individuals with many barriers as compared to the total number to be served.

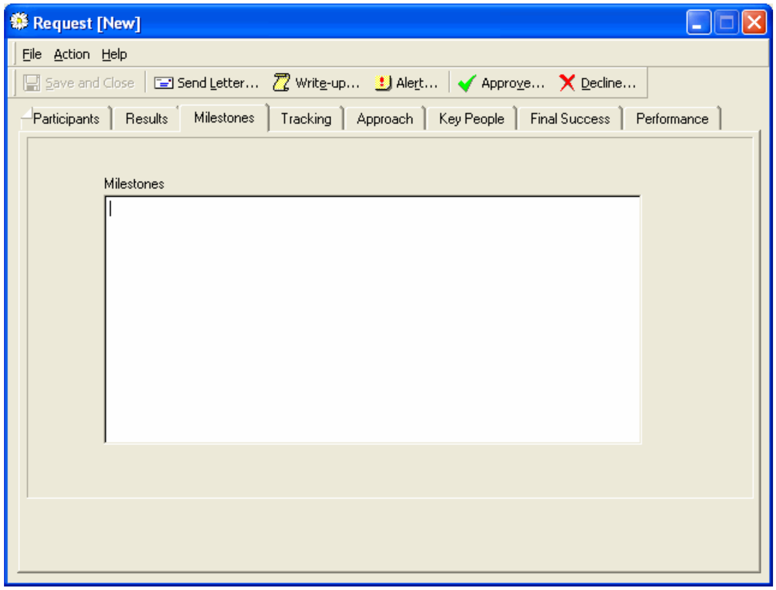
Results tab



The following information describes what data should be in each field of the Results tab:

- Number who will achieve the result: This field should contain the number of people expected to effectively achieve the change described in the 'Results Statement.'
- Number who would achieve this regardless of the program: This field should contain the number of people who would reach the program goal without the help of the organization and it's program.
- Investment Per Result: This calculated field displays the request amount divided by the number who will achieve the result giving you an idea of your investment per person for this project.
- Cost Per Result: This calculated field displays the Project Budget amount divided by the number who will achieve the result. It illustrates the broader cost for each person to achieve the result.
- Results Statement: This field should contain information about the desired change in behavior and/or condition for the program participants.
- Results Verification: The data tools or observations used to verify the achieved results.
- Broader Gains/ROI: The grantee should include ancillary benefits that may be achieved as a result of the program.

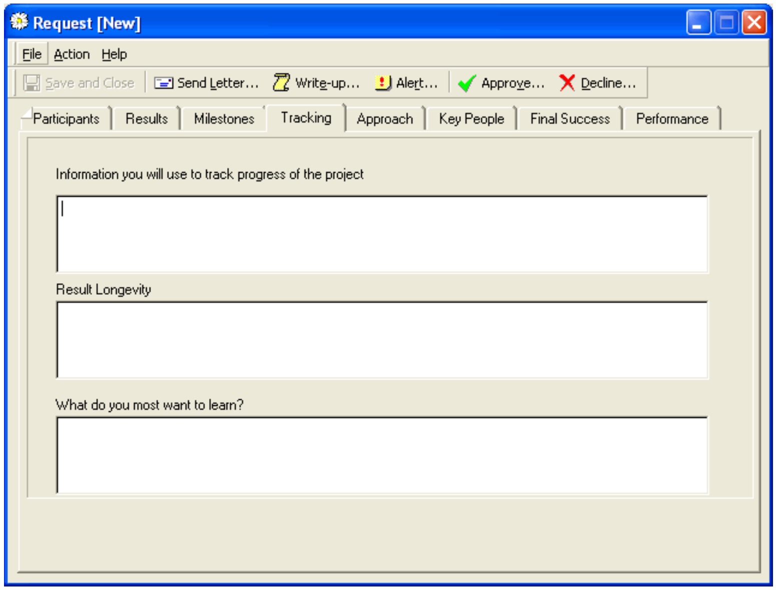
Milestones Tab



The following information describes what data should be in the field in the Milestones tab:

- Milestones: The organization should either list their most critical activities or simply state what they think predicts success. In addition, they should include what they plan to look for to confirm that their participants are on track.

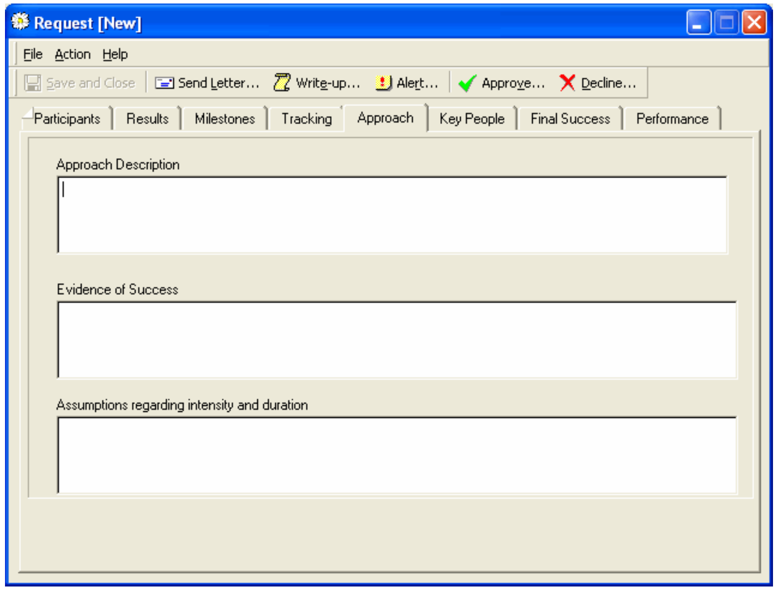
Tracking Tab



The following information describes what data should be in each field of the Tracking tab:

- Information you will use to track progress of the project: The information in this field should describe the other information you will use to track the progress of the program. An example might be taking attendance.
- Result Longevity: This field allows the grantee to describe how a follow-up component to their program might be the best money to insure durable success.
- What do you most want to learn: High performing organizations make learning intentional by asking the grantee what they most want to learn. You can gauge their growth potential and ability to succeed in addition to gaining more information about the project.

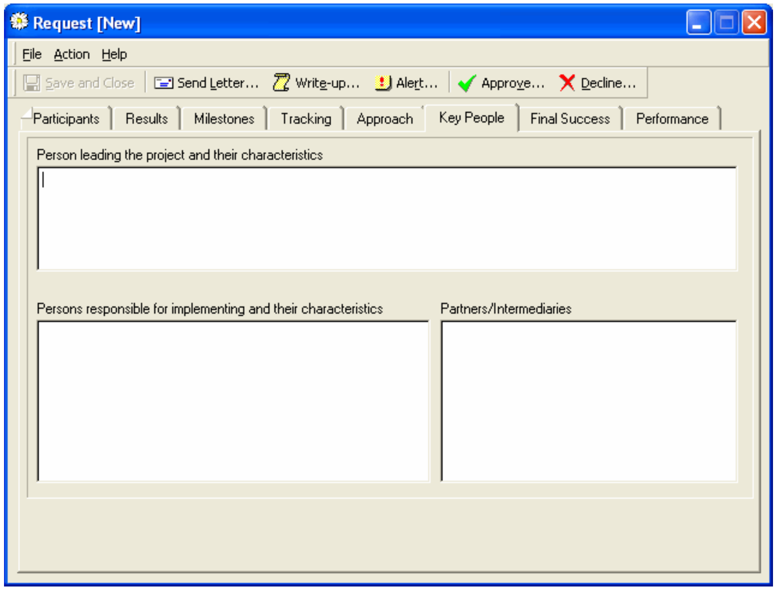
Approach Tab



The following information describes what data should be in each field of the Approach tab:

- Approach Description: The organization should include a few core elements of their particular way of solving a problem and why they think it is the best way to engage participants and help them succeed.
- Evidence of Success: If the grantee has evidence of the success of their approach, it should be included here.
- Assumptions regarding intensity and duration: This field allows the grantee to describe what it really takes to achieve the result. For example, this field can contain the number of hours per day they need to commit to this project or the number of times a week they need to interact with their participants.

Key People Tab



The following information describes what data should be in each field of the Key People tab:

- Person leading the project and their characteristics: This field contains information about the person leading the project and his or her qualifications.

- Persons responsible for implementing and their characteristics: This field contains information about the other people responsible for implementing the project, including their qualifications.

- Partners/Intermediaries: The information in this field should focus on those groups who have to play a role for the grantee to be successful and on their commitments to play that role.

The following Customizer fields are automatically added to any Requests for the Request Type associated with the Improving Lives (Direct Service) investment type. This section lists the Request tab name first, followed by the Customizer field names and labels in the tab.

Note: If you have the Reviews Module or ReviewerCONNECT, the following tabs (Results Buying, Chance at Results, Best Use of $) and associated fields appear in the Review, not the Request. If you do not have the Reviews Module or ReviewerCONNECT, the tabs and the fields will be created in the Request record.

Area Specific

Field Name	Label
Sustainability	Sustainability
Core_Know_How	Core know-how
Past_Achievement	Achievements in past three years
Similiar_Groups	Similar groups
Individuals_With_Issues	Individual with issues
Issue_Challenge	Issues to address

Participants

Field Name	Label
Participant_Community	Participants characteristics
Partic_Few_Barriers	Few barriers to results
Partic_Few_Barriers_Notes	Few barriers details
Partic_Mid_Barriers	Mid barriers to results
Partic_Mid_Barriers_Notes	Mid barriers details
Partic_Many_Barriers	Many barriers to results
Partic_Many_Barriers_Notes	Many barriers details
Partic_Example1	Participant example
Partic_Example2	Participant example
Partic_Example3	Participant example
Partic_Num_To_Serve	Total to be served

Field Name	Label
Total_to_be_served	Total to be served (calculated)
Percent_with_many_barriers	Percent with many barriers

Results

Field Name	Label
Results_Num1	Number who will achieve the result
Results_No_Program	Number who would achieve this regardless of the program
Investment_per_result	Investment per result
Cost_Per_Result	Cost per result
Results_Statement1	Results Statement
Results_Verification	Results verification
Results_Broader_Gains	Broader gains/ROI

Milestones

Field Name	Label
Milestones	Milestones

Tracking

Field Name	Label
Tracking_Info	Information you will use to track progress of the project
Result_Longevity	Result longevity
Learning_Questions	What do you most want to learn?

Approach

Field Name	Label
Project_Approach	Approach description
Project_Evidence	Evidence of success
Project_Assumptions	Assumptions regarding intensity and duration

Key People

Field Name	Label
Key_Project_Lead	Person(s) leading the project and their characteristics
Key_Implementors	Person(s) responsible for implementing and their characteristics
Key_Partners	Partners/Intermediaries

Results Buying

Field Name	Label
Targets_Clear	Are project results clear and easily verifiable?
Target_Level_High	Results set high enough relative to what would happen without the program and nature of participants?
Target_Approach_Effective	Results clearly contribute to foundation outcomes?
Section_1_Score_il	Section 1 score
Target_Ranking	Section 1 rank
Target_Notes	Comments

Chance at Results

Field Name	Label
Rating_Key_People	Do key people have attributes/ capabilities that predict success?
Rating_Mission_Alignment	Clear alignment between organization mission, intended program content and the proposed results/approach?
Rating_Prior_Achievement	Is prior achievement in a similar area or population strong?
Rating_Strategy	Is project clear in terms of needed intensity/duration to get participants to stated results?
Rating_Partners_Resources	Are commitments clear from partners or intermediaries?
Rating_Milestones	Is the description of participant progress (milestones) through the program predictive of success?
Section_2_Score_il	Section 2 score
Chance_at_Results_Ranking	Section 2 rank
Chance_at_Results_Notes	Comments

Best Use of $

Field Name	Label
Use_of_Money_Reasonable	Are the requested funds to achieve results reasonable for this participant group and project approach?
Use_of_Money_Clear	Is it clear what our funds are paying for and how that affects the results for this project?
Use_of_Money_Future	Are there broader gains or replication possibilities that go beyond the project itself?

Field Name	Label
Section_3_Score_il	Section 3 score
Use_of_Money_Ranking	Section 3 rank
Overall_Score_il	Overall score
Use_of_Money_Notes	Comments
Proposal_Overall_Ranking	Overall rank

Final Num

Field Name	Label
Final_Num_Achieved1	Participants achieving results
Final_percent_who_achieved	Final percent who achieved
Final_cost_per_results	Final cost per result
Final_investment_per_results	Final investment per result
Final_Num_Few_Barriers	Final number few barriers
Final_Num_Mid_Barriers	Final number mid barriers
Final_Num_Many_Barriers	Final number many barriers
Final_Num_Served1	Final number served
Final_Number_Served_calc	Final number served (calculated)

Final Success

Field Name	Label
Final_Results_Grantee_SelfRate	Success in achieving results
Final_Results_Impediments	Impediments to results
Five_Things_Different	Five things doing differently

Performance

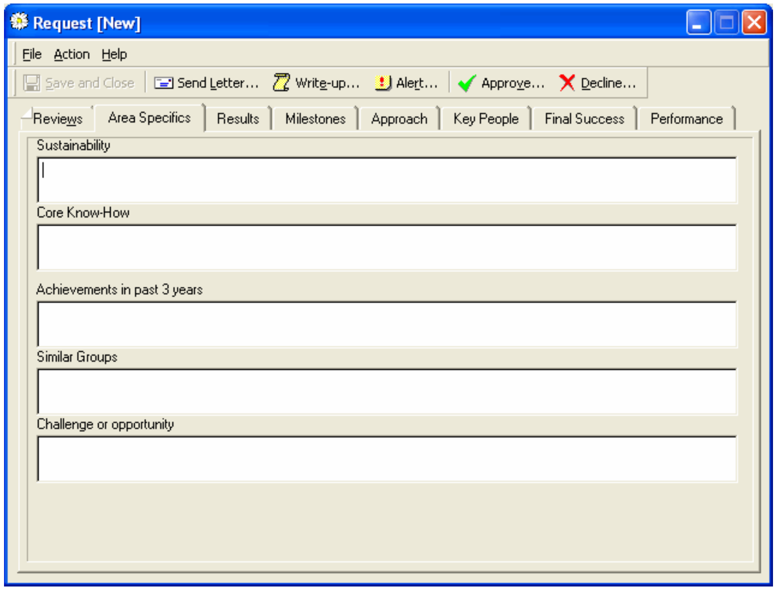
Field Name	Label
Performance_Rating	How would you rate the grant performance?
Rec_Next_Steps_Low	Next investment steps for programs rated low success
Rec_Next_Steps_Medium	Next investment steps for programs rated medium success
Rec_Next_Steps_High	Next investment steps for programs rated high success
Performance_Comments	Comments on performance
Rec_Next_Steps_Comments	Comments on recommendations

Achievement Building

Listed below are the fields used to track and report on outcomes data for Achievement Building grants, or grants for organizations that deliver programs and services. This Request Type contains the following tabs: Area Specifics, Results, Milestones, Approach, and Key People. These tabs contain fields that are defined in the following section.

Note: This Request Type also contains other tabs, including Final Success, Performance, Results Buying, Chance at Results, and Best Use of $. These tabs contain fields that are self-explanatory and thus are not included in this section.

Area Specifics Tab

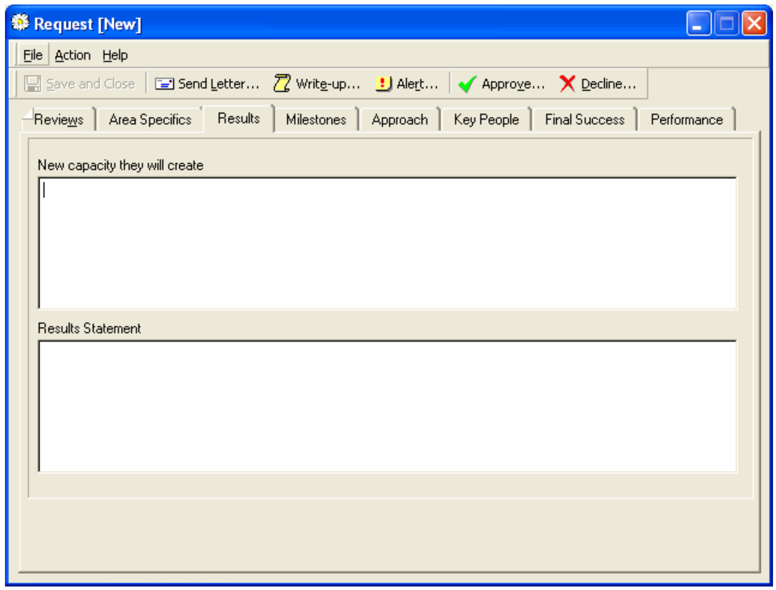


The following information describes what data should be in each field of the Area Specifics tab:

- Sustainability: This field should contain information that addresses finances (such as trends, events, and other factors that influence the organization’s financial viability), and leadership (including ability to achieve success and past or anticipated replacement of key people).
- Core Know-How: This field should contain information regarding what the organization does especially well in this area. This can include knowledge, skills, and how well they are able to influence others to change their behavior or conditions.
- Achievements in past 3 years: This field should contain information describing how the organization has successfully served this group of people in the past through other programs.
- Similar Groups: This field should contain information describing how the organization is different from other groups involved in similar programs which would lead you to want to invest in them.

- Challenge or Opportunity: This field should state the challenge or problem the grantee is trying to address in clear terms as it is experienced by their participants.

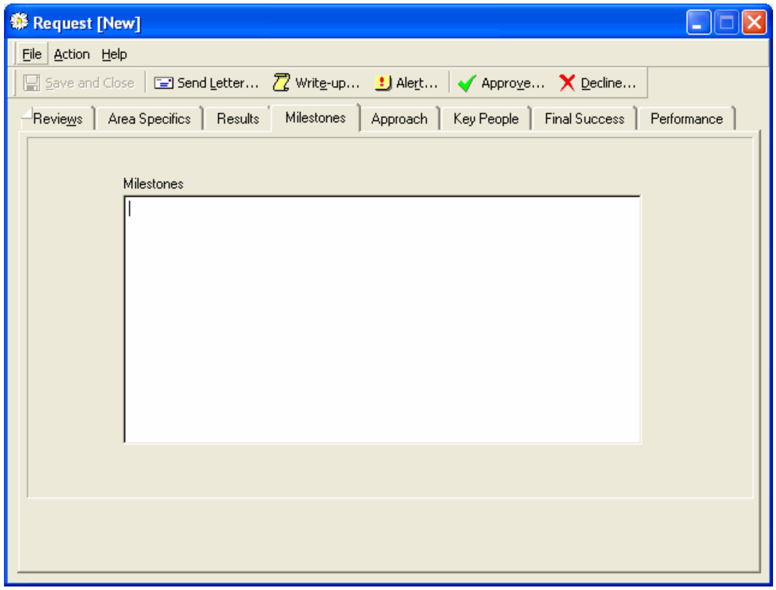
Results Tab



The following information describes what data should be in each field of the Results tab:

- New capacity they will create: This field should contain information about the best way to invest in the organization in order to increase human gain and the organization's sustained ability to provide it.
- Results Statement: This field should contain information about the change in behavior and/or conditions for people, and should articulate behaviors and/or conditions rather than attitudes.

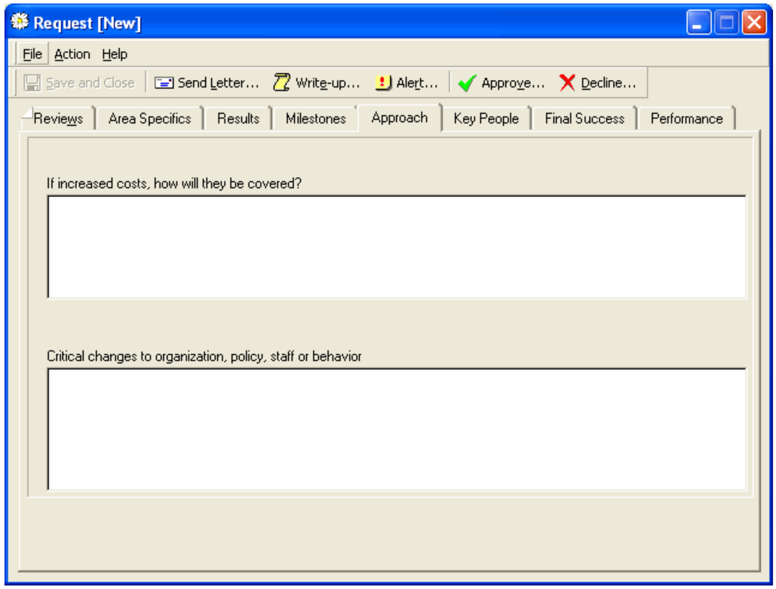
Milestones Tab



The following information describes what data should be in the field of the Milestones tab:

- Milestones: The organization should either list their most critical activities or simply state what they think predicts success. In addition, what will they look for to confirm that their participants are on track?

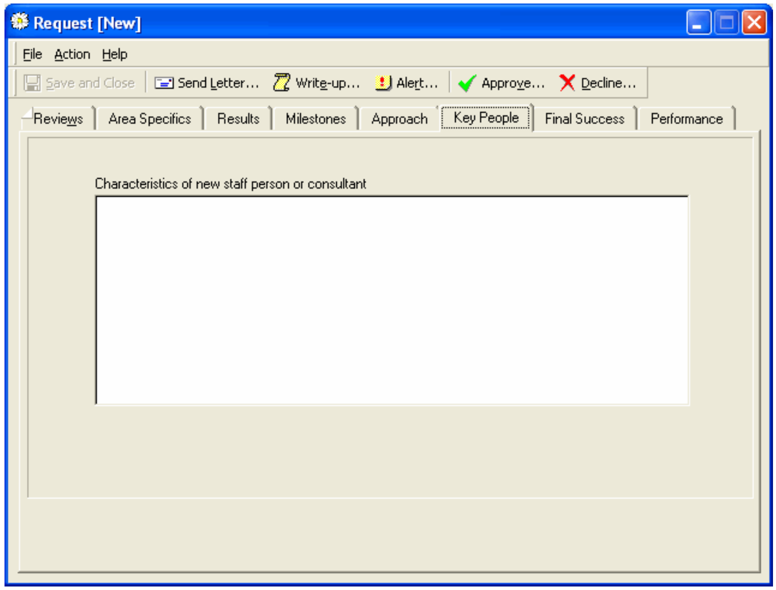
Approach Tab



The following information describes what data should be in each field of the Approach tab:

- If increased costs, how will they be covered: This field should explain how the organization will handle increased costs (e.g., maintaining a new computer system, adding staff, increasing the number of program participants, etc.).
- Critical changes to organization, policy, staff or behavior: This field can contain a list of the organization changes (i.e., policies and practices) and the specific behavioral changes that will be needed if the capability is to be fully expressed.

Key People Tab



The following information describes what data should be in each field of the Key People tab:

❖ Characteristics of new staff person or consultant: This field contains information about any new staff people or consultants, including their qualifications.

The following Customizer fields are automatically added to any Requests for the Request Type associated with the Achievement Building investment type. This section lists the Request tab name first, followed by the Customizer field names and labels and in the tab.

Note: If you have the Reviews Module or ReviewerCONNECT, the following tabs (Results Buying, Chance at Results, Best Use of $) and associated fields appear in the Review, not the Request. If you do not have the Reviews Module or ReviewerCONNECT, the tabs and the fields will be created in the Request record.

Area Specifics

Field Name	Label
Sustainability	Sustainability
Core_Know_How	Core know-how
Past_Achievement	Achievements in past three years
Similiar_Groups	Similar groups
Issue_Challenge	Challenge or opportunity

Results

Field Name	Label
New_Capacity_Improvment	New capacity that will be created
Results_Statement1	Results Statement

Milestones

Field Name	Label
Milestones	Milestones

Approach

Field Name	Label
Cost_Implications	If increased costs, how will they be covered?
Org_Change_Required	Critical changes to organization, policy, staff or behavior

Key People

Field Name	Label
Key_Project_Lead	Characteristics of new staff person or consultant

Results Buying

Field Name	Label
Targets_Clear	Will new/added capacity lead to results in at least one of the four areas: reduced cost, increased revenue, increased results, or decreased time to get results?
Targets_Gains	Is relationship clear between project results and gains anticipated for participants with this new/added capacity?
Section_1_Score_ab	Section 1 score
Target_Ranking	Section 1 rank
Target_Notes	Comments

Chance at Results

Field Name	Label
Rating_Key_People	Do the characteristics of new staff or consultants clearly contribute to the project success?
Rating_Mission_Alignment	Is there a clear commitment to implementing critical organization changes?
Rating_Milestones	Is the description of three to four steps and related achievements predictive of success?

Field Name	Label
Section_2_Score_ab	Section 2 score
Chance_at_Results_Ranking	Section 2 rank
Chance_at_Results_Notes	Comments

Best Use of $

Field Name	Label
Use_of_Money_Reasonable	Are the requested funds to create new or added capacity reasonable?
Use_of_Money_Clear	Is it clear what our funds are paying for and how these contribute to the organization's ability to achieve new or added capacity?
Use_of_Money_Future	If operating costs increase, is it clear how these costs will be covered?
Section_3_Score_ab	Section 3 score
Use_of_Money_Ranking	Section 3 rank
Overall_Score_ab	Overall score
Use_of_Money_Notes	Comments
Proposal_Overall_Ranking	Overall rank

Final Success

Field Name	Label
Final_Results_Grantee_SelfRate	Success in achieving results
Final_Results_Impediments	Impediments to results
Five_Things_Different	Five things doing differently

Performance

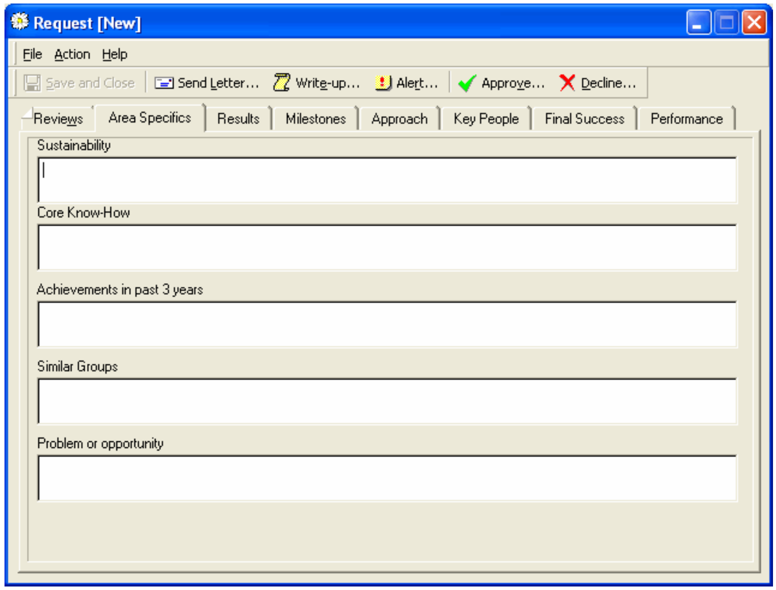
Field Name	Label
Performance_Rating	How would you rate the grant performance?
Rec_Next_Steps_Low	Next investment steps for programs rated low success
Rec_Next_Steps_Medium	Next investment steps for programs rated medium success
Rec_Next_Steps_High	Next investment steps for programs rated high success
Performance_Comments	Comments on performance
Rec_Next_Steps_Comments	Comments on recommendations

Advancing Innovation

Listed below are the fields used to track and report on outcomes data for Advancing Innovation grants, or grants for organizations that develop and test new approaches to outperform existing practices. This Request Type contains the following tabs: Area Specifics, Results, Milestones, Approach, and Key People. These tabs contain fields that are defined in the following section.

Note: This Request Type also contains other tabs, including Final Success, Performance, Results Buying, Chance at Results, and Best Use of $. These tabs contain fields that are self-explanatory and thus are not included in this section.

Area Specifics Tab

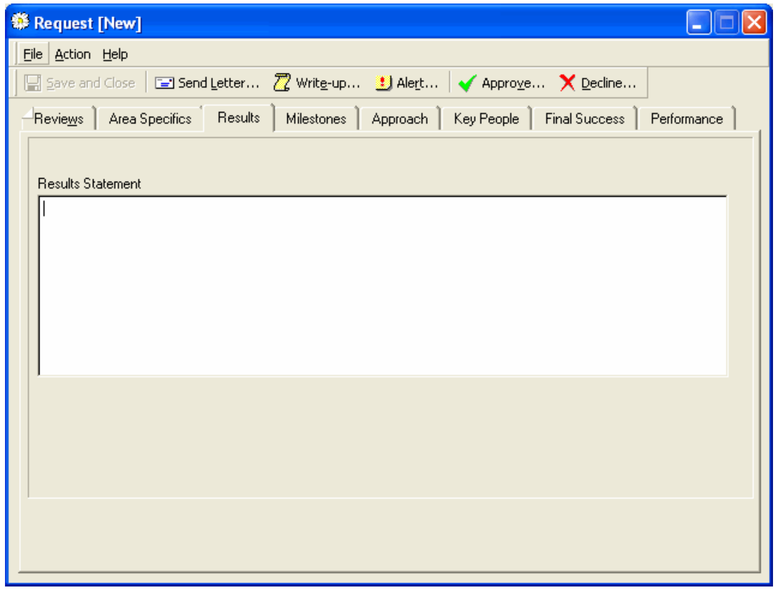


The following information describes what data should be in each field of the Area Specifics tab:

- Sustainability: This field should contain information that addresses finances (such as trends, events, and other factors that influence the organization's financial viability), and leadership (including ability to achieve success and past or anticipated replacement of key people).
- Core Know-How: This field should contain information regarding what the organization does especially well in this area. This can include knowledge, skills, and how well they are able to influence others to change their behavior or conditions.
- Achievements in past 3 years: This field should contain information describing how the organization has successfully served this group of people in the past through other programs.
- Similar Groups: This field should contain information describing how the organization is different from other groups involved in similar programs which would lead you to want to invest in them.

❖ Problem or Opportunity: This field should contain the data relating to the issue or problem the grantee is going to tackle.

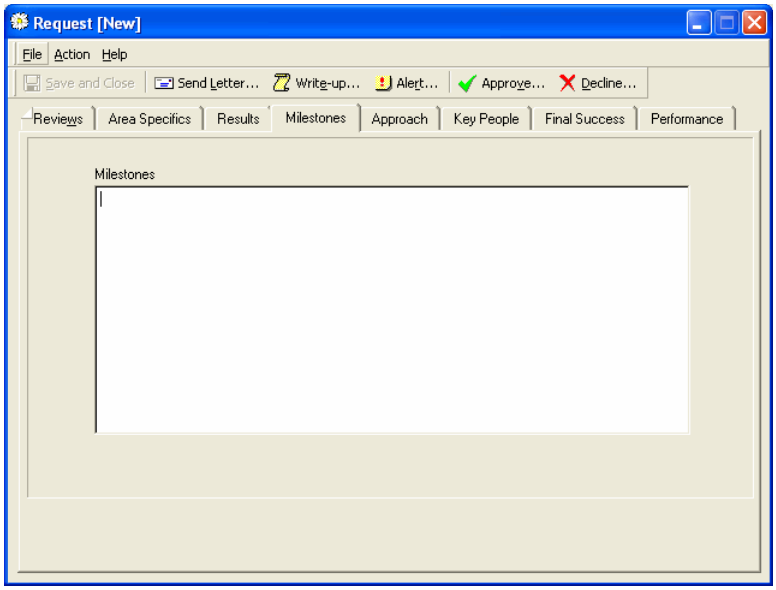
Results Tab



The following information describes what data should be in the field on the Results tab:

❖ Results Statement: This field should contain information about the desired change in behavior and/or conditions for the program participants.

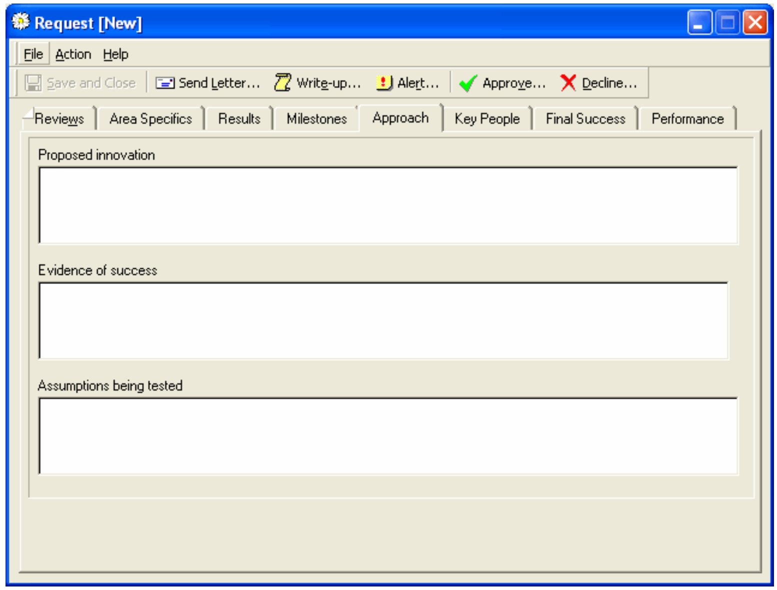
Milestones Tab



The following information describes what data should be in the field on the Milestones tab:

❖ Milestones: The organization should either list their most critical activities or simply state what they think predicts success. In addition, include what will they look for to confirm that their participants are on track.

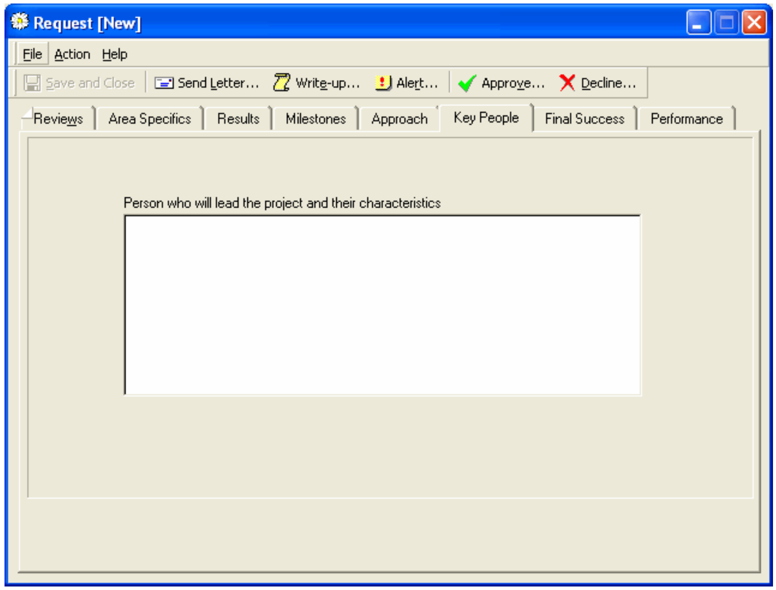
Approach Tab



The following information describes what data should be in each field of the Approach tab:

- Proposed innovation: This field should explain the approach or strategy that the organization will use and how it is different from current practices. It should highlight the ways the proposed innovation may produce stronger results.
- Evidence of success: If the grantee has evidence of the success of their approach, they should include in here.
- Assumptions being tested: This field contains the program's assumptions, which are critical in determining program success. It should include the information you are expecting regarding the participants, the program resources, and the participant/program connection.

Key People Tab



The following information describes what data should be in each field of the Key People tab:

- Person who will lead the project and their characteristics: This field contains information about the person leading the project and his or her qualifications.

The following Customizer fields are automatically added to any Requests for the Request Type associated with the Advancing Innovation investment type. This section lists the Request tab name first, followed by the Customizer field names and labels in the tab.

Note: If you have the Reviews Module or ReviewerCONNECT, the following tabs (Results Buying, Chance at Results, Best Use of $) and associated fields appear in the Review, not the Request. If you do not have the Reviews Module or ReviewerCONNECT, the tabs and the fields will be created in the Request record.

Area Specifics

Field Name	Label
Sustainability	Sustainability
Core_Know_How	Core know-how
Past_Achievement	Achievements in past three years
Similiar_Groups	Similar groups
Issue_Challenge	Problem or opportunity

Results

Field Name	Label
Results_Statement1	Results Statement

Milestones

Field Name	Label
Milestones	Milestones

Approach

Field Name	Label
Project_Approach	Proposed innovation
Project_Evidence	Evidence of success
Project_Assumptions	Assumptions being tested

Key People

Field Name	Label
Key_Project_Lead	Person(s) who will lead the project and their characteristics

Results Buying

Field Name	Label
Targets_Clear	Are project results clear?
Target_Approach_Effective	Do the results clearly show the effectiveness of the approach over existing ones?
Section_1_Score_ai	Section 1 score
Target_Ranking	Section 1 rank
Target_Notes	Comments

Chance at Results

Field Name	Label
Rating_Key_People	Do key people have the attributes and capabilities that predict success?
Rating_Mission_Alignment	Is there clear alignment between the issue/missed opportunity and proposed results?
Rating_Prior_Achievement	Does the evidence for the approach suggest a reasonable promise of success?
Rating_Strategy	Do the assumptions clearly link action and consequences of the project?
Rating_Milestones	Are milestones clear and presumed predictors of success?

Field Name	Label
Rating_Partners_Resources	Do project assumptions clearly address participant, program and/or resource needs?
Section_2_Score_ai	Section 2 score
Chance_at_Results_Ranking	Section 2 rank
Use_of_Money_Notes	Comments

Best Use of $

Field Name	Label
Use_of_Money_Reasonable	Is 'cost of learning' strong?
Use_of_Money_Clear	Are there strong project level impact potentials beyond specific results?
Use_of_Money_Future	Are there reasonable impact possibilities or replication that go beyond the project?
Section_3_Score_ai	Section 3 score
Use_of_Money_Ranking	Section 3 rank
Overall_Score_ai	Overall score
Chance_at_Results_Notes	Comments
Proposal_Overall_Ranking	Overall rank

Final Success

Field Name	Label
Final_Results_Grantee_SelfRate	Success in achieving results
Final_Results_Impediments	Impediments to results
Five_Things_Different	Five things doing differently

Performance

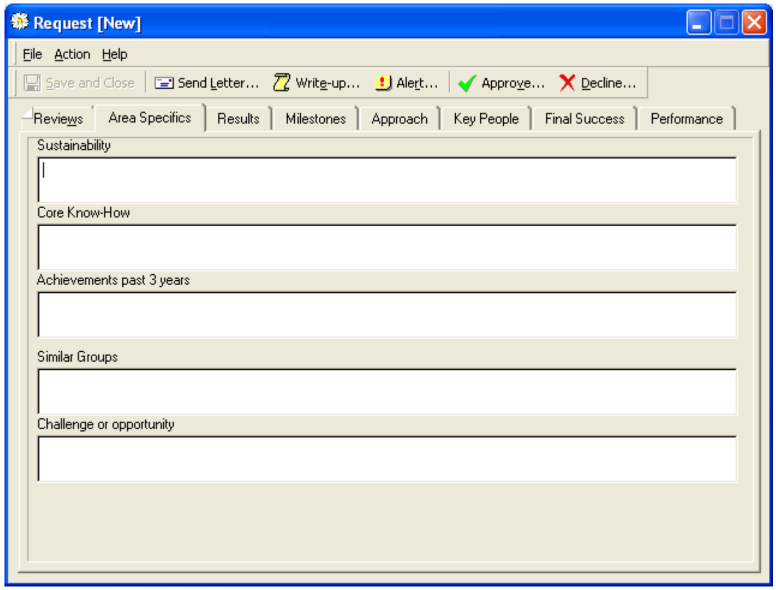
Field Name	Label
Performance_Rating	How would you rate the grant performance?
Rec_Next_Steps_Low	Next investment steps for programs rated low success
Rec_Next_Steps_Medium	Next investment steps for programs rated medium success
Rec_Next_Steps_High	Next investment steps for programs rated high success
Performance_Comments	Comments on performance
Rec_Next_Steps_Comments	Comments on recommendations

Capital Improvements

Listed below are the fields used to track and report on outcomes data for Capital Improvement grants, or grants that are used to increase efficiency or effectiveness in an organization. This Request Type contains the following tabs: Area Specifics, Results, Milestones, Approach, and Key People. These tabs contain fields that are defined in the following section.

Note: This Request Type also contains other tabs, including Final Success, Performance, Results Buying, Chance at Results, and Best Use of $. These tabs contain fields that are self-explanatory and thus are not included in this section.

Area Specifics Tab

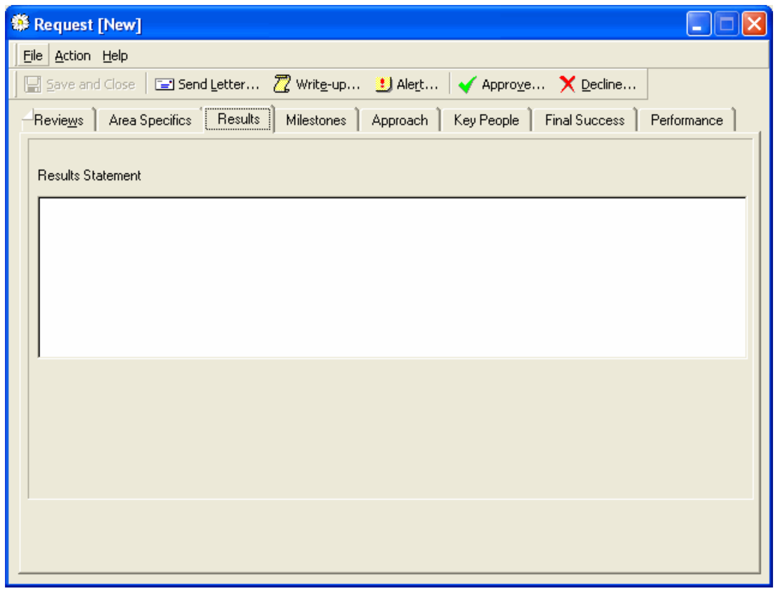


The following information describes what data should be in each field of the Area Specifics tab:

- Sustainability: This field should contain information that addresses finances (such as trends, events, and other factors that influence the organization's financial viability), and leadership (including ability to achieve success and past or anticipated replacement of key people).
- Core Know-How: This field should contain information regarding what the organization does especially well in this area. This can include knowledge, skills, and how well they are able to influence others to change their behavior or conditions.
- Achievements in past 3 years: This field should contain information describing how the organization has successfully served this group of people in the past through other programs.
- Similar Groups: This field should contain information describing how the organization is different from other groups involved in similar programs which would lead you to want to invest in them.

❖ Challenge or opportunity: This field should state the challenge or problem the grantee is trying to address in clear terms as it is experienced by their participants.

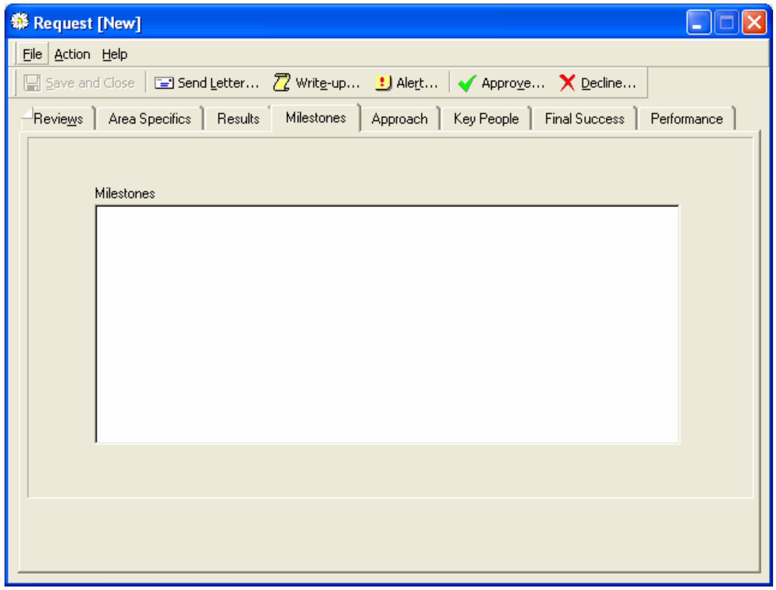
Results Tab



The following information describes what data should be in each field of the Results tab:

❖ Results Statement: This field should contain information about the desired change in behavior and/or conditions for the program participants.

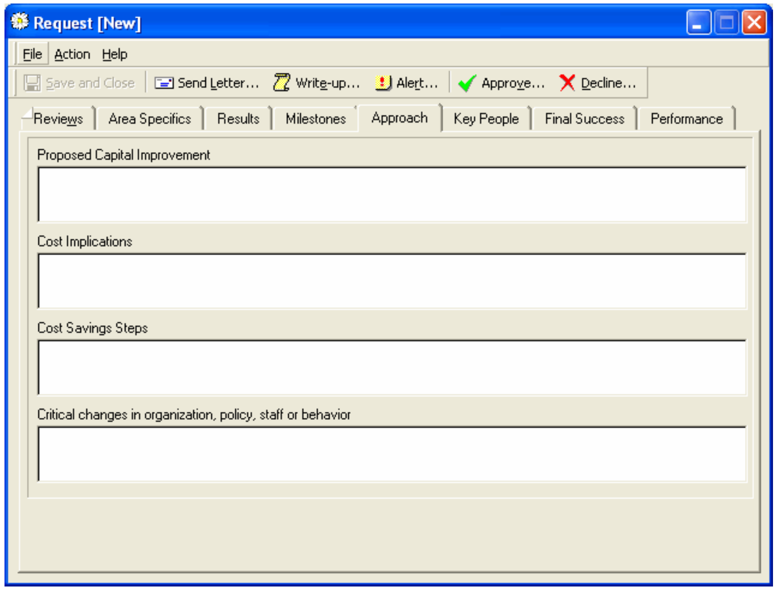
Milestones Tab



The following information describes what data should be in the field on the Milestones tab:

❖ Milestones: The organization should either list their most critical activities or simply state what they think predicts success. In addition, what will they look for to confirm the participants are on track.

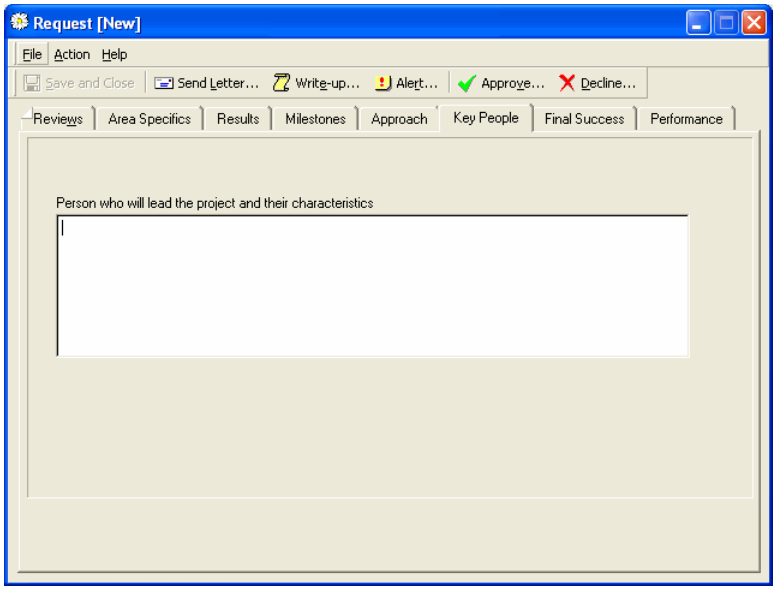
Approach Tab



The following information describes what data should be in each field of the Approach tab:

- Proposed Capital Improvement: This field should contain information from the grantee that specifically describes the capital improvement in terms of equipment, square feet of space, etc., that will be used to increase the effectiveness of the organization and/or program.
- Cost Implications: This field should contain information that explains how increased operation costs will be incorporated into the organization's annual operating budget.
- Cost Savings Steps: This field should contain specific information on what has been done or will be done to ensure the best value or lowest costs are obtained.
- Critical changes in organization, policy, staff or behavior: This field can contain a list of the organizational changes (i.e., changes in policies and practices) and the specific behavioral changes that will be needed to be successful in achieving the stated results.

Key People Tab



The following information describes what data should be in each field of the Key People tab:

- Person who will lead the project and their characteristics: This field contains information about the person leading the project and his or her qualifications.

The following Customizer fields are automatically added to any Requests for the Request Type associated with the Capital Improvements investment type. This section lists the Request tab name first, followed by the Customizer field names and labels in the tab.

Note: If you have the Reviews Module or ReviewerCONNECT, the following tabs (Results Buying, Chance at Results, Best Use of $) and associated fields appear in the Review, not the Request. If you do not have the Reviews Module or ReviewerCONNECT, the tabs and the fields will be created in the Request record.

Area Specifics

Field Name	Label
Sustainability	Sustainability
Core_Know_How	Core know-how
Past_Achievement	Achievements in past three years
Similiar_Groups	Similar groups
Issue_Challenge	Challenge or opportunity

Results

Field Name	Label
Results_Statement1	Results Statement

Milestones

Field Name	Label
Milestones	Milestones

Approach

Field Name	Label
Project_Approach	Proposed capital improvement
Cost_Implications	Cost implications
Cost_Savings_Steps	Cost savings steps
Org_Change_Required	Critical changes in organization, policy, staff or behavior

Key People

Field Name	Label
Key_Project_Lead	Person(s) who will lead the project and their characteristics

Results Buying

Field Name	Label
Targets_Clear	Are project results clear and verifiable?
Targets_Gains	Does the capital improvement project address an increase in gains for those they served?
Section_1_Score_ci	Section 1 score
Target_Ranking	Section 1 rank
Target_Notes	Comments

Chance at Results

Field Name	Label
Rating_Key_People	Does the person responsible have the attributes and capabilities that predict success?
Rating_Mission_Alignment	Is it clear the organization will implement any changes in approach or staff to be successful?
Rating_Timing	Is the timing right?
Rating_Milestones	Is the description of three to four steps predictive of success?
Section_2_Score_ci	Section 2 score
Chance_at_Results_Ranking	Section 2 rank

Field Name	Label
Chance_at_Results_Notes	Comments

Best Use of $

Field Name	Label
Use_of_Money_Reasonable	Are the requested funds reasonable for the project?
Use_of_Money_Clear	Is it clear what our funds are paying for?
Use_of_Money_Future	If there will be an increase in operating costs, is it clear how they will cover these costs in the future?
Use_of_money_savings	Have they taken appropriate cost saving steps?
Section_3_Score_ci	Section 3 score
Use_of_Money_Ranking	Section 3 rank
Overall_Score_ci	Overall score
Use_of_Money_Notes	Comments
Proposal_Overall_Ranking	Overall rank

Final Success

Field Name	Label
Final_Results_Grantee_SelfRate	Success in achieving results
Final_Results_Impediments	Impediments to results
Five_Things_Different	Five things doing differently

Performance

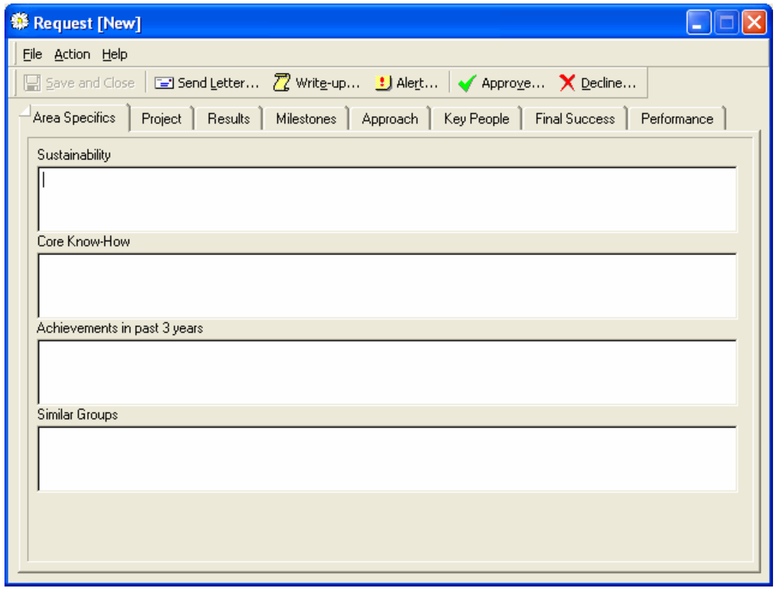
Field Name	Label
Performance_Rating	How would you rate the grant performance?
Rec_Next_Steps_Low	Next investment steps for programs rated low success
Rec_Next_Steps_Medium	Next investment steps for program rated medium success
Rec_Next_Steps_High	Next investment steps for programs rated high success
Performance_Comments	Comments on performance
Rec_Next_Steps_Comments	Comments on recommendations

Policy or Advocacy

Listed below are the fields used to track and report on outcomes data for Policy or Advocacy grants, or grants that are used to change the institutional structures, underlying conditions, or policies and practices that influence the likelihood of improved outcomes in their area of interest. This Request Type contains the following tabs: Area Specifics, Project, Results, Milestones, Approach, and Key People. These tabs contain fields that are defined in the following section.

Note: This Request Type also contains other tabs, including Final Success, Performance, Results Buying, Chance at Results, and Best Use of $. These tabs contain fields that are self-explanatory and thus are not included in this section.

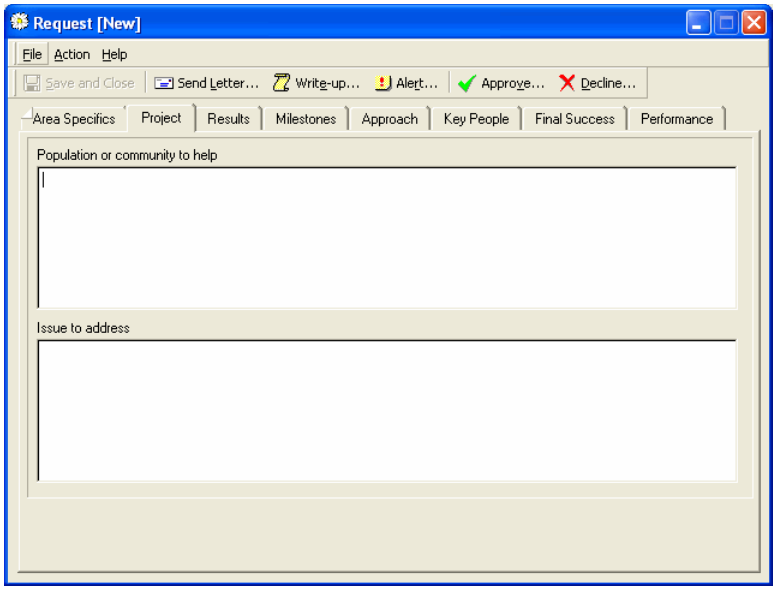
Area Specifics Tab



The following information describes what data should be in each field of the Area Specifics tab:

- Sustainability: This field should contain information that addresses finances (such as trends, events, and other factors that influence the organization's financial viability), and leadership (including ability to achieve success and past or anticipated replacement of key people).
- Core Know-How: This field should contain information regarding what the organization does especially well in this area. This can include knowledge, skills, and how well they are able to influence others to change their behavior or conditions.
- Achievements in past 3 years: This field should contain information describing how the organization has successfully served this group of people in the past through other programs.
- Similar Groups: This field should contain information describing how the organization is different from other groups involved in similar programs which would lead you to want to invest in them.

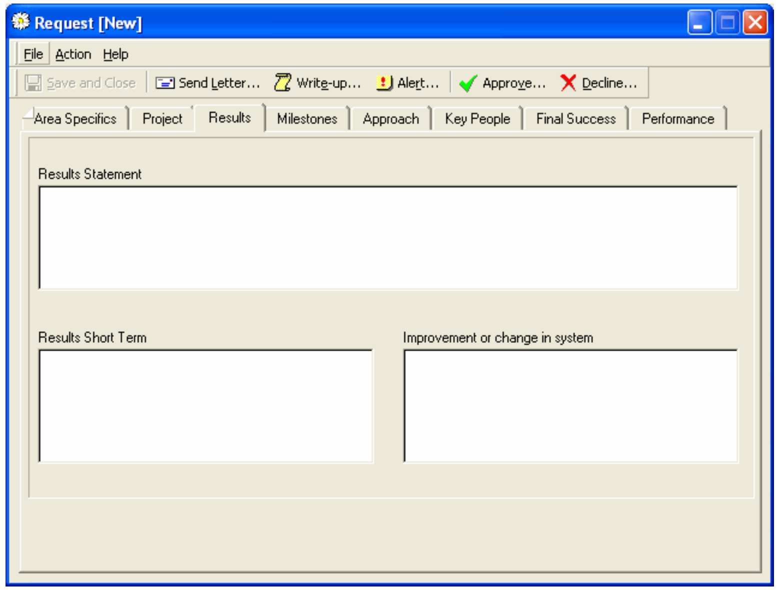
Project Tab



The following information describes what data should be in each field of the Project tab:

- Population or community to help: This field should contain information that describes the persons or groups that are not effectively served by existing programs but will benefit from this program.
- Issue to address: This field should contain important problems or constraints that people face, and funding streams, delivery mechanisms or other large factors or forces that operate independently of individuals or household behavior.

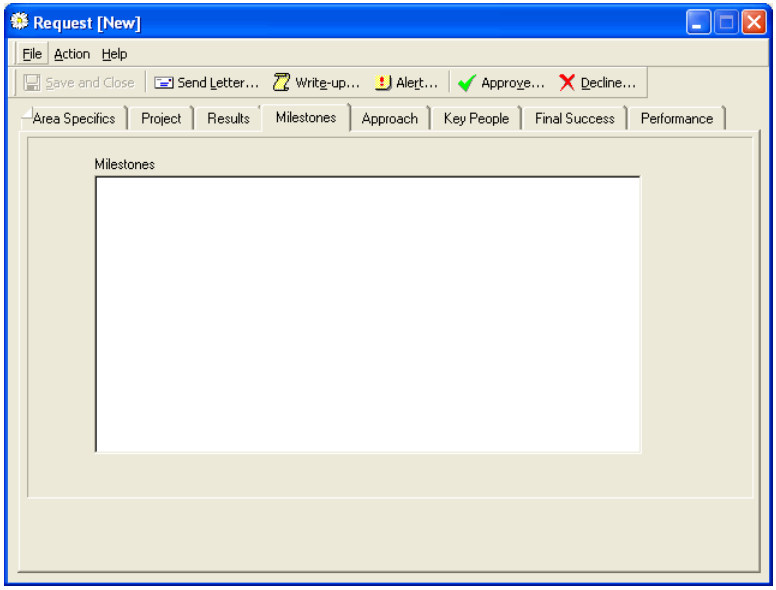
Results Tab



The following information describes what data should be in each field of the Results tab:

- Results Statement: This field should contain information about the desired change in behavior and/or conditions for the program participants.
- Results Short Term: This field should contain information that describes the three or four critical steps that will indicate that the organization's initiative is on the path to success.
- Improvement or change in system: This field should contain details on how the system will be different if the program is a success and whether this program will result in any new regulations or policy changes.

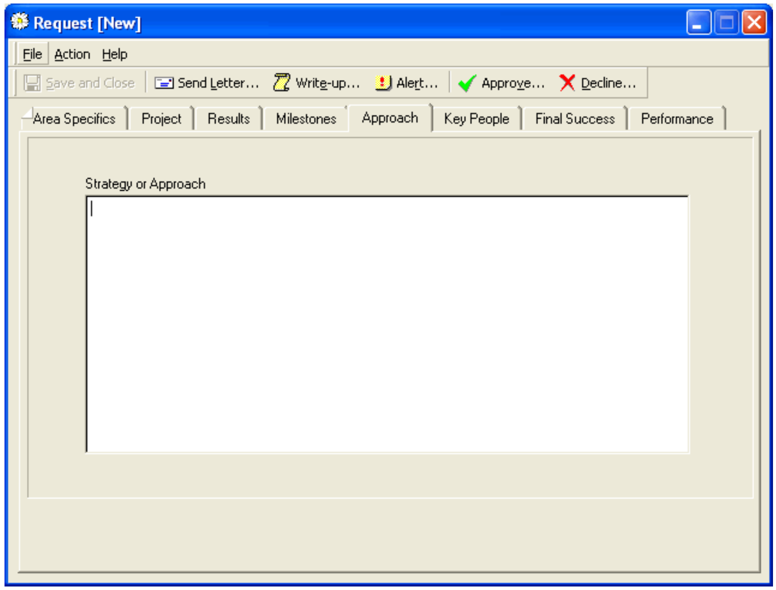
Milestones Tab



The following information describes what data should be in the field on the Milestones tab:

- Milestones: The organization can either list their most critical activities or simply state what they think predicts success. In addition, what will they look for to confirm the participants are on track?

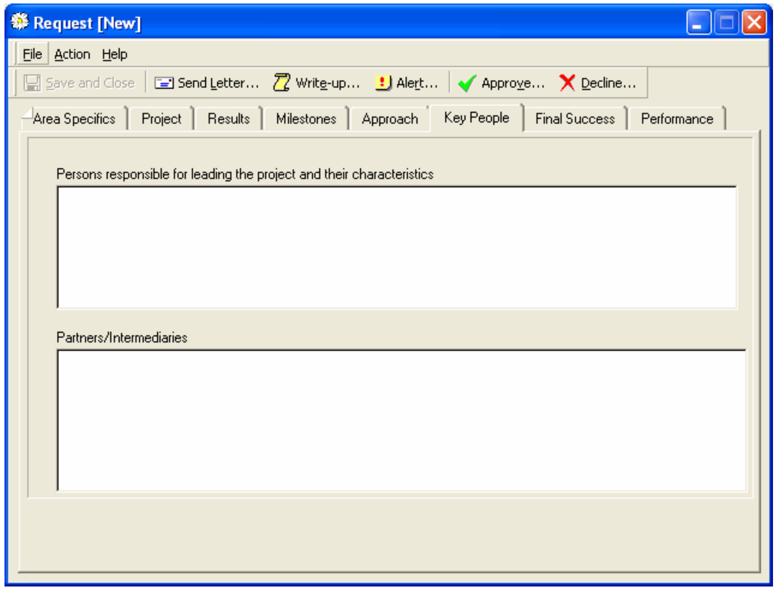
Approach Tab



The following information describes what data should be in the field on the Approach tab:

❖ Strategy or Approach: This field should contain information on the organization's particular way of solving a problem and why the organization thinks it is the best way to encourage participants and help them succeed.

Key People Tab



The following information describes what data should be in each field of the Key People tab:

- Person responsible for leading the project and their characteristics: This field contains information about the person leading the project and his or her qualifications.
- Partners/Intermediaries: The information in this field should focus on those groups who have to play a role for the organization to be successful and on their commitments to play that role.

The following Customizer fields are automatically added to any Requests for the Request Type associated with the Policy or Advocacy investment type. This section lists the Request tab name first, followed by the Customizer field names and labels in the tab.

Note: If you have the Reviews Module or ReviewerCONNECT, the following tabs (Results Buying, Chance at Results, Best Use of $) and associated fields appear in the Review, not the Request. If you do not have the Reviews Module or ReviewerCONNECT, the tabs and the fields will be created in the Request record.

Area Specifics

Field Name	Label
Sustainability	Sustainability
Core_Know_How	Core know-how
Past_Achievement	Achievements in past three years
Similiar_Groups	Similar groups

Project

Field Name	Label
Participant_Community	Population or community to help
Issue_Challenge	Issue to address

Results

Field Name	Label
Results_Statement1	Results Statement
Results_Short_Term	Results short term
New_Capacity_Improvment	Improvement or change in system

Milestones

Field Name	Label
Milestones	Milestones

Approach

Field Name	Label
Project_Approach	Strategy or approach

Key People

Field Name	Label
Key_Implementors	Person(s) responsible for leading the project and their characteristics
Key_Partners	Partners/Intermediaries

Results Buying

Field Name	Label
Targets_Clear	Are project results clear and verifiable?
Targets_Gains	Are the results reasonable to achieve the change in the system or condition they want to bring about?
Target_Level_High	Are project results set at a high enough level relative to the nature of the population or community?
Target_Approach_Effective	Do the expected results clearly show the potential effectiveness of this approach over existing ones to achieve the results?
Section_1_Score_policy	Section 1 score
Target_Ranking	Section 1 rank
Target_Notes	Comments

Chance at Results

Field Name	Label
Rating_Prior_Achievement	Are recent accomplishments in a similar area strong?
Rating_Key_People	Do key people have the attributes and capabilities that predict success?
Rating_Mission_Alignment	Is there clear alignment between the organization's mission and the project?
Rating_Milestones	Is the description of three to four critical steps and achievements predictive of success?
Rating_Partners_Resources	Are the commitments clear from partners or intermediaries?
Rating_Strategy	Is the overall strategy or method of approach logical to achieve the stated results?
Rating_Timing	Is the timing right?
Section_2_Score_policy	Section 2 score
Chance_at_Results_Ranking	Section 2 rank
Chance_at_Results_Notes	Comments

Best Use of $

Field Name	Label
Use_of_Money_Reasonable	Are the requested funds reasonable to achieve results?
Use_of_Money_Clear	Is it clear what our funds are paying for and how that affects the ability to achieve results?
Section_3_Score_Policy	Section 3 score
Use_of_Money_Ranking	Section 3 rank

Field Name	Label
Overall_Score_policy	Overall score
Use_of_Money_Notes	Comments
Proposal_Overall_Ranking	Overall rank

Final Success

Field Name	Label
Final_Results_Grantee_SelfRate	Success in achieving results
Final_Results_Impediments	Impediments to results
Five_Things_Different	Five things doing differently

Performance

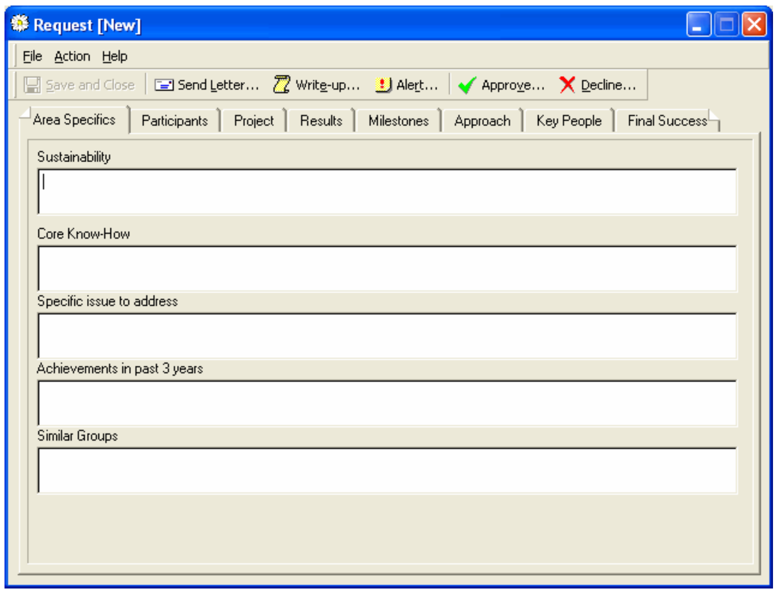
Field Name	Label
Performance_Rating	How would you rate the grant performance?
Rec_Next_Steps_Low	Next investment steps for programs rated low success
Rec_Next_Steps_Medium	Next investment steps for programs rated medium success
Rec_Next_Steps_High	Next investment steps for programs rated high success
Performance_Comments	Comments on performance
Rec_Next_Steps_Comments	Comments on recommendations

Applied Research

Listed below are the fields used to track and report on outcomes data for Applied Research grants, or grants that are used by organizations to generate, analyze, and interpret data to identify problems, causalty, and solutions. This Request Type contains the following tabs: Area Specifics, Participants, Project, Results, Milestones, Approach, and Key People. These tabs contain fields that are defined in the following section.

Note: This Request Type also contains other tabs, including Final Success, Performance, Results Buying, Chance at Results, and Best Use of $. These tabs contain fields that are self-explanatory and thus are not included in this section.

Area Specifics Tab



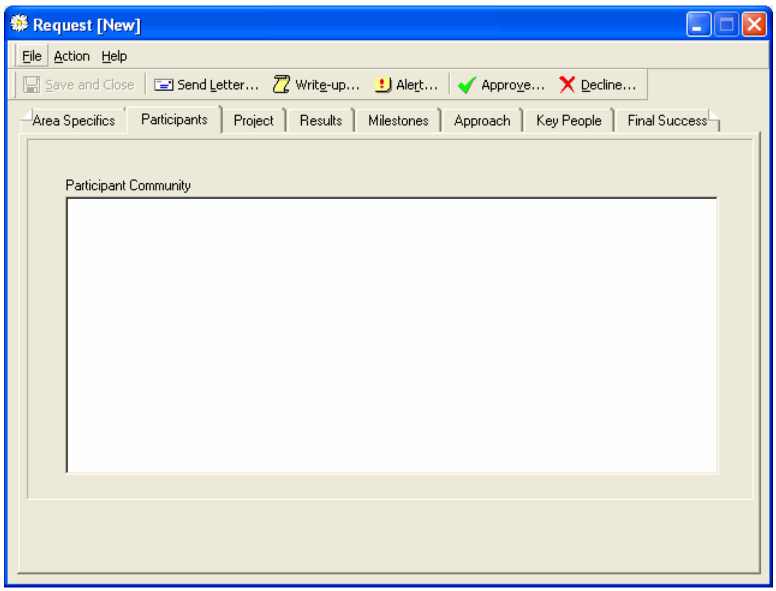
The following information describes what data should be in each field of the Area Specifics tab:

- Sustainability: This field should contain information that addresses finances (such as trends, events, and other factors that influence the organization's financial viability), and leadership (including ability to achieve success and past or anticipated replacement of key people).
- Core Know-How: This field should contain information regarding what the organization does especially well in this area. This can include knowledge, skills, and how well they are able to influence others to change their behavior or conditions.

❖ Achievements in past 3 years: This field should contain information describing how the organization has successfully served this group of people in the past through other programs.

❖ Similar Groups: This field should contain information describing how the organization is different from other groups involved in similar programs which would lead you to want to invest in them.

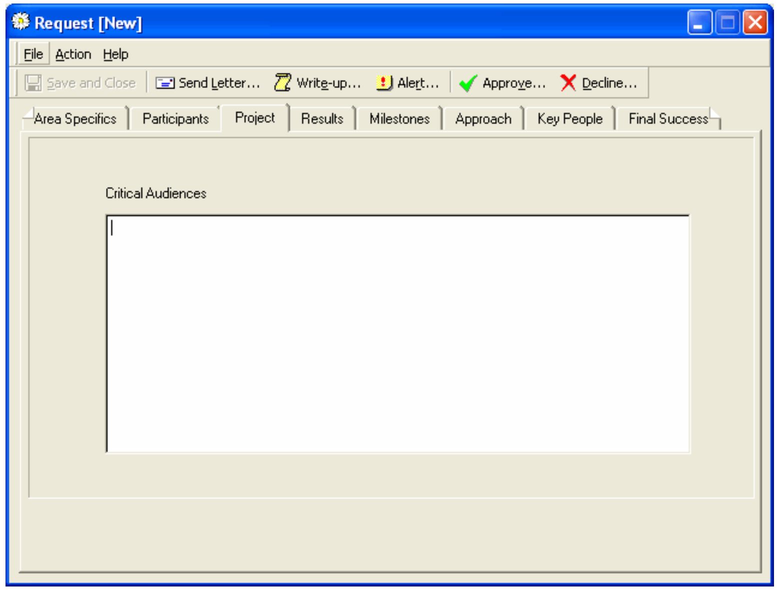
Participants Tab



The following information describes what data should be in the field on the Participants tab:

❖ Participant Community: This field should contain information that describes the persons or groups that the organization thinks is not effectively covered or well served by existing systems or conditions.

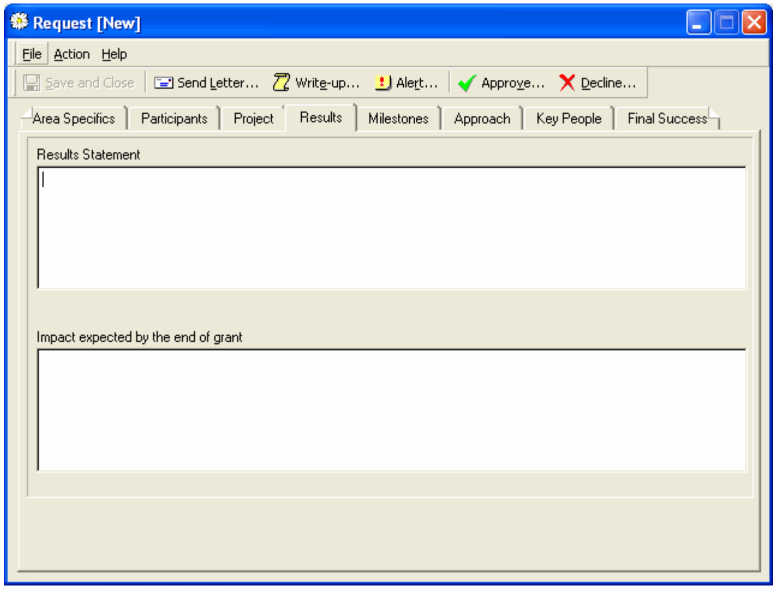
Project Tab



The following information describes what data should be in the field on the Project tab:

- Critical Audiences: This field should contain information about who will use the organization's research to change their behavior or practices.

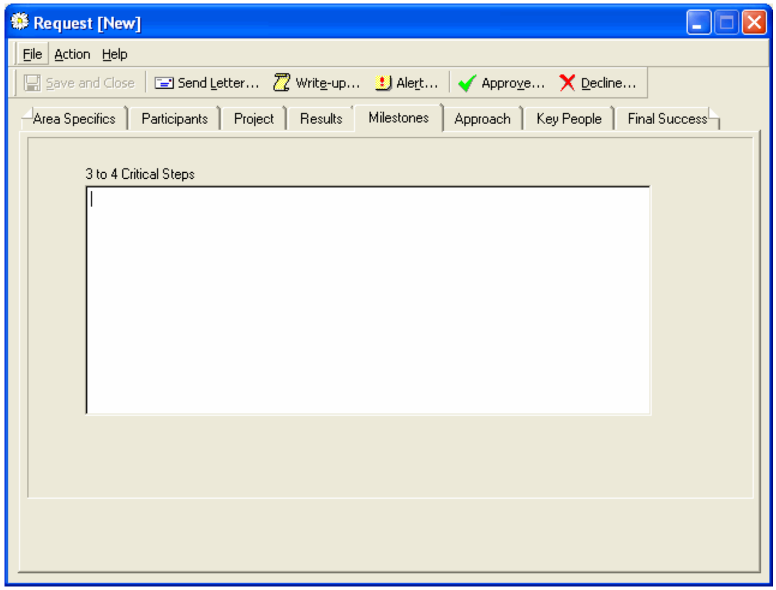
Results Tab



The following information describes what data should be in each field of the Results tab:

- Results Statement: This field should contain information about the desired change in behavior and/or conditions for the program participants.
- Impact expected by the end of grant: This field should contain information that focuses on interim results or milestones during the life of the grant that predict later success.

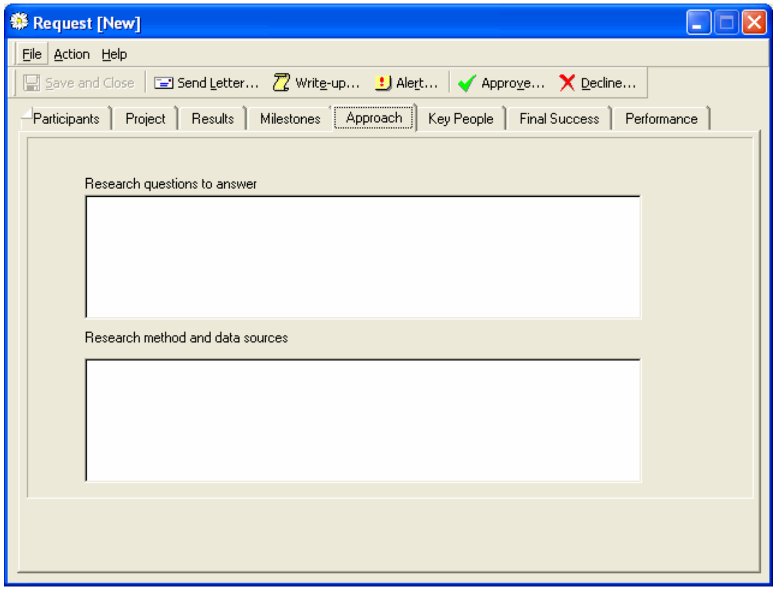
Milestones Tab



The following information describes what data should be in the field on the Milestones tab:

- 3 to 4 Critical Steps: This field should contain information that describes the three or four critical steps that will indicate that the organization's initiative is on the path to success.

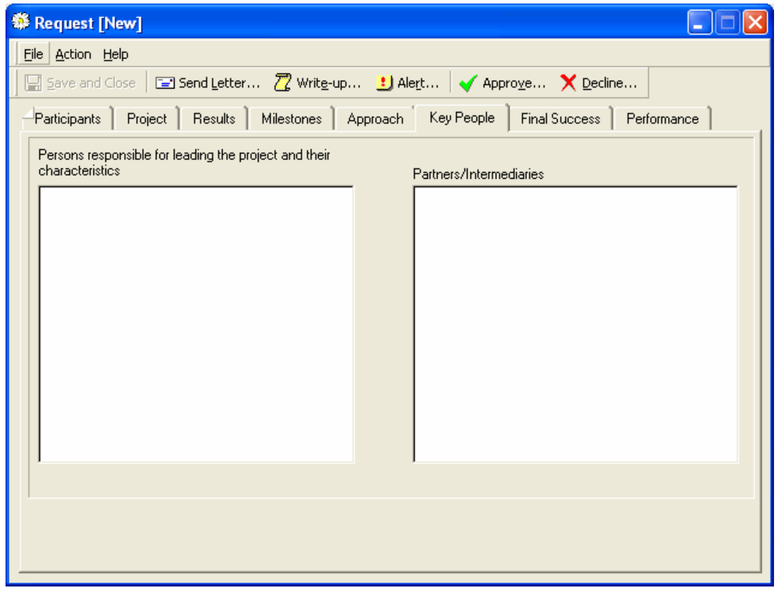
Approach Tab



The following information describes what data should be in each field of the Approach tab:

- Research questions to answer: This field should contain information on what specific research questions the organization intends to answer.
- Research method and data sources: This field should contain information on the research methods the organization intends to use and what data sources the organization will reference.

Key People Tab



The following information describes what data should be in each field of the Key People tab:

- Persons responsible for leading the project and their characteristics: This field contains information about the person leading the project and his or her qualifications.
- Partners/Intermediaries: The information in this field should focus on those groups who have to play a role for the grantee to be successful and on their commitments to play that role.

The following Customizer fields are automatically added to any Requests for the Request Type associated with the Applied Research investment type. This section lists the Request tab name first, followed by the Customizer field names and labels in the tab.

Note: If you have the Reviews Module or ReviewerCONNECT, the following tabs (Results Buying, Chance at Results, Best Use of $) and associated fields appear in the Review, not the Request. If you do not have the Reviews Module or ReviewerCONNECT, the tabs and the fields will be created in the Request record.

Area Specifics

Field Name	Label
Sustainability	Sustainability
Core_Know_How	Core know-how
Issue_Challenge	Specific issue to address
Past_Achievement	Achievements in past three years
Similiar_Groups	Similar groups

Participants

Field Name	Label
Participant_Community	Participant community

Project

Field Name	Label
Project_Audiences	Critical audiences

Results

Field Name	Label
Results_Statement1	Results Statement
Results_Short_Term	Impact expected by the end of grant

Milestones

Field Name	Label
Milestones	Three to four critical steps

Approach

Field Name	Label
Learning_Questions	Research questions to answer
Project_Approach	Research method and data sources

Key People

Field Name	Label
Key_Implementors	Persons responsible for leading the project and their characteristics
Key_Partners	Partners/Intermediaries

Results Buying

Field Name	Label
Targets_Clear	Are the project results clear and verifiable?
Target_Level_High	Are project results set at a high enough level relative to the nature of the population or community and the critical audiences who will use the research?
Target_Approach_Effective	Do the anticipated results clearly show the potential effectiveness of this approach over existing ones to achieve the results?
Section_1_Score_ar	Section 1 score
Target_Ranking	Section 1 rank
Target_Notes	Comments

Chance at Results

Field Name	Label
Rating_Key_People	Do key people have the attributes and capabilities that predict success?
Rating_Mission_Alignment	Is there clear alignment between the organization's mission, the project and the research methods to be used?
Rating_Prior_Achievement	Are recent accomplishments in a similar area strong?
Rating_Partners_Resources	If the project is dependent on partners or intermediaries for success, are the commitments from these players clear and agreed to?
Rating_Milestones	Is the description of the three to four critical steps and achievements predictive of success?
Section_2_Score_ar	Section 2 score
Chance_at_Results_Ranking	Section 2 rank
Chance_at_Results_Notes	Comments

Best Use of $

Field Name	Label
Use_of_Money_Reasonable	Are the requested funds reasonable to achieve results?
Use_of_Money_Clear	Is it clear what our funds are paying for and how it affects the ability to achieve results?
Section_3_Score_ar	Section 3 score
Use_of_Money_Ranking	Section 3 rank
Overall_Score_ar	Overall score

Field Name	Label
Use_of_Money_Notes	Comments
Proposal_Overall_Ranking	Overall rank

Final Success

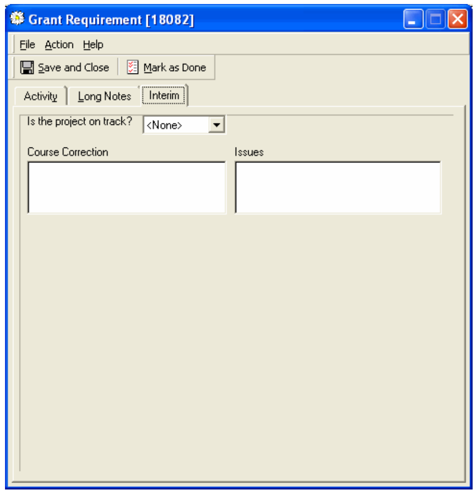
Field Name	Label
Final_Results_Grantee_SelfRate	Success in achieving results
Final_Results_Impediments	Impediments to results
Five_Things_Different	Five things doing differently

Performance

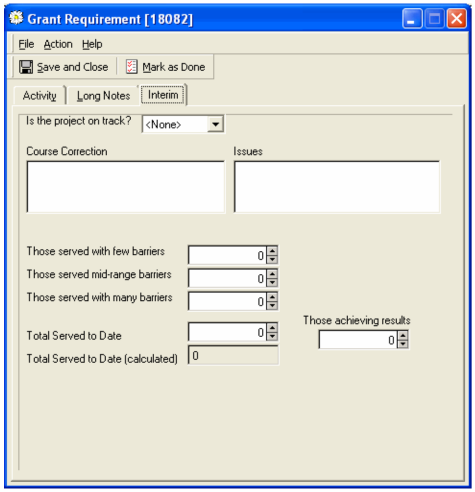
Field Name	Label
Performance_Rating	How would you rate the grant performance?
Rec_Next_Steps_Low	Next investment steps for programs rated low success
Rec_Next_Steps_Medium	Next investment steps for programs rated medium success
Rec_Next_Steps_High	Next investment steps for programs rated high success
Performance_Comments	Comments on performance
Rec_Next_Steps_Comments	Comments on recommendations

Requirement Customizer Fields

The following Customizer fields are automatically added to Requirements on the Interim tab: Is the project on track, Course Correction, and Issues, as the image below demonstrates.



Additional fields will be added to the Interim tab if you have selected the Improving Lives (Direct Service) investment type during the Outcomes Plus installation process. These fields will display for all investment types but are specific to tracking outcomes for the Improving Lives (Direct Service) investment type.



Note: In the table below, field names with an asterisk next to them are only added if you have selected the Improving Lives (Direct Service) investment type during the Outcomes Plus installation process.

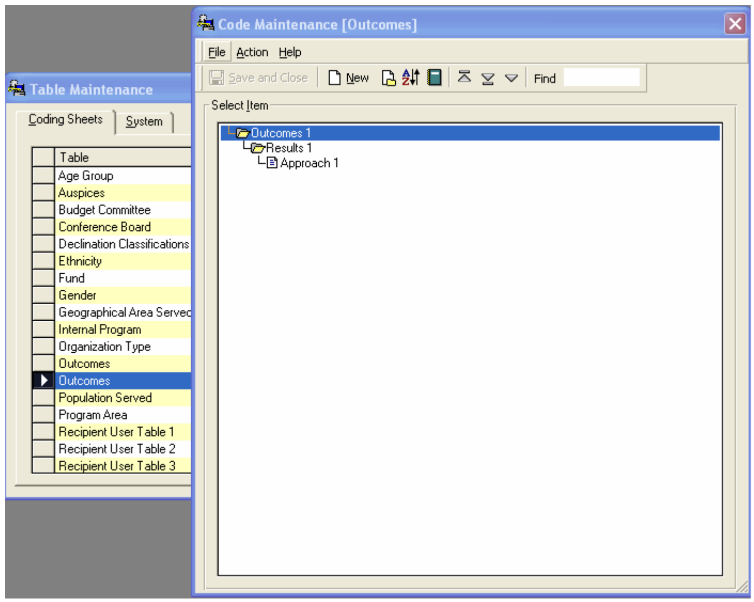
Interim This tab contains the following field names and labels.

Field Name	Label
On_Track	Is the project on track?
On_Track_Course_Correction	Course Correction
On_Track_Issues	Issues
* Interim_Num_Few_Barriers	Those served with few barriers
* Interim_Num_Mid_Barriers	Those served mid-range barriers
* Interim_Num_Many_Barriers	Those served with many barriers
* Interim_Num_Served	Total Served to Date
* Total_Served_to_Date_calculated	Total Served to Date (calculated)
* Interim_Num_Results1	Those achieving results

Code Tables

Outcomes Code Table

During the Outcomes Plus installation process, a new code table is added to your Coding Sheets called Outcomes. The image below displays the new Outcomes code table.



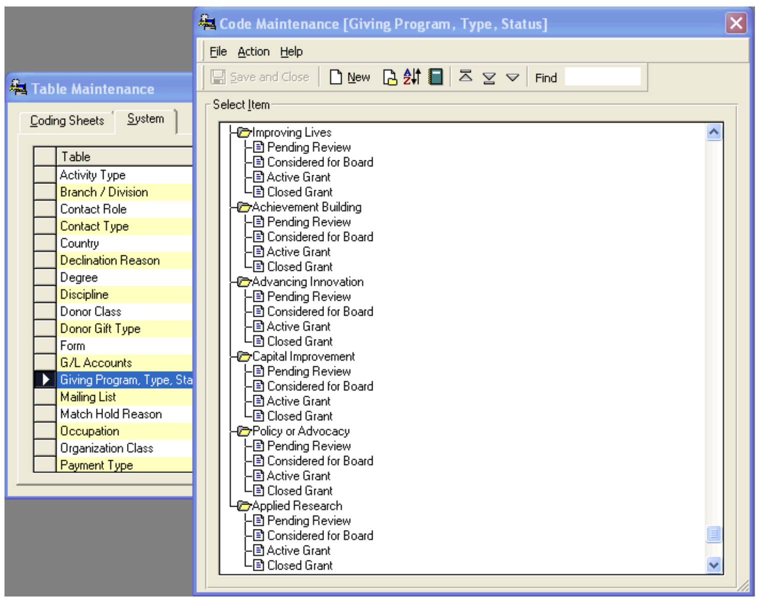
The Outcomes code table contains three levels. You can select up to five codes for each request. Once you have defined the coding sheet information, you can add the Outcomes category (code table) to the Request coding sheet. For more information, see "Maintaining Codes" on page 19 of the *GIFTS Administrator's Guide*.

Note: By default, this code table will not be added to the Request coding sheet. For more information, see "Coding Sheet Preferences" on page 61 of the *GIFTS Administrator's Guide*.

Request Giving Program, Type, Status Code Table

If you select 'New' as the Request Type to associate to the investment type when installing Outcomes Plus, the investment type and the status will be added to the Giving Program, Type and Status system code table. If you did not associate any of the investment types with a new Request Type, then no changes will be made to the code table.

The image below displays the updated Giving Program, Type, Status code table.



Outcomes Plus Review Stages

If you have the Reviews Module or ReviewerCONNECT, the following internal Review Stages are added during the Outcomes Plus installation, depending on the investment types selected during installation. If any investment types are not selected, the associated internal Review Stage is not added.

- ❖ Proposal Review - Achievement Building

- Proposal Review - Advancing Innovation
- Proposal Review - Applied Research
- Proposal Review - Capital Improvement
- Proposal Review - Policy or Advocacy
- Proposal Review - Improving Lives

For the review stages added above, the following tabs will also be added to the Review: Results Buying, Chance at Results, and Best Use of $. For a list of the specific fields with these tabs, refer to “Customizer Fields by Investment Type” on page 151.

Outcomes Plus Views and Saved Searches

Organizer Views allow you to combine and save Organizer display settings, including column headings, column widths, sorts, saved searches, and printing options. During the Outcomes Plus installation process, certain Views and associated saved searches are added to GIFTS based on the investment types selected.

The following section details the Views added for each investment type selected and the saved search applied to each View for Requests, Reviews, and Requirements. There is also a section which lists all the saved searches and the criteria for these searches.

For more information about Views, see “Using Organizer Views” on page 65 of the *GIFTS User’s Guide*. For more information about saved searches, see “Using Saved Searches” on page 99 of the *GIFTS User’s Guide*.

For more information about the Customizer fields added during the Outcomes Plus installation process, please see “Customizer Fields by Investment Type” on page 151.

Note: Blank fields under Column Heading indicate a combined column.

Request Views

The following section details the Views added for Requests and the saved search applied to each View, depending on the investment types selected during the Outcomes Plus installation process.

Important: The saved search applied to each View assumes the creation of new Request Types when setting up Outcomes Plus. If you chose to add the fields to existing Request Types, the saved search associated to each View will need to be modified manually.

Note: If you have the Reviewers Module or ReviewerCONNECT, the Views with an asterisk (*) next to them appear in the Reviews folder instead of the Requests folder.

Achievement Building View This view contains the following fields and column headings.

Field Name	Column Heading
Request: Organization, Contact, Phone	Organization
Request: Project Title	Project Title
Coding Sheet: Program Area	Program Area
Coding Sheet: Outcomes	Result Area
Request: Request Amount	Request Amount
Request: Issue Challenge	Issue or Challenge
Request: New Capacity Improvement	New Capacity
Request: Results Statement1	Results Statement
Request: Milestones	Milestones

This view includes the Achievement Building Pending saved search, which filters Requests that have a Disposition of ‘Pending’, and a Request Type of ‘Achievement Building.’

Advancing Innovation View This view contains the following fields and column headings.

Field Name	Column Heading
Request: Organization, Contact, Phone	Organization
Request: Project Title	Project Title
Coding Sheet: Program Area	Program Area
Coding Sheet: Outcomes	Results Area
Request: Request Amount	Request Amount
Request: Project Description	Project Description
Request: Issue Challenge	Challenge or Opportunity
Request: Project Approach	Project Approach
Request: Results Statement1	Results Statement
Request: Milestones	Milestones

This view includes the Advancing Innovation Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Advancing Innovation.'

Applied Research View This view contains the following fields and column headings.

Field Name	Column Heading
Request: Organization, Contact, Phone	Organization
Request: Project Title	Project Title
Coding Sheet: Program Area	Program Area
Coding Sheet: Outcomes	Result Area
Request: Request Amount	Request Amount
Request: Issue Challenge	Issue or Challenge
Request: Participant Community	Population to Help

Field Name	Column Heading
Request: Project Audiences	Project Audiences
Request: Project Approach	Research Question and Approach
Request: Results Statement1	Results Statement
Request: Results Short Term	Results Short Term
Request: Milestones	Milestones

This view includes the Applied Research Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Applied Research.'

Capital Improvement View This view contains the following fields and column headings.

Field Name	Column Heading
Request: Organization, Contact, Phone	Organization
Request: Project Title	Project Title
Coding Sheet: Program Area	Program Area
Coding Sheet: Outcomes	Result Area
Request: Request Amount	Request Amount
Request: Project Description	Project Description
Request: Issue Challenge	Issue or Challenge
Request: Project Approach	Project Approach
Request: Results Statement1	Results Statement
Request: Milestones	Milestones

This view includes the Capital Improvement Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Capital Improvement.'

Improving Lives View This view contains the following fields and column headings.

Field Name	Column Heading
Request: Organization, Contact, Phone	Organization
Request: Project Title	Project Title
Coding Sheet: Program Area	Program Area
Coding Sheet: Outcomes	Result Area
Request: Request Amount	Request Amount
Request: Issue Challenge	Issue or Challenge
Request: Participant Community	Participant Community
Request: Pct w many barriers	Percent with many barriers
Request: Results Statement1	Results Statement
Request: Milestones	Milestones

This view includes the Improving Lives Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

Policy or Advocacy View This view contains the following fields and column headings.

Field Name	Column Heading
Request: Organization, Contact, Phone	Organization
Request: Project Title	Project Title
Coding Sheet: Program Area	Program Area
Coding Sheet: Outcomes	Result Area
Request: Request Amount	Request Amount
Request: Issue Challenge	Issue or Challenge
Request: Participant Community	Participant Community

Field Name	Column Heading
Request: Project Approach	Project Approach
Request: Results Statement1	Results Statement
Request: Results Short Term	Results Short Term
Request: Milestones	Milestones

This view includes the Policy or Advocacy Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Policy or Advocacy.'

*** End of Grant Summary View (Excludes Improving Lives)** This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location, Project Title
Organization: City	
Organization: State	
Request: Project Title	
Request: Grant Amount	Grant Amount
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Outcome Addressed
Request's Coding Sheet: Outcomes	Result Area
Request: Results Statement1	Project Results
Review: Results Short Term	Results Short Term
Review: Proposal Overall Ranking	Proposal Ranking
Request: Performance Rating	End of Grant Performance
Request: Performance Comments	Performance Comments

This view includes the End of Grant Reports (Excludes Improving Lives) saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Achievement Building', 'Advancing Innovation', 'Capital Improvement', 'Policy or Advocacy', or 'Applied Research.'

*** End of Grant Summary View (Improving Lives)** This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location, Project Title
Organization: City	
Organization: State	
Request: Project Title	
Request: Grant Amount	Grant Amount
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Outcome Addressed
Request's Coding Sheet: Outcomes	Result Area
Request: Results Statement1	Project Results
Review: Proposal Overall Ranking	Proposal Ranking
Request: Performance Rating	End of Grant Performance
Request: Performance Comments	Performance Comments

This view includes the End of Grant Reports (Improving Lives) saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

*** Pending Requests with Ranking (Improving Lives)** This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	

Field Name	Column Heading
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Request: Results Num1	# Projected to Achieve
Request: Pct w many barriers	% with Many Barriers
Request: Investment per result	Investment per Result
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score il	Overall Score
Review: Section 1 Score il	Section 1 Score
Review: Section 2 Score il	Section 2 Score
Review: Section 3 Score il	Section 3 Score

This view includes the Improving Lives Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

*** Pending Requests with Ranking (Achievement Bldg)** This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant

Field Name	Column Heading
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score ab	Overall Score
Review: Section 1 Score ab	Section 1 Score
Review: Section 2 Score ab	Section 2 Score
Review: Section 3 Score ab	Section 3 Score

This view includes the Achievement Building Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Achievement Building.'

*** Pending Requests with Ranking (Adv Innovation)** This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results

Field Name	Column Heading
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score ai	Overall Score
Review: Section 1 Score ai	Section 1 Score
Review: Section 2 Score AI	Section 2 Score
Review: Section 3 Score ai	Section 3 Score

This view includes the Advancing Innovation Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Advancing Innovation.'

*** Pending Requests with Ranking (Applied Research)** This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Request: Results Short Term	Project Results Short Term
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score ar	Overall Score
Review: Section 1 Score ar	Section 1 Score
Review: Section 2 Score ar	Section 2 Score

Field Name	Column Heading
Review: Section 3 Score ar	Section 3 Score

This view includes the Applied Research Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Applied Research.'

*** Pending Requests with Ranking (Capital Improve)** This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score ci	Overall Score
Review: Section 1 Score ci	Section 1 Score
Review: Section 2 Score ci	Section 2 Score
Review: Section 3 Score ci	Section 3 Score

This view includes the Capital Improvement Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Capital Improvement.'

*** Pending Requests with Ranking (Policy)** This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Request: Results Short Term	Project Results Short Term
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score policy	Overall Score
Review: Sec1 Score policy	Section 1 Score
Review: Sec2 Score Policy	Section 2 Score
Review: Sec3 Score Policy	Section 3 Score

This view includes the Policy or Advocacy Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Policy or Advocacy.'

Portfolio Review (Improving Lives) This view contains the following fields and column headings.

Field Name	Column Heading
Grantee Organization: Name	Organization Name
Request: Project Description	Project Description

Field Name	Column Heading
Coding Sheet: Program Area	Program Area
Coding Sheet: Outcomes	Result Area
Request: Total to be served	Projected # to be served
Request: Final Num Served1	# Served
Request:Pct w many barriers	% with many barriers
Request: Results Statement1	Project Results
Request: Results Num1	Projected to achieve
Request: Final Num Achieved1	# Achieved Results
Request: Grant Amount	Grant Amount

This view includes the End of Grant Reports (Improving Lives) saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

Success Details (Improving Lives) This view contains the following fields and column headings.

Field Name	Column Heading
Request: Performance Rating	Performance Rating
Grantee Organization: Name	Org Name, Location, Project Title
Grantee Organization: City	
Grantee Organization: State	
Request: Project Title	
Coding Sheet: Outcomes	Result Area
Request: Grant Amount	Grant Amount
Request: Results Statement1	Project Results
Request: Final pct achieved	% Who Achieved
Request: Rec Next Steps High	Recommendations

Field Name	Column Heading
Request: Rec Next Steps Low	
Request: Rec Next Steps Medium	
Request: Rec Next Steps Comments	Comments
Request: Staff Person	Program Officer

This view includes the End of Grant Reports (Improving Lives) saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

Success Details (Other funding types) This view contains the following fields and column headings.

Field Name	Column Heading
Request: Performance Rating	Performance Rating
Grantee Organization: Name	Org Name, Location, Project Title
Grantee Organization: City	
Grantee Organization: State	
Request: Project Title	
Coding Sheet: Outcomes	Result Area
Request: Grant Amount	Grant Amount
Request: Results Statement1	Project Results
Request: Rec Next Steps High	Recommendations
Request: Rec Next Steps Low	
Request: Rec Next Steps Medium	
Request: Rec Next Steps Comments	Comments
Request: Staff Person	Program Officer

This view includes the End of Grant Reports (Excludes Improving Lives) saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Achievement Building', 'Advancing Innovation', 'Capital Improvement', 'Policy or Advocacy', or 'Applied Research.'

Review Views

The following section details the Views added for Reviews and the saved search applied to each View, depending on the investment types selected during the Outcomes Plus installation process

Important: The saved search applied to each View assumes the creation of new Request Types when setting up Outcomes Plus. If you chose to add the fields to existing Request Types, the saved search associated to each View will need to be modified manually.

End of Grant Summary View (Excludes Improving Lives) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location, Project Title
Organization: City	
Organization: State	
Request: Project Title	
Request: Grant Amount	Grant Amount
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Outcome Addressed
Request's Coding Sheet: Outcomes	Result Area
Request: Results Statement1	Project Results
Review: Results Short Term	Results Short Term
Review: Proposal Overall Ranking	Proposal Ranking
Request: Performance Rating	End of Grant Performance

Field Name	Column Heading
Request: Performance Comments	Performance Comments

This view includes the End of Grant Reports (Excludes Improving Lives) saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Achievement Building', 'Advancing Innovation', 'Capital Improvement', 'Policy or Advocacy', or 'Applied Research.'

End of Grant Summary View (Improving Lives) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location, Project Title
Organization: City	
Organization: State	
Request: Project Title	
Request: Grant Amount	Grant Amount
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Outcome Addressed
Request's Coding Sheet: Outcomes	Result Area
Request: Results Statement1	Project Results
Review: Proposal Overall Ranking	Proposal Ranking
Request: Performance Rating	End of Grant Performance
Request: Performance Comments	Performance Comments

This view includes the End of Grant Reports (Excludes Improving Lives) saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

Pending Requests with Ranking (Improving Lives) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Request: Results Num1	# Projected to Achieve
Request: Pct w many barriers	% with Many Barriers
Request: Investment per result	Investment per Result
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score il	Overall Score
Review: Section 1 Score il	Section 1 Score
Review: Section 2 Score il	Section 2 Score
Review: Section 3 Score il	Section 3 Score

This view includes the Improving Lives Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

Pending Requests with Ranking (Achievement Bldg) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score ab	Overall Score
Review: Section 1 Score ab	Section 1 Score
Review: Section 2 Score ab	Section 2 Score
Review: Section 3 Score ab	Section 3 Score

This view includes the Achievement Building Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Achievement Building.'

Pending Requests with Ranking (Adv Innovation) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	

Field Name	Column Heading
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score ai	Overall Score
Review: Section 1 Score ai	Section 1 Score
Review: Section 2 Score AI	Section 2 Score
Review: Section 3 Score ai	Section 3 Score

This view includes the Advancing Innovation Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Advancing Innovation.'

Pending Requests with Ranking (Applied Research) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title

Field Name	Column Heading
Request: Results Statement1	Project Results
Request: Results Short Term	Project Results Short Term
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score ar	Overall Score
Review: Section 1 Score ar	Section 1 Score
Review: Section 2 Score ar	Section 2 Score
Review: Section 3 Score ar	Section 3 Score

This view includes the Applied Research Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Applied Research.'

Pending Requests with Ranking (Capital Improve) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score ci	Overall Score
Review: Section 1 Score ci	Section 1 Score

Field Name	Column Heading
Review: Section 2 Score ci	Section 2 Score
Review: Section 3 Score ci	Section 3 Score

This view includes the Capital Improvement Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Capital Improvement.'

Pending Requests with Ranking (Policy) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Organization, Location
Organization: City	
Organization: State	
Organization: Total Grant Amount	Prior Year Grant
Request: Request Amount	Current Year Requested
Request's Coding Sheet: Program Area	Program Area
Request's Coding Sheet: Outcomes	Result Area
Request: Project Title	Project Title
Request: Results Statement1	Project Results
Request: Results Short Term	Project Results Short Term
Review: Proposal Overall Ranking	Proposal Ranking
Review: Overall Score policy	Overall Score
Review: Sec1 Score policy	Section 1 Score
Review: Sec2 Score Policy	Section 2 Score
Review: Sec3 Score Policy	Section 3 Score

This view includes the Policy or Advocacy Pending saved search, which filters Requests that have a Disposition of 'Pending', and a Request Type of 'Policy or Advocacy.'

Requirement Views

The following section details the Views added for Requirements and the saved search applied to each View, depending on the investment types selected during the Outcomes Plus installation process.

Off Track (Improving Lives) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Org Name, Location, Project Title, ID
Organization: City	
Organization: State	
Request: Project Title	
Request: ID	
Request: Project Description	Project Description
Request: Total to be served	Total to be Served
Requirement: Interim Num Served	Served to Date
Request: Results Statement1	Project Results
Request: Results Num1	Total to Achieve Results
Requirement: Interim Num Results1	Achieved Results to Date
Requirement: On Track Issues	Problems
Requirement: On Track Course Correction	Course Correction

This view includes the Off Track (Improving Lives) saved search, which has the On track field set to 'No' and a Request Type of 'Improving Lives.'

Off track (Other Investment Types) This view contains the following fields and column headings.

Field Name	Column Heading
Organization: Name	Org Name, Location, Project Title, ID
Organization: City	
Organization: State	
Request: Project Title	
Request: ID	
Request: Project Description	Project Description
Request: Results Statement1	Project Results
Requirement: On Track Issues	Problems
Requirement: On Track Course Correction	Course Correction

This view includes the Off Track (Other Funding Areas) saved search, which has the On track field set to 'No' and a Request Type of 'Achievement Building', 'Advancing Innovation', 'Capital Improvement', 'Policy or Advocacy', or 'Applied Research.'

Saved Searches

The following section details the saved searches added to GIFTS, depending on the investment types added during the installation process.

Achievement Building Pending Filters Requests that have a Disposition of 'Pending', and a Request Type of 'Achievement Building.'

Advancing Innovation Pending Filters Requests that have a Disposition of 'Pending', and a Request Type of 'Advancing Innovation.'

Applied Research Pending Filters Requests that have a Disposition of 'Pending', and a Request Type of 'Applied Research.'

Capital Improvement Pending Filters Requests that have a Disposition of 'Pending', and a Request Type of 'Capital Improvement.'

End of Grant Reports (Excludes Improving Lives) Filters Requests that have a Disposition of 'Pending', and a Request Type of 'Achievement Building', 'Advancing Innovation', 'Capital Improvement', 'Policy or Advocacy', or 'Applied Research.'

End of Grant Reports (Improving Lives) Filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

Improving Lives Pending Filters Requests that have a Disposition of 'Pending', and a Request Type of 'Improving Lives.'

Off Track (Improving Lives) Filters Requests which have the On track field set to 'No' and a Request Type of 'Improving Lives.'

Off Track (Other Funding Areas) Filter Requests which have the On track field set to 'No' and a Request Type of 'Achievement Building', 'Advancing Innovation', 'Capital Improvement', 'Policy or Advocacy', or 'Applied Research.'

Policy or Advocacy Pending Filters Requests that have a Disposition of 'Pending', and a Request Type of 'Policy or Advocacy.'

Outcomes Plus Reports

During the Outcomes Plus installation process, up to four Outcomes Plus reports are added to the GIFTS Report Library.

❖ Success Summary Grouped by Outcome and Result Area: This report provides a summary view of the number of grants in each success category and the total investment that was made. This report displays information first by outcome and then by the result area.

Success Summary Grouped by Outcome and Result Area

3/10/2009

		High Success		General Success		Low Success		Total	
Outcome	Result Area	# of Grants	Grant Dollars	# of Grants	Grant Dollars	# of Grants	Grant Dollars	# of Grants	Grant Dollars
Excellence in Education for Underserved Youth									
	Increase number of parents reading to their children regularly	1	$10,000	0	$0	1	$5,000	2	$15,000
	Total:	**1**	**$10,000**	**0**	**$0**	**1**	**$5,000**	**2**	**$15,000**
	% of Total Investment:		**67%**		**0%**		**33%**		**100%**
Health Initative for a healthier city									
	Prevention of Infant mortality	3	$97,000	2	$18,500	0	$0	5	$115,500
	Prevention of malnutrition	1	$20,000	1	$11,000	0	$0	2	$31,000
	Total:	**4**	**$117,000**	**3**	**$29,500**	**0**	**$0**	**7**	**$146,500**
	% of Total Investment:		**80%**		**20%**		**0%**		**100%**
Reduce crime in our township so that all residents report they feel save waking at night									
	Increase # of citizens who report suspicious behavior in their neighborhood	0	$0	0	$0	2	$17,500	2	$17,500
	Increase in # of teens who are off the street at night	2	$37,000	2	$35,000	0	$0	4	$72,000
	Reduce or replace # of adult theatres and stores in town	1	$5,000	0	$0	0	$0	1	$5,000
	Total:	**3**	**$42,000**	**2**	**$35,000**	**2**	**$17,500**	**7**	**$94,500**
	% of Total Investment:		**44%**		**37%**		**19%**		**100%**

- Success Summary Grouped by Result Area and Approach: This report provides a summary view of the number of grants in each success category and the total investment that was made. This report displays information first by result area and then by approach.

The following two additional reports are only added to the Report Library if the Improving Lives (Direct Service) investment type was selected during the Outcomes Plus installation process:

- Portfolio Summary Report Grouped by Outcome and Result Area: This report provides a summary view of the larger impacts that were achieved by grants. This report shows the return on investment in the number of participants who were helped and your investment for each of these participants to succeed. This report displays information first by the outcome and then by the result area.

Portfolio Summary Report Grouped by Outcome and Result Area

3/10/2009

Outcome	Result Area	Grant Count	Grant Amount	# Served	# Achieved	% Achieving	Investment Per Result
Excellence in Education for Underserved Youth							
	Increase number of parents reading to their children regularly	3	$70,000	350	246	70%	$285
	Total	**3**	**$70,000**	**350**	**246**	**70%**	**$285**
Health Initative for a healthier city							
	Prevention of Infant mortality	5	$115,500	815	577	71%	$200
	Prevention of malnutrition	2	$31,000	375	296	79%	$105
	Total	**7**	**$146,500**	**1,190**	**873**	**73%**	**$168**
Reduce crime in our township so that all residents report they feel save walking at night							
	Increase # of citizens who report suspicious behavior in their neighborhood	2	$17,500	720	250	35%	$70
	Increase in # of teens who are off the street at night	4	$72,000	570	432	76%	$167

- Portfolio Summary Report Grouped by Result Area and Approach: This report provides a summary view of the larger impacts that were achieved by grants. This report shows the return on investment in the number of participants who were helped and your investment for each of these participants to succeed. This report displays information first by result area and then by the approach used by the grantee.

You can access these reports via the Requests tab in the Reports window. For more information about reports, see “Running Reports” on page 140 of the *GIFTS User’s Guide*.

Outcomes Plus Correspondence Templates

During the Outcomes Plus installation process, up to two correspondence templates are added. These templates are added to the Writeup letter Event for Requests.

The following correspondence template is added if the Improving Lives (Direct Service) investment type was selected during the Outcomes Plus installation process:

❖ Improving Lives Review Summary: This template helps capture answers for the following question categories in relation to the Improving Lives investment type: What are we buying? What are the chances we will get the result? Is this the best use of our money? Each of these question categories have multiple questions contained within them, such as *Are targets clear and verifiable?*, *Do key people have the attributes and capabilities that predict success?*, and *Are the requested funds to achieve results reasonable for this participant group and project approach?*

Improving Lives Review Summary

Organization: Sunflower House for Youth in Distress

Proposal Number: 714
Project Title: Night classes/activities to help keep teens off the street at night.

What are we buying?	Proposal Content
1. Are targets clear and verifiable?	*What results are you committed to achieving and for how many persons?* persons will get to the following result: *How will you know when your results have been achieved? What information or evidence will you use to verify success?*
2. Are targets set at a compelling high level relative to: a) what would have happened without the program and b) the nature of participants?	*What problem are you addressing and about how many individuals within your focus area have it?* individuals have this issue: *Who are your participants? What are their characteristics and are they in any way different from the full set of people who have the problem within your geographic focus?* We plan on serving with these characteristics: *What results are you committed to achieving and for how many persons?* persons will get to the following result: *What is your projected result longevity? If some people are forecast to lose within the next five years the success they reached, what will you do to help insure the staying power of accomplishment?* *For the people you serve, what would happen without you? That is, how many people are likely to get to the result you state if you did not exist?* people would still get to this result.

The following correspondence template is added if the Achievement Building investment type was selected during the Outcomes Plus installation process:

❖ Achievement Building Review Summary: This template helps capture answers for the following question categories in relation to the Achievement Building investment type: What are we buying? What are the chances we will get the result? Is this the best use of our money? Each of these question categories has multiple questions contained within them, such as *Is the relationship clear between project results and the gains anticipated for program participants, with this new or added capacity?*, *Do the characteristics described for new staff or consultants clearly contribute to the project's success?*, and *Are the requested funds to create the new or added capacity reasonable?*

Achievement Building Review Summary

Organization: Sunflower House for Youth in Distress

Proposal Number: 714
Project Title: Night classes/activities to help keep teens off the street at night.

What are we buying?	Proposal Content
1. Will the new or added capacity to be created lead to results in at least one of the following four areas: 1. Reduced costs. 2. Increased revenue. 3. Increased results. 4. Decreased time to get results	*Define the new or added results you will achieve once the capacity is fully operational.*
2. Is the relationship clear between project results and the gains anticipated for program participants, with this new or added capacity?	*Describe the new capacity you will create in response to the challenge or opportunity defined above. Please be specific about what new capability will be in place.* *Define the new or added results you will achieve once the capacity is fully operational.*

What are the chances we will get the result?	Proposal Content
1. Do the characteristics described for new staff or consultant clearly contribute to the project's success?	*If the new capacity is dependent on either a new staff person or consultant, what characteristics are critical to their success?*
2. Is there a clear commitment from the organization to implement critical changes in policy, staffing or actions?	*What are the critical changes in organizational policy or staff behavior that must take place for this new capacity to have its greatest impact?*

For more information about generating correspondence, see "Generating Correspondence" on page 453 of the *GIFTS User's Guide*.

11 Using Link Plus for Use with Outlook

This chapter describes how to use Link Plus for use with Outlook.

In This Chapter

About Link Plus

GIFTS Link Plus for use with Outlook allows you to send Outlook email to GIFTS as a Mail Activity. If you have Document Manager, you can store the email and/or email attachments as documents. During the linking process, you can choose to link the Mail Activity with a record in GIFTS.

Depending on how Link Plus has been configured, the body of the email will be saved in the Long Notes section of the Mail Activity, or the email will be saved as a message (.msg) file in Document Manager. Also, depending on how Link Plus has been configured, email attachments may be exported into GIFTS as External Document Activities.

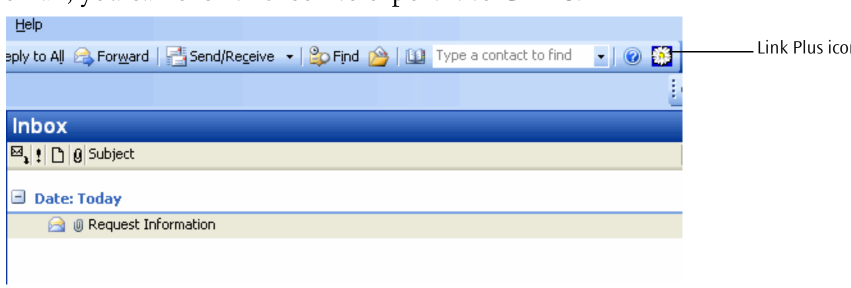
Note: The examples in this section have the body of the email saved in the Long Notes section of the Mail Activity.

For more information about configuring Link Plus, see "Setting Up Link Plus Security" on page 19.

Note: Essential GIFTS users cannot use GIFTS Link Plus.

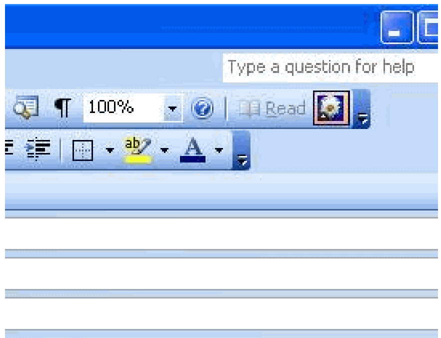
Working with the Link Plus Icon

After you install Link Plus, the Link Plus icon appears as a MicroEdge daisy on your Outlook Standard toolbar. After selecting any sent or received email, you can click this icon to export it to GIFTS.



Note: If you have the Standard toolbar hidden, the icon will not appear. Also, if Word is your default email editor and you are using Outlook 2003, 'Send to GIFTS' appears in place of the icon in the email window.

For any unsent message, you can depress the Link Plus icon to automatically export the message to GIFTS when the email is sent. The Link Plus icon is depressed after you click it. The image below displays an unsent email message in which the Link Plus icon has been depressed.



Important: An email with a depressed Link Plus icon is automatically exported to GIFTS just before the email is sent, so a Mail Activity is created in GIFTS regardless of whether or not the email is delivered to its recipient(s). If you do not want a Mail Activity in GIFTS for an undelivered email that did not reach its intended recipient(s), you must manually delete the Mail Activity in GIFTS.

Exporting Outlook Email into GIFTS

If you have both GIFTS 6.2.1 and Plus Pack 5, you can export one or more Outlook email messages to GIFTS.

To export Outlook email and create a new Mail Activity in GIFTS:

1. Select one or more email messages in Outlook.

   Note: You cannot export any unsent emails into GIFTS.

2. Click the Link Plus daisy icon in the Outlook toolbar.

Note: If you have previously exported this email to GIFTS, a message appears asking you if you want to export it again.

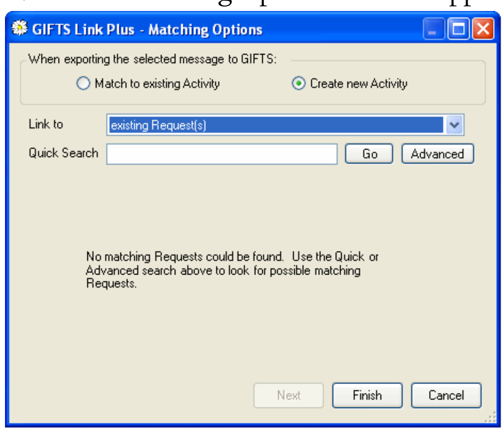
Tip: If you want to see which emails have already been exported to GIFTS, you can add the MERECID column to your Outlook Inbox. This column displays a GIFTS Activity ID if the email has already been exported to GIFTS. To add this column:

i. Right-click on the Outlook Inbox column and select 'Field Chooser'.

ii. Select 'User-defined fields in Inbox' from the Field Chooser drop-down menu.

iii. Drag and drop 'MERECID' to any Inbox column heading location.

3 If you are not currently logged into GIFTS, a GIFTS Login dialog box appears. Enter your GIFTS login information and click OK. The GIFTS Link Plus Matching Options window appears.



4 In the two radio buttons at the top of the window, select whether you would like to create a new Mail Activity, or link the email(s) to an existing Mail Activity currently in GIFTS.

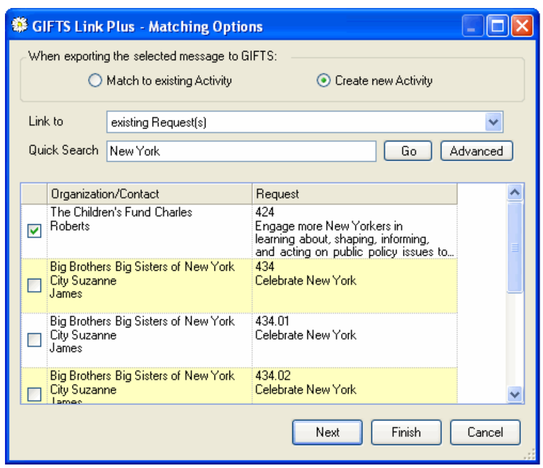
Note: If you select Match to existing Activity, your new Mail Activity will either overwrite or create a new Activity, depending on your Link Plus preferences. For more information, see "Setting Up Link Plus Security" on page 19.

5 Using the Link to drop-down menu, select the kind of existing GIFTS record to which you want to link the email(s), or if you do not want to link the email(s) to any existing GIFTS record.

Note: This field is only active if you selected the Create new Activity radio button.

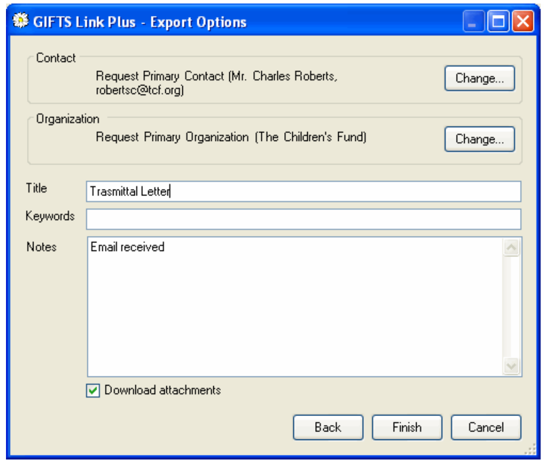
6 Enter search text in the Quick Search text box to help find the GIFTS record(s) to which you want to link the email(s), and then click Go. Possible matches display in the GIFTS Link Plus Matching Options window.

Note: For more information about using this field as well as the Advanced search functionality, refer to "Linking Email to Existing GIFTS Records" on page 253.



7 Enable the checkbox next to the GIFTS record(s) to which you want to link the email(s) and then click Next. The GIFTS Link Plus Export Options window appears.

Note: You can link an email to multiple GIFTS records (except for Activities), and you can link multiple emails to a single GIFTS record, but you cannot link multiple emails to multiple GIFTS records.



Note: Click Change next to the Contact or Organization fields to change these records. These fields are not active if you are exporting multiple emails.

8 Enter an Activity Title, Keywords, and Notes, if necessary.

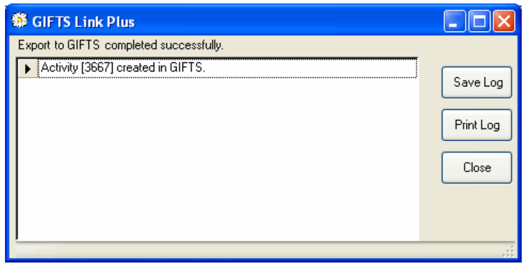
9 If you want to include any email attachment(s) in the export, enable the Download attachments checkbox.

Note: This field only appears if Link Plus is configured to allow email attachments, and your email contains an attachment. In order to download email attachments, you must have the Document Manager.

10 If you selected to match this Activity to an Existing Activity, enable the Delete existing Activity if you want this Activity to replace the existing one.

Note: This field only appears if your Link Plus preferences have been configured to allow this option. For more information, see "Setting Up Link Plus Security" on page 19.

11 Click Finish. A process monitor appears.

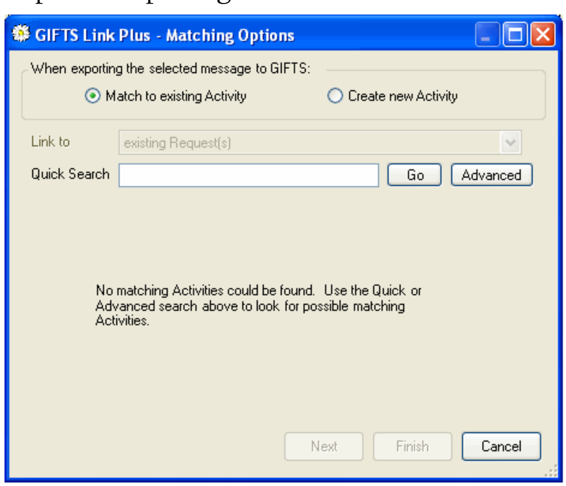


12 Click Close.

Note: You can click Save Log to save this log information as a text (.txt) file, or Print Log to print it. Please note that this is the only log created for the Mail Activity, so if you do not save it, you will have no history of it.

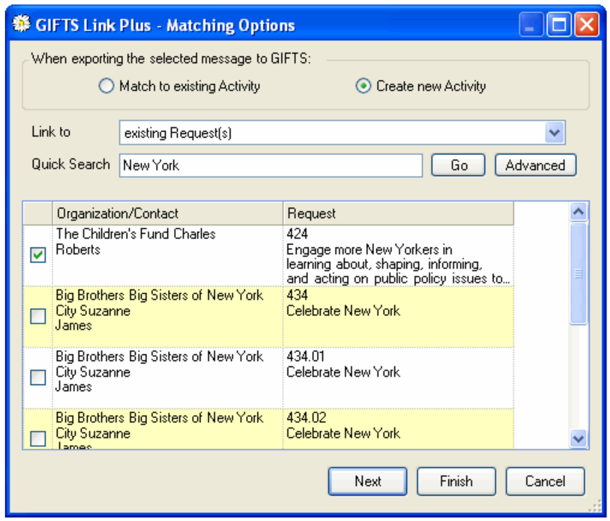
Linking Email to Existing GIFTS Records

You can use the Quick Search text box and the Advanced button on the GIFTS Link Plus Matching Options window to locate the correct GIFTS record to which you want to link the Outlook email. This section describes step 6 in "Exporting Outlook Email into GIFTS" on page 249.



Working with the Quick Search

Depending on which selection you make in the Link to drop-down menu, you can enter search criteria in the Quick Search field and click Go to display all related GIFTS records containing that criteria.



The Quick Search uses the following logic to find possible matches, depending on the selection in the Link to drop-down menu:

Existing Request(s) The functionality searches first for a Request ID that matches the search criteria. If no match is found, the functionality searches for a Request Reference Number that matches the search criteria. If no match is found, the functionality then searches for a Project Title that contains the search criteria.

Existing Organization(s) The functionality searches for any Organization Name that contains the search criteria.

Existing Contact(s) If the search criteria contains a space, the functionality uses the first word to search for a Contact First Name that matches the search criteria, and uses the second word in the search criteria to search for a Contact Last Name that matches the search criteria. If no match is found, the functionality then searches for a Contact Last Name that contains the search criteria.

Match to existing Activity If you select this radio button, the Link to drop-down menu is grayed out. The functionality searches for a Letter Subject that contains the search criteria. If no match is found, the functionality searches for a Request ID that matches the search criteria. If no match is found, the functionality then searches for Letter Keywords that contain the search criteria.

Working with Advanced Search

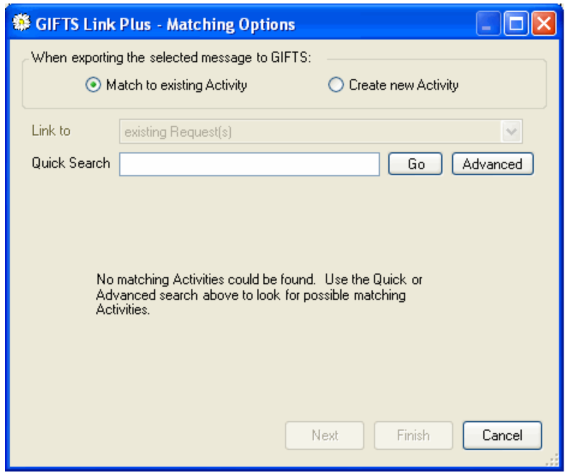
The Link Plus Advanced search functionality works similarly to the Quick Find Search functionality in GIFTS. The Advanced search functionality appears when you click Advanced on the GIFTS Link Plus Matching Options window.

To use the Advanced search functionality to export Outlook email and create a new Mail Activity in GIFTS:

1. Select one or more email messages in Outlook.
2. Click the Link Plus icon in the Outlook toolbar.

   Note: If you have previously exported this email to GIFTS, a message appears asking you if you want to export it again.

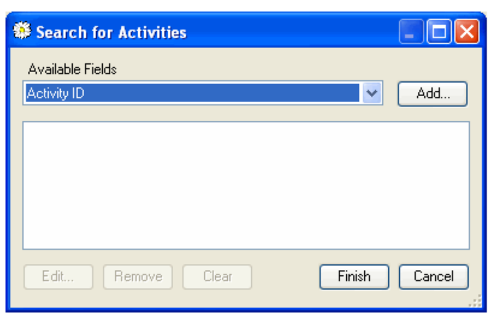
3 If you are not currently logged into GIFTS, a GIFTS Login dialog box appears. Enter your GIFTS login information and click OK. The GIFTS Link Plus Matching Options window appears.



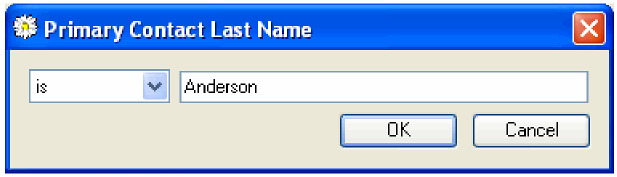
4 At the top of the window, select to link the email(s) to an existing Mail Activity currently in GIFTS if it is not already selected.

Note: Your new Mail Activity will either overwrite or create a new Activity, depending on your Link Plus preferences. For more information, see “Setting Up Link Plus Security” on page 19.

5 Click Advanced. The Search for Activities window appears.



6 After selecting a field in the Available Fields drop-down menu, click Add to add a search expression to the search criteria. A window allowing you to enter specific search parameters for that expression appears.



Note: The drop-down menu on the left side of the window allows you to enter an operator, such as “is”, “begins with” or “contains.” The field on the right side allows you to enter a value.

7 Enter search parameters for the field, and then click OK. The expression appears in the Search for Activities window.

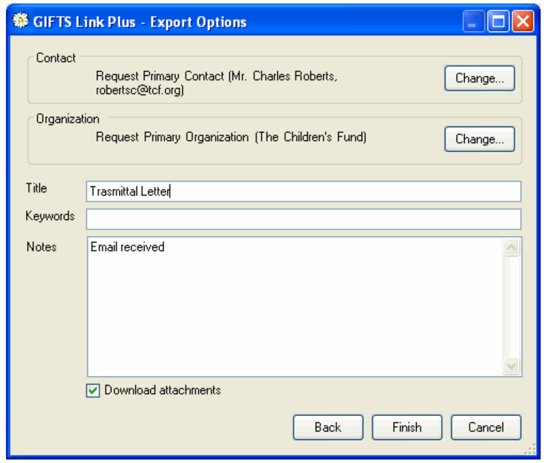
Tip: Click Edit to edit the search parameters for a selected expression, or Remove to remove any selected expression. Click Clear to remove all expressions from the search criteria.

8 Add more search expressions to the search criteria, if necessary.

9 Click Finish. Any records matching the search criteria appear.

10 Enable the checkbox next to the GIFTS record(s) to which you want to link the email(s) and then click Next. The GIFTS Link Plus Export Options window appears.

Note: You can link an email to multiple GIFTS records, and you can link multiple emails to a single GIFTS record, but you cannot link multiple emails to multiple GIFTS records.



Note: Click Change next to the Contact or Organization fields to change these records. These fields are not active if you're exporting multiple emails.

11 Enter an Activity Title, Keywords, and Notes, if necessary.

12 If you want to include any email attachment(s) in the export, enable the Download attachments checkbox.

Note: This field only appears if Link Plus is configured to allow email attachments, and your email contains an attachment. In order to download email attachments, you must have the Document Manager.

13 If you selected to match this Activity to an Existing Activity, enable the Delete existing Activity if you want this Activity to replace the existing one.

Note: This field only appears if your Link Plus preferences have been configured to allow this option. For more information, see "Setting Up Link Plus Security" on page 19.

14 Click Finish. A process monitor appears.

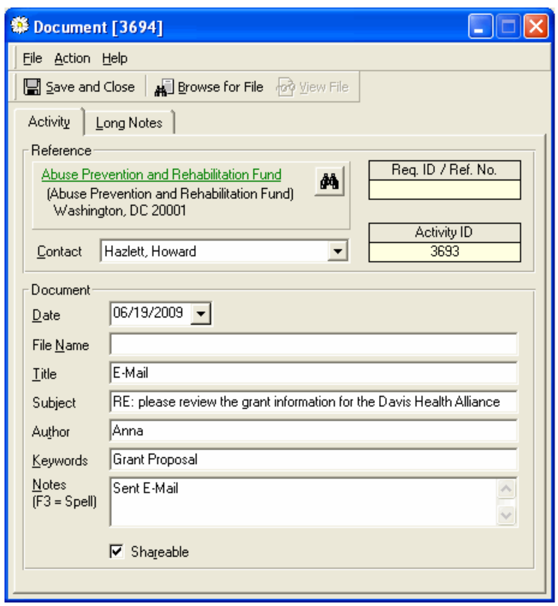
15 Click Close.

Note: You can click Save Log to save this log information as a text (.txt) file, or Print Log to print it. Please note that this is the only log created for the Mail Activity, so if you do not save it, you will have no history of it.

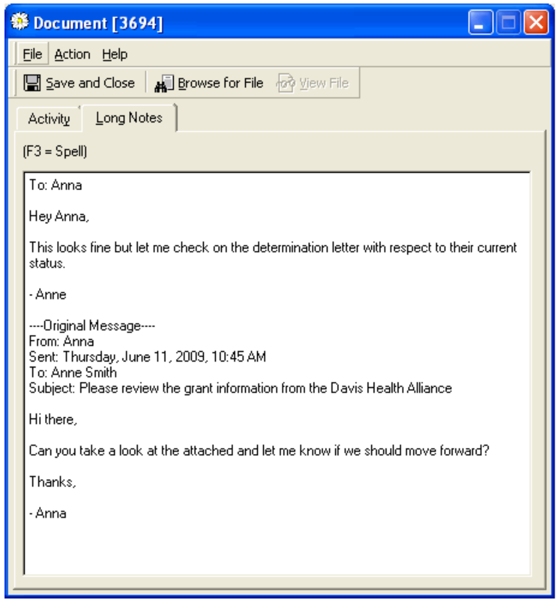
Working with Link Plus Email Activities in GIFTS

After you export an Outlook email into GIFTS, you can view the associated Mail Activity in GIFTS. The Mail Activity appears in both the Activities and Documents tabs in GIFTS.

The image below displays a Mail Activity.



If you selected the ‘Save Messages in Activity Notes’ preference in the Link Plus section of the Plus Pack Configuration utility, the email content is displayed in the Long Notes section of the Mail Activity.



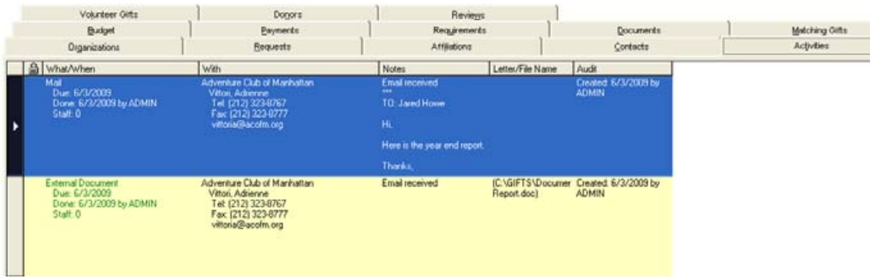
If you selected the ‘Save messages as .msg files’ preference in the Link Plus section of the Plus Pack configuration utility, the email content is attached to the Mail Activity as an .msg file. You can view the .msg file containing the email content by clicking View File on the Mail Activity, or by zooming in on the Activity and clicking the Documents tab.

For more information about Link Plus and the Plus Pack Configuration utility, see “Setting Up Link Plus Security” on page 19.

Working with Email Attachments in GIFTS

If the email contains attachments, and you selected the ‘Download Attachments’ checkbox while exporting the email, each email attachment appears in GIFTS as an External Document Activity. Below is an image showing two related Activities: a Mail Activity and an External Document

Activity. Both of these Activities were created when one email with one attachment was exported to GIFTS using Link Plus.



Both Activities display in both the Activities tab and the Documents tab.

Note: If you do not have the Document Manager, you cannot export any email attachments to GIFTS, and no External Document Activities will be created.

Appendix: Tax Status Codes

The following is a list of tax status codes and their associated descriptions and organization types. Your GIFTS Administrator can use this table when setting up tax status codes. For more information, please see "Setting Up Tax Status Codes" on page 110.

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

Tax Status Code	Description	Organization Type
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

Tax Status Code	Description	Organization Type
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)

Index

Numerics

A

B

C

D

E

F

W