11/6/15 - GIFTS Online Post Conversion Notes

On September 21, 2015, after a second attempt to migrate from GIFTS Classic to GIFTS Online the Foundation’s management committee made the decision to continue the use of GIFTS Classic because the conversion would cause serious implications to the Foundation’s business process.

The GIFTS Online web-based grants management solution uses the internet to access a hosted solution at a secure data center. MicroEdge maintains the solution and stores all grant information in a single, integrated system for a seamless way to access, search, and analyze data across all giving areas. No IT needed, and no hassle involved. The GIFTS Online system is supposed to help grant making organizations give more efficiently and effectively while streamlining processes without the risk of losing data. Letter and email templates can be set up based on organization needs, and correspondence can be generated in batch to save time. By comparison, GIFTS Online does not offer the same robust system functionality needed to run our business as does GIFTS Classic in regards to document customizability, storage, and retrieval; customizable permission sets; third party program integration, and grant ID number reset functionality. Therefore, a seamless transition is not feasible without considerable changes to our current processes and an increase in resources or a change to GIFTS Online programming logic at which time there is no intent to modify code.

We have been informed by the MicroEdge implementation team that documents generated in batch and/or changes made to documents generated in batch in GIFTS Online cannot be saved to GIFTS Online document records, but rather requires saving documents to a local or network drive; additionally, we found that dynamic date changes are not allowed unless an updated document is uploaded back into GIFTS Online. Therefore, GIFTS Online does not track all grant making in one system and does not fit the unique needs of our organization.

Our GIFTS letter and email templates are set up based on the unique needs of our organization and require the flexibility for modification and change. Because of the diversity of our grantees frequent changes are made to grant documentation. We create a high volume of grant documents generated in batch to save time and we also pre-date correspondence to allow time for an internal review process. Changes made to documents saved locally will not be reflected in the documents associated with requests in GIFTS Online unless each independent document is uploaded back to GIFTS Online causing a huge strain on employee resources. Saving batch correspondence locally also puts our document retention process and grant compliance measures at high risk because there is no way to easily keep track of documents generated in batch because they are not linked to the appropriate request, grant or organization in GIFTS Online but rather saved locally. Since centralized document management is not available in GIFTS Online for documents generated in batch all documents created for a grant are no longer stored in one centralized database location, therefore, creating the potential of losing data stored in multiple locations. Additionally, saving batch documents locally does not allow for real-time access to grant information via the internet nor ensure that all of our data is protected and backed-up by the hosting service, for secure and reliable access. We do not have a local or network document retrieval system in place to associate independent documents to grant requests because currently all of our grant documents are stored in one centralized GIFTS database location versus a local computer or network drive. In order to utilize the GIFTS online batch functionality each document produced would need to be uploaded back into the GIFTS Online system adding considerable resource allocation. We have been told that our options for document management are to either create templates that fit all our needs without editing or to batch create documents, make edits, and store locally which will disconnect documents with the grant record. A third option would be for our organization to spend a considerable amount of time on administrative tasks uploading each independent document back to GIFTS Online in order to match all grant correspondence to one record to meet our compliance requirements. Additional IT support, staff and a change to our processes would be required to do so.

During discussions with the MicroEdge implementation team we were told that modified permission sets, allowing our program staff to modify dashboards, would be available to us upon conversion. However, modifying a dashboard is only available with a grants manager permission set which also includes access to financial transactions. Our Foundation policy allows only select individuals to have control over financial transactions to maintain separation of duties to safeguard assets; therefore, program staff are not allowed access to financial transactions related to the grants they propose. Thus, GIFTS Online permission sets are not customizable to fit our user groups.

Upon evaluating financial reports and system functionality during our first test migration we discovered that the standard GIFTS Online reports utilizing the ‘As Of’ date logic did match results of reports run in GIFTS Classic. We were prompted to submit a case to the help desk and were told that the logic would be fixed with the next version release. After our second migration attempt we discovered through internal testing that the ‘As Of’ date programming error relayed to MicroEdge after our first migration attempt was not completely resolved and rolled out across all standard GIFTS Online reports utilizing the ‘As Of’ date logic. As a result, we are uncertain if all the standard reports have been amended for us to rely upon the data extracted from GIFTS Online in order to book our month end entries to our financial statements. We also determined that the export/import functionality of payment information via the A/P module caused an error upon importing data back into GIFTS Online. This bug became apparent during our first migration system testing and was to be resolved prior to our second conversion. We are not certain a fix is in place since a second attempt error occurred. We currently utilize the Reset ID number functionality at the beginning of each year to set our grant id numbers to begin with the present year i.e. 2015xxxx. This system helps our organization track grants by year. The ID number reset functionality is not available in GIFTS Online. Without this feature an alternative grant numbering system would need to be devised and implemented.

It was our understanding that GIFTS Online was easily deployed and configurable to our needs. We have found that GIFTS Online does not give us the power and robustness that we have come to expect from GIFTS Classic. We have spent a lot of time testing and troubleshooting the GIFTS Online product to make sure that we could produce the same financial data results of GIFTS Classic and have found that MicroEdge does not test features of GIFTS Online, but expects users to find errors or issues in reports or functionality. Once identified, problems are reported to the help desk and sent to a queue for attention. Depending on many factors the issues may be fixed quickly or may be tabled for changes with the release of a new version of GIFTS Online. Without having a comprehensive stable product available to remotely host all of our grant data and make it readily accessible in one place or implementing substantial changes of our current grant process a migration is not plausible at this time.