



GIFTS Online[®]

360 Reporting



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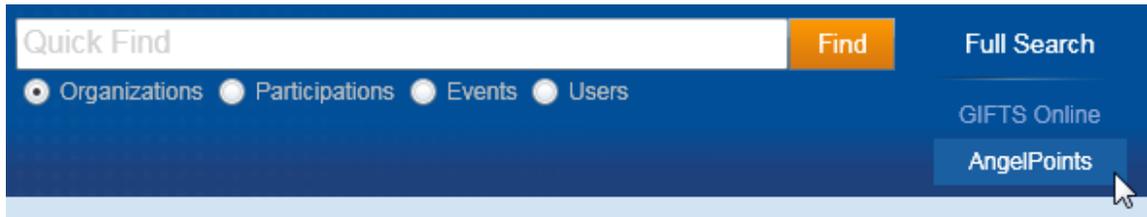
Welcome to 360 Reporting

360 Reporting leverages existing technologies to provide GIFTS Online users with access to their AngelPoints data as well.

Accessing 360 Reporting

To access 360 Reporting, first log into your GIFTS Online site.

Once logged in, you will notice new buttons under the Full Search button on the header for GIFTS Online and AngelPoints.



These are the 360 Reporting toggle buttons which allow you to switch quickly between your GIFTS Online and AngelPoints Quick Find options.

MicroEdge Support Program

As a GIFTS Online, you receive unlimited telephone consultation on the use of the software, assistance in error isolation and correction, and prompt furnishing of any available problem solutions relating to 360 Reporting.

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

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

Phone

(877) 704-3343

Fax

(212) 757-1784

Email

helpdesk@microedge.com

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

Using 360 Reporting

Managing your AngelPoints data via 360 Reporting will be very similar to GIFTS Online.

You can perform many of the same actions on your AngelPoints data as you do on your GIFTS Online data.

- Quick Searches
- Full Searches
- Advanced Searches
- Views
- Saved Searches
- Display AngelPoints data in Table and Chart dashboard parts

Setting up Quick Find

By default the Quick Find for AngelPoints will only display the Organizations radio button.

To configure Quick Find search options, click the **Quick Find** link in the Preferences section of the User menu.

This will open the Quick Find Options form.

Be sure to click the **AngelPoints** radio button at the top.

Quick Find Options

GIFTS Online AngelPoints

Organizations

Include Organizations

Organization Name contains

Tax ID <do not search>

ID <do not search>

Participations

Include Participations

Event Title contains

User Last Name <do not search>

Organization Name <do not search>

ID <do not search>

Rewards

Include Rewards

User Last Name <do not search>

Organization Name <do not search>

ID <do not search>

OK Cancel

On this form you can:

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

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

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

Also note that some of these Record Types are only shown based on your site's configuration. For example, if your site is not configured for Rewards, you would not see the Rewards Record Type here.

Record Type	Field	Search Option Default
AngelPoints Organization	Organization Name	contains
	Tax ID	<do not search>
	ID	<do not search>
Participations	Event Title	contains
	User Last Name	<do not search>
	Organization Name	<do not search>
	ID	<do not search>
Rewards	User Last Name	contains
	Organization Name	<do not search>
	ID	<do not search>
Events	Title	contains
	Organization Name	<do not search>
	ID	<do not search>
Donations	Donor Last Name	contains
	Organization Name	<do not search>
	ID	<do not search>
Users	Last Name	contains
	Email	<do not search>
	ID	<do not search>

AngelPoints Data in Dashboards

As with GIFTS Online, you can create multiple dashboards to display your AngelPoints data.

The following dashboard parts are available:

Dashboard part	Notes
Chart	Chart tool with many formatting options
Table	Displays records as a list.

The Chart Dashboard Part

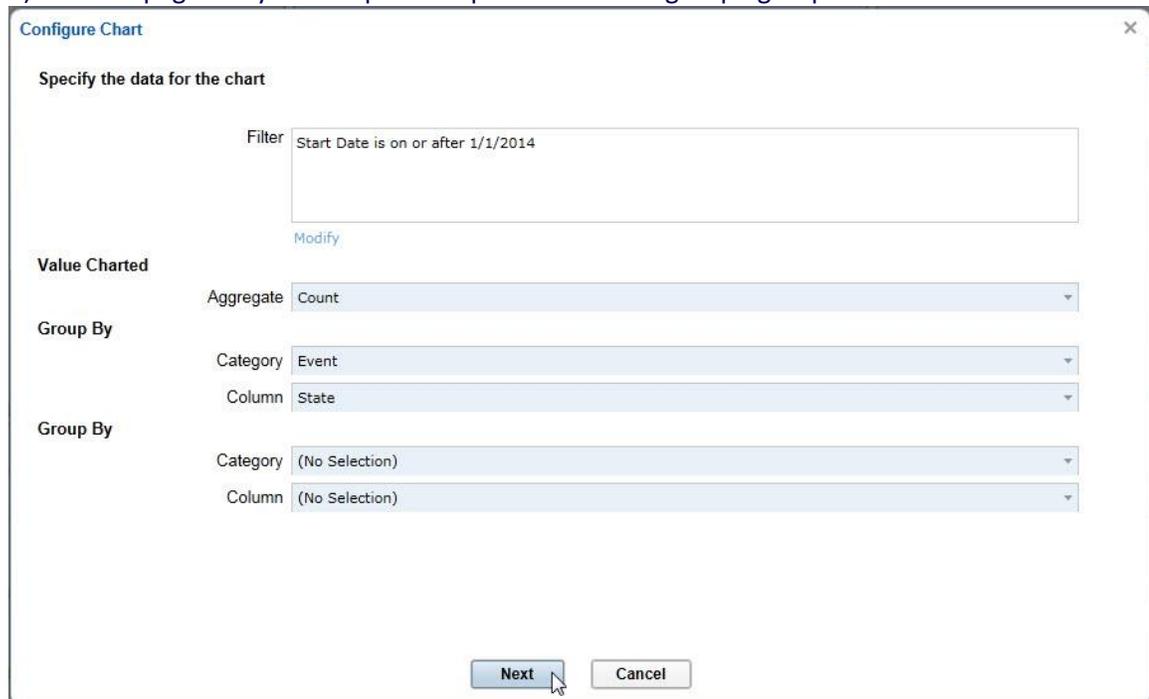
The Chart dashboard part allows you to place charts with AngelPoints data on home page of any user.

Add a Chart

To add a Chart dashboard part:

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

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



The screenshot shows a 'Configure Chart' dialog box with the following configuration options:

- Specify the data for the chart**
 - Filter: Start Date is on or after 1/1/2014
 - Modify (link)
- Value Charted**
 - Aggregate: Count
- Group By**
 - Category: Event
 - Column: State
- Group By**
 - Category: (No Selection)
 - Column: (No Selection)

At the bottom of the dialog, there are 'Next' and 'Cancel' buttons.

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



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

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

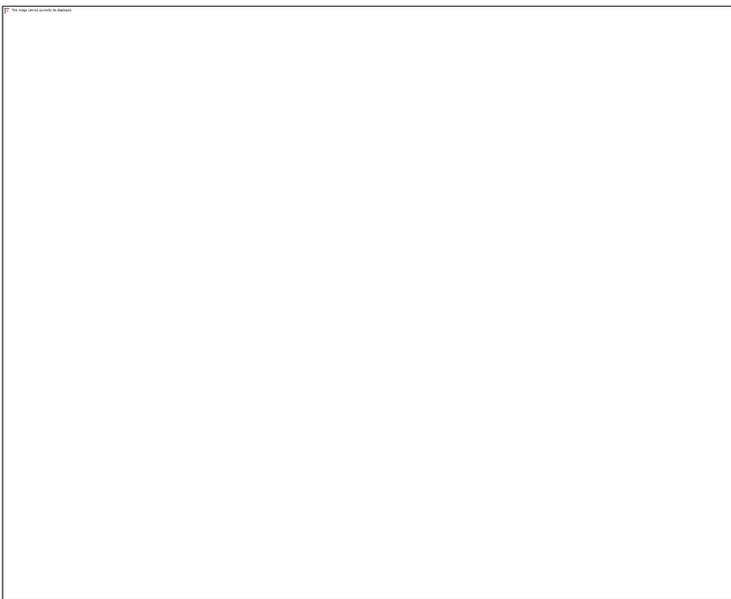


Chart Options

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

Option	Description
Page 1:	
Filter	<p>This field will be gray and read-only. It will either show the name of the current Saved Search assigned or the search logic defined.</p> <p>Clicking the Modify link below will open the standard Search form where you can choose to use the Query Builder to create/edit a search, or select from a Recent Search or Saved Search.</p> <p>If an ad hoc search is already associated with the part when the user clicks the Modify link, the search form will display with the existing criteria loaded into the query builder, so the user can make changes.</p> <p>Clicking the Select button will save any changes and return you to the Configuration form.</p> <p>NOTES:</p> <ul style="list-style-type: none"> • If a Saved View or ad hoc View is associated with a Saved Search, this read-only prompt will be populated with the name of that search, and the Modify link will be disabled. • If a Saved Search associated with a View is selected and no View parameters have been defined, the part View will automatically default to that View. (But the option to modify it will still be available.) If View information has already been defined, the user will be asked if they wish to overwrite it. • If the user changes the Record Type of the Filter, any associated View information will be cleared automatically. • You can select AngelPoints record types in the Search form using the radio buttons on the bottom left of the form.
Value Charted	<p>NOTE: Disabled if no Filters are defined.</p> <p>The calculation to be done when plotting the records on the chart. Aggregate options include Count, Sum, Average, Min and Max.</p> <p>If Sum, Average, Min, or Max is selected, Category/Column fields will give you more options. Only the numeric and currency values that can be summarized are available.</p>
Group By	<p>NOTE: Disabled if no Filters are defined.</p> <p>Lets you group the data returned by Category and Column.</p> <p>If the chart is one of the bar-type charts, a secondary Group By set of prompts will also display. This provides the user with the ability to group at a sub-level as well.</p>
Page 2:	

Option	Description
Title	Enter the title as you want it to appear on the Dashboard.
Chart Type	<p>The following chart types are available: Bar, Stacked Bar, Horizontal Bar, Horizontal Stacked Bar, Line, Step Line, Spline, Area, Pie, Donut, 3D Bar, 3D Stacked Bar, 3D Line, 3D Area, 3D Pie, 3D Donut.</p> <p>Drill down with 2D charts will open the Search Results for the record set.</p> <p>NOTE: Drill down is not supported for 3D charts.</p>
Header	Optional text that appears above the Dashboard part content just below the title.
Footer	Optional text that appears at the bottom of the part.
Formatting	<p>X Axis Label – the label across the bottom of the chart.</p> <p>Show X Axis Item Labels - uncheck this box to turn off labels for the x axis of Bar and Line charts.</p> <p>X Axis Item Label Rotation – An angle to tilt the labels that appear with the values going across the chart</p> <p>Y Axis Label – a label across the side of the chart</p> <p>Legend Position – top, bottom, left and right</p> <p>Legend Label – a label that appears above the legend bar</p> <p>Show Item Tooltips – with this enabled, hovering over an item on the chart shows the values in a tooltip</p> <p>Show Item Labels – shows labels for the items on the chart.</p> <p>Show Item Label Connectors- draws a line from the item label to the item</p> <p>Item Label Distance – the distance between the item label and the chart segment it represents.</p>

Viewing Chart Details

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

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

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

Exporting Charts to Excel

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

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



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

Available Export formats include:

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

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

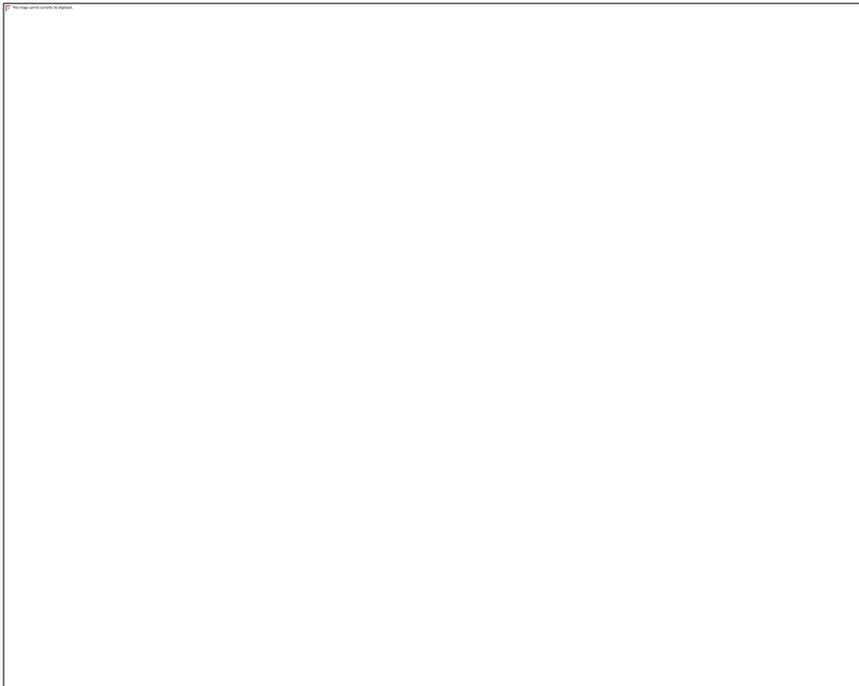
The Table Dashboard Part

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

Adding a New Table Dashboard Part

To add a new Table dashboard part:

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



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



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

- The field will display the name/criteria of the current search.
- The **Modify** link will open a version of the Search popup.
- This version of the popup differs from the standard in the following ways:
 - o The Search button is relabeled **Select**.
- If you choose a Saved Search or click **Select**, the search popup will close and the Filters for the dashboard part will be updated accordingly.
 - o Note that if the user changes the Record Type here, then the View selection (described below) will be reset to “(defaults)”.

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

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

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

The Table dashboard part will include the following options:

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

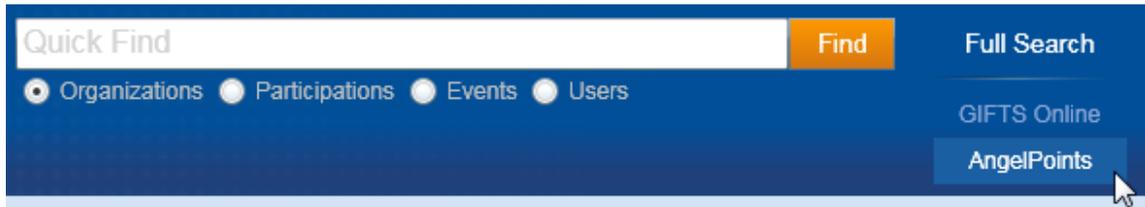
Searching for AngelPoints Data

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

Using Quick Find

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

To use Quick Find to locate AngelPoints data, first make sure the AngelPoints toggle is selected.



The screenshot shows a search interface with a blue header. On the left, there is a search input field with the placeholder text "Quick Find". To the right of the input field is an orange button labeled "Find". Below the input field are four radio buttons: "Organizations" (selected), "Participations", "Events", and "Users". On the right side of the header, there are three buttons: "Full Search", "GIFTS Online", and "AngelPoints". A mouse cursor is pointing at the "AngelPoints" button.

You can then enter a search value in the field, select a record type from the radio buttons displayed, and click the **Find** button. You can also press **Tab** or **Enter** to begin the search.

Full Search

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

- The **Query Builder** to create a new search or Ad Hoc report
- **Recent Searches** to access a list of recent searches in chronological order
- **Saved Searches** to access a list of saved searches by record category type
- **Advanced Search** to fine tune a query by manually adding filters, conditions, and parameters.

For 360 Reporting users, the Full Search form also allows you to switch between **GIFTS Online** and **AngelPoints** databases in the lower left.

The screenshot shows the 'Full Search' window with the following elements:

- Navigation:** Three radio buttons at the top: 'Query Builder' (selected), 'Recent Searches', and 'Saved Searches'.
- RECORD TYPES:** A list on the left with 'AngelPoints Organizations' selected. Other options include 'AngelPoints Participations', 'AngelPoints Rewards', 'AngelPoints Events', and 'AngelPoints Users'.
- Filters:** A central area with two filter rows:
 - Row 1: 'Area of Focus' field with a dropdown set to 'is' and a text input containing '<any>'. Includes '+' and 'x' icons.
 - Row 2: 'Tax ID' field with a dropdown set to 'is' and an empty text input. Includes '+' and 'x' icons.
- Database Selection:** Two radio buttons at the bottom left: 'GIFTS Online' and 'AngelPoints' (selected).
- Actions:** 'Add Filters', 'Reset', and 'Advanced' links at the bottom center; 'Search' and 'Cancel' buttons at the bottom right.

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

Linking Organizations

For 360 Reporting users, reporting all their giving to a particular organization means establishing a 1-to-1 link between each AngelPoints organization record and matching GIFTS Online Organization record. Some AngelPoints organizations will already be represented in the GIFTS Online database; others will need to have a new GIFTS Online organizations record created.

Linking AP Organizations to GIFTS Online

To perform this function, a new menu item labeled **Link AngelPoints Organizations** is available in the **Launch** menu in GIFTS Online.

NOTE: Only users with the Grants Manager role will have access to this option.

This will open the Link AngelPoints Organization page, detailed below.

The Link AngelPoints Organization Page

The Link AngelPoints Organization page will open.

The screenshot displays the 'Link AngelPoints Organizations' page. At the top, there is a navigation bar with a search bar and links for 'Requests', 'Organizations', and 'Contacts'. Below the navigation bar, the page title is 'AngelPoints Organizations' and 'Link AngelPoints Organizations'. A table lists the following organizations:

Organization Name	EIN/Tax ID	Street Address	City	State	Postal Code
March of Dimes Maryland	131846366	175 W. Ostend St., Suite C	Baltimore	MD	21230
N/A		2641 S CALUMET	CHICAGO	IL	60616-2901
ASSOCIATED CATHOLIC CHARITIES INC	520591538	1966 GREENSPRING DR STE 200	TIMONIUM	MD	21093-4164
THE UNITED WAY OF CENTRAL MARYLAND INC	520591543	100 SOUTH CHARLES STREET	BALTIMORE	MD	21201-2725
SPECIAL OLYMPICS MARYLAND INC	237089144	3701 COMMERCE DR STE 103	BALTIMORE	MD	21227-1651

At the bottom of the page, there is a footer with a dashboard overview showing 'Dashboard', 'Arts & Culture', and 'Link AngelPoints Organi'.

The main body of the page is taken up by a Workspace-style grid listing all records in the AngelPoints database that are **not** linked to a GIFTS Online Organization.

Check boxes on the left allow you to select one or more unlinked AngelPoints Organization.

MicroEdge GIFTS Online

Quick Find Find Full Search

Requests Organizations Contacts

Welcome, Miri Linsmayer

GIFTS Online AngelPoints

Link to GIFTS Online

AngelPoints Organizations

Link AngelPoints Organizations

Select All | Clear All 3 items selected.

<input type="checkbox"/>	Organization Name	EIN/Tax ID	Street Address	City	State	Postal Code	Contact Name	ID
<input type="checkbox"/>	ASSOCIATED CATHOLIC CHARITIES INC	520591538	1966 GREENSPRING DR STE 200	TIMONIUM	MD	21093-4164		14200004
<input type="checkbox"/>	THE UNITED WAY OF CENTRAL MARYLAND INC	520591543	100 SOUTH CHARLES STREET	BALTIMORE	MD	21201-2725		14200005
<input checked="" type="checkbox"/>	SPECIAL OLYMPICS MARYLAND INC	237089144	3701 COMMERCE DR STE 103	BALTIMORE	MD	21227-1651		14200006
<input checked="" type="checkbox"/>	RONALD MCDONALD HOUSE CHARITIES OF BALTIMORE INC	521184957	635 W LEXINGTON ST	BALTIMORE	MD	21201-1546		14200007
<input checked="" type="checkbox"/>	CIVIC WORKS INC	521925614	2701 SAINT LO DRIVE	BALTIMORE	MD	21213-1100		14200008
<input type="checkbox"/>	MOVEABLE FEAST INC	521663825	3236 EASTERN AVE	BALTIMORE	MD	21224-4012		14200009
<input type="checkbox"/>	BALTIMORE TREE TRUST INC	264031411	PO BOX 26202	BALTIMORE	MD	21210-0102		14200010
<input type="checkbox"/>	March of Dimes Fdn - NATIONAL OFFICE	131846366	1275 MAMARONECK AVE	WHITE PLAINS	NY	10605-5201		14200011
<input type="checkbox"/>	GREATER DC CARES INC	521625585	SUITE 150	WASHINGTON	DC	20005-0000		14200012
<input type="checkbox"/>	NATIONAL ARBOR DAY FOUNDATION	237169265	211 N 12TH ST STE 501	LINCOLN	NE	68508-1411	GARY DEEMER	14200014
<input type="checkbox"/>	MARYLAND FOOD BANK INC	521135690	2200 HALETHORPE FARMS RD	BALTIMORE	MD	21227-4551		14200015
<input type="checkbox"/>	JUNIOR ACHIEVEMENT OF CENTRAL MARYLAND	520688275	10711 RED RUN BLVD STE 110	OWINGS MILLS	MD	21117-5138		14200016
<input type="checkbox"/>	HABITAT FOR HUMANITY OF THE CHESAPEAKE INC	521226188	3741 COMMERCE DR STE 309	ARBUTUS	MD	21227-1664		14200017
<input type="checkbox"/>	DUCK UNLIMITED INC	320113436	1 WATERFOWL WAY	MEMPHIS	TN	38120-2351	MICHAEL TURNER	14200018
<input type="checkbox"/>	KENNEDY KRIEGER INSTITUTE INC	521524965	707 N BROADWAY	BALTIMORE	MD	21205-1832		14200019
<input type="checkbox"/>	AMERICAN NATIONAL RED CROSS	530196605	17TH AND D STS NW	WASHINGTON	DC	20006-0000		14200020
<input type="checkbox"/>	PARKS & PEOPLE FOUNDATION INC	521349346	800 WYMAN PARK DR STE 10	BALTIMORE	MD	21211-2821		14200021
<input type="checkbox"/>	PGA TOUR INC	520999206	100 PGA TOUR BLVD	PONTE VEDRA BEAC	FL	32082-3046	JEANNE LIGHTCAP CONTROLLER	14200022

50 First Previous Page 1 of 45 Next Last Refresh Displaying 1 to 50 of 2231 items

Dashboard Link AngelPoints Organi

You can then select one or more of the records and click the **Actions > Link to GIFTS Online** button.

Link to GIFTS Online

Once you click Link to GIFTS Online, the following form is displayed.

Organization - AngelPoints
THE UNITED WAY OF CENTRAL MARYLAND
INC
100 SOUTH CHARLES STREET
BALTIMORE, MD 21201-2725
520591543, AP ID 14200005

1 / 4

Link this AngelPoints Organization to:

None - do not link this to GIFTS Online now

A new GIFTS Online Organization

Back Link & Next Skip Close

This form allows you to examine each AngelPoints Organization in turn and do one of the following:

- Select None – do not link this to GIFTS Online now
- Create a new GIFTS Online organization and populate it with data from AngelPoints
- Link the AngelPoints Organization record to an existing GIFTS Online Organization record which the system suggests as a match.
- Link the AngelPoints Organization record to an existing GIFTS Online Organization record which you search for using the magnifying glass icon and select.

Click **Link & Next** when you are ready to move on to the next record.

Alternatively, you can use the **Skip** button to move forward without establishing a link or use the **Back** button to go to the previous record.

Once at the last record, click the **Link & Close** button to complete the process.

Clicking the **X** button will close the form without establishing a link for the current record and any records not yet reviewed. You will be prompted for confirmation.

Linked organizations will have a new AngelPoints contact card displayed when viewing their organization details.

The example below shows an organization that was created from AngelPoints data.

The screenshot shows the 'Organization - (48) CIVIC WORKS INC' page in GIFTS Online. The interface includes a top navigation bar with 'New' and 'Actions' buttons, and a toolbar with 'Set Alert', 'Tax Status Verify', 'Research GuideStar', 'Delete', 'Generate E-mail', and 'Generate Letter'. A left sidebar contains a 'DETAIL' menu with 'Organization', 'Legal Status', 'Background', 'Wire Transfer', 'Coding', and 'Staff Info', and a 'RELATED' menu with 'Requests', 'Payments', 'Requirements', 'Documents', 'Activities', and 'Affiliations'. The main content area is divided into two sections: 'Organization' and 'Legal Status'. The 'Organization' section contains fields for Name (CIVIC WORKS INC), Address (2701 SAINT LO DRIVE), City (BALTIMORE), State (MD), Postal Code (21213-1100), Country (<No Selection>), Phone, Fax, E-mail, and WWW. The 'Legal Status' section contains fields for Legal Name, Tax ID (521925614), Registration Date, Financial Report Date, Notes, Charitable Organization (checkbox), Cumulative Index Revision / Page No., Last Verified By, Next Verification On, and Tax Statures (<No Selection>). A 'PRIMARY CONTACT' section on the right shows 'None' and a linked 'AngelPoints ORGANIZATION' card with details: CIVIC WORKS INC, 2701 SAINT LO DRIVE, BALTIMORE, MD 21213-1100, 521925614, AP ID 14200008. At the bottom, there are 'Save & Close', 'Save', and 'Cancel' buttons. The taskbar at the very bottom shows the dashboard and the current organization record.

Once all your AngelPoints organizations have been linked to GIFTS Online organizations, you will be able to perform GIFTS Online queries using the following filters.

- AngelPoints Organization ID
- AngelPoints Area of Focus
- AngelPoints Contact Name

You will be able to include GIFTS Online Organization fields in your AngelPoints Views and Reports (where there is a relation to the AngelPoints Organization Record type), and AngelPoints Organization fields in your GIFTS Online Views and Reports (when there is a relation to the GIFTS Online Organization record).

You can use both AngelPoints and GIFTS Online fields in the same dashboard parts.