



Customizing GIFTS: Codes and Fields

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Session Description

Talk about custom reporting! Did you know you can add **code tables** and **fields** to GIFTS to truly customize your system and reports? A look at **custom coding** and using the **Customizer** to add all types of **fields** to your database. No programming knowledge required!

Note: some functionality not available in Essential GIFTS

Agenda

- Code Tables
- Customizer Fields
- Comparing Code Tables and Customizer Fields
- Choosing the Right Approach for *Your* Organization



Code Tables

Code Tables

- Part of MicroEdge's "Open Classification System"
- Provide categories to consistently classify data
- Enable you to define codes in each category
- Can be applied to:
 - Organizations
 - Requests
 - Contacts
- Drive queries and reporting

Three Types of Code Tables

1. Standard

- Pre-defined and delivered by MicroEdge
- Populate dozens of standard reports
- Satisfy many organizations' reporting needs

2. User Defined

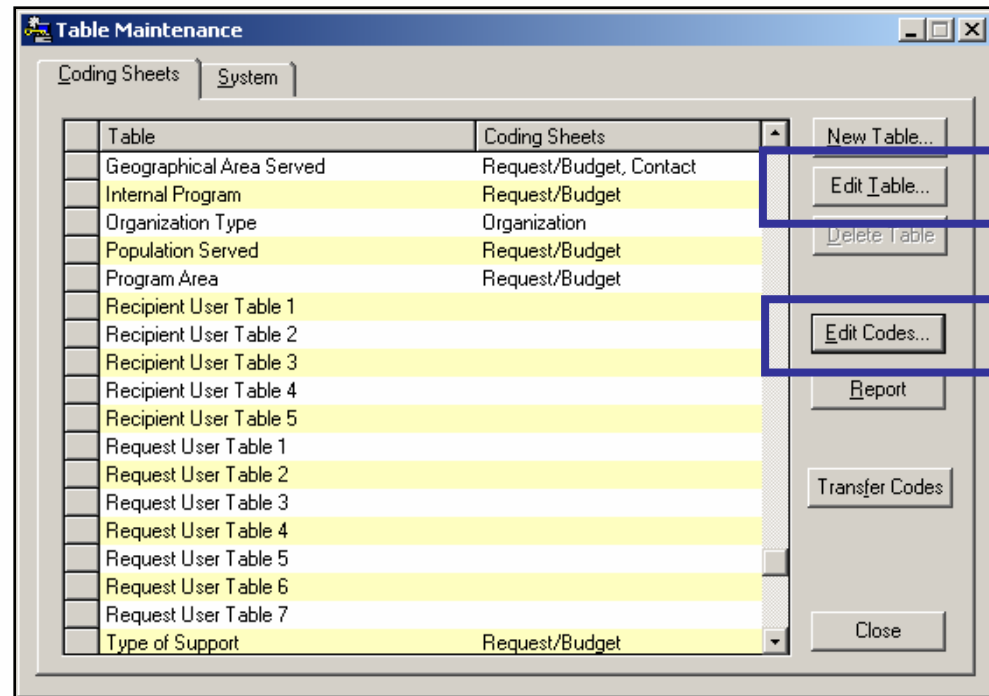
- Pre-delivered by MicroEdge
- Partially definable
- Available for Organizations (5 tables) and Requests (7 tables)

3. New (Custom)

- Created by end user
- Completely definable
- Available for Organizations, Requests, and Contacts

Maintaining Code Tables

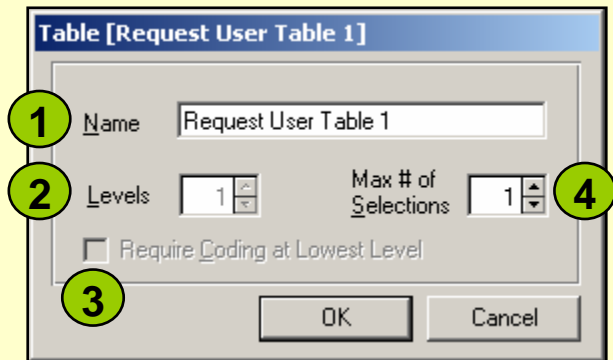
- Perform all code table maintenance via Admin Module
- Edit codes for Standard tables
- Edit table and codes for User Defined tables
- Create table and edit codes for New tables



Administrator > Setup > Codes Tables

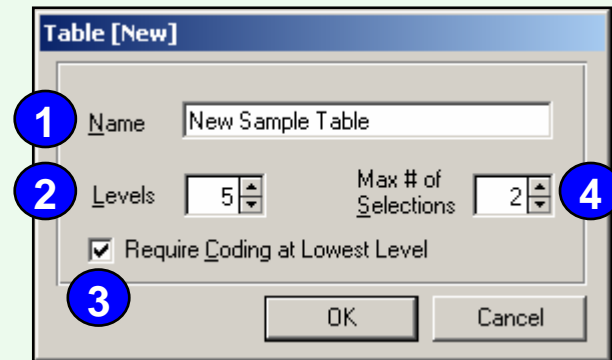
User Defined and New Table Properties

User Defined Table Properties



1. Change table name
2. No. levels set at one (1)
3. Table already at lowest level
4. Set max # of selections

New Table Properties



1. Change table name
2. Set max # of levels (up to 5)
3. Require coding at lowest level
4. Set max # of selections

Code Table Decision Matrix

Criteria	Type of Code Table		
	Standard	User Defined	New
Include in MicroEdge standard reports	√	X	X
Include in ad-hoc / custom reports	√	√	√
Change table name	X	√	√
Create hierarchy of values	√ X (see note)	X	√
Load via Import Module	√	√	X
Search via Quick Find	√	√	√
Include in views	√	√	√
Include in correspondence templates	√	√	√
Add to IGAM application	√	√	√

Note: Program Area (5), Geographic Area Served (5), and Organization Type (2) standard code tables can have multiple levels



Customizer Fields

GIFTS Customizer[®]

- Tailor GIFTS for your organization's unique needs
- Create additional data fields and data entry screens
- Track unlimited data
 - Select from several field data types
 - Create as many screens as needed
- Include custom fields in seaches, reports, and templates
- Add custom fields to IGAM application forms

Types of Custom Fields

Type	Description
Text	Text up to 255 characters
Long Text	Text up to approx. 120,000 characters
Small Number (no decimal)	Integers: 0 to 255
Medium Number (no decimal) ¹	Integers: -32,768 to 32,767
Large Number (no decimal)	Integers: -2,147,483,647 to 2,147,483,647
Number (with decimal)	Numbers with up to 4 decimal places
Currency	Currency values with 2 decimal places
Date	Date values (with calendar selection)
Values	Discrete values as specified
True / False	Checkbox indicating True/False or Yes/No
Calculations ²	Formulas using numerical/currency fields
Web Clippings	Display mini-web browser within custom form

¹ Access version only

² Created directly in form, not in database

Create Custom Forms By...

- **Requests**
- Organizations
- Contacts
- Payments
- Activities
- Requirements
- **Reviews**
- Affiliations

- *Default*
- *Cash Grants*
- *Dinners and Events*
- *Forecast*
- *In-Kind*
- *Subgrant*
- *Volunteer Event*

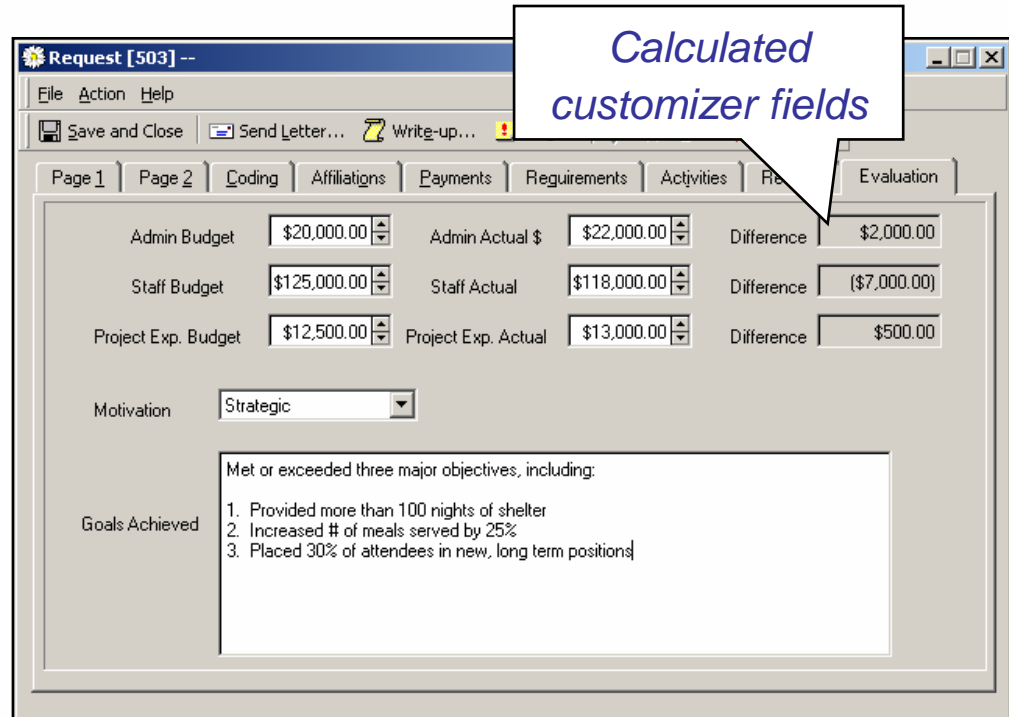
***Request
Types***

- *Default*
- *External Review Stage*
- *Internal Review Stage*

***Review
Stages***

Sample Request Customizer Screen

- Choose tab name
- Position fields
- Add multiple types
- Add calculated fields
- Customize to meet ***YOUR*** needs



The screenshot shows a software window titled "Request [503] --" with a menu bar (File, Action, Help) and a toolbar (Save and Close, Send Letter..., Write-up...). Below the toolbar are several tabs: Page 1, Page 2, Coding, Affiliations, Payments, Requirements, Activities, Re, and Evaluation. The "Evaluation" tab is active, displaying a table of budget and actual data, a dropdown for Motivation, and a text area for Goals Achieved.

Admin Budget	\$20,000.00	Admin Actual \$	\$22,000.00	Difference	\$2,000.00
Staff Budget	\$125,000.00	Staff Actual	\$118,000.00	Difference	(\$7,000.00)
Project Exp. Budget	\$12,500.00	Project Exp. Actual	\$13,000.00	Difference	\$500.00

Motivation: Strategic

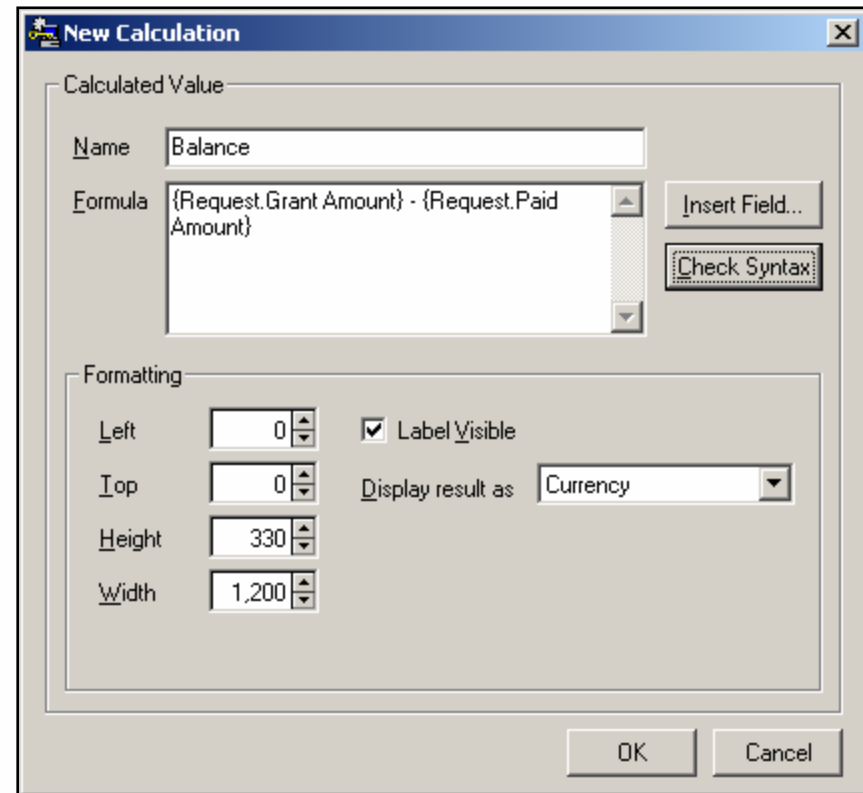
Goals Achieved: Met or exceeded three major objectives, including:

1. Provided more than 100 nights of shelter
2. Increased # of meals served by 25%
3. Placed 30% of attendees in new, long term positions

Track budget and measurement criteria

Customizer Calculated Fields

- Name the field
- Create formulas with:
 - Standard fields
 - Customizer fields
- Adjust formatting
- Show / hide label



Add a Custom Calculation



Comparing Codes Tables and Customizer Fields

Code Tables vs. Customizer Fields

Criteria	Code Tables	Customizer Fields
Choose data types	Text	Various
Search via...	Quick Find	Advanced Find
Create hierarchy	Yes	No
Include in views	Yes	Yes
Include in reports	Yes	Yes
Include in templates	Yes	Yes
Make required	Yes	No
Import data	Yes*	No
Include in IGAM	Yes	Yes
Create calculations	No	Yes

* Import into Standard and User Defined Tables, only



Choosing the Right Approach for *Your* Organization

Decision Matrix

If I Need To...	Then I Should Use...	
	Code Tables	Customizer Fields
Find data (more) easily	√	
Import data	√	
Build a hierarchy of values	√	
Make fields required	√	
Create a long list of values	√	
Create custom forms		√
Create calculations		√
Create a short list of values		√
Enable data entry		√

The Bottom Line with Custom Data

- Think about:
 - Where you're going to use it
 - How you're going to use it
 - When you're going to use it
 - Who's going to use it
- Use the Decision Matrices
- Tailor GIFTS to fit *your* grantmaking

GIFTS vs. Essential GIFTS Reference

Coding	GIFTS	Essential GIFTS
Standard and user-defined classification tables for grants, as well as ability to classify grants by type	Standard	Standard
Standard and user-defined classification tables for organizations and contacts	Standard	Not available
Open classification system – user-defined and maintained code screens and tables. Add custom tables with up to five levels of hierarchy to match your classification needs.	Standard	Not available
Ability to multi-code grants by selecting more than one value in a list of codes (e.g., code geographic areas served by a grant as New York, New Jersey, and Connecticut)	Standard	Not available
Ability to set up required codes	Standard	Not available

Custom Fields	GIFTS	Essential GIFTS
Add new custom fields and data entry screens to track all specialized information, including data needed for outcomes measurement and analysis	With Customizer Module	Not available



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