

MyGIFTS[®] User Set-up Guide:
User-Level Pages with Filters

Version 1.0

For more information on this or other custom training guides, contact:

Stuart M. Revness
President, SMR Consulting, Inc.
srevness@smrglobal.com
www.smrglobal.com

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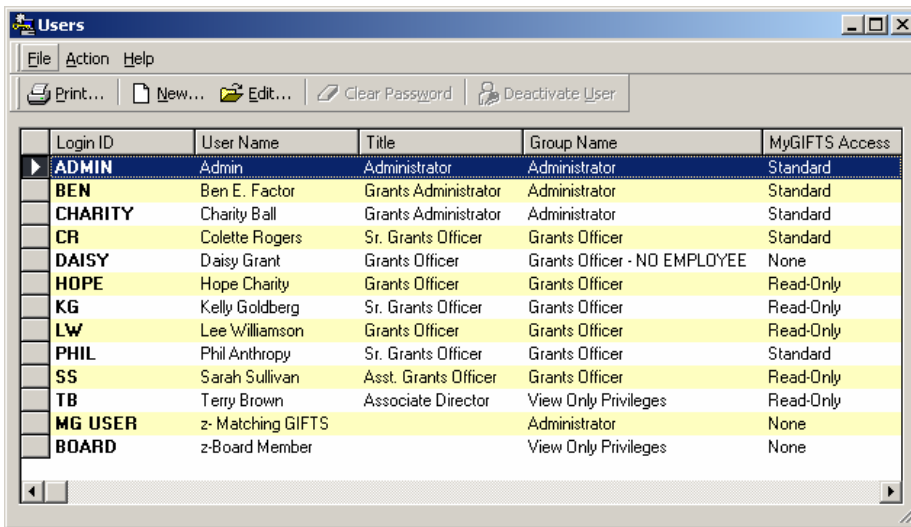
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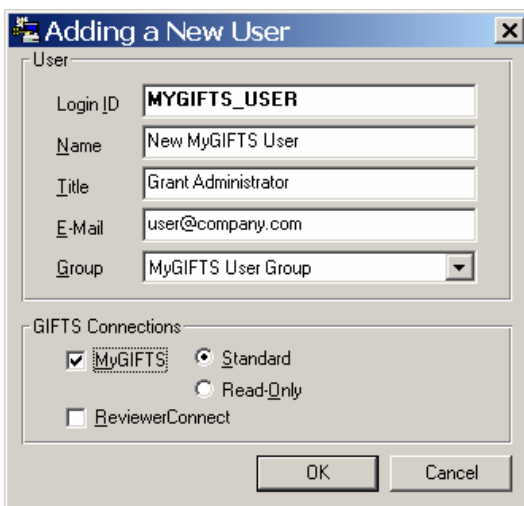
1. Create New GIFTS® User

A new MyGIFTS user must first be created as a user in the GIFTS system even though the user may never login to the actual GIFTS application. A MyGIFTS license (or “seat”) is assigned to the user in the GIFTS Administrator Module. Then, the user is able to log into the MyGIFTS system.

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1. Login to the GIFTS Administrator Module.
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2. Go to Access > Users from the menu bar. Click the ‘New...’ button.



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3. The ‘Adding a New User’ screen appears.



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4. Enter a ‘Login ID’ for the MyGIFTS user.
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5. Enter a 'Name' for the MyGIFTS user.

6. Enter a 'Title' for the MyGIFTS user.

7. Enter an 'E-Mail' for the MyGIFTS user.

8. Select the appropriate User Group for the user.

9. Check the MyGIFTS box.

10. Select the 'Standard' button to grant standard GIFTS permissions to this user.

11. Click OK.

2. Create Saved Searches for Page Parts

Each user can be assigned a user-level homepage in MyGIFTS. Each user-level home page may have several page parts with saved searches associated with them. These saved searches act as filters to ensure that only the data relevant for that user, and for that page part, is selected from GIFTS and displayed in the MyGIFTS page part. The saved search must be created in GIFTS before it can be added in MyGIFTS. Note that searches common to all users only have to be created once in GIFTS.

This section describes the steps required to create a Request saved search in GIFTS. The same process can be used to create a saved search in any GIFTS folder. This document does not address the specific search criteria that you may have to determine for each page part.

Note that you should determine a standard naming convention for all saved searches. It is assumed for purposes of this document that the following convention will be used:

Search Code – Record Type – Page Part Description

For example:

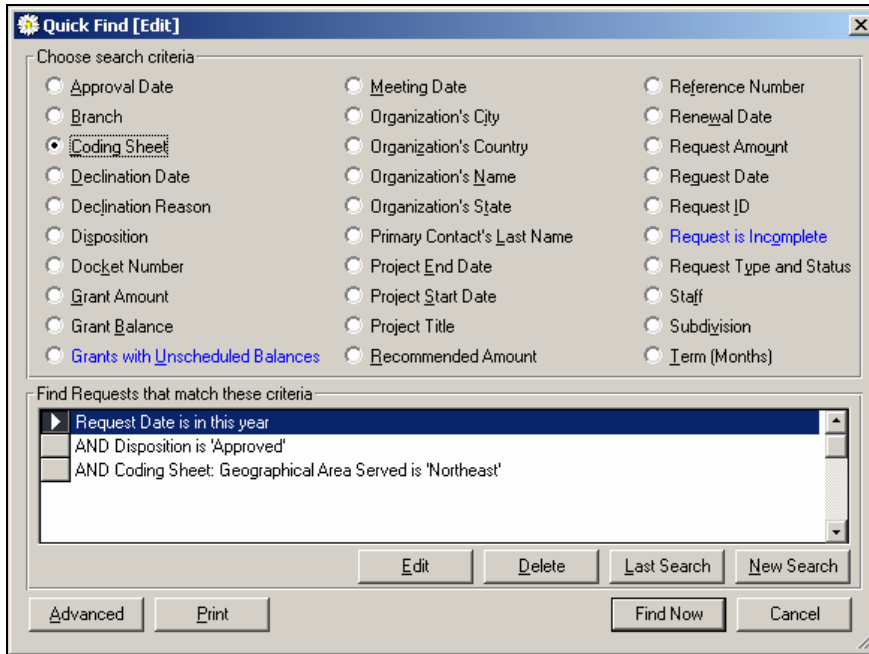
0338 – Requests – Approved Requests

0410 – Payments – Local Payment Summary

1. In the GIFTS Requests folder, click the quick Find button.

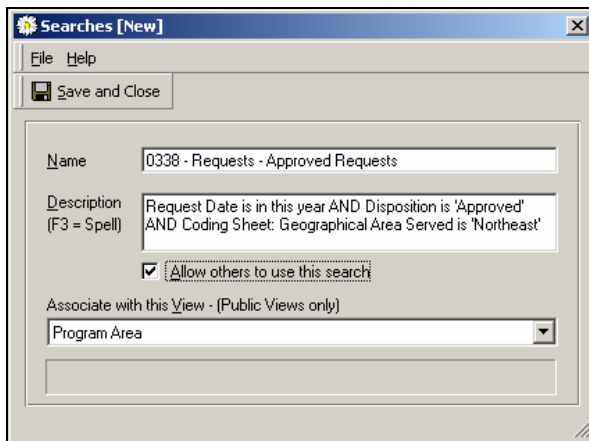


2. Create the desired search for the particular page part. The search below is for sample purposes, only. When the search is complete, click 'Find Now.'



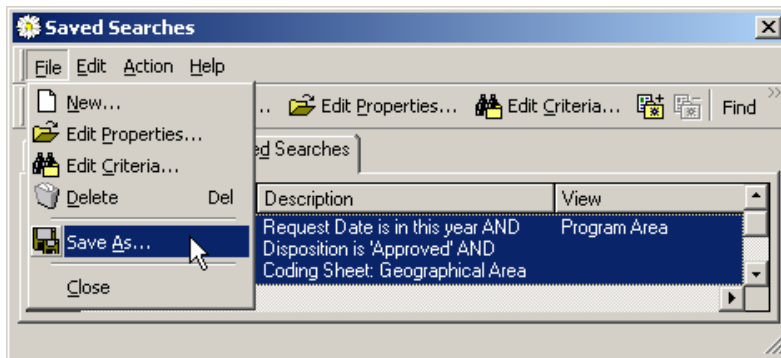
3. GIFTS will run the search and the results will be displayed on the screen. (If no results are found, click "No" when asked if you want to refine your search and continue with the next step.)

4. Go to Edit > Save Search from the menu bar. The 'Searches [New]' screen appears.

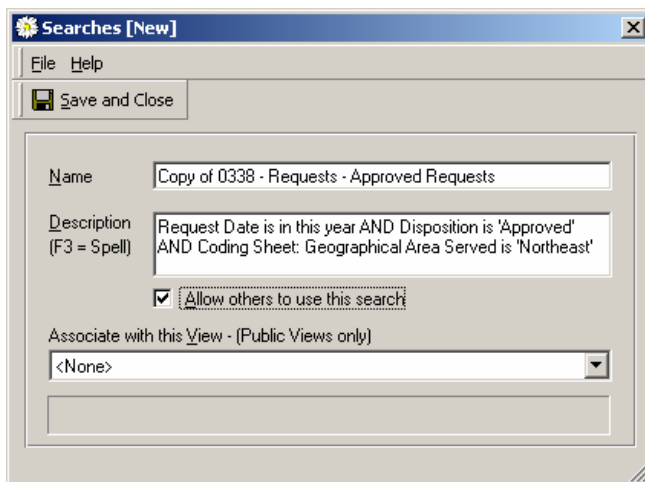


5. Enter a 'Name' for the search. Follow your naming convention for MyGIFTS searches.

6. The 'Description' defaults to the search criteria. This does not need to be changed.
7. Check 'Allow others to use this search.'
8. If you want to associate the search with a view, select the view from the drop-down list at the bottom of the screen. If you want to create a new view, you can add the view to the search later on. Creating and saving views is not covered in this guide. See the GIFTS help for more information on creating and saving views.
9. Click 'Save and Close.'
10. Repeat steps 1-9 in the appropriate GIFTS folders as many times as needed to create all the searches required for each page part for each user.
11. Note that to save time, you can use the 'Save As...' feature in the Saved Searches screen to copy an existing search, rename it, and update the criteria. To do this, go to Edit > Get Search in the menu bar. Select the desired search and go to File > Save As... from the menu bar.



Give the search a new name, change the search criteria, allow others to use the search, and save it.



3. Unlock User in MyGIFTS

After you setup the user in GIFTS, they will be able to login via MyGIFTS. Before they do, their homepage can be changed to add the filters specific to each page part on their homepage. To do that, the user must first be unlocked in MyGIFTS. You must login to MyGIFTS as an administrator to unlock a user.

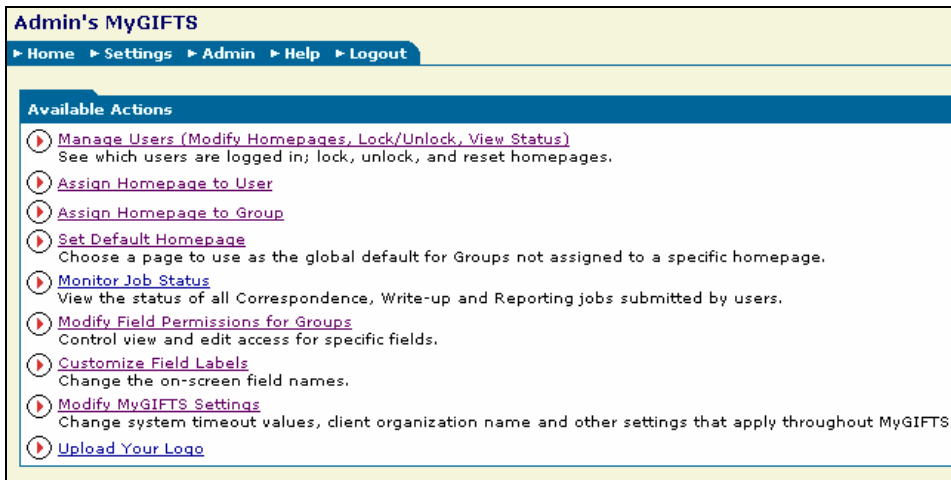
1. Login to MyGIFTS as an Administrator. You can use any ID that is assigned to the Administrator group in GIFTS.



2. After login, click the 'Admin' link.



3. The Admin menu appears. Click the first link to 'Manage Users (Modify Homepages, Lock/Unlock, View Status)'.



4. The User Status page appears.

Admin's MyGIFTS					My Homepage
Home Settings Admin Help Logout					
User Status					
User	Group	Homepage	System Status	Locked Status	Full Name
ADMIN	Administrator	User	Logged In	Unlocked	Admin
BEN	Administrator	System Modify System Homepage	Logged Out	Locked	Ben E. Factor
CHARITY	MyGIFTS User Group	System Modify System Homepage	Logged Out	Locked	Charity Ball
CR	Grants Officer	User Modify User Homepage	Logged Out	Unlocked	Colette Rogers
HOPE	Grants Officer	User Reset to Group Modify User Homepage	Logged Out	Locked	Hope Charity
KG	Grants Officer	Group Modify Group Homepage	Logged Out	Locked	Kelly Goldberg
LW	Grants Officer	User Modify User Homepage	Logged Out	Unlocked	Lee Williamson
PHIL	Grants Officer	Group Modify Group Homepage	Logged Out	Locked	Phil Anthropy
SS	Grants Officer	Group Modify Group Homepage	Logged Out	Locked	Sarah Sullivan
TB	View Only Privileges	System Modify System Homepage	Logged Out	Locked	Terry Brown

5. For the user you wish to unlock, click the 'Locked' hyperlink in the 'Locked Status' column. In this case, the user Charity will be unlocked and her homepage information will change as shown below. Charity's homepage can now be updated with user-specific page part filters.

CHARITY	MyGIFTS User Group	User Modify User Homepage	Logged Out	Unlocked	Charity Ball
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6. Click the link to 'Modify User Homepage' for Charity.

4. Add Saved Search to Page Part

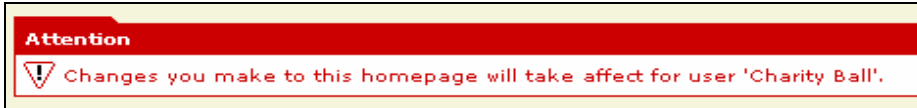
Once the user is unlocked, you can now add the saved searches created in GIFTS to the specific page parts for that user. In this example, the saved search for '0338 – Requests – Approved Requests' will be added to the Approved Requests page part.

1. Click the link to 'Modify User Homepage' in the User column.

CHARITY	MyGIFTS User Group	User Modify User Homepage	Logged Out	Unlocked	Charity Ball
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- You are now “Ghosting” the user Charity. This means that you see her homepage as she will see it when she logs in. Since you are an Administrator in MyGIFTS, you have the ability to edit her homepage “on behalf of” her.

Check the Title bar at the top of the screen. It will tell you EXACTLY that will happen when you modify this homepage. In this example, it tells you that changes you make to the homepage will ONLY affect Charity’s homepage. If this user was assigned to a Group or System homepage, changes you made would affect everyone in the entire Group or System, respectively.



- Charity’s homepage is shown below. This page is similar to the homepage that a typical MyGIFTS user might see.

Charity Ball's MyGIFTS [My Homepage](#)

[Home](#) | [Settings](#) | [Admin](#) | [Log off Charity Ball](#) | [Help](#) | [Logout](#)
[Layout](#) | [Add Part](#)

Attention
 ⚠ Changes you make to this homepage will take affect for user 'Charity Ball'.

Budget Summary [edit](#) | [-](#)

Description	Current Budget	Granted	Balance	Paid
C Corporate	\$1,364,049.43	\$0.00	\$1,364,049.43	\$0.00
C Foundation	\$6,888,746.17	\$309,333.34	\$6,579,412.83	\$84,750.00
Total	\$8,252,795.60	\$309,333.34	\$7,943,462.26	\$84,750.00

National Grants Paid This Year [edit](#) | [-](#)

Description	Amount
Total Scheduled	\$7,750.00
Total Paid	\$7,750.00
Balance to be Paid	\$0.00
Number of Records - 2	

[View Detail](#)

Pending Requests [edit](#) | [-](#)

American Foundation for Children, New York NY
[Ms. Joanne Collins](#)
Requested \$28,560 on 6/17/2008
 To help sponsor "The Children of the World" Conference

Teen Aid Center, Newark NJ
[Mr. George Nottingham](#)
Requested \$50,000 on 6/16/2008 -- \$50,000 recommended
 Awake at Night
[\[2 of 55\] - View More](#)

East Side Learning Center, New York NY
[Ms. Kathleen Crispen](#)
Awarded \$2,500 on March 19, 2008
 The Support for the "Spring Formal Gala"

Shea Dance Company, New York NY
[Mr. Johnathan J. Smith](#)
Awarded \$5,250 on February 27, 2008
 The 2003 Annual Banquet
[\[2 of 541\] - View More](#)

American Foundation for Children, New York NY
[Mr. Martin Doyle](#)
Declined 12/14/2007 -- Limited Resources
 Requested \$0 on 2/2/2007

Arlington School of Dentistry, Los Angeles CA
[Dr. Anita Ravse, M.D.](#)
Declined 12/14/2007 -- Limited Resources
 Requested \$9,000 on 2/15/2007
[\[2 of 135\] - View More](#)

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- To add a saved search to a page part, click on the 'Edit' hyperlink in that page part. In the example above, the 'Approved Requests' page part will be edited.
 - Scroll down to the bottom of the screen to the 'Filter – Saved Search' section. Find the appropriate saved search for that page part for that user, and select it from the drop-down list. Click Update. The saved search will be added to that page part.
-

Filter - Saved Search
is 0338 - Requests - Approved Requests

Filter - Request Date
is <any date>

Filter - Staff
is <any user>

Filter - Request Type and Status
is <any value>

Filter - Meeting Date
is <any date>

Filter - Organization's State
Operator is
Value

Update

-
- Repeat this process for as many page parts as needed.

In addition, a budget page part filter can be added to the Budget Summary page part. However, this filter is done directly in the Budget Summary page part by adding a "Top Level" filter and not by adding a saved search from GIFTS.

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- Charity's homepage is now updated to display the appropriate information in each page part based on the saved search filters added to each part.
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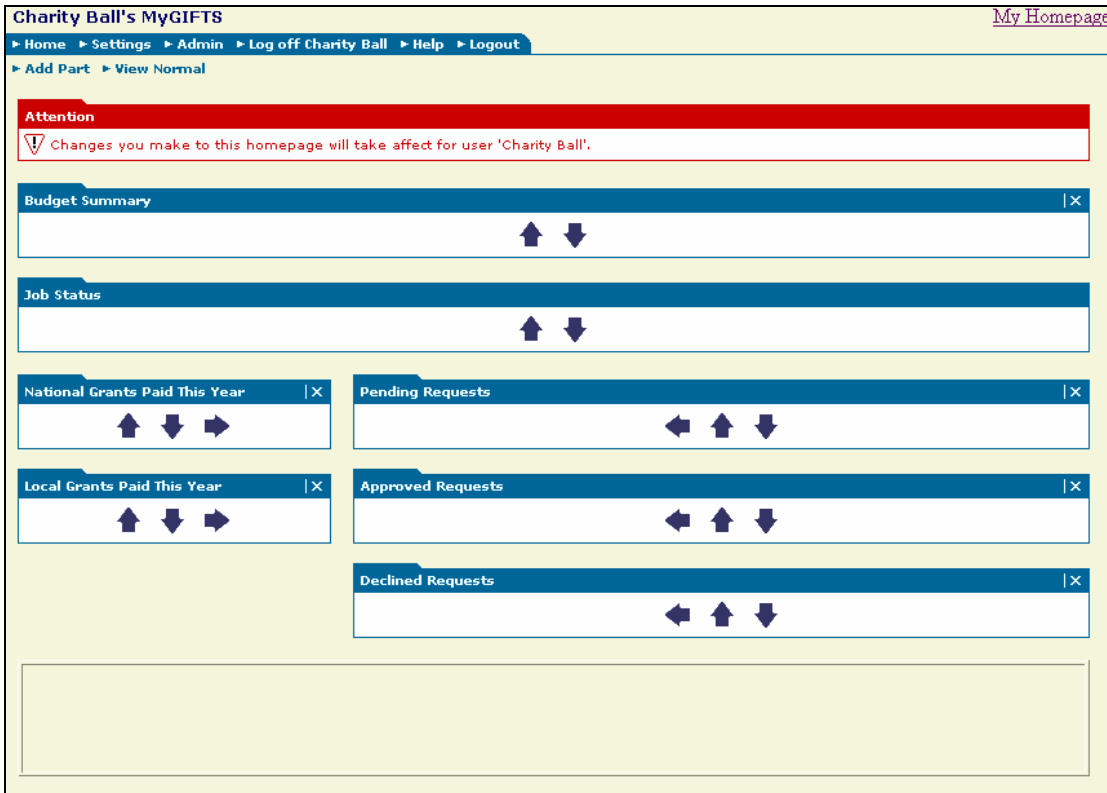
5. Change the Home Page layout

MyGIFTS users may initially have the same homepage layout, meaning the same page parts in the same locations on the screen. If the layout for a user or group must be changed, however, it can be done quickly and easily.

1. While ghosting a user, return to the user’s homepage. Click the ‘Layout’ hyperlink.



2. The Layout screen appears. Click the arrows to move a page part to a different location on the screen. Page parts can be positioned in the Top Span, Left Span, Right Span, or Bottom Span. In the example below, there are no page parts in the bottom span. Note that the Job Status page part appears if the user has run a background job such as downloading data to a spreadsheet. If the user has no active jobs, this part is not shown on the homepage.

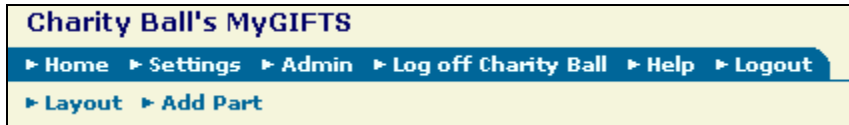


3. To remove a page part, click the ‘x’ in the upper-right corner of the page part.

6. Add a Page Part to the Home Page

Page parts can also be added to the home page. You can even add the same page part multiple times and filter each page part differently. For instance, you can add the page part for approved grants twice and add a filter for “this year” to one and “last year” to the other. Of course, you would change the page part title to reflect the information displayed in that part.

1. While ghosting a user, return to the user’s homepage. Click the ‘Add Part’ hyperlink.



2. The ‘Add a Page Part’ screen appears. Click the drop-down arrow to see the list of page parts available to be added. Select the desired page part, change the name if desired, and click ‘Submit.’

Refer to the MyGIFTS Administrator Guide for a complete description of each page part. Pay particular attention to any pre-defined filters that may accompany a page part. For example, the ‘Grants’ page part will only show approved requests.

 A screenshot of a web form titled "Add a Page Part". The form contains the following elements:

- A label "Select the Part to Add:" followed by a dropdown menu showing "Activities and Requirements to be Done".
- A label "Part Position:" followed by four radio button options: "Top Span" (which is selected), "Left Span", "Right Span", and "Bottom Span".
- A label "Part Title:" followed by an empty text input field.
- A "Submit" button at the bottom of the form.

3. Repeat this process for as many page parts as needed.