

GIFTS Online Permissions

Role Permissions and Default Assignments – 2017

GIFTS Online® is a hosted solution that requires all users to have internet access and use of a compatible browser. This document details the GIFTS Online Role Permissions and Default Assignments.

Support

If you have questions or need assistance in any way, please contact MicroEdge Technical Support.

Support Hours: M-F, 8:00 am – 8:00 pm ET

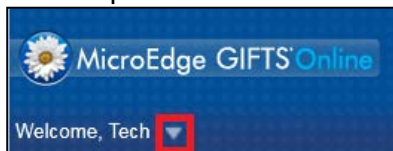
Phone: 877.704.3343

Email: helpdesk@microedge.com

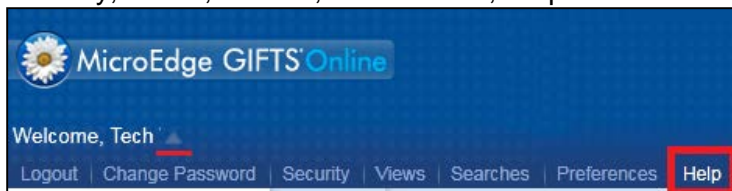
Online: www.microedge.com

For information on troubleshooting common issues, see the *Technical Support* section in the online help.

1. In the top menu bar of **GIFTS Online**® under your name, is the User Menu.



2. Select the triangle next to your name to view the User Menu options: Logout, Change Password, Security, Views, Search, Preferences, Help



3. Select **Help** and the online web help opens in a new window.

How-to Documentation

Have questions or need to quickly get up to speed? Check out these help files, guides, videos, walkthroughs, and other assistance for step-by-step instructions and detailed information:

<https://www.blackbaud.com/howto/giftsonline>

The MicroEdge Community Resources Site

To keep up with all the latest news on MicroEdge products, access our knowledgebase, or join in relevant discussions on our forums, go to - <https://community.blackbaud.com/products/microedge>.

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only – Board Member
1	Organization General Add	Add a New Organization	X	X	X	X	
2	Organization General Update	Update an Existing Organization	X	X	X	X	
3	Organization General Delete	Delete an Existing Organization	X	X			
4	Organization Tax Status Update	Perform Tax Status Look-up / Verification	X	X	X	X	
5	Organization Coding Sheet Update	Update an Organization's Coding Sheet	X	X	X	X	
6	Pending Requests Add	Add a Pending Request	X	X	X	X	
7	Pending Requests Update	Update an Existing Pending Request	X	X	X	X	
8	Pending Requests Delete	Delete an Existing Pending Request	X	X	X	X	
9	Declined Requests Update	Update an Existing Declined Request	X	X	X	X	
10	Declined Requests Delete	Delete an Existing Declined Request	X	X			
11	Approved Requests Update	Update an Existing Approved Request	X	X	X	X	
12	Approved Requests Delete	Delete an Existing Approved Request	X	X			
13	Approved Requests Coding Sheet Update	Update an Approved Request's Coding Sheet	X	X	X	X	
14	Approved Requests Payments Add	Add Payments to an Approved Request	X	X	X	X	
15	Approved Requests Payments Update	Update Payments for an Approved Request	X	X	X	X	
16	Approved Requests Payments Delete	Delete Payments for an Approved Request	X	X			
17	Approved Requests Requirements Add	Add Requirements to an Approved Request	X	X	X	X	
18	Approved Requests Requirements Update	Update Requirements for an Approved Request	X	X	X	X	
19	Approved Requests Requirements Delete	Delete Requirements for an Approved Request	X	X			
20	Contacts Add	Add a New Contact	X	X	X	X	
21	Contacts Update	Update an Existing Contact	X	X	X	X	
22	Contacts Delete	Delete an Existing Contact	X	X			
23	Activities Add	Add a New Activity	X	X	X	X	
24	Activities Update	Update an Existing Activity	X	X	X	X	
25	Activities Delete	Delete an Existing Activity	X	X			

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only – Board Member
26	Affiliations Add	Add a New Affiliation	X	X	X	X	
27	Affiliations Update	Update an Existing Affiliation	X	X	X	X	
28	Affiliations Delete	Delete an Existing Affiliation	X	X			
29	Wire Transfer Information View	View Wire Transfer Information (Org, Request, Payment)	X	X		X	
30	Wire Transfer Information Add	Add New Wire Transfer Information (Org, Request, Payment)	X	X		X	
31	Wire Transfer Information Update	Update Existing Wire Transfer Info (Org, Request, Payment)	X	X		X	
32	Wire Transfer Information Delete	Delete Existing Wire Transfer Info (Org, Request, Payment)	X	X			
33	Public Saved Searches Add	Create a New Public (Shared) Saved Search	X	X	X	X	X
34	Public Saved Searches Update	Update any Existing Public (Shared) Saved Search (created by any user)	X	X	X	X	X
35	Public Saved Searches Delete	Delete any Existing Public (Shared) Saved Search (created by any user)	X	X	X	X	
36	Public Saved Views Add	Create a New Public (Shared) Saved View	X	X	X	X	X
37	Public Saved Views Update	Update an Existing Public (Shared) Saved View (created by any user)	X	X	X	X	X
38	Public Saved Views Delete	Delete an Existing Public (Shared) Saved Search (created by any user)	X	X	X	X	
39	Letter Template Add	Create a New Letter Template	X	X	X	X	
40	Letter Template Update	Update an Existing Letter Template	X	X	X	X	
41	Letter Template Delete	Delete an Existing Letter Template	X	X	X	X	
42	Approve Request	Approve a Request for Funding	X	X	X		
43	Decline Request	Decline a Request from the System	X	X	X		
44	Amend Request	Amend the Grant Amount on an Approved Request	X	X			
45	Mark Payment Paid	Mark a Payment as "Paid"	X	X			
46	Void Payment	Void a Paid Payment	X	X			
47	Place Payment on Hold	Place a Payment on Hold	X	X			

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only – Board Member
48	Mark Requirement Done	Mark a Requirement as Complete "Done"	X	X	X	X	
49	Run Reports	Generate Standard and / or Ad Hoc Reports	X	X	X	X	X
50	Generate Correspondence	Generate Email and / or Letter Correspondence & Write-ups	X	X	X	X	X
51	Export Payments	Export Payments to an Accounts Payable Format (System)	X	X			
52	Import Payments	Import Updates to Payments from an Accounts Payable System (Import File)	X	X			
53	Requested Amount Update	Permission to Update the Request Amount Field	X	X	X	X	
54	Recommended Amount Update	Permission to Update the Recommended Amount Field	X	X	X	X	
55	Approved Amount Update	Permission to Update the Grant Amount Field	X	X	X	X	
56	Project Title Update	Permission to Update the Project Title Field	X	X	X	X	
57	Staff Override	Allows editing/access of locked records for non-assigned staff persons.	X				
58	Request Change Status	Ability to Update the Request Status	X	X	X	X	
59	Request Rollback Disposition to Pending	Roll a Declined / Approved Request back to Pending	X	X	X		
60	System Activities Update	Ability to Update a System Activity Record	X	X	X	X	
61	System Activities Delete	Ability to Delete a System Activity Record	X	X			
62	Delete Voided Payments	Ability to Delete a Voided Payment from the System	X	X			
63	Request Grant Renewal	Renew an Approved Request (which creates a new, related Pending Request)	X	X	X	X	
64	Assign Edit Reference Numbers	Add / Edit a Reference Number	X	X	X	X	
65	Grant Amendment Activities Update	Ability to Update an existing Grant Amendment Activity	X	X	X		
66	Grant Amendment Activities Delete	Ability to Delete an existing Grant Amendment Activity	X	X	X		

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only – Board Member
67	Update Paid Payment Fiscal Year	Ability to Update the fiscal year on Payment marked as "Paid"	X	X	X	X	
68	Update Scheduled Payment Fiscal Year	Ability to Update the fiscal year on Payment marked as "Scheduled"	X	X	X	X	
69	Update Grant Fiscal Year	Ability to change the Fiscal Year on an Approved Request	X	X	X	X	
70	Update Amendment Fiscal Year	Ability to change the Fiscal Year on an Approved and Amended Request	X	X	X	X	
71	Lock Requests	Block a Request from being able to be Updated	X	X	X		
72	Unlock Requests	Remove the Block on a Request being Updated	X	X	X		
73	Delete Paid Payments	Void/Delete a Paid Payment	X	X			
74	Cancel Payments	Cancel a Scheduled Payment	X	X			
75	Include Documents	Ability to Add a document to any record	X	X	X	X	
76	View Documents	Ability to View documents in a record	X	X	X	X	X
77	Remove Documents	Ability to Remove / Delete Document	X	X			
80	Lock Documents	Restrict an existing document from being modified or removed	X	X	X		
81	Unlock Documents	Remove Lock on an existing document	X	X	X		
83	Edit All Documents	Ability to check out and edit a document	X	X	X		
84	Override Checkouts	Ability to Check In a document checked out by another User	X	X	X		
85	Budget Appropriate	Ability to Appropriate payments to a budget	X	X	X	X	
86	Budget Transfer	Ability to Transfer funds when appropriating a payment to the budget	X	X	X	X	
87	Budget Create	Ability to Create a new Fiscal Year Budget	X	X			
88	Budget Update	Ability to Update an Open / Planning Budget	X	X			
89	Budget Delete	Ability to Delete a Budget in the Planning Stage	X	X			

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only – Board Member
90	Budget Administration	Allows access to the Budget Module	X	X			
91	Budget Allocate	Allocate budget items in Budget Administration	X	X			
92	Budget Adjust	Ability to Adjust an Open Budget	X	X			
93	Budget Open	Ability to Open a Fiscal Years Budget	X	X			
94	Budget Close	Ability to Close a Fiscal Years Budget	X	X			
95	Reviewers Login	Access Reviewer Module	X	X	X	X	
96	Reviews Add	Ability to Create / Assign reviews	X	X	X	X	X
97	Reviews Update	Ability to Update an Existing Review	X	X	X	X	X
98	Reviews Delete	Ability to Delete an Existing Review	X	X	X		
99	Approve Reviewed Request	Ability to Approve a Request upon completion of review	X	X	X		
100	Decline Reviewed Request	Ability to Decline a Request upon completion of review	X	X	X		
101	Publish Requirement Add	Ability to publish a created requirement to the online applicant portal	X	X	X	X	
102	Publish Requirement Delete	Ability to remove a published requirement from the online applicant portal	X	X	X	X	
103	Branch Transfer	Ability to transfer a Request from one Branch to another	X	X			
106	Batch Update	Ability to update Coding, Type/Status, Meeting Date, Project Description, Staff Assignments in Batch	X	X		X	
107	Tax Status Lookup	Search the IRS database for Organizations that do not currently exist in their GIFTS Online system	X	X	X	X	
108	Tax Status Verify	Verify the tax status of existing Organization records	X	X	X	X	
109	Execute Watchlist	Run Watchlist verification for Organizations and Contacts	X	X		X	
111	Manage Bank Accounts	Ability to set up Bank Account information	X	X			
112	Produce Checks	Ability to run checks using template	X	X			

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only – Board Member
113	Export hGrants	Export Approved Request data for Foundation Center's Grantsfire Project	X	X		X	
114	Configure Dashboards	Ability to Create / Edit / Delete dashboard parts and dashboard pages	X	X		X	
115	Share Dashboard	Ability to Share dashboard pages with other like users	X	X		X	
116	Reminders	Ability to Add / Update / Delete automatic system reminders	X	X		X	
118	Manage Report Defaults	Ability to set system defaults for Ad Hoc report design	X	X			
119	Blueprint	Access to Blueprint functionality including custom fields, fields library and forms library	X	X			
120	Public Saved Report Definition Templates Add	Create a New Public (Shared) Saved Report	X	X		X	
121	Public Saved Report Definition Templates Update	Update any Existing Public (Shared) Saved Report (created by any user)	X	X		X	
122	Public Saved Report Definition Templates Delete	Delete any Existing Public (Shared) Saved Report (created by any user)	X	X			
123	Transfer Requests	Ability to Transfer a Request to another Grantee Account	X	X	X	X	
124	Transfer Requirements	Ability to Transfer a published requirement to another Grantee Account	X	X	X	X	
125	Link AngelPoints to GIFTS Online	Pull Organization information from AngelPoints, both Adds/Updates records	X			X	
132	Scholarships Add	Add a Pending Scholarship Request	X	X		X	
133	Scholarships Update	Update an Existing Pending Scholarship Request	X	X		X	
134	Scholarships Delete	Delete an Existing Pending Scholarship Request	X	X			
135	Funds Add	Add Funds for Scholarship allocation	X	X			
136	Funds Update	Update Funds in Scholarship set up	X	X			

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only – Board Member
137	Funds Delete	Delete Funds in Scholarship set up	X	X			
138	Report Schedules Access Own	Ability to add/update/delete scheduled reports created by you	X	X	X	X	X
139	Report Schedules Access All	Ability to add/update/delete scheduled reports created by others	X	X		X	
140	Publish Application Resubmission	Ability to resubmit an existing submitted request back to applicant to update	X	X		X	
141	Publish Requirement Resubmission	Ability to resubmit an existing submitted requirement back to applicant to update	X	X		X	
142	Bypass Review	Ability to skip a reviewer in a Sequential review process	X	X		X	
143	Allow Resubmit Review	Ability to resubmit a completed review back the Reviewer to be revised	X	X		X	
144	Forward Review		X	X		X	

The following permissions are available with the release of GIFTS Online 6.1.

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only –Board Member
145	Administration Classifications	Ability to manage system codes and coding sheets	X				
146	Administration Template Manager	Ability to access document template manager to create/edit/delete email and printed templates	X				
147	Administration System Preferences	Ability to set link to outlook defaults, reminders default and set reference number	X				
148	Administration Auditing	Access is audit trail information	X				
149	Administration Reviews	Administration review stages, committees, rules and global notifications	X				
150	Administration Dashboards	Ability to edit/create/delete/share dashboard and dashboard parts	X				
151	Online Applications Manage Applications	Access to manage and retrieve applications	X	X		X	
152	Online Applications Retrieve Requirements	Ability to retrieve Requirements	X	X		X	
153	Online Applications Manage Forms	Access to forms manager	X	X		X	
154	Online Applications Historical Applications	Ability to view historical applications including rejected	X	X		X	
155	Online Applications Reset Grantee Password	Reset Grantee Account password	X	X		X	
156	Online Applications Transfer Account	Transfer grantee account between grantees	X	X		X	
157	Online Applications Publish Status	Controls visibility of the 'Publish Status' option in the Request or Payment Edit Form and Workspace Action Ribbon Menus.	X	X		X	

#	Backend Permission	Permission	Client Administrator (New)	Grants Manager	Program Officer	Grant Associate (New)	View Only – Board Member
158	Online Applications Forms Activate	Controls ability for Users to Activate a form in the Forms Manager.	X	X		X	
159	Online Applications Forms Deactivate	Controls ability for Users to Deactivate a form in the Forms Manager.	X	X		X	
160	Online Applications Forms Delete	Controls ability for Users to Delete a Form in the Forms Manager and for them to Restore a deleted form.	X	X		X	
161	Online Applications Generate Stage 2	Controls ability for Users to generate a Stage 2 application in the Consider process.	X	X		X	