

Buzzacott Giving Solutions Newsletter June 2010

Welcome to a new organisation

The Harold Hyam Wingate Foundation has recently purchased GIFTS. They plan to be using it initially for their Scholarships programme. We're looking forward to them joining our family of GIFTS users. For more information please visit the Harold Wingate Foundation's website.

MicroEdge User Group Meeting

MicroEdge is planning their Solutions Conference for 4-6th October 2010. This will be held in New Orleans, an exciting venue. For more information please see Microedge's website.

The UK User Group Meetings

We are also in the process of planning our own User Group meetings and once again have to say a huge Thank You to BBC Children in Need for sponsoring us for both venues.

This year the London based meeting is set for 18th October and the 'local' meeting will be held in Glasgow on the 13th October 2010.

Invitations will be sent out to you once the agenda has been finalised, but for now please make a note in your diary to keep the date free.

In the meantime, if you have any suggestions for topics or would like to volunteer as a guest speaker, please don't be shy - contact Kim Hook or Ally Longman.

The Plus Pack - now contains Link Plus

The Plus Pack was upgraded recently to version 5, with the new utility Link Plus for use with Outlook. It allows you to save Outlook emails in GIFTS as a Mail Activity. If you also have the Document Manager manual, you can store the email and/or email attachments as documents. During the linking process, you can choose to link the Mail Activity with a record in GIFTS.

Depending on how Link Plus has been configured, the body of the email will be saved in the Long Notes section of the Mail Activity, or the email will be saved as a message (.msg) file in Document Manager. Also depending on how Link Plus has been configured, email attachments may be exported into GIFTS as External Document Activities.

Once installed, a new button appears on the Outlook Standard toolbar.

From here you can either "file" an email you have sent or an email you have received, and link it to the appropriate record in GIFTS.

This is great news for everyone who doesn't like the formatting when sending emails from GIFTS. Now you can export Contacts to Outlook, send your emails from there, and use the Plus Pack to record the activity back in GIFTS.

If you would like more information about the Plus Pack, or would like to purchase it (currently £585 plus VAT), please contact Kim Hook or Ally Longman.

If you already have the Plus Pack and would like the latest upgrade, please contact the Help Desk on 020 7556 1313 or by email to grants@buzzacott.co.uk.

Help Desk Update

We have recently updated our Helpdesk software and have noticed that we do not have current information for all our clients. We will shortly be sending out a web link asking you for up to date information on your versions of GIFTS, Windows servers, workstations and Office versions. Please help us by completing and returning this form as soon as you can.

Can we ask that in future you let us know when implementing new hardware or upgrading software on your systems.

If you are not yet on the most recent version of GIFTS 6.2.1 (including IGAM 4) and Plus Pack 5, please contact the Helpdesk to request an upgrade pack. Please do let us know if you require any assistance with upgrading.

Hints & Tips section

As mentioned at our last user group meeting, we've been encouraging our clients to accept our offer of free review meetings. We try to arrange these once a year and they are generally much appreciated, so when you are invited please give it a go.

The following hints and tips have come from the topics discussed at recent review meetings. If you would like

any detailed information about these or would like to arrange your review meeting soon, please contact your GIFTS consultant or Kim Hook.

How to Zoom and Un-Zoom?

You're probably used to zooming on a record so that all the remaining GIFTS tabs are populated with associated records.

If not, try it now:

- search for a Request and zoom on it by selecting the record, then clicking the zoom icon. If you prefer press Ctrl+Z on your keyboard
- Now take a look at the other tabs; the Organization tab shows the grantee organisation; the Contacts tab will show any contacts affiliated to this Request; the Payments tab will display all payments which have been scheduled for this Request; etc. This is brilliant if someone is on the telephone - you can quickly get access to all the relevant details.

Now if you've finished working on that Request you can either clear all tabs (Ctrl+L) or you may prefer to un-zoom the original Request, perhaps to zoom on another.

To un-zoom, click on a row item, press the spacebar and click the zoom icon.

Quickly adjusting your view of records

When looking at your view you may wish to temporarily hide a column or swap columns around. Armed with a mouse these are "easy-peasy".

To hide a column - click the column heading with your right mouse button. The column should disappear, leaving a small space where the column heading was. This space can be clicked again to bring the column back, when you want to view it again.

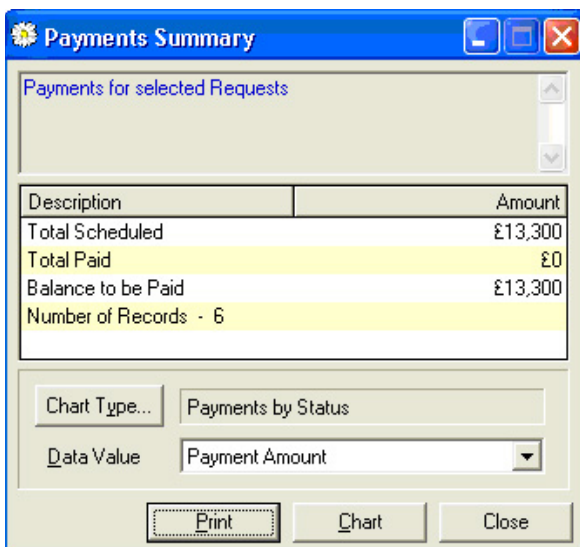
To swap columns around you can click and drag a column heading to its new location, then let go. If you would like to keep this change to a saved view, remember to go back to the View menu and choose Update this View.

Counting records

Sometimes we search GIFTS just to find out how many records are there - perhaps how many Payments need to be processed this month, and how much do they total? Or how many pending Requests are in the system?

Once you've done your search if you look at the second toolbar, you'll see that the search criteria is displayed and, in brackets, the number of records.

However, if your search criteria are very detailed, it can take up the whole width of the toolbar so that you cannot see the record count. To get around this, click the Sigma button on the same toolbar to see one of the following screens (depending on whether you were searching in the Requests or Payments tab originally):



Payments Summary

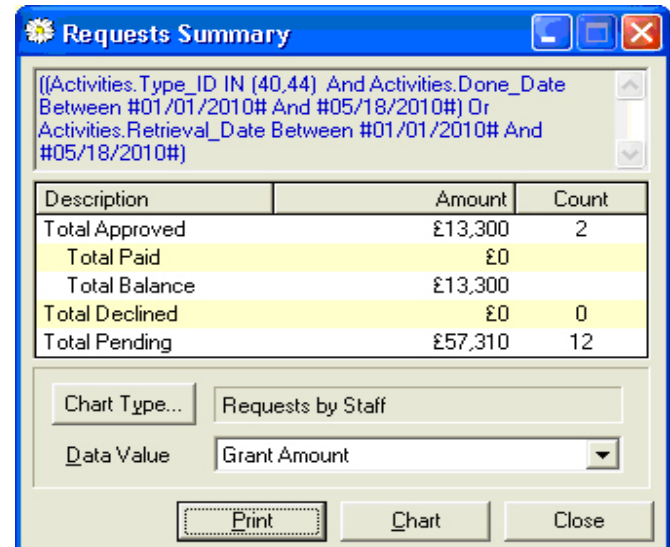
Payments for selected Requests

Description	Amount
Total Scheduled	£13,300
Total Paid	£0
Balance to be Paid	£13,300
Number of Records - 6	

Chart Type... Payments by Status

Data Value Payment Amount

Print Chart Close



Requests Summary

[(Activities.Type_ID IN (40,44) And Activities.Done_Date Between #01/01/2010# And #05/18/2010#) Or Activities.Retrieval_Date Between #01/01/2010# And #05/18/2010#]

Description	Amount	Count
Total Approved	£13,300	2
Total Paid	£0	
Total Balance	£13,300	
Total Declined	£0	0
Total Pending	£57,310	12

Chart Type... Requests by Staff

Data Value Grant Amount

Print Chart Close

Ways to select multiple records

Once you've done a search you may want to highlight selected records so that you can work on them as a batch (perhaps change the Status of Requests, mark Requirements as Done or generate a batch of correspondence).

If you want to select all the records

- Press Ctrl+A on your keyboard.

If you want to select most of the records

- Press Ctrl+A on your keyboard, let go and then press Ctrl, and click on records you do not want selected.

If you want to select records which are next to each other

- click the first record, then press down the Shift key and click the last record - all the records will now be selected.

Finally, if you want to select a few records which are not next to each other

- keep the Ctrl key down whilst you click the right records. If you accidentally click the wrong record, just click it again.

Fix Excel so exported numbers do not show as text

After a GIFTS upgrade you may notice that when you export to Excel, currency and numerical fields are coming into Excel formatted as text. This means you can't do calculations based on those cells.

The upgrade has replaced the Empty.xls file that you have in your main GIFTS folder. You can replace it very easily as follows:

1. Open Excel and create a new worksheet - remove spare sheets so only one sheet is left.

2. Save this file into your GIFTS folder, and call it Empty.xls. It should overwrite the existing file.

3. Voila, you're done. Try exporting again and all should be well.

If you have any requests for specific topics, or would like to share your own tips, don't be shy contact Kim Hook.

One client's solution

During a telephone call with Maria Karska at the Paul Hamlyn Foundation, Maria mentioned how she had worked around a problem with exporting addresses into Excel. I persuaded her to share her tip, so we can all use it. So, with many thanks, I'll hand over to Maria:

"We had a problem every time we needed to get a list of names and addresses from GIFTS into a spreadsheet which could be then be used as a source file to produce merge letters or labels. When the address appeared in the spreadsheet it was always in one cell with an end line character between each line of the address. As it is difficult to sort or filter the data it seemed a good idea to find a way to sort each line of the address into separate cells.

The way we found to accomplish this was to use the SUBSTITUTE function in Excel. I hope my notes and example below are useful to you too."

Here 's an example of the data that has been brought into Excel - you can see how the address lines run into each other.

Organization	Address
The ABC Foundation	1 Buckingham Palace Road London SW1W 0RE
The ACT Trust	Ashton Centre5 Churchill StreetBelfast BT15 2BP

1. We need to get a sample of the end of line character. To do this:

- Insert a row above the first address line
- Copy up a cell with an address
- Remove all text from first line, leaving only the end line character on that line, plus any text that appears below.

Organization	Address
The ABC Foundation	1 Buckingham Palace Road London SW1W 0RE
The ACT Trust	Ashton Centre5 Churchill StreetBelfast BT15 2BP

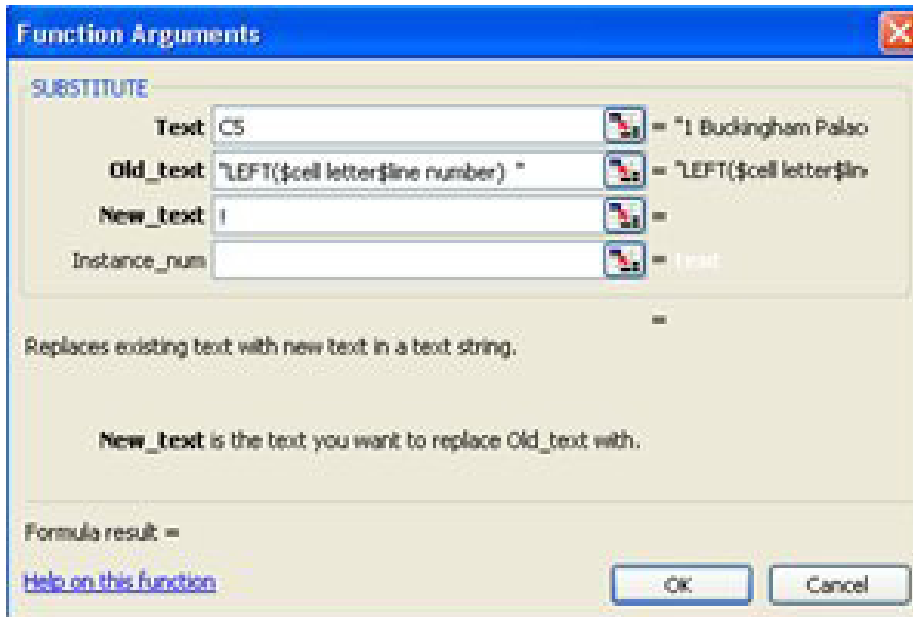
2. Next we'll substitute this end of line character with the exclamation mark - this will become our new delimiter, because it is an easier character to deal with.

- Go to the cell to the right of the first full address and click on the function key
- Type in SUBSTITUTE in the Search for a function area and click Go.

This will find the right function below, which you can now select and OK.

- In the Text box insert the cell address to the left - ie one which needs working on.

In 'Old_text' type LEFT and an open bracket, then select the cell which has our end of line character example, and use the F4 key so that it now says LEFT(\$C\$2) or similar.

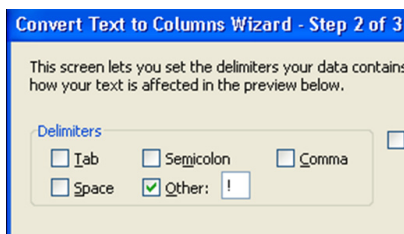


- In 'New_text' type an exclamation mark
- Click OK
- Copy down this formula to all the rows you need to tidy up.
- Select the column you added in step 3.
- From the Data menu, choose Text to columns
- Choose the Delimited option, and Other - and type in an exclamation mark
- Click the Finish button.

3. Next we'll convert this formula into text:

- Copy the address column, and in the next column use Edit, Past Special and Paste values only. This copies the addresses into this column, and you should see the exclamation marks.

4. Finally, we'll use another feature of Excel to split the addresses into separate columns, one for each line of the address:



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Upcoming Training & Events

Check out our new online training. Our bite sized courses offer a convenient way of getting to grips with key functionality of GIFTS from the comfort of your own computer. To learn more please visit our website.

Trustee Training Workshop

- 17th November 2010

This seminar provides trustees with an overview of their responsibilities in key areas. Whilst directed primarily at trustees, the workshop may also be suitable for charity senior managers who are seeking guidance on key areas of charity regulation. This seminar is free of charge.

Please visit our website for more details and bookings.

The end result:

Organization	Address	Formula	New columns ...		
	London SW1W 0RE				
The ABC Foundation	1 Buckingham Palace Road London SW1W 0RE	=LEFT(Buckingham Palace, 1)	Buckingham Palace Road	London SW1W 0RE	
The ACT Trust	Ashton Centre 5 Churchill Street Belfast BT15 2BP	=LEFT(Ashton Centre, 5)	Ashton Centre	5 Churchill Street	Belfast BT15 2BP
The BCT Trust	Barbican Centre Silk Street London EC2Y 8DS	=LEFT(Barbican Centre, 1)	Barbican Centre	Silk Street	London EC2Y 8DS

Many thanks to Maria for sharing this tip. We would be delighted to share more ideas, so if you have a tip do let me, Kim Hook, know.