



Griffin Training Manual
Donor Acknowledgement System (DAS)
User Manual

Donor Acknowledgement System

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The Donor Acknowledgement System (DAS)

Manual Overview

Manual Purpose

The purpose of this manual is to provide an introduction to Alumni Relations and Development's (ARD's) new gift acknowledgement system – DAS.

Manual Organization

This manual is organized into volumes:

Volume One – The Gift Acknowledgement Workflow

Volume Two – Application Admin Workflow

Manual Objective

To ensure users understand:

- Work flow terminology and process
- The high level gift acknowledgement workflow
- System roles and responsibilities
- How to create the acknowledgement

To ensure that users are able to:

- Create, modify and review acknowledgement templates
 - Create and manage acknowledgement groups
 - Create and manage acknowledgement teams
 - Create and manage acknowledgement users
-

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Donor Acknowledgement System

Manual Overview, continued

Manual Content

Volume One – The Gift Acknowledgement Workflow

- Chapter 1** **Introduction to the Donor Acknowledgement System**
Provides an overview of Acknowledgements.
- Chapter 2** **Understanding DAS Workflow**
Provides an overview of the acknowledgement processing in DAS and defines the terminology and responsibility used throughout the system.
- Chapter 3** **Getting Started with the Donor Acknowledgement System**
Provides an overview of the menus, links and icons that you see throughout the system.
- Chapter 4** **Processing Gift Records**
Describes how to utilize the Acknowledgments Update form as a processing dashboard to search for and view the detail and content of the gift record(s) to be acknowledged.
- Chapter 5** **Managing the Acknowledgement Template**
Provides an overview of the acknowledgement letter templates and how to manage and assign them.
- Chapter 6** **Printing the Acknowledgement**
Describes how to print the acknowledgement letter and how to access its history.
- Chapter 7** **Acknowledge Reports**
Describes how to report on the gifts that were acknowledged.

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Manual Overview, continued

Manual
Content,
continued

Volume Two – The Application Admin Workflow

Chapter 1 System Administration

Describes the role of the system admin and how to create and manage DAS groups.

Chapter 2 Group Administration

Describes the role of the group admin and how to create and manage DAS group users and teams.

Chapter 3 Team Administration

Describes the role of the team admin and how the team admin works within the system to maintain teams and team members

Continued on next page

Manual Overview, continued

How to use this Manual

This manual may include the graphics pointing out specific text. Refer to the descriptions below for detailed information about each icon.



How To:

“How To” steps are used to provide a step-by-step instruction for completing a task in the system.



IMPORTANT!

“Important” notifications indicate there is something you need to understand before continuing.



Note:

“Note” indicates there is something you may encounter within the system given certain circumstances.



Reference:

“Reference” notifications refer you to where you can find more information about the topic, whether it is another location in the current manual or outside sources such as site help.



Tip:

“Tip” notifications indicate a helpful shortcut or other piece of advice related to a specific topic or process.

Volume One: The Gift Acknowledgement Workflow

About this Volume

Volume Purpose This volume will provide users with an overview of system terminology, the gift record assignment process and the acknowledgement workflow.

- Volume Objective**
- Understand system terminology
 - Understand the acknowledgement workflow
 - Understand the various stages of the workflow process and the statuses assigned to a stage
 - Understand the workflow responsibility by role
 - Understand system buttons and icons
 - Manage gift record team assignments
 - Manage gift record acknowledgement letter and template assignments
 - Approve and review templates
 - Print templates
 - Run reports
-

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Chapter One: Introduction to DAS

DAS Overview

About Gift Acknowledgement and DAS

A Gift acknowledgement is correspondence in the form of a letter, card, E-mail or other communication sent to a donor to recognize a gift or a pledge made. A gift may have primary and attributed donors. Attributed donors are in a form of associated, joint, in memory of or in honor of donor(s). Gift acknowledgements may be sent to primary and attributed donors.

The [Donor Acknowledgement System \(DAS\)](#) is a role based web application that automates the process of creating, printing and tracking correspondences sent as acknowledgement to the gifts made to the University. Gift data for DAS will be pulled from Griffin and made available via the user's acknowledgement dashboard in DAS.

DAS User Requirements

Before using the Donor Acknowledgement System, user must meet the following requirements:

- Have Gift Inquiry privileges
 - Have account login to DAS
 - Understands and keep in mind the policies and procedures related to confidentiality and use of the organization's gift data
 - Understands that generated datasets and acknowledgement letters should be distributed to appropriate individuals and/or groups (staffs and donors) to serve its purpose
 - Be able to understand and follow the [workflow process of DAS](#)
-

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Donor Acknowledgement System

DAS Overview, continued

DAS Browser Requirements

The following are DAS supported browsers:

- Internet Explorer 8
 - Internet Explorer 9
 - Chrome (current version)
 - FireFox (current version)
 - iPad 2.0 (iOS 5.0) and higher
-

Chapter Two: Understanding DAS Workflow

Chapter Overview

Introduction Actions that must be taken in DAS in order to take the gift record from receipt to acknowledgement “Complete” are dependent on the rules pre-determined by the receiving group or University division. These actions, referred from now on as DAS workflow, are not only rule based, but are also dependent on a user’s team role.

- Chapter Objectives** At the end of this chapter, you will understand:
- The Work flow terminology and process
 - The high level gift acknowledgement workflow
 - System roles and responsibilities
 - The acknowledgement statuses
-

Chapter Content

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Understanding DAS Workflow

Explanation of the Workflow Process

The [DAS workflow process](#) is as follows:

1. DAS will pull gift and selected bio data from Griffin.
2. Each pulled gift record will be evaluated thru pre-defined assignment rules.



*Pre-defined **assignment rules** are processing rules created in DAS that will be used to assign a gift record to a specific team and acknowledgement letter template.*

3. If an assignment rule is met, the gift record is assigned to a team and an acknowledgement template.
4. Email notifications are sent to various team members based upon email rules set on the group level. *See to Appendix C for email notification examples.*
5. The team Assignee will create the Acknowledgement letter using the assigned template for the rule the gift record satisfies.



Each group will have their own set of assignment rules and templates.

6. When an Acknowledgement letter is created, the team's Reviewer(s) will review, update the letter as needed, and approve it.
7. The team Support staff will review the approved acknowledgement letter.
8. The team Support staff will print and send the Acknowledgement letter to the signer.
9. When the Acknowledgement letter is signed, it will be mailed to the recipient Donor.
10. Status of the acknowledgement in DAS will be set to Complete.



Refer to Appendix A for a flowchart of the DAS Workflow

Donor Acknowledgement System

Workflow Roles and Responsibilities

Acknowledgement Team Roles and Responsibilities A Team is the group of users, with different roles, that are assigned to work on an Acknowledgement letter. Each member of a team has their own role. The team roles and responsibilities are as follows:

Role	Responsibilities
<i>Team Administrator</i>	<ul style="list-style-type: none">• Add and remove team users• Create and maintain team templates• Create and maintain assignment rules
<i>Assignee</i>	An assignee creates the Acknowledgement letter.
<i>Support staff</i>	<ul style="list-style-type: none">• Reviews the team assigned to the Acknowledgement• Reviews the approved Acknowledgement• Print Acknowledgement letters and send to Signer• Change the Acknowledgment's status to "Complete" once it has been mailed to recipient
<i>Reviewer</i>	A Reviewer reviews the created Acknowledgement letter, makes necessary changes and approves it.
<i>Signer</i>	A Signer signs Acknowledgement letters before mailing to recipient.

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Other DAS Roles and Responsibilities

**Group and
System Roles**

Role	Responsibilities
<i>Group Administrator</i>	<ul style="list-style-type: none">• Update group that Group Admin is a member of• Create and remove teams• Create and maintain team templates• Create and maintain assignment rules
<i>System Administrator</i>	<ul style="list-style-type: none">• Create and maintain users• Create and maintain groups• Create Tokens

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DAS Workflow Statuses

The gift record will undergo numerous statuses as it moves throughout the workflow process. The workflow statuses are defined in the table below:

DAS Workflow Status Values

STATUS	DESCRIPTION
<i>Assigned</i>	Status when a gift record satisfies a pre-determined assignment rule and has been assigned to a team and template.
<i>Unassigned</i>	Status when a gift record did not satisfy any pre-determined assignment rule, thus assigned to no team and needs to be reviewed by support staff to determine if it should be acknowledged.
<i>Create a Letter</i>	Status when an assignee has started creating the acknowledgement letter.
<i>In Review</i>	Status when an acknowledgement letter is already assigned to a Reviewer, for review.
<i>Approved</i>	Status when an acknowledgement letter has been approved and ready for signing.
<i>Pending Electronic Signature</i>	Status when an acknowledgement is awaiting electronic signature, before being sent via email.
<i>Out for Signature</i>	Status when an acknowledgement letter is assigned to a Signer, and awaiting signature.
<i>Complete</i>	Status when an acknowledgement letter is signed, and mailed to recipient.
<i>No Acknowledgement</i>	Status when a gift does not require any acknowledgement.

Chapter Three: Getting Started with DAS

Chapter Overview

Introduction

Although DAS is available 24/7 and accessible via the web, groups and users must be granted access to the system. Access is granted by approval from the ARD User Relations team and accounts are setup by a System Administrator. Please contact griffinhelp@uchicago.edu for further information.

Chapter Objectives

At the end of this chapter, you will understand how to :

- Access the system
 - Log into the system
 - Navigate the system using the Navigation menu
-

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Accessing DAS

Logging into DAS

1. Open a supported browser (i.e., Internet Explorer, Google Chrome or Firefox).
2. Type in the DAS URL link in the browser's address bar and press **Enter**.

For now, the DAS URL is: <https://acks.uchicago.edu>

3. The DAS login page will display.



4. Type your CNetID in the **Username** field.

Continued on next page

Accessing DAS, continued

Logging into DAS continued

5. Type in your CNet password in the **Password** textbox.
6. Type in the random letters displayed in a grayed out box on the **Security code** textbox.

The security code is called *Captcha*. Captcha is a test wherein the computer generates random distorted text and user will type in those random letters in a textbox. It is used to prevent automated software from filling out or checking boxes and abusing vulnerable systems.

7. Click on the **Login** button.



If you missed entering or entered incorrect value in one or more fields on the screen, you will be prompted with specific error message such as “user not found, “invalid password” and “captcha not verified”. Try entering or re-entering values, as needed. For every login attempt, the random letters on the gray box change. You will not be able to successfully log into DAS while you are getting error messages.

Navigating DAS

DAS Navigation Menu

Upon a successful login, the DAS home page with navigation menu will be displayed. The username is displayed in the upper right corner of the page, above the Logout link. On the sample navigation menu screen above, “**system**” is the name of the current user. Below is the **DAS navigation menu** with the logged in username.



Elements of the Navigation Menu

Elements of the navigation menu are described in the following table:

Navigation Link	Description
<i>Acknowledgements</i>	Acknowledgements will bring user back to a group’s Processing dashboard page, from whichever page you are currently on.
<i>My Account</i>	My Account allows user to change user preference.
<i>Accounts</i>	The Account menu allows user to create and maintain user accounts. <i>Available only to users with system admin role.</i>
<i>Tokens</i>	The Tokens menu allows system admin user to create and maintain tokens that will be used in the system. Token is another term for data element or field. <i>Available privilege to system administrators only.</i>
<i>Group</i>	The Groups menu allows user to create and maintain groups. Groups can be your organization’s division or department. <i>Available to System Administrators only.</i>

Navigating DAS, continued

Elements of the
Navigation
Menu
continued

Navigation Link	Description
<i>Teams</i>	The Teams menu allows user to create (<i>Group Administrator only</i>) and maintain teams (<i>Group or Team Administrator</i>). Teams are sub groups.
<i>Templates</i>	Template menu allows user to create and maintain acknowledgement templates. Each group will have their own set of templates. <i>Team Administrator only</i> .
<i>Rules</i>	Rules menu allows user create and maintain assignment rules. Each group will have their own set up rules. Only the assignment rules in your group will be listed in the Rules drop down menu.

Chapter Four: Processing Gift Records

Chapter Overview

Introduction

The first page displayed after a successful login is the Acknowledgements page of the group where a user is a member. If a user is a member of multiple groups, the Acknowledgements page will default to gift records of the first group in the Acknowledgements menu list. The Acknowledgements page is where a user, regardless of team role, can access the gift record(s) they need to process, view the status of a gift record within their group and see all unassigned gifts in the system.

Chapter Objectives

At the end of this chapter you will be able to:

- Utilize the Acknowledgements page to search for and view the detail of the gift record to be acknowledged
 - Re-assign the gift record to be acknowledged
 - Update the status of the gift record
 - Save, copy or delete the gift record
 - Navigate within the acknowledge Update screen
-

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Understanding the Acknowledgements Page

Sections of the Page The Acknowledgements page has 2 sections:
Search fields

The Search fields are used to filter the Acknowledgement records on the Search Result list. Search criteria can be one or a combination of search fields. If you enter value in one or more search fields, the **AND** operator is used to combine these fields into one criteria. Below is an example of search criteria using multiple fields:

MBSD Acknowledgements

Gift ID: Started Before: Max Amount:

Scope: Date of Rec After: Donor Name:

Status: Date of Rec Before: Trustee:

Assigned To: Entry Date After: Alum:

Team: Entry Date Before:

Started After: Min Amount:

On the Acknowledgements page, static search fields are Gift ID, Status and Team. Additional search fields can be added, depending on a group's required fields for searching.

Search result list

The Search result list will show all active acknowledgements by default. The Search result list is the list of Acknowledgement records that satisfy the specified Search field values. Selected fields can be sorted by double clicking on the field column header.

On the Processing dashboard page, static search result fields are Gift ID, Team, Status, Completed, Aging and Duration. Additional search fields can be added, depending on a group's required fields for search results.

Gift ID	Team	Status	Started	Completed	Aging	Duration	Gift Amount
100001.1		Unassigned	09/18/2012 ...				\$100,000.00
100001.2		Unassigned	09/18/2012 ...				\$100,000.00
100002.1		Unassigned	09/18/2012 ...				\$100,000.00
100002.2		Unassigned	09/18/2012 ...				\$100,000.00

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Performing a Gift Record Search

Perform the steps below to search for a gift record:

Searching Gifts to Acknowledge

1. First, determine the scope of the criteria you will use to filter the acknowledgements, i.e., by **My Team Acks** or **All**. The default sort value is **My Acks**, which sorts by acknowledgements that have either been manually assigned to you, or have defaulted to you based upon team role and acknowledgement status or group rules.



The screenshot shows a web form titled "MBSD Acknowledgements". It contains several input fields and dropdown menus for searching records. The fields are arranged in a grid-like fashion. At the bottom of the form, there are three buttons: "Search", "Report", and "Clear".

Field	Value
Gift ID:	<input type="text"/>
Scope:	All
Status:	My Acks
Assigned To:	All
Team:	choose ...
Started After:	<input type="text"/>
Started Before:	<input type="text"/>
Date of Rec After:	<input type="text"/>
Date of Rec Before:	<input type="text"/>
Entry Date After:	<input type="text"/>
Entry Date Before:	<input type="text"/>
Min Amount:	<input type="text"/>
Max Amount:	<input type="text"/>
Donor Name:	<input type="text"/>
Trustee:	choose ...
Alum:	choose ...

2. Click the **Search** button.
3. Click on **Clear** button to clear and re-enter search field value.

Donor Acknowledgement System

Sorting Gift Records

Sorting the Result List

1. Click on the column headers to sort the list by.



The first time a column header is clicked, a triangle icon will be displayed. The triangle icon means that the list is sorted in ascending order. Ascending is the default sort order.

1000 record(s) found. Maximum number of records exceeded, please refine your search.

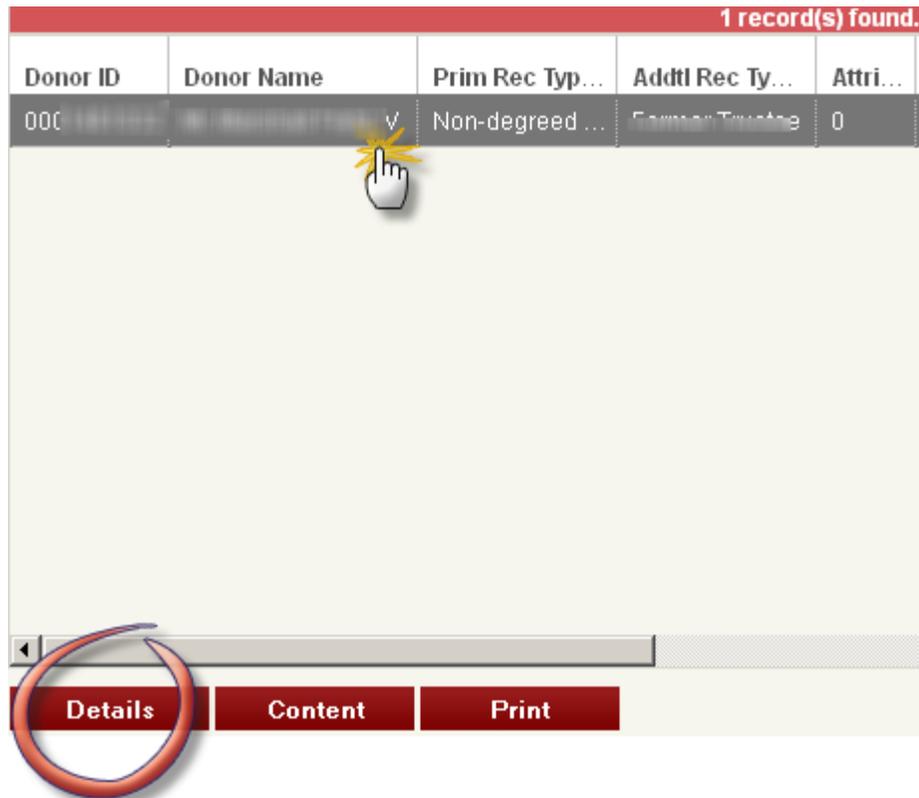
Gift ID	Team 	Assigned To	Status	Started	Completed	Aging	Duration
0002327826.1.G	ARD Vice Pre...	Assigned To	Assigned	10/29/2012 ...		00d 00h 30m	00d 01h 07m
0002328188.1.G	ARD Vice Pre...	Assigned To	Assigned	10/29/2012 ...		00d 00h 30m	00d 01h 07m
0002328215.1.G	ARD Vice Pre...	Assigned To	Assigned	10/29/2012 ...		00d 00h 30m	00d 01h 07m
0002328215.2.G	ARD Vice Pre...	Assigned To	Assigned	10/29/2012 ...		00d 00h 30m	00d 01h 07m
0002327396.2.G	ARD Vice Pre...	Assigned To	Assigned	10/29/2012 ...		00d 00h 22m	00d 00h 30m
0002327397.1.G	ARD Vice Pre...	Assigned To	Assigned	10/29/2012 ...		00d 00h 22m	00d 00h 30m
0002327743.2.G	Univ Pres Team	Assigned To	Assigned	10/29/2012 ...		00d 01h 06m	00d 01h 07m
0002327841.1.P	Univ Pres Team	Assigned To	Assigned	10/29/2012 ...		00d 01h 06m	00d 01h 07m
0002327841.2.P	Univ Pres Team	Assigned To	Assigned	10/29/2012 ...		00d 01h 06m	00d 01h 07m
0001979150.1.P			Unassigned	10/29/2012 ...		00d 01h 07m	00d 01h 07m

2. Click on the column header again, and an inverted triangle will be displayed, which means the list is sorted by descending order.

Viewing Gift Records

Accessing and Viewing Details of the Gift Record

1. To view the detail of the gift record, double click over the record to view or, click the **Details** button.



2. You will be navigated to the Acknowledgement Update screen.

Continued on next page

Donor Acknowledgement System

Viewing Gift Records, continued

Accessing and Viewing Details of the Gift Record, continued

Acknowledgement Update

Gift ID:	000...	Group:	MBSD	Team:	Medicine 1 Team (...)
Started:	11/04/2012	Completed:		Status:	Assigned
Status Date:	11/06/2012	Template:	Temporary Template	Receipt#:	0002129461
Gift Amt:	\$63,300.73	Donor ID:	000...	Donor Name:	Dr. Ronald P. ...
Trustee Ind:	No	Alum Ind:	Yes		

Status:	Assigned	Team:	Medicine 1 Team (Tem	Save
Comment:	<input type="text"/>			Copy
				Delete

Search	Content	Next	Prev
--------	---------	------	------

Processing Log

5 record(s) found.

Date / Time	User	Comment
11/04/2012 10:25:10 PM	system (system)	acknowledgement created: status => Unassigned: created by system pull process
11/06/2012 02:22:42 PM	system (system)	team set => Medicine 1 Team (Temporary), status updated => Assigned: updated by rule ...
11/06/2012 02:22:42 PM	system (system)	external type set => MCD(MBSD Thank You Letter), content added: updated by rule 10...
11/30/2012 02:22:45 PM	system (system)	team updated => Medicine 2 Team (Temporary)
11/30/2012 02:23:03 PM	system (system)	team updated => Medicine 1 Team (Temporary)

The Acknowledgements Update screen will allow you to view transactional detail related to the gift, e.g., donor name, DAS and Griffin receipt numbers, gift amount, trustee and alumni indicators, DAS workflow status, and DAS team and acknowledgement template assignment. It will also pull the Processing Log in with the detail of the gift record.

Modifying the Gift Record Detail

Updating the Gift Record Detail

Once inside the Acknowledgement Update, you can re-assign the processing team, change the processing status of the gift record based upon the processing workflow, and duplicate or delete the gift record.

If multiple results were returned during the gift record search, the **Next** and **Prev** buttons can be used to move into the detail of the next and previous gift records in the search result list.

Reassigning the Acknowledgement Team

1. Choose the new team to process the gift record acknowledgement from within the Team menu.

The screenshot shows the 'Acknowledgement Update' form. At the top, there are two dropdown menus: 'Status' (set to 'Assigned') and 'Team' (set to 'Medicine 1 Team (Tem...'). To the right of these are three buttons: 'Save', 'Copy', and 'Delete'. Below the dropdowns is a 'Comment:' label and a text input field. At the bottom of the form are four buttons: 'Search', 'Content', 'Next', and 'Prev'. Below the form is a table with a red header bar that says '6 record(s)'. The table has three columns: 'Date / Time', 'User', and 'Comment'. The table contains six rows of data, including system-generated records and user-generated records.

Date / Time	User	Comment
11/04/2012 10:25:10 PM	system (system)	acknowledgement of
11/06/2012 02:22:42 PM	system (system)	team set=> Medicin
11/06/2012 02:22:42 PM	system (system)	external type set=> M
11/30/2012 02:22:45 PM	system (system)	team updated => Medicin
11/30/2012 02:23:03 PM	system (system)	team updated => Medicin

2. Click the **Save** button to save the team assignment.

Continued on next page

Donor Acknowledgement System

Modifying the Gift Record Detail, continued

Reassigning Team, continued

3. The new team assignment is now visible in the last row of the Processing Log.

Processing Log		
6 record(s) found.		
Date / Time	User	Comment
11/04/2012 10:25:10 PM	system (system)	acknowledgement created: status => Unassigned: created by system pull proc
11/06/2012 02:22:42 PM	system (system)	team set => Medicine 1 Team (Temkin), status updated => Assigned: updated b
11/06/2012 02:22:42 PM	system (system)	external type set => MCD(MBSD Thank You Letter), content added: updated by r
11/30/2012 02:22:45 PM	[REDACTED]	team updated => Medicine 2 Team [REDACTED]
11/30/2012 02:23:03 PM	[REDACTED]	team updated => Medicine 1 Team [REDACTED]
12/04/2012 10:38:52 AM	[REDACTED]	team updated => Basic Sciences Team

Updating the Workflow Status

Follow the steps below to update the workflow status of the gift being acknowledged:

1. Select the appropriate value from within the Status menu. The value selected should correspond to your role or processing responsibility.



REFERENCE: Refer to Chapter Two: Understanding DAS Workflow, for a detail description of the available workflow statuses.

Acknowledgement Update					
Gift ID:	[REDACTED]	Group:	MBSD	Team:	Basic Sciences T...
Started:	[REDACTED]	Completed:		Status:	Assigned
Status Date:	[REDACTED]	Template:	Temporary Template	Receipt#:	[REDACTED]
Gift Amt:	[REDACTED]	Donor ID:	[REDACTED]	Donor Name:	[REDACTED]
Trustee Ind:	No	Alum Ind:	Yes		

Status:	Assigned	Team:	Basic Sciences Team	Save
Comment:	choose ...			Copy
	Unassigned			Delete
	Assigned			
	In Review			
	Approved			
	Pending Electronic Signature			
	Out for Signature			
	Complete			
	Archived			
	No Acknowledgement			

2. Click Save.



If the gift record no longer needs to be acknowledged, but you would like it to remain in the gift record pool, set the status to "No Acknowledgment."

Modifying the Gift Record Detail, continued

Duplicating the Gift Record

Sometimes it is necessary to have multiple instance of the gift record in order to acknowledge it by multiple teams or multiple individuals.

To duplicate the gift record:

1. Navigate to the detail of the gift record to duplicate.



this means you must be within the Acknowledgement Update page in order to duplicate the gift record.

2. Click **Copy**.
3. Click **Yes** when presented with the copy confirmation popup menu.



Donor Acknowledgement System

Modifying the Gift Record Detail, continued

Deleting a Gift Record

Follow the steps below to remove a gift record from processing workflow:

1. Navigate to the detail of the gift record to delete.



this means you must be within the Acknowledgement Update page in order to delete the gift record.

2. Click **Delete**.

Acknowledgement Update

Gift ID:	0002329161.1.G	Group:		Team:	Basic Sciences Team
Started:	10/11/2010	Completed:		Status:	Assigned
Status Date:	10/11/2010	Template:	Temporary Template	Receipt#:	0002329161
Gift Amt:	\$5,000.00	Donor ID:	000188100	Donor Name:	Dr. Richard P. ...
Trustee Ind:	No	Alum Ind:	Yes		

Status: Team:

Comment:

3. Click **Yes** when presented with the delete acknowledgement confirmation popup menu.

Confirm

Are you sure you would like to delete this acknowledgement?

Continued on next page

Modifying the Gift Record Detail, continued

Deleting a Gift Record continued

4. You are returned to the Acknowledgements page which will now display a message informing you that your deletion was successful.

The screenshot displays the 'MBSD Acknowledgements' interface. At the top, there is a search filter section with various input fields and dropdown menus. Below this is a table with 3 records found. The table columns include Donor ID, Donor Name, Prim Rec Type, Addtl Rec Type, Attrib., Jnt Gi..., Trans Type, Mod I..., Trust..., and Alloc Name. A success message 'Update applied successfully.' is displayed in a red box at the bottom of the table area.

MBSD Acknowledgements

Gift ID: Started Before: Max Amount:
Scope: Date of Rec After: Donor Name:
Status: Date of Rec Before: Trustee:
Assigned To: Entry Date After: Alum:
Team: Entry Date Before:
Started After: Min Amount:

3 record(s) found.

Donor ID	Donor Name	Prim Rec Type	Addtl Rec Type	Attrib.	Jnt Gi...	Trans Type	Mod I...	Trust...	Alloc Name
100012345	Mr. [Redacted]	Non-degree A...	Former Trustee	0	Yes	Pledge Payment	No	No	[Redacted]
100012345	Ms. [Redacted]	Friend		0	Yes	Pledge Payment	No	No	[Redacted]
100012345	Mr. [Redacted]	Non-degree A...	Former Trustee	0	Yes	Pledge Payment	No	No	[Redacted]

Donor Acknowledgement System

Reporting from the Gift Detail

Available Gift Detail Reports

The Acknowledgements Update Page provides links to 2 Web Intelligence reports: The Donor Basic Bio and the Gift Detail.

Acknowledgement Update			
Gift ID:	0002329161.1.G	Group:	MBSD
Started:	11/06/2012	Completed:	
Status Date:	11/06/2012	Template:	Temporary Template
Gift Amt:	987,500.00	Donor ID:	0001000000
Trustee Ind:	No	Alum Ind:	Yes
Team:	Basic Sciences T...	Status:	Assigned
Receipt#:	0001000012	Donor Name:	DR. STEPHEN...

Accessing the Reports

1. Double click the link of the report you want to view.
2. Log into Business Objects using your CNet credentials. *Be sure Authentication is set to Windows AD.*

SAP BusinessObjects

Log On to InfoView

Enter your user information and click Log On.
(If you are unsure of your account information, contact your system administrator.)

User Name:

Password:

Authentication:

Log On

3. Once the report opens, use the Document button to save the output to your computer.

Continued on next page

Reporting from the Gift Detail, continued

Accessing the Reports, continued

The screenshot shows the SAP BusinessObjects InfoView interface. At the top, there is a navigation bar with 'Home', 'Document List', 'Open', 'Send To', and 'Dashboards'. Below this is a browser-like address bar with 'Web Intelligence - BasicBioAcknowledgement'. A 'Document' menu is open, showing options: 'Close', 'Edit', 'Save (Ctrl+S)', 'Save as', 'Save to my computer as' (highlighted with a red circle), and 'Save report to my computer as'. A secondary menu is open over 'Save to my computer as', listing 'Excel', 'PDF', 'CSV', and 'CSV (with options)...'. The background shows a report titled 'Bio Acknowledgement' with the 'GRIFFIN' logo. The report content includes a table with columns for 'Entity Mail Name', 'Special Handling', 'Univ Rel Mgr Entity Name', 'Entity Medical Ctr Trustee Ind', 'Entity Record Status Desc', 'Entity Primary Record Type Desc', 'Entity Record Type Desc Terse', 'UC Degrees Terse', 'Lifetime Cash + Match Paid', and 'Anonymous Giving Flag (Lifetime)'. To the right of the table are sections for 'Home Address' and 'Business Address'.

Chapter Five: Managing the Acknowledgment

Chapter Overview

Introduction The Content page is where you work with the acknowledgement template assigned to the gift record. It provides the ability to edit the template, letter type and the text and format of the template.

Chapter Objectives At the end of this chapter you will be able to:

- Replace and load the template assigned to the acknowledgement
- Merge the actual token (field data) values to the template
- Add/update comments to the acknowledgement content
- Edit the content of the acknowledgement

Chapter Content This chapter contains the following topics:

Topic	See Page
Working with the Content of the Gift Record	37
Editing the Content	41
Copying and Pasting Content	43

Donor Acknowledgement System

Working with the Content of the Gift Record, continued

Replacing and Loading the Assigned Template

1. On the acknowledgement Content page, select the applicable template from the Template drop down list.

The screenshot shows the 'Acknowledgement Content' page. At the top, there is a header 'Acknowledgement Content'. Below it, a table displays gift record details: Gift ID, Started, Status Date, Gift Amt, Trustee Ind, Group, Completed, Template, Donor ID, Alum Ind, Team, Status, Receipt#, and Donor Name. The 'Template' field is currently set to 'Temporary Template'. Below the table, there is a form with a 'Template:' dropdown menu, a 'Type:' dropdown menu, and a 'Comment:' text area. The 'Template:' dropdown menu is open, showing a list of templates including 'Temporary Template', 'Comer Pediatric - foldover side', 'Donor Relations', 'Education - General', 'Education - Org', 'Education - foldover Staff', 'Foldover side - with envelope', 'Foldover top', 'Forefront Fund - General', 'Forefront Fund - foldover Staff', 'Foundation Relations', 'GI', 'Letter template - monarch envelope', 'Medical Center - General Organization', 'Medicine Center - General Individual', 'Medicine Center - General foldover for Staff', 'New Hospital Surgery', 'Pediatric Cancer', 'Pediatrics', 'Principal Gifts', and 'Temporary Template'. To the right of the form, there are buttons for 'Merge', 'Load', 'Print', and 'Save'. A 'Search' button is also visible next to the 'Comment:' text area.



The initial template attached to the gift record is the one satisfied by the DAS assignment rule.

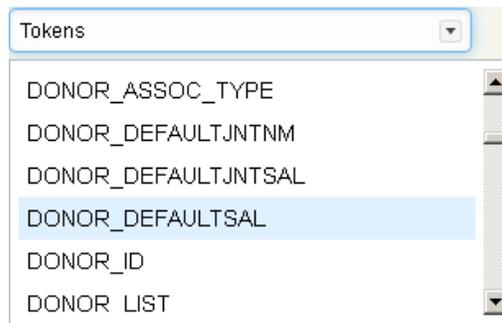
2. Click on **Load** to load the content of the newly selected template.
3. Click on **Save**.
4. Click on **Cancel** to disregard the selected template and go back to the Acknowledgements list.

Donor Acknowledgement System

Working with the Content of the Gift Record, continued

Inserting Token Values New tokens (data fields) can be inserted into the template prior to completing the acknowledgment letter and existing tokens can be removed. Follow the steps below to insert or remove tokens from the acknowledgment template:

1. Select the template you will use to acknowledge the gift record from the Template menu.
2. Place your cursor in the position where you want to insert the token.
3. Select the token to insert from the Tokens menu.



4. The token will now appear within the template editor.



REFERENCE: Refer to Appendix B for a list of available tokens.

\$DONOR_DEFAULTJNTSAL\$

It gave me great pleasure to learn of your recent gift supporting \$GIFT_FUND_NAME\$ at the University of Chicago Medicine.

As a member of the University community, you know firsthand the importance of philanthropic support and the impact it has on the advancement of medicine. Not only are you helping to fund important education, research, and patient care programs, but you are helping to improve the lives of countless individuals who benefit from our work.

Thank you for your leadership and commitment.

5. To remove a token, simple highlight it and hit the delete key on your keyboard.



The changes to the acknowledgement template will only apply to the gift record the user is working on. The original content of the assigned template will not change

Donor Acknowledgement System

Working with the Content of the Gift Record, continued

Merging the Tokens Values

1. On the acknowledgement Content page, click on **Merge** to replace the token names with actual values.



The screenshot shows a web form with the following elements:

- Template: Medicine Center - Gene (dropdown menu)
- Type: MBSD Thank You Lette (dropdown menu)
- Comment: (text input field)
- Buttons: Search, Details, Next, Previous (horizontal row); Merge, Load, Print, Save (vertical column)

The **Merge** button is highlighted with a mouse cursor icon.

2. Click on **Save**.
3. Click on **Cancel** to disregard any changes to the acknowledgement content.

Adding Comments

1. On the acknowledgement Content page, type in text in the comment field.
2. Click on **Save**.
3. Click on **Cancel** to disregard any changes to the acknowledgement content page.



The comment value will be saved and added into the Processing log after clicking on Save. Then the comment field will be cleared of its value.

Editing the Content

Editing the Content of the Template

The content of the template can be edited using the provided html editor. It has formatting functionality that is very similar to that within MS Word. When the mouse is hovered over an icon, a hot tip of the feature is displayed. A description of each icon is provided in the table below:

Icon	Description
Source 	The source button displays the program code of the page. This may not be useful for business users, but would be helpful for the technical staff for troubleshooting purposes.
Paste 	Paste copied text values (including from Word document) into clipboard, then into the acknowledgement html editor.
Undo/Redo 	Undo or Redo updates on the content.
Search, Replace and Select All 	Search for text, replace specific text or simply select all text content of the template.
Text formatting 	Format font or remove formatting (last icon in the text formatting)
Alignment and Text direction 	Align text to left, center, right or justified. Specify text direction, left to right or right to left.
Table, special characters, line and page break 	Insert table, horizontal line, special characters or page break for printing.

Continued on next page

Donor Acknowledgement System

Editing the Content, continued

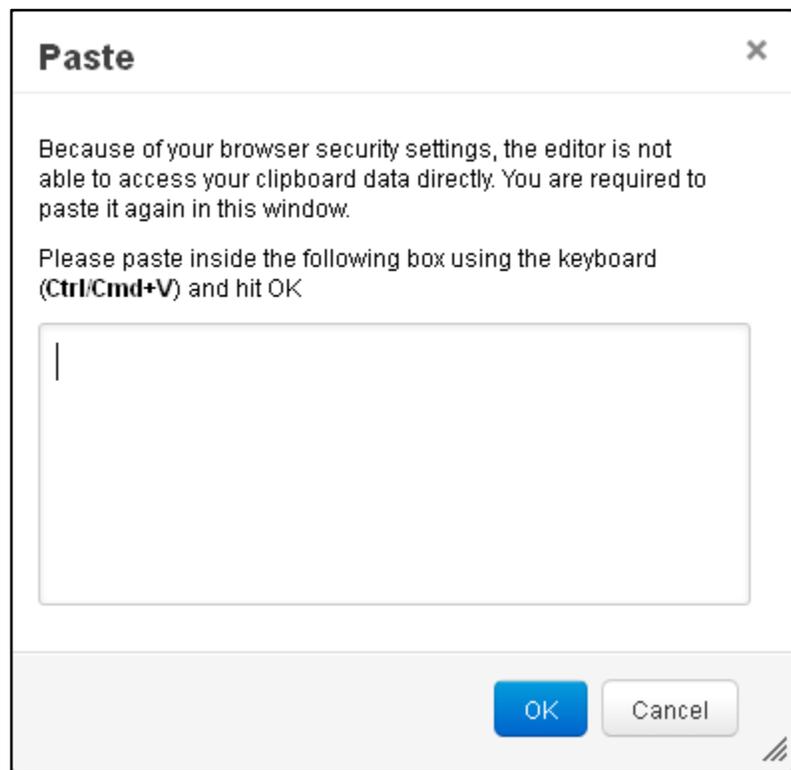
Editing the
Content of the
Template,
continued

Icon	Description
Formatting style 	Used to select a pre-defined style associated with the acknowledgement text.
Font Format 	Used to select a pre-defined header style associated with the acknowledgement text.
Font size 	Used to select font size.
Text color and background color 	Used to set the color of the font.
Tokens 	A drop down list of DAS tokens (Griffin fields), that can be inserted into the Acknowledgement letter via the HTML editor.

Copying and Pasting Content

Copy and Paste Limitations The Paste icons in the html editor have limitations. Pasting text from the clipboard using Firefox, Google Chrome or Safari is done by using Ctrl-C or using the copy/cut icons in the application's editor.

However, if using the DAS paste from Word icon  to perform the paste operation, a pop-up window will appear in DAS informing you to use the Ctrl+V command to complete the operation.



Chapter Six: Acknowledgement Printing

Chapter Overview

Introduction Acknowledgements can be printed at any time throughout the workflow process, but can only be printed from the Acknowledgements page or from the Acknowledgement Content page.

Objective At the end of this chapter you will be able to:

- Prepare the acknowledgement for printing using your browser's page setup menu
 - Print the acknowledgement
-

Chapter Contents

Topic	See Page
Setting Print Page Options	45
Printing the Letter	47

Setting Print Page Options

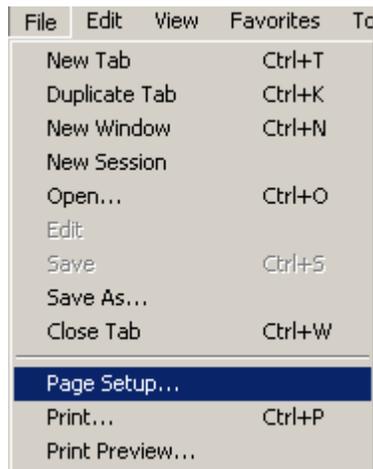
Setting Print Page Options

In IE 9,

1. Click on **Tools** menu.
2. Click on **Print**.
3. Click on **Page Setup**.

In IE 8 and FireFox,

4. Click on **File**.
5. Click on **Page Setup**.

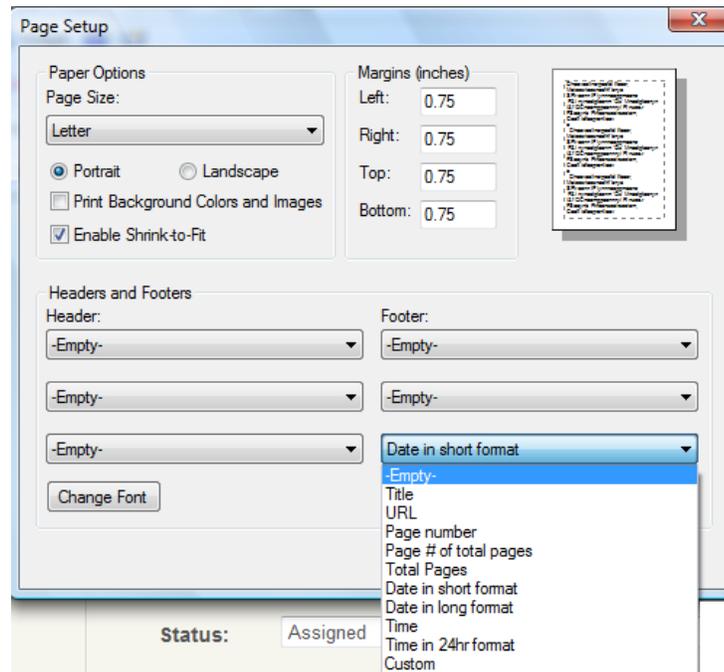


Continued on next page

Setting Print Page Options, continued

Setting Print Page Options, continued

6. In the Margins section (IE) or the Margins & Header/Footer tab (Firefox), specify the appropriate margins to be used for printing.

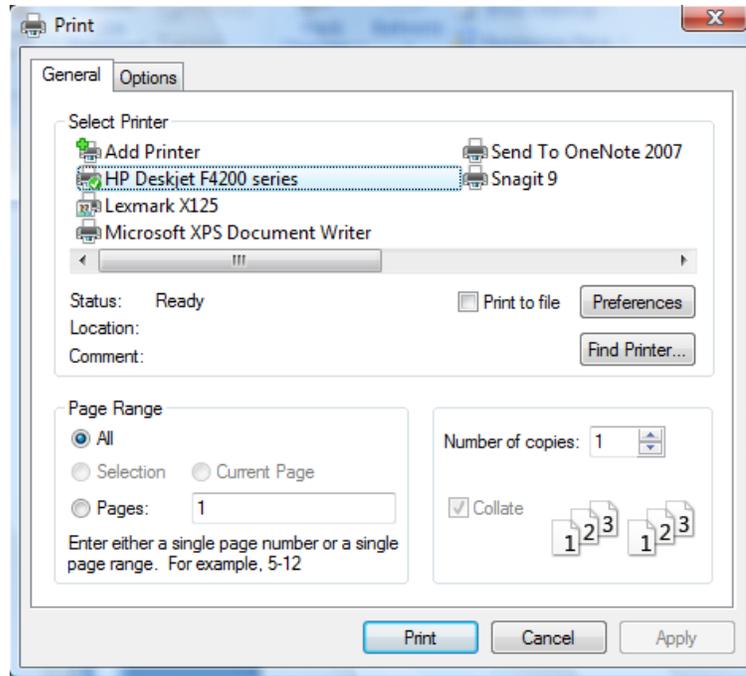


7. On the Headers and Footers section, header and footer should have a value of -Empty-, so that date, URL link and page number will not be printed on the acknowledgement letter.
8. Click on **OK**.

Printing the Letter

Printing the Acknowledgement

1. Select **Print** from the browser's main menu.
2. Printing from the browser's main menu uses Window's print functionality dialog form.



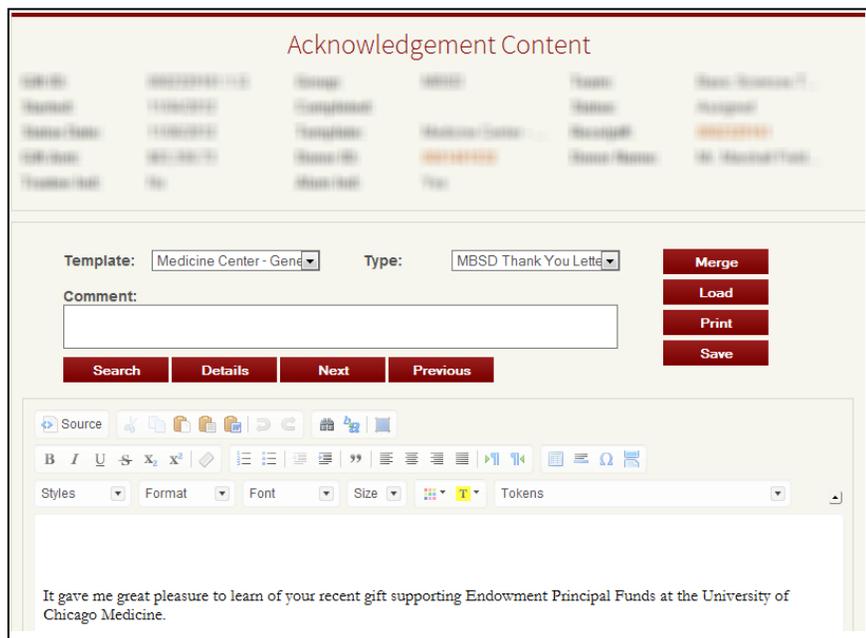
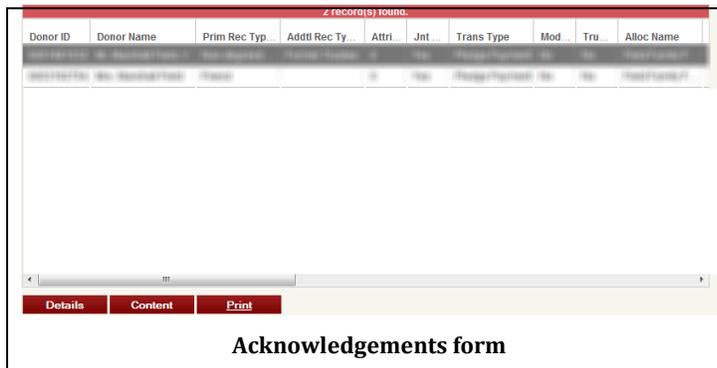
Continued on next page

Donor Acknowledgement System

Printing the Letter, continued

Printing the Acknowledgement,
continued

3. Or, select an acknowledgement and click the **Print** button from the Acknowledgements or Acknowledgement Content page.



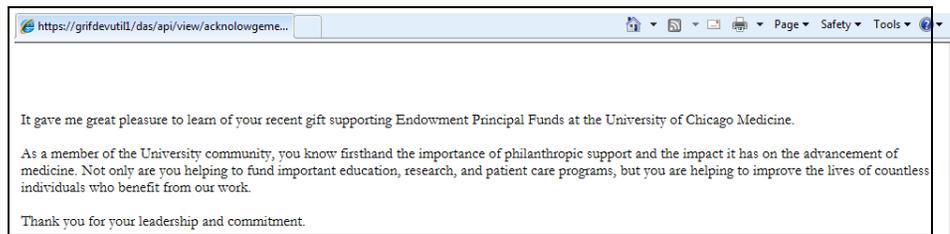
Continued on next page

Donor Acknowledgement System

Printing the Letter, continued

Printing the Acknowledgement, continued

4. The content of the acknowledgement letter will open in another browser window or tab, depending on your browser settings.



Chapter 7: Acknowledgment Reporting

Introduction to DAS Reporting

DAS provides three reports as downloadable Excel files.

The table below describes the contents of the reports in DAS:

Report Name	Report Description
Manager Report	This report will show selected gifts and acknowledgement detail. Acknowledgement records that can be included in this report will be from a Search Query result.
Status Report	This report will show the current status and number of records for each Acknowledgement status within a given period by Team or Team Member
Average Turn Around time Report	This report will show the average time, as a group or team, to complete the processing of acknowledgements

Chapter Objectives

By the end of this chapter you will know:

What reports are available in DAS
The description of the Reports in DAS
How to invoke and run the reports in DAS

Chapter Contents

This chapter contains the following topics:

Topic	See Page
How to Run DAS Reports	52

How to Run DAS Reports

Running Reports from the Acknowledgement Form

Follow the steps below to run a report out of DAS:

1. From the Acknowledgements form, click the **Report** button.



2. Choose the report to run from the drop down list.



3. Click on **Launch**.

Running Reports from the Gift Record

2 reports are available from the detail of the gift record: the Donor report and the Gift report.



To access the reports:

Donor Acknowledgement System

How to Run DAS Reports, continued

Running Reports from the Gift Record (continued)

1. Double click a gift record from the Acknowledgement form or highlight And select **Detail** or **Content**.

Donor ID	Donor Name	Prim Rec Typ...	Addtl Rec Ty...	Attri...	Jnt...	Trans Type	Mod...	Trustee Ind	Alloc Nar
0002106585	Mrs. James H. ...	Friend		3	No	Gift (Outright)	Yes	No	James H. ...

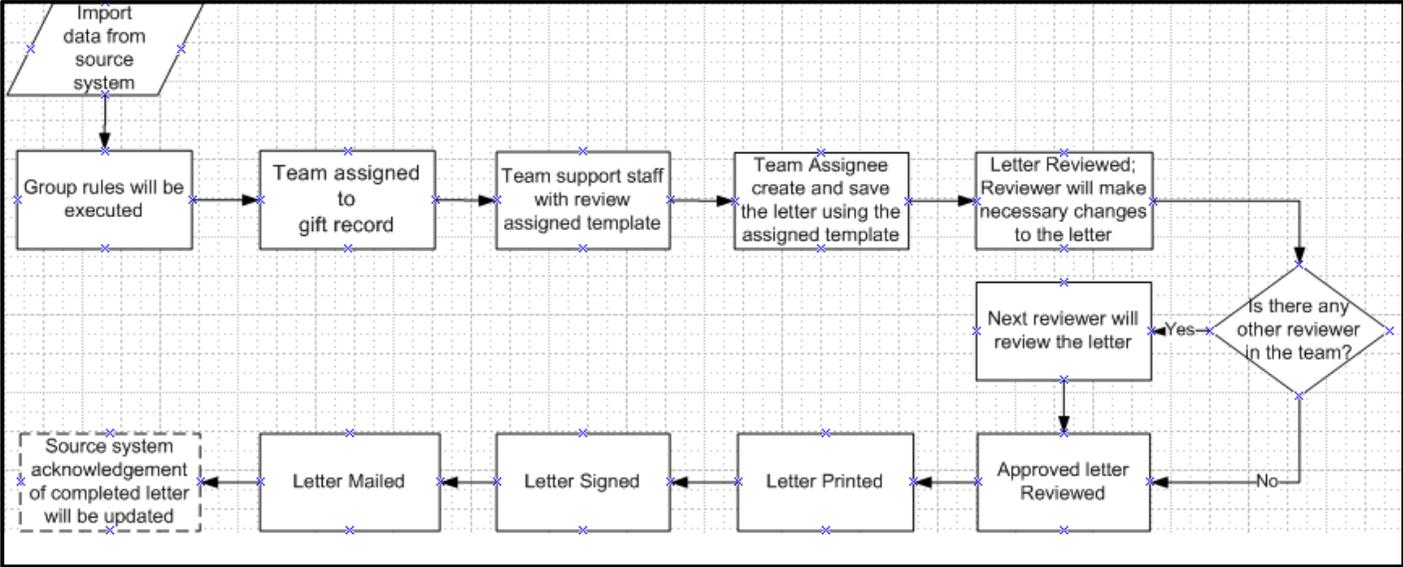
2. You are taken to the Acknowledgment Content or Detail form.

Acknowledgement Update

Gift ID:	0002106585.2.G	Group:	MBSD	Team:	
Started:	04/30/2013	Completed:		Status:	Unassigned
Status Date:	04/30/2013	Template:		Receipt#:	0002106585
Gift Amt:	\$0.00	Donor ID:	0004...	Donor Name:	Mrs. James H. ...
Prim Rec Type:	Friend	Addtl Rec Type:		Attrib Dnr Cnt:	3
Jnt Gift Ind:	No	Trans Type:	Gift (Outright)	Mod Ind:	Yes
Trustee Ind:	No	Alum Ind:	No	Alloc Name:	James H. ...
Trans Type:	Gift (Outright)	Date of Record:	August 15, 2013	Credit Amt:	\$0.00

3. Click the Donor ID or Receipt# link to open the Business Objects report.

Appendix A: Flowchart of DAS Workflow



Donor Acknowledgement System

Appendix B: List of available Tokens

TOKEN NAME	DESCRIPTION
ADDL_RECTYPELIST	Primary Donor Addl Record type (terse)
ADDRESS	Preferred Address
AFFIL_CLASSYR	Affil Class Year
ALLOCATION_CODE	Allocation Code
ALLOCATION_NAME	Allocation Name
ALUMNI_AFFIL	Alumni Affiliation (depending on group)
ALUMNI_IND	Alumni Indicator (depending on group)
ANONYMOUS_DESC	Anonymous Description
ARD_STAFF_IND	ARD Staff Ind
CITY	Preferred Address City
CONSECGIV_IND_SCH	Consecutive Giving Ind (per School)
CONSECGIV_IND_SCH_AF	Consecutive Giving Ind (AF - per school/division)
CURR_VSC_IND	Curr Visiting Committee (per school/division)
DATE_OF_RECORD	Gift Date of Record
DEGREE_SCHOOL	Degree school (terse)
DONOR_ASSOC_TYPE	Donor Associated Type
DONOR_DEFAULTJNTNM	Donor Default Joint Name
DONOR_DEFAULTJNTSAL	Donor Default Joint Salutation
DONOR_DEFAULTSAL	Donor Default Salutation
DONOR_ID	Donor Id
DONOR_LIST	Donor Listing (terse)
DONOR_PREF_MAIL_NAME	Donor Pref Mail Name
DONOR_SORT_NAME	Donor Sort Name
FACULTY_EMERITI_IND	Faculty Emeriti Indicator
FACULTY_STAFF_IND	Faculty Staff Indicato
FINAL_SEGMENT_IND	Final Segment Indicator
FIRSTTIMEGIVEIND_SCH	First Time Giving Indicator
GIFT_ACCOUNT	Gift Account
GIFT_ALLOC_DEPT	Gift Allocation Dept Name
GIFT_ALLOC_DEPTCD	Gift Allocation Dept Code
GIFT_ALLOC_DIV	Gift Allocation Division Name

Donor Acknowledgement System

TOKEN NAME	DESCRIPTION
GIFT_ALLOC_DIVCD	Gift Allocation Division Code
GIFT_ALLOC_SUBDEPT	Gift Allocation Sub Dept Name
GIFT_ALLOC_SUBDEPTCD	Gift Allocation Sub Dept Code
GIFT_AMOUNT	Gift Amount
GIFT ASSOCCREDITAMT	Gift Associated Credit Amount
GIFT_DATE_ADDED	Gift Date Added
GIFT_DATE_MODIFIED	Gift Date Modified
GIFT_FUND_NAME	Gift Fund Name
GIFT_ID	Gift ID (Griffin Receipt/Pledge Number.Gift Sequence.Transaction Type)
GIFT_NOTES	Gift Comments and Notes
GIFT_PURPOSE	Gift Purpose Desc
GIFT_REFERENCE1	Gift Reference 1
GIFT_REFERENCE2	Gift Reference 2
GIFT_SEQUENCE	Gift Sequence Number
GIFT_SPECHANDLING	Gift Special Handling
GIVING_CODE	Gift Giving Codes (terse)
GIVING_CODE_DESC	Gift Giving Code Desc (terse)
HONOR_RECIPIENT_NAME	In Honor Of Recipient Name
IN_HONOR_IND	In Honor of Indicator
IN_MEMORY_IND	In Memory of Indicator
INCREASED_GIVING_IND	Increased Giving Indicator
INCREASEDGIVSCH_IND	Increased Giving Indicator (per sch/division)
JOINT_GIFT_IND	Joint Gift Indicator
JOINT_MAIL_IND	Joint Mail Indicator
LAST_YR_SCHOOL	Last Yr Gift (per school/division)
LAST_YR_UNIV	Last Yr Univ Gift
LOCAL_DEGREE_LIST	Primary Donor local degree list (terse)
MATCH_AMOUNT	Gift Match Amount
MEM_RECIPIENTNM	In Memory of Recipient Name
MOD_IND	Modified Gift Indicator
MOD_REASON_CHANGED	Modified Reason Changed
ORG_CONTACT_NAME	Organization Donor - Contact Name
ORG_CONTACT_SAL	Organization Donor - Contact Salutation
ORG_CONTACT_TITLE	Organization Donor - Contact Title
PAST_VSC_IND	Past Visiting Committee Indicator
PERSON_OR_ORG	Person or Organization

Donor Acknowledgement System

TOKEN NAME	DESCRIPTION
PLEDGE_AMOUNT_PD	Pledge Amount Paid
PLEDGE_BALANCE	Pledge Balance
PLEDGE_FINAL_PMT_IND	Pledge Final Payment Indicator
PLEDGE_FIRST_PMT_IND	Pledge First Payment Indicator
PREF_EMAIL	Donor Pref Email
PRIMARY_RECTYPE	Donor Primary Record type desc
PRIMARY_RECTYPE_CD	Donor Primary Record type code
PROSPECT_ID	Prospect Id
PROSPECT_MANAGER	Prospect Manager (per school/division)
PROSPECT_MANAGER_ID	Prospect Manager ID
PROSPECT_MANAGER_CNET_ID	Prospect Manager Cnet ID
RECEIPT_DATE	Gift Receipt Date
RECEIVING_OFFICE	Receiving Office
RECURRING_GIFT_IND	Recurring Gift Indicator
REUNION_IND	Reunion Indicator
SAL_SIGNER_NAME	Donor Signer Salutation signer name
SIGNER_SAL_TYPE	Donor Signer Salutation Type
SIGNER_SALUTATION	Donor Signer Salutation
SPLIT_GIFT_IND	Split Gift Indicator
SPOUSE_NAME	Donor Spouse Name
SPOUSE_PRIM_RECTYPE	Donor Spouse Name primary record type
STATE	Donor Pref Address State desc
STATE_CD	Donor Pref Address State code
TRANSACTION_TYPE	Transaction Type Desc
TRANSACTION_TYPECD	Transaction Type Code
TRUSTEE_IND	Trustee Indicator
UNIV_RELATION_MGR	Univ Relation Manager
VIP_IND	Booth VIP Indicator
YR_CONSECGIV_SCH	Years of Consecutive Giving (per school/division)
YR_CONSECGIVSCH_AF	Years of Consecutive Giving (AF)
YTD_SCHOOL	YTD Total (per school/division)

Appendix C: Email Notification

- **Components of DAS email notification**
 - **User name** – name of the team user
 - **Gift ID** – gift id
 - **Team** – team assigned to the acknowledgments
 - **Role** – role of the team user within the group/team
 - **Status** – status of the acknowledgement
 - **Status Age** – days/time since an acknowledgement is set with its current status
 - **Duration** – days/time since an acknowledgement was created in DAS
- **Group admin email notification**

Test UserA1,

The following acknowledgements require action.

Gift ID: 1000000001.1.G
Team: Team A1
Role: Group Admin
Status: In Review
Status Age: 00d 04h 50m
Duration: 00d 05h 37m

Gift ID: 1000000001.2.G
Team: Team A1
Role: Group Admin
Status: In Review
Status Age: 00d 01h 56m
Duration: 00d 05h 37m

Gift ID: 1000000003.1.G
Team: Team A1
Role: Group Admin
Status: Approved
Status Age: 00d 00h 58m
Duration: 00d 05h 37m

Gift ID: 1000000004.1.G
Team: Team A1
Role: Group Admin
Status: Out for Signature
Status Age: 00d 00h 58m

Donor Acknowledgement System

Duration: 00d 05h 37m
Gift ID: 1000000005.1.G
Team: Team A2
Role: Group Admin
Status: Pending Electronic Signature
Status Age: 00d 00h 35m
Duration: 00d 05h 37m

- **Team admin email notification**

Test UserA1,

The following acknowledgements require action.

Gift ID: 1000000004.2.G
Team: Team A2
Role: Team Admin
Status: In Review
Status Age: 00d 00h 39m
Duration: 00d 05h 35m

Gift ID: 1000000005.1.G
Team: Team A2
Role: Team Admin
Status: Pending Electronic Signature
Status Age: 00d 00h 33m
Duration: 00d 05h 35m

Gift ID: 1000000098.2.G
Team: Team A2
Role: Team Admin
Status: Approved
Status Age: 00d 00h 39m
Duration: 00d 05h 35m

Gift ID: 1000000100.1.G
Team: Team A2
Role: Team Admin
Status: Out for Signature
Status Age: 00d 00h 32m
Duration: 00d 05h 35m

Gift ID: 1000000001.1.G

Donor Acknowledgement System

Team: Team A1
Role: Team Admin
Status: In Review
Status Age: 00d 04h 48m
Duration: 00d 05h 35m

Gift ID: 1000000001.2.G
Team: Team A1
Role: Team Admin
Status: In Review
Status Age: 00d 01h 53m
Duration: 00d 05h 35m

- **Assigned email notification**

Test UserA1,

The following acknowledgements require action.

Gift ID: 1000000001.1.G
Team: Team A1
Role: Team Reviewer
Status: In Review
Status Age: 00d 03h 54m
Duration: 00d 04h 41m

Gift ID: 1000000001.2.G
Team: Team A1
Role: Team Reviewer
Status: In Review
Status Age: 00d 00h 59m
Duration: 00d 04h 41m

Gift ID: 1000000002.1.G
Team: Team A2
Role: Team Assignee
Status: Assigned
Status Age: 00d 04h 41m
Duration: 00d 04h 41m

Gift ID: 1000000002.2.G
Team: Team A1

Donor Acknowledgement System

Role: Team Reviewer
Status: In Review
Status Age: 00d 00h 03m
Duration: 00d 04h 41m

Gift ID: 1000000003.2.G
Team: Team A1
Role: Team Reviewer
Status: In Review
Status Age: 00d 00h 03m
Duration: 00d 04h 41m

Donor Acknowledgement System
