Griffin Training Manual

Donor Acknowledgement System (DAS)

Volume Two: Administrator Manual

Table of Contents

Volume Two: The Application Admin Workflow

Volume Overview

An Introduction to DAS admin Workflow

A subset of users in DAS will have the ability to create and maintain access, privileges and acknowledgement rules and templates. The user roles that correspond to these system functionalities include system, group or team administrator.

Volume Objectives

This volume of the Donor Acknowledgement System manual will provide administrative users with the process and procedural knowledge needed in order to create and maintain system level configurations (rules and templates), user and group accounts, and acknowledgement teams. At the end of this volume users will be able to:

- Create and manage acknowledgement users
- Create and manage acknowledgement groups
- Create and manage acknowledgement teams
- Create acknowledgement templates
- Create and manage group acknowledgement rules

Volume Content

This publication contains the following topics:

Chapter One: System Administration

Chapter Overview

The Role of the System Administrator

DAS system administrators have the ability to create and manage:

- User accounts
- Acknowledgment groups
- Acknowledgment Tokens

This chapter will discuss the steps and describe the fields associated with the system administrator's privileges.

Chapter Contents

This chapter contains the following topics:

Administering User Accounts

About Manage Accounts

Manage Accounts is an administrative functionality that is used to create and maintain DAS user accounts. Only users with the System admin role will be able to view, create and maintain user accounts. A need for a new or update to a user's account should be requested to the system administrator.

On the Manage Accounts page, you can do the following:

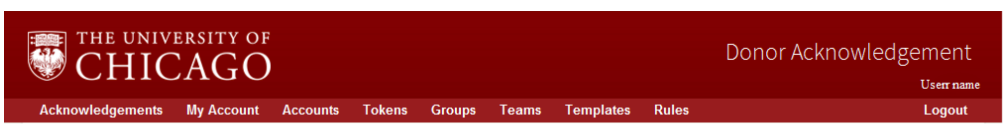
- Search for users using the available search fields
- Sort the result list using the column headers
- Create a user account
- Update a user account
- Delete a user account

Creating a New User Account

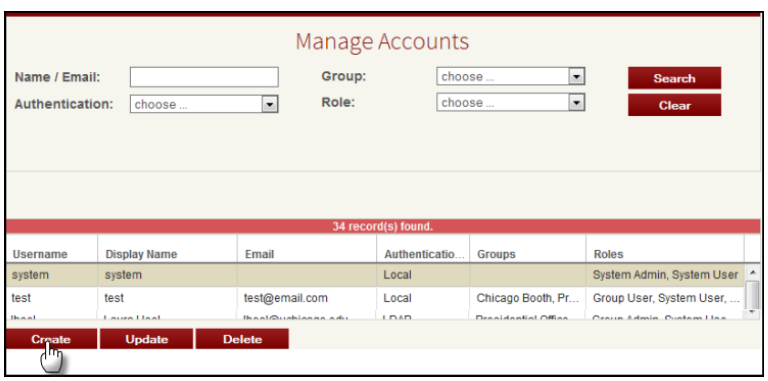
Once a user account is created and the roles assigned the user will automatically have the ability to log into the DAS system.

to Create a user account:

1. Click the **Accounts** link on the DAS navigation menu.



2. The Manage Accounts page will open.



3. Click Create. The Create Account page will open.

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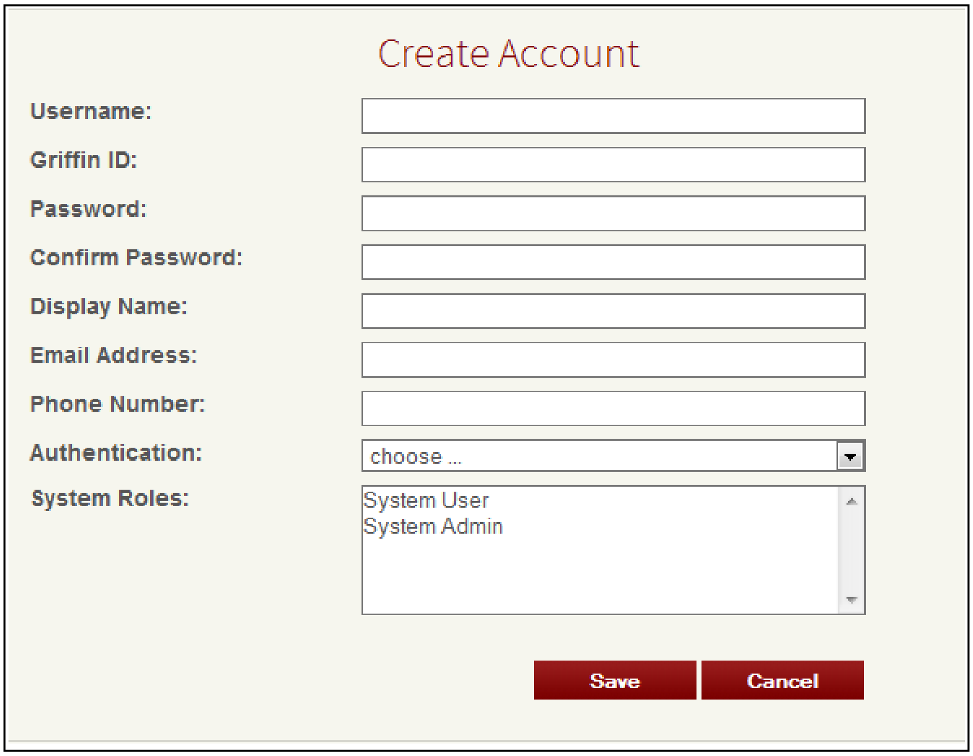
Administering User Accounts, Continued

Creating a New User Account
(continued)



4. Fill in the fields on the form according to the rules below:

Field Name	Required	Definition/Entry Rule
Username	Required	Users CNetID
Griffin ID	Optional	The Griffin ID number of the user being added
Password	Optional	Password allows user who may not necessarily log into the system to be added in the system, for team role assignment purpose. *Password must be at least 8 characters and can contain letters, numbers, or any of the following characters: ! @ # $ * %*
Confirm Password	Optional	Re-entry of Password for confirmation purposes

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Administering User Accounts, Continued

Creating a New User Account (continued)

Field Name	Required	Definition/Entry Rule
Display Name	Required	Users full name.
Email Address	Required	Users U of C preferred email address
Phone Number	Optional	Phone number acceptable formats are: • ***999-999-9999*** • ***(999) 999-9999***
Authentication	Required	Select from one of the values below: - Disabled – disable user account - Local – login to local database server - Ldap – login to your organization network server
System Roles	Required	A user can be one of the following: System User System User and System Admin

5. Click **Save** to create the account. Click **Cancel** to exit the page without saving.

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Administering User Accounts, Continued

Searching for the User Account

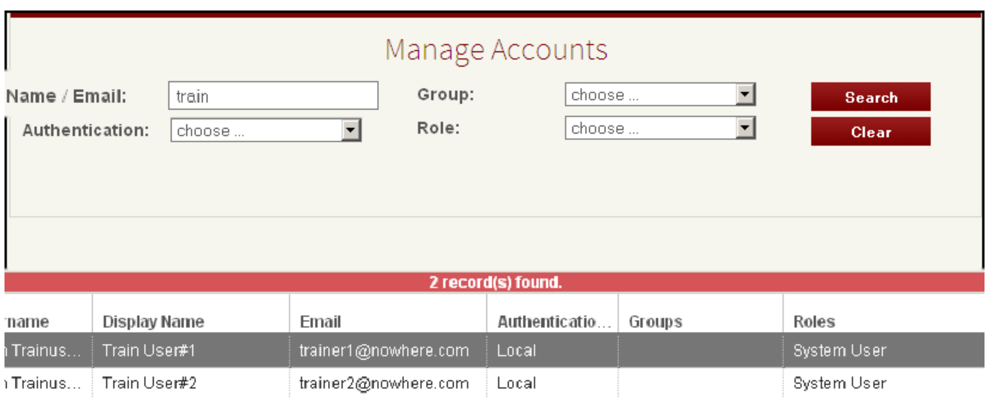
Before a user's account can be modified, it must first be located.

To locate a user's account:

1. On the Manage Accounts page, enter or select a value on one or more search fields.

To search for a user by full name, first or last name, display name or partial name, enter the information in the Name/Email field. DAS will return all users that meet the entered name criteria.

2. Click **Search**.



3. Click **Clear** to reset and re-enter search field values.

Updating a User Account

To update a user account:

1. On the Manage Accounts page, double click the user account to update from the Search result list.

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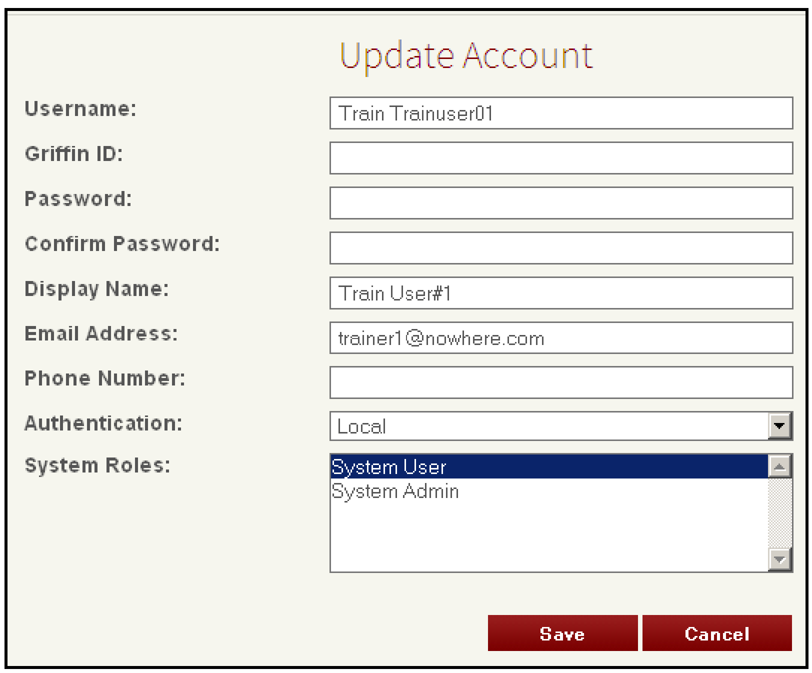
Administering User Accounts, Continued

Updating a User Account (continued)

OR
Highlight the row of the user account to update within the Search result list, and click **Update**.

2. You are taken to the Update Account screen.



3. Once you have made the modifications, click **Save** to update the user account.

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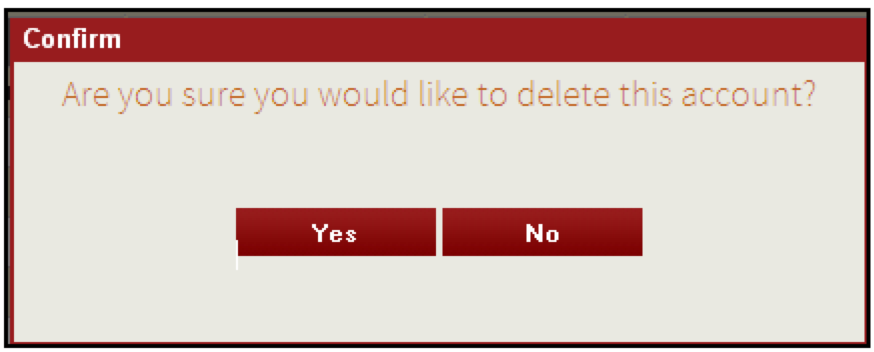
Administering User Accounts, Continued

Deleting a User Account

To delete a user's account:

1. Highlight the row of the user account to update within the Search result list, and click Delete.

2. You are presented with a delete account confirmation dialogue box.



3. Click **Yes** to confirm or **No** to cancel the account deletion.

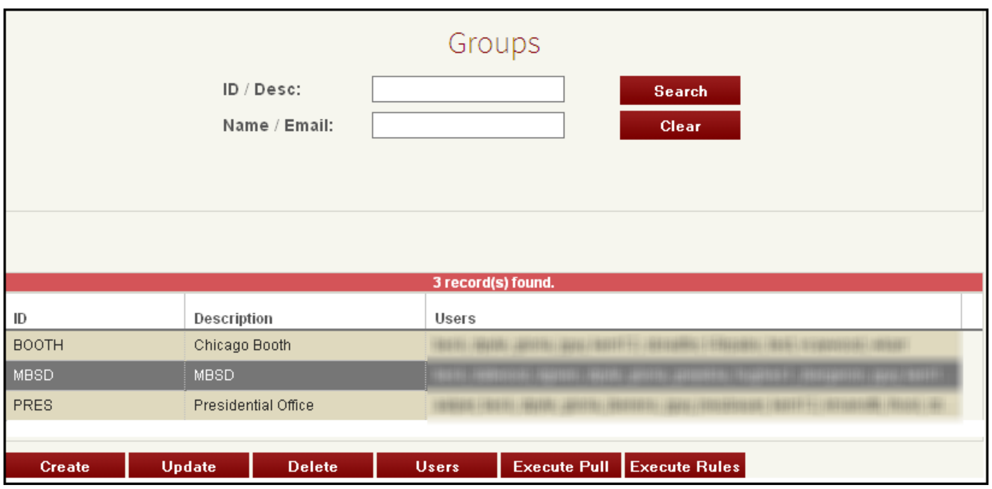
Administrating DAS Groups

About Manage Groups

Manage Groups is an administrative functionality that is used to create and maintain DAS groups. Users with the System administrator role can create and maintain DAS groups. Users with Group admin roles have the ability to update a group that the user is a member of.

On the Group admin page, you can do the following:

- Search for a group using the available search fields
- Sort the result list using the column headers
- Create a group
- Update a group
- Delete a group
- Add users to a group
- Execute a manual group gift data pull
- Execute group rules



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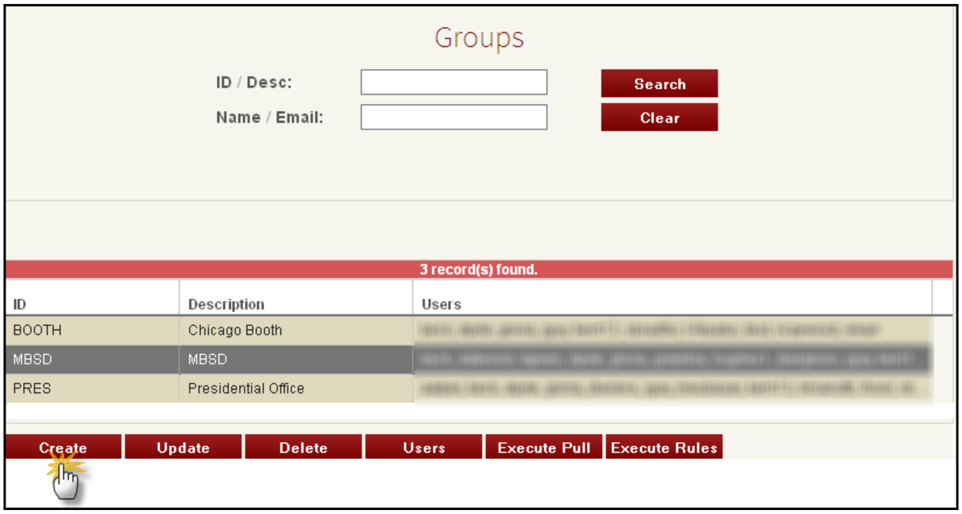
Administrating DAS Groups, Continued

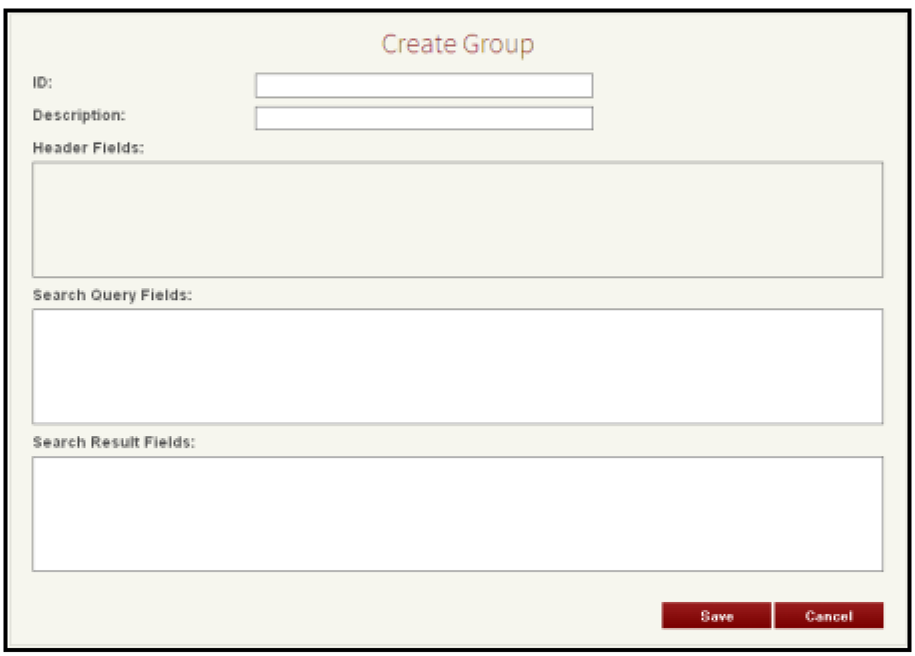
Creating a New Group

To create a new group:

1. From the Group Admin page, click the **Create** button.



2. The Create Group page will be opened.



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Administrating DAS Groups, Continued

Creating a New Group
(continued)

3. Enter values according to the data entry rules below:

Field Name	Required	Definition
ID	Required	Name of the group being created (maximum 10 characters, no spaces and special characters, except underscore)
Description	Required	Description of the group being created
Header Fields	Required	The list of tokens that can be used to modify the acknowledgement letter, available within the Acknowledgement Detail and Content page. *It is a required field and should have at least 1 token specified. Choose from the list of available tokens (Appendix () of this document)* *A link to a report can be attached to the token. If attaching a report link it should be in the following format:*
Search Query Fields	Required	Contains the list of fields that will be used when searching for acknowledgement records. *It is a required field and should have at least 1 token specified.*
Search Results Field	Required	Contains the list of tokens that will be displayed in the Search Result pane *It is a required field and should have at least 1 token specified.*

IMPORTANT! A technical system admin should add or make sure that the header field, search query field or search result field that will be added, is supported/included in the DAS gift source data provider package.

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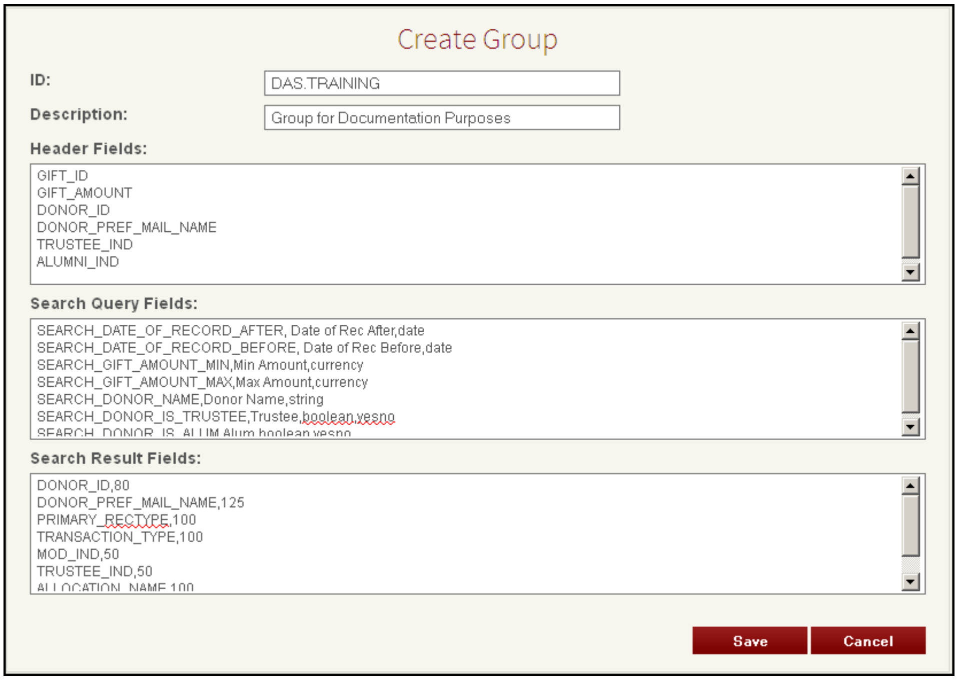
Administrating DAS Groups, Continued

Creating a New Group
(continued)



4. Click the **Save** button to save the newly created group or click **Cancel** to exit from this page without saving.

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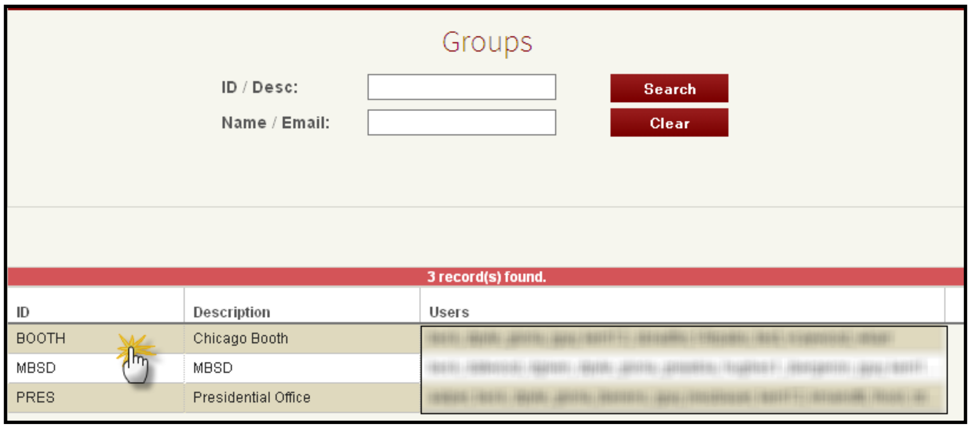
Administrating DAS Groups, Continued

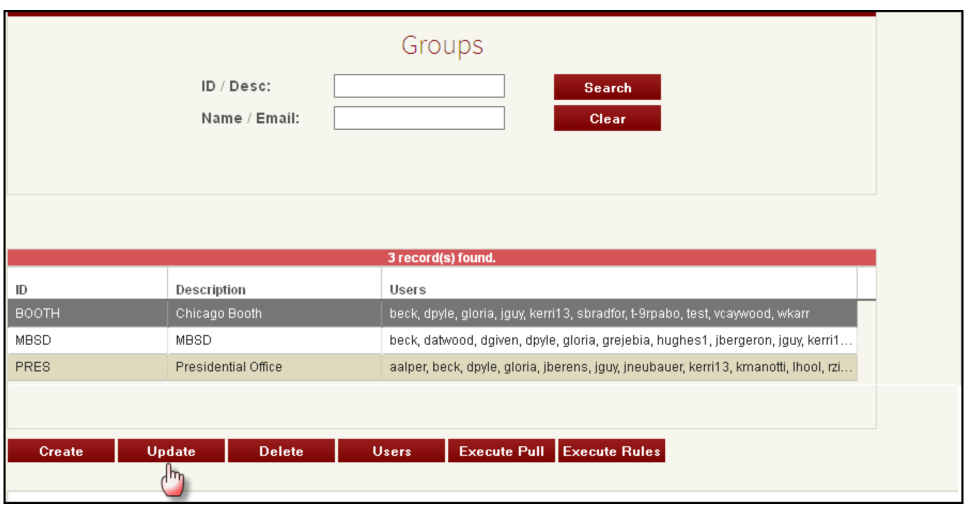
Updating a Group

To update a group:

1. On the Groups page, double click on the Group name to update from the Search result list.



OR
Highlight the Group to update and click the **Update** button to open the Update Group page.



2. You are taken to the Update Group page.

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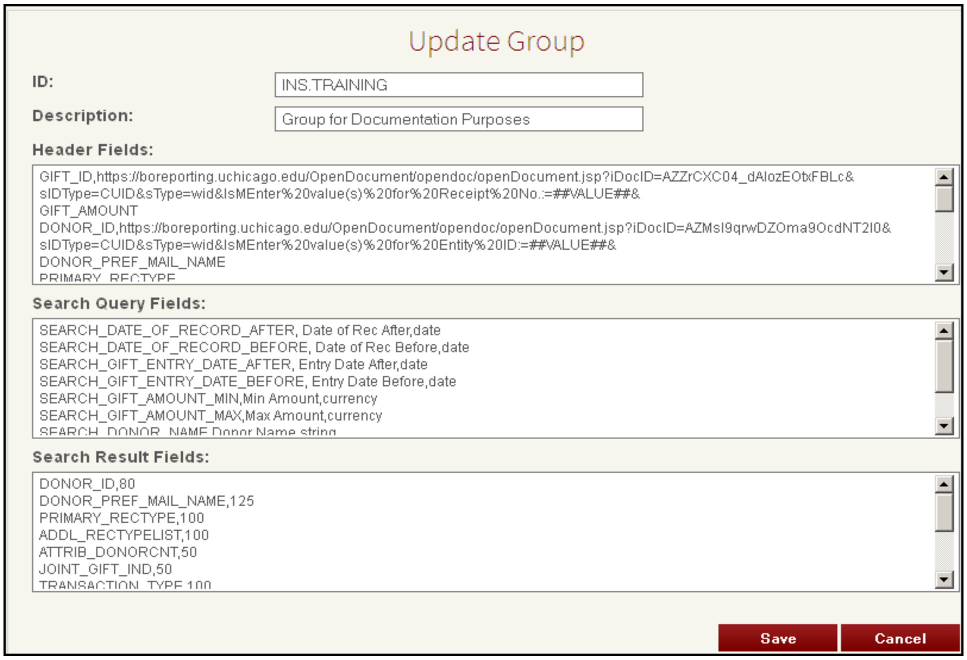
Administrating DAS Groups, Continued

Updating a Group (continued)



3. Make the modifications and then click **Save** to save the changes to the system or click **Cancel** to exit the form without saving.

Deleting a Group

To delete a group:

1. On the Groups page, highlight the Group to update and click the **Delete** button.

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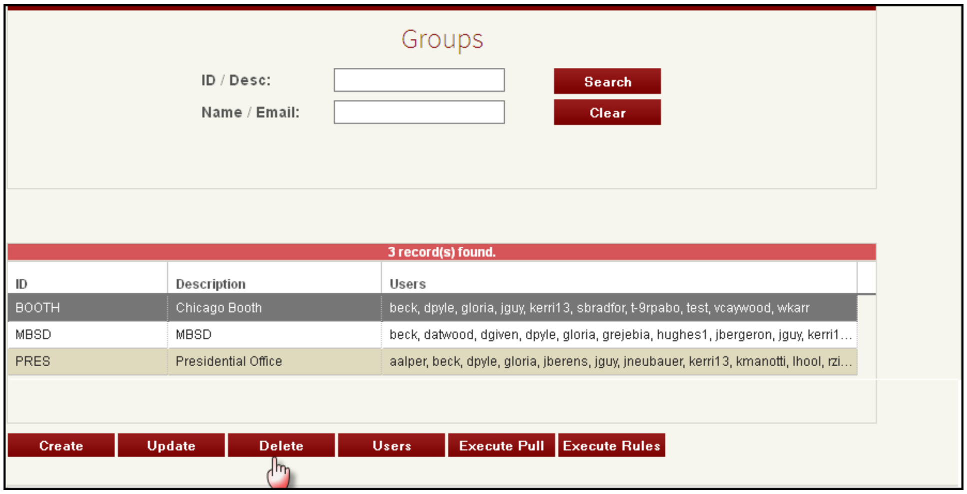
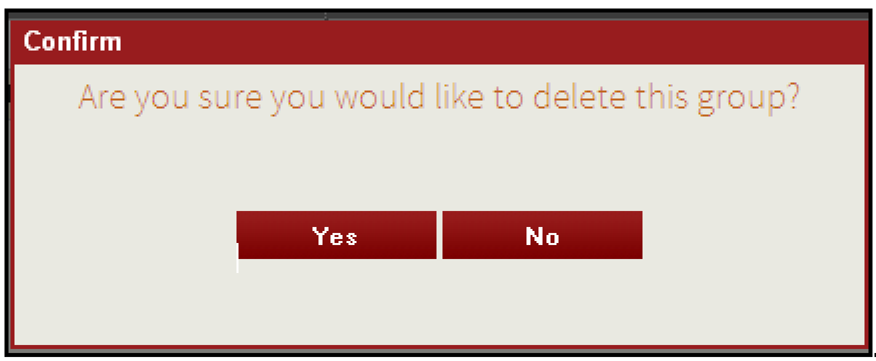
Administrating DAS Groups, Continued

Deleting a Group (continued)



2. You are presented with a Delete Group confirmation dialogue box.



3. Click **Yes** to confirm the deletion or **No** to exit the page without deleting the group.

Managing Group Tokens

Tokens Defined

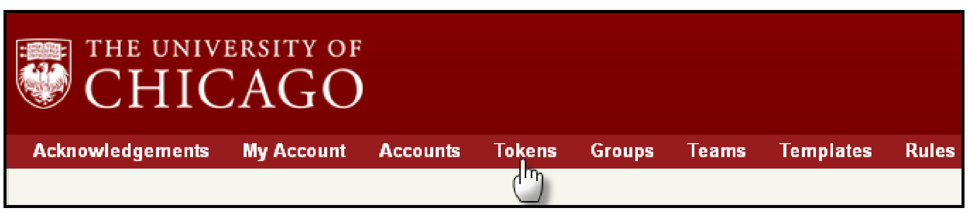
Tokens are used in DAS as data fields/elements such as donor name, gift amount, etc. Tokens are used to create acknowledgement templates and assignment rules. Tokens are replaced by the actual data values when an assignment rule is executed, or a template is previewed or printed. On the Group Acknowledgement page, tokens are used for adding search fields and controlling what is displayed in the search results.

On the Tokens page, you can do the following:

- Search tokens using the available search field(s)
- Sort the result list using the column headers
- Create a token
- Update a token
- Delete a token

Creating Tokens

To create a token:



1. Click **Tokens** from the navigation menu.

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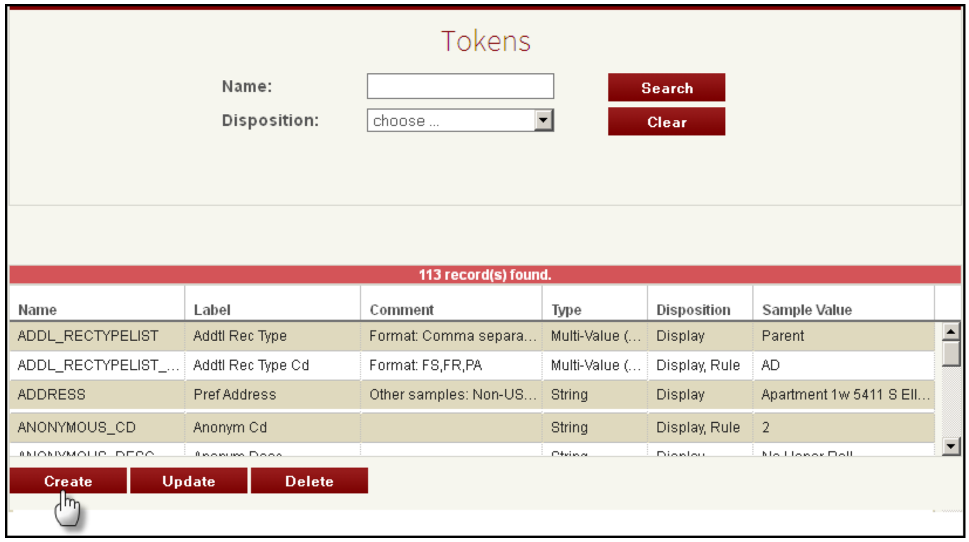
Managing Group Tokens, Continued

Creating Tokens (continued)



2. Click on **Create** to add a new token.

3. Enter the data according to the data entry rules below:

Field	Required	Definition
Name	Required	Token name Example: ALLOC_CODE *It should have a maximum number of 20 characters, no spaces and other special characters except for underscore (_)*
Label	Optional	Token label as it should appear on the DAS screens/pages Example: Allocation Code

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Managing Group Tokens, Continued

Creating Tokens (continued)

Field	Required	Definition
Comment	Optional	Notes related to the token or token description such as business term and data value format or type.
Disposition	Required	Purpose of the token in DAS – for display or rule creation *Tokens with disposition of **Display** will be Included in the list of tokens on the Acknowledgement Content page and can be added in a group's Detail Header and in the acknowledgement page search results. If the disposition is set to **Rul**e, then the token will be available on the rule creation and maintenance pages.*
Type	Optional	Token data type *Available field data types are: Boolean, Currency, Date, Date Short, Integer, Multi value, String*

If a token being created has not been added to the DAS token script, a "not supported" message, such as the one below, will be displayed and the token cannot be saved.

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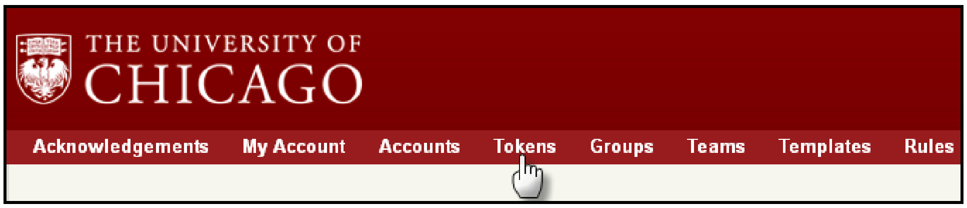
Managing Group Tokens, Continued

Creating Tokens (continued)

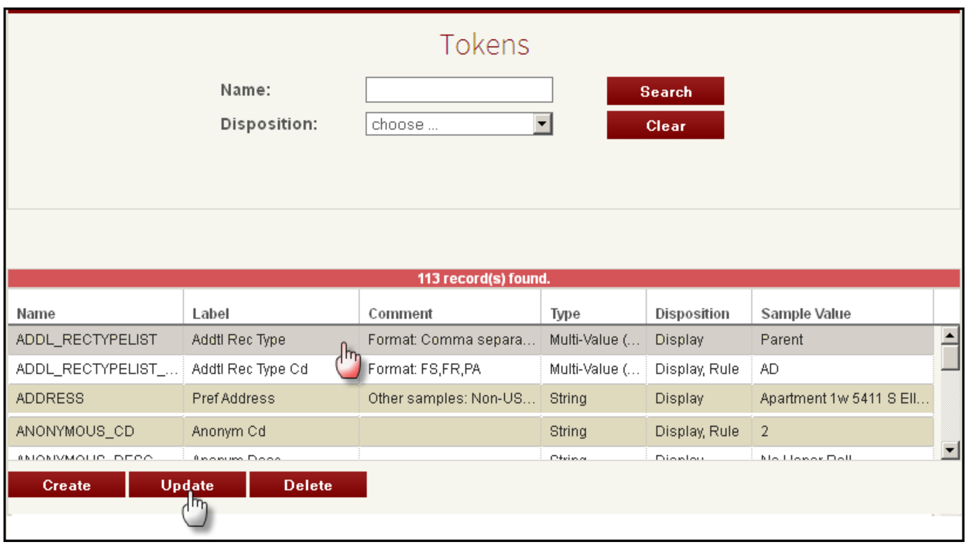
4. Click Save to save the newly created token or Cancel to exit the page without saving the token.

Updating a Token

To update a token:



1. Click **Tokens** from the navigation menu. You are taken to the Tokens page.



2. Double click on the token that will be updated.
OR
Select the token to modify, from the search result list and click Update.

3. You are taken to the Update token page.

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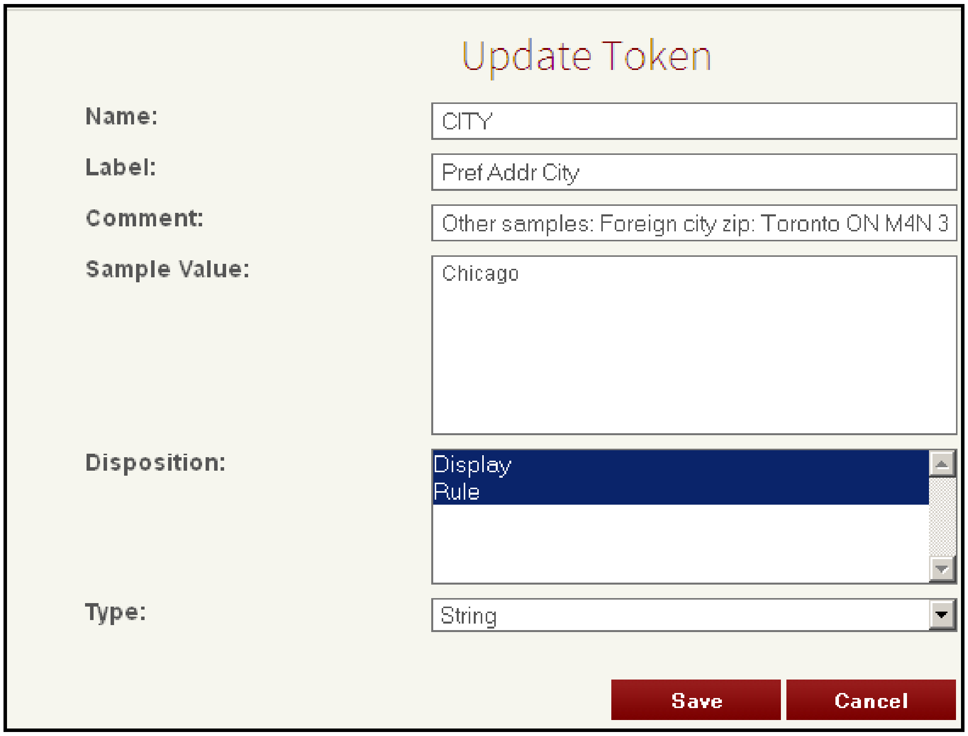
Managing Group Tokens, Continued

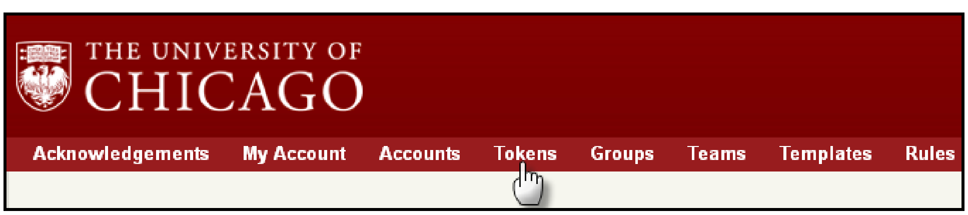
Updating a Token (continued)



4. Edit the selected token and then click **Save** commit the modifications. Click **Cancel** to exit the page without updating the token.

Deleting Tokens

To delete a token:



1. Click **Tokens** on the navigation menu. You are taken to the Tokens page.

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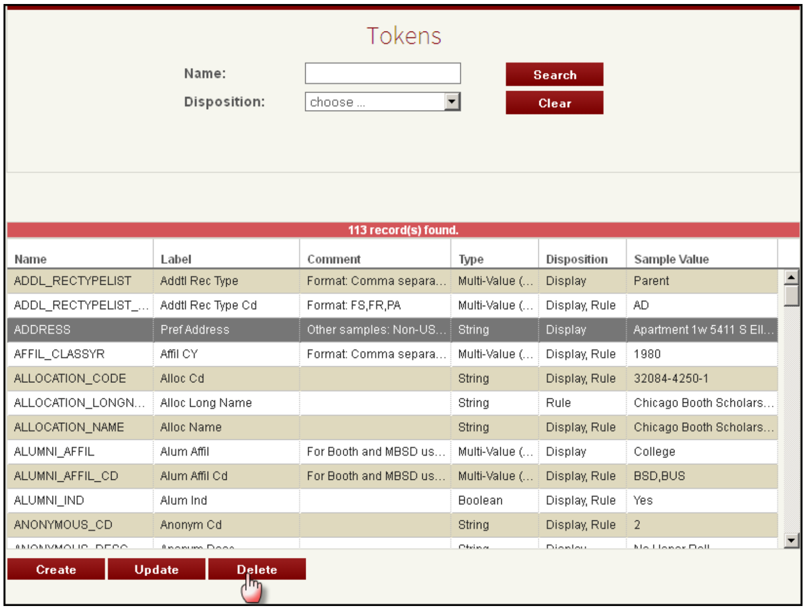
Managing Group Tokens, Continued

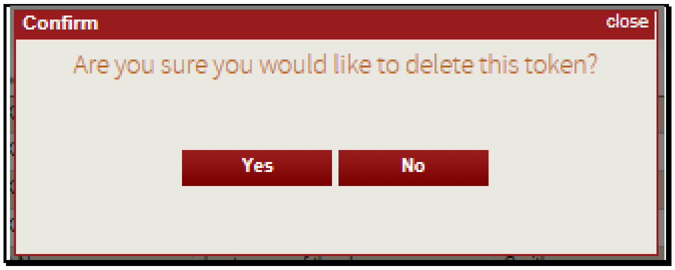
Deleting Tokens (continued)



2. Highlight (click over) the token to delete, from the Tokens list.

3. Click **Delete**.

4. You are presented with a Delete Token confirmation dialogue box.



5. Click **Yes** to delete the token. Click **No** to cancel the deletion of the token.

Chapter Two: Group Administration

Introduction

An Overview of Group Administration

Users with Group Administrator privileges have the ability to:

- Add users to or remove users from the group that they are a member of
- Maintain Group teams
- Create and maintain templates
- Create and maintain rules
- Execute rules
- Execute group manual gift pull

Chapter Contents

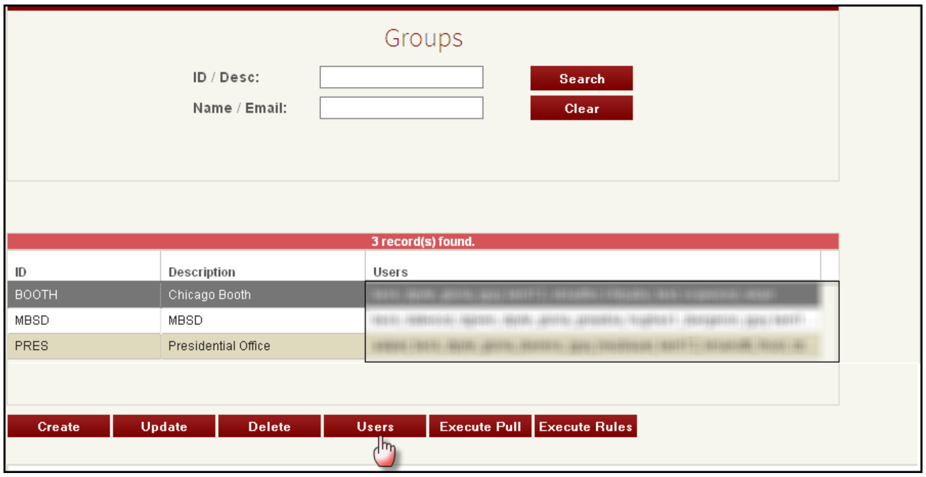
This chapter contains the following topics:

Managing Group Users

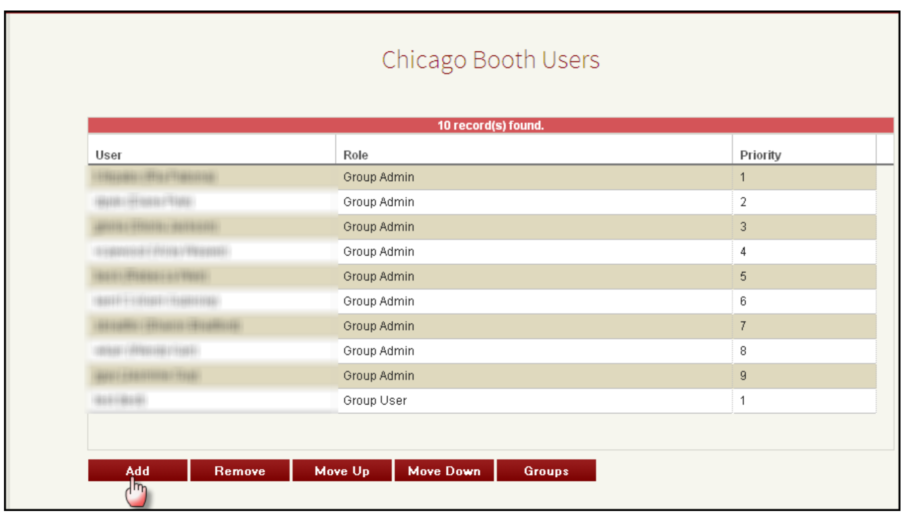
Adding Users to a Group

Once a user account is created, the user must be added to a group and assigned group roles. This can be accomplished for any group by a system administrator or for a specific group by a member with group administrator privileges.

To add users to a group:



1. On the Groups page, click **Users** to open the Group Users page.



2. Click **Add** to open the Add Group User page.

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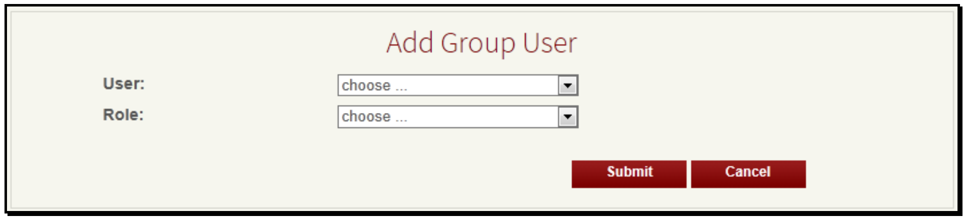
Managing Group Users, Continued

Adding Users to a Group (continued)



3. Select the user to add from the User drop down list. The list will contain all the users in the system.

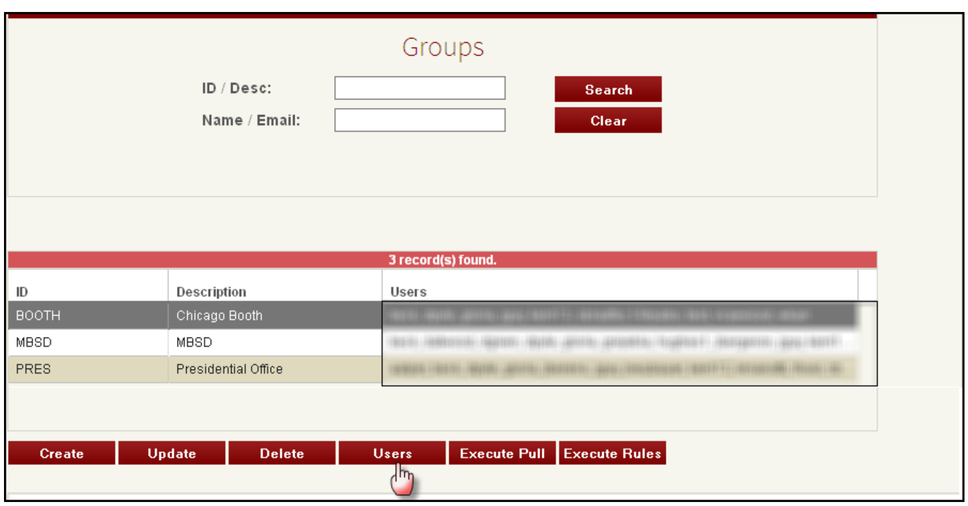
4. Select the Role of the user from the Role drop down list. Each user should have the Group User role.

5. Click **Save** to save the user to the group or **Cancel** to exit the page without adding the user.

A user can have multiple group roles. To add another role to a user, click on Add button again from the Group Users page. The list will display multiple rows for users with multiple group roles.

Deleting a User from a Group

To delete a user from a group:



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Managing Group Users, Continued

Deleting a User from a Group (continued)

1. On the Groups page, click Users to open the Group Users page.

2. On the Group Users page, highlight the row of the user to delete and. Click **Remove**. A pop up form below will be displayed to confirm deletion of the selected group.

3. Click **Yes** if to delete the selected user from the group.

4. Click **No** to exit the page without deleting the user from the group.

Administrating Teams

About Managed Teams

Users with the group admin role can create and maintain group teams. Users with the group user and team admin roles can maintain group Teams.

On the Team admin page, you can do the following:

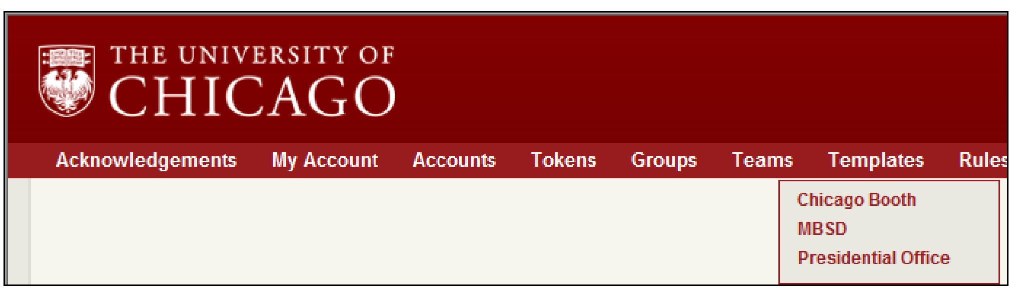
- Search teams using the available search fields
- Sort the result list using the column headers
- Create a team
- Update a team
- Delete a team
- Access Team Users page

A group can have one or more teams.

Creating a Team

To create a group team:

1. Click on **Teams** from the navigation menu.



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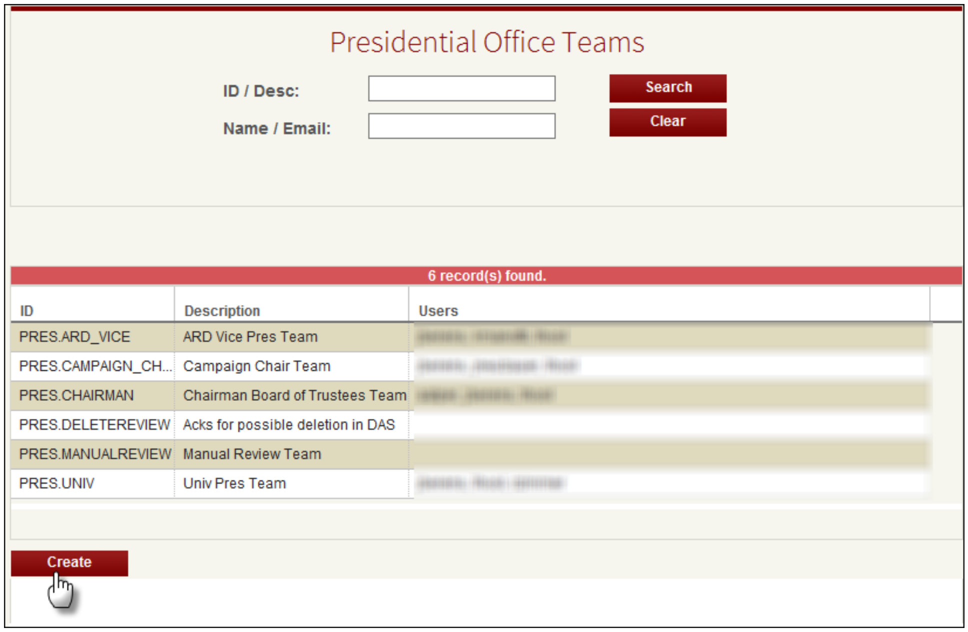
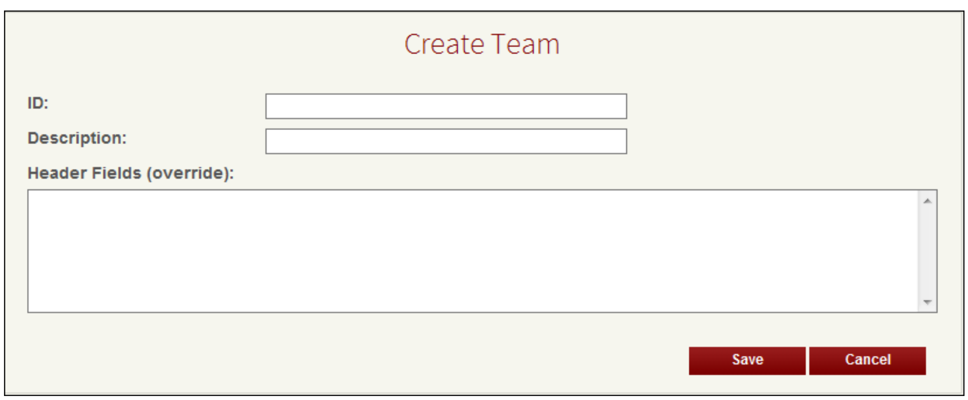
Administrating Teams, Continued

Creating a Team (continued)

2. From the drop down menu select the group the team will be created for. You will be navigated to the Group's Teams page.



3. Click the **Create** button. You are navigated to the Create Team page.



4. Enter the ID and Description of the team to be created.

These fields are required fields. If the submit button is clicked and no id or description has been entered, a "required field" notification in red font will be displayed under the Description field.

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Administrating Teams, Continued

Creating a Team
(continued)

ID value should have the following format: name of the group in which the team is part of +period (.)+name of team, e.g., GROUPA.TEAM1.

5. Specify on the header template the list of tokens (fields) to be displayed on the Acknowledgement Detail page. The team header fields are optional. If fields are specified, they will override the header fields defined on the Group level, if any.

6. Click Submit to save or click **Cancel** to exit from the Create Team page without saving.

Deleting a Team

1. On the Teams page, select the team description to delete, from the Search result list.

2. A pop up form below will be displayed to confirm deletion of the selected team.

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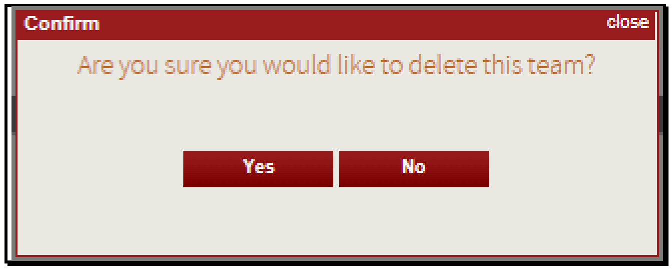
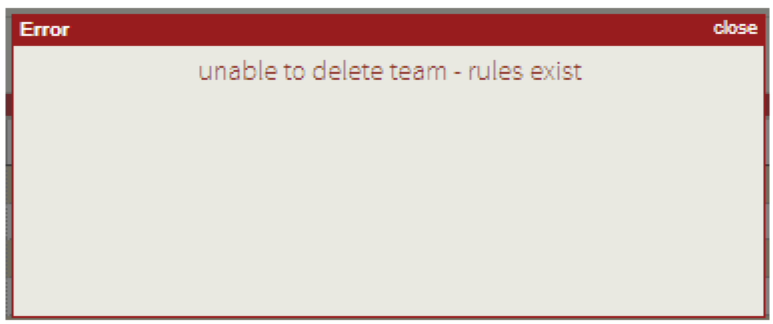
Administrating Teams, Continued

Deleting a Team
(continued)



3. Click on **Yes** if you are sure to delete the selected team. Click on **No** or **close** link to cancel the delete operation.

If a team is assigned to a rule, selected team will not be deleted. A pop up error message below will be displayed:



Maintaining Group Templates

About Acknowledgement Templates

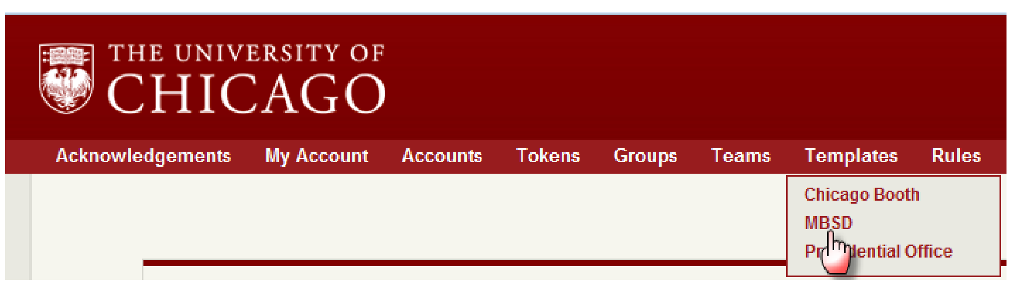
In DAS, a template is a group's pre-defined document for generating the acknowledgement letter. A template is assigned to one or more assignment rules. Users with the Group administrator or Team administrator role will be able to create and maintain group templates. Request for a new or update to a template should be sent to a team administrator. Users without the Team admin role will only be able to view the group templates.
On the Group Templates admin page, you can do the following:

- Search template using the available search field(s)
- Create a template
- Copy a template
- Update a template
- Delete a template
- Re-organize order of template

Searching for a Template

To search for a team template:

1. Click **Templates** on the navigation menu.



2. Select the group to create the template for. The list may have more than one group name available, if user belongs to more than one group in the system.

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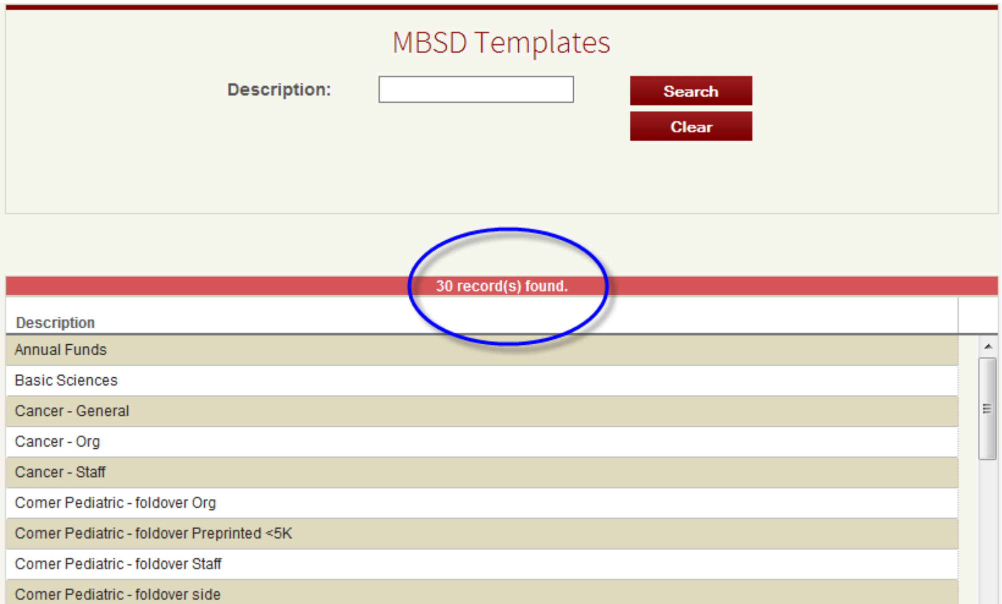
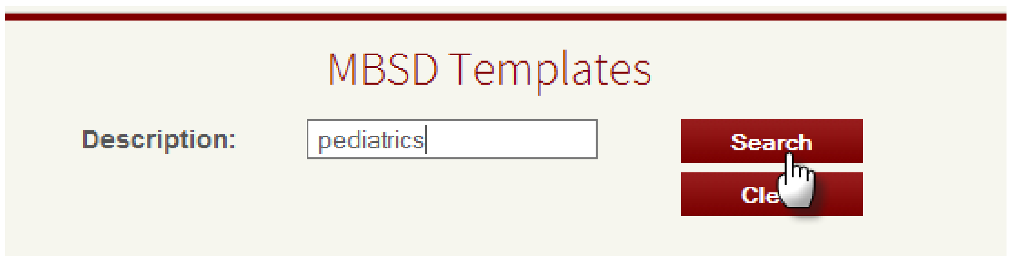
Maintaining Group Templates, Continued

Searching for a Template (continued)



3. The page should display the list of templates for the selected group and display the record count of total templates for the group.

4. Enter a value on the description field and click **Search.**



5. Or, click on **Clear** to clear and re-enter search field value.

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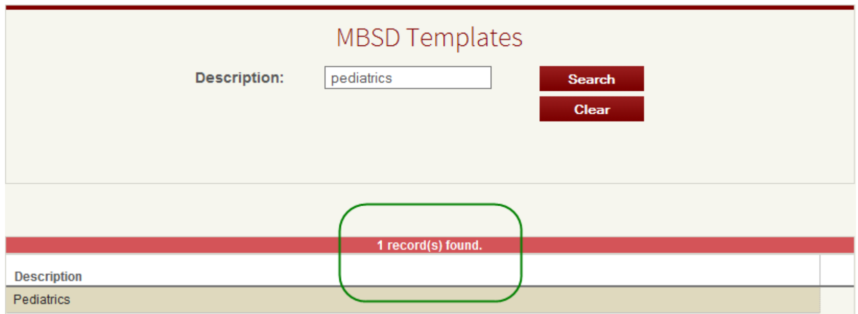
Maintaining Group Templates, Continued

Searching for a Template (continued)

The % wild card character can be used for description search field.



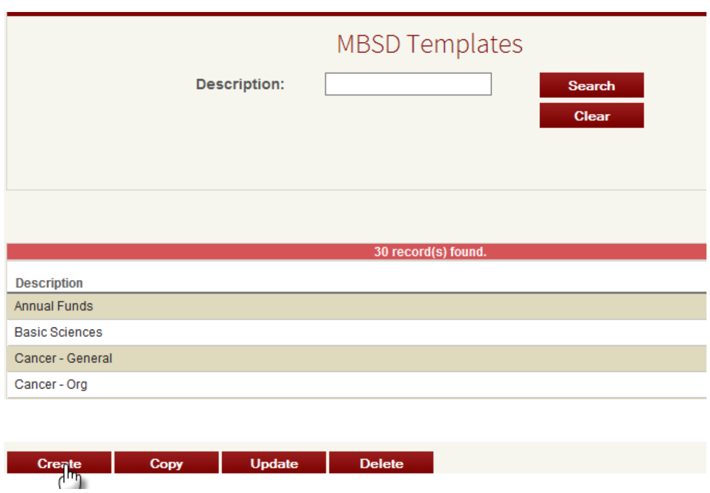
6. The number of templates whose name meets the entered search criteria will be returned.

Creating a Template

To Create a template:

1. Click on **Templates** from the navigation menu.

2. Select the group to create the template for. The page should display the list of templates for the selected group.



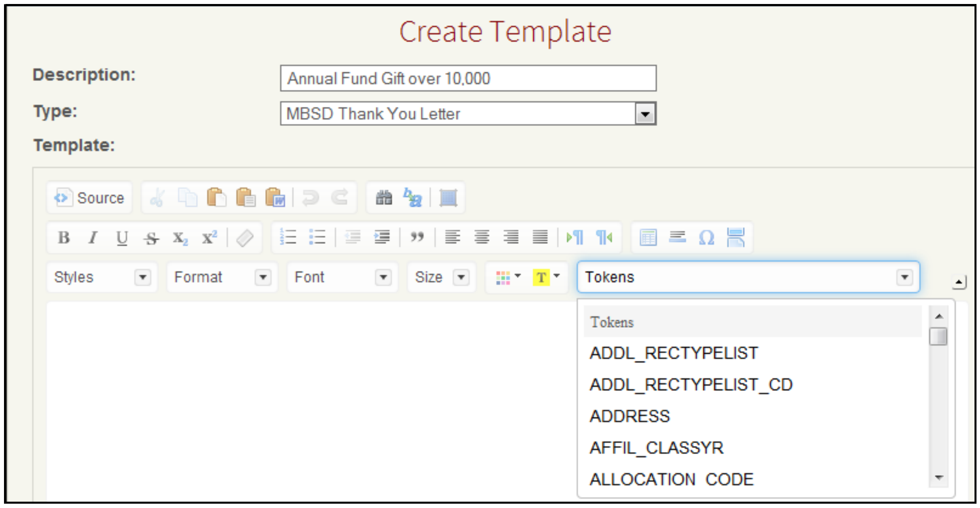
3. Click on **Create** to add a new template.

Continued on next page

Maintaining Group Templates, Continued

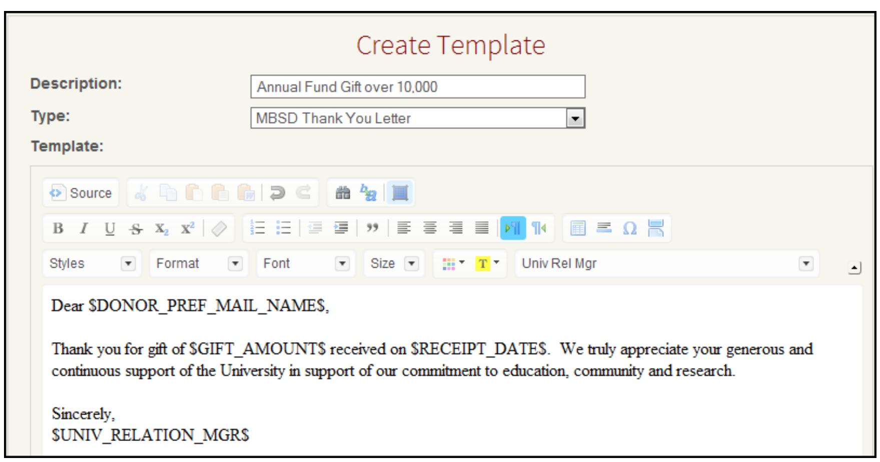
Creating a Template (continued)

4. On the Create Template page, specify the template **Description** then specify the Type of acknowledgement for the template.



1. Start working on the template content using the html editor icons. Fields can be included by selecting from the Tokens drop down list.

Expand toolbar or Collapse toolbar button is displayed on upper right corner of the html text editor to expand or collapse toolbar.



2. When the template is created to your satisfaction, click **Save**.

Continued on next page

Maintaining Group Templates, Continued

Creating a Template (continued)

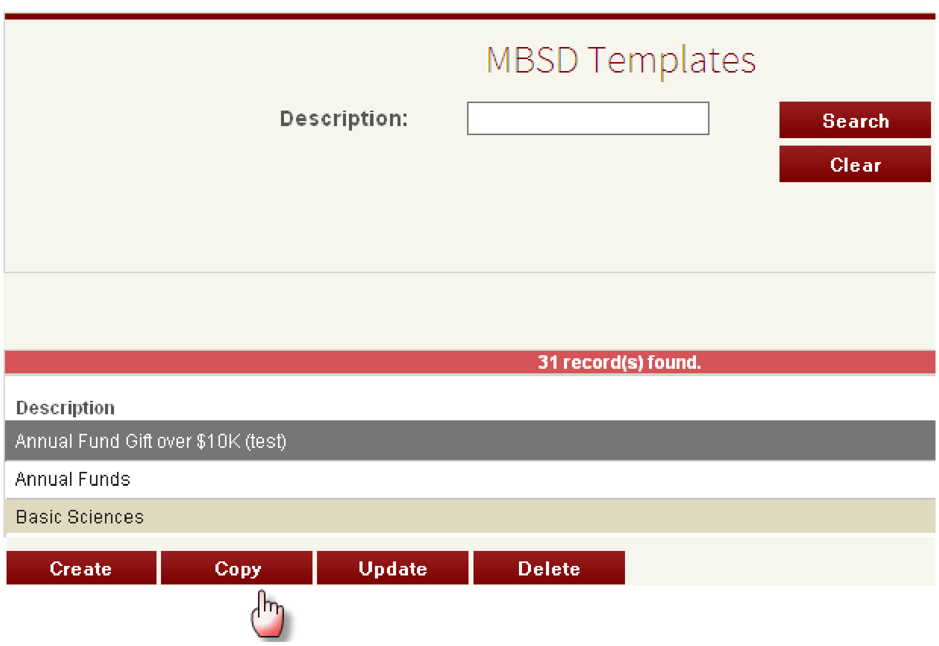
3. Or, click **Cancel** to exit from this page without saving work. Click on **Test** to print preview a template. Press on **Ctrl+P** or select Print option from the browser menu to print the template.

> Dear Mr. John Smith,
>
> Thank you for gift of $ 5,000.00 received on January 01, 2012. We truly appreciate your generous and continuous support of the University in support of our commitment to education, community and research.
>
> Sincerely,
> Mr. George Smith

Copying or Modifying a Template

To copy a template:

1. Click on **Templates** from the navigation menu.
2. Select the group that owns the template to be copied.
3. The page should display the list of templates for the selected group.
4. Select the template to be copied.
5. Click on **Copy** or **Update**.



Continued on next page

Maintaining Group Templates, Continued

Copying or Modifying a Template (continued)

6. A Copy or Update Template page will be open, pre-populated with the same tokens from the template selected.

The copy template may have the same name as the copied template, as each template is assigned a unique internal ID in the database.

7. Modify the template as needed.

8. When the modifications to the template have been completed, click on **Save**.

9. Click on **Cancel** to exit from this page without saving work. Click on **Test** to print preview a template. The values that will be populated on the template are sample values defined with the selected Tokens included in a template.

Deleting a Template

To delete a template:

1. Click on **Templates** from the navigation menu.

2. Select the group that owns the template to be deleted.

3. The page should display the list of templates for the selected group.

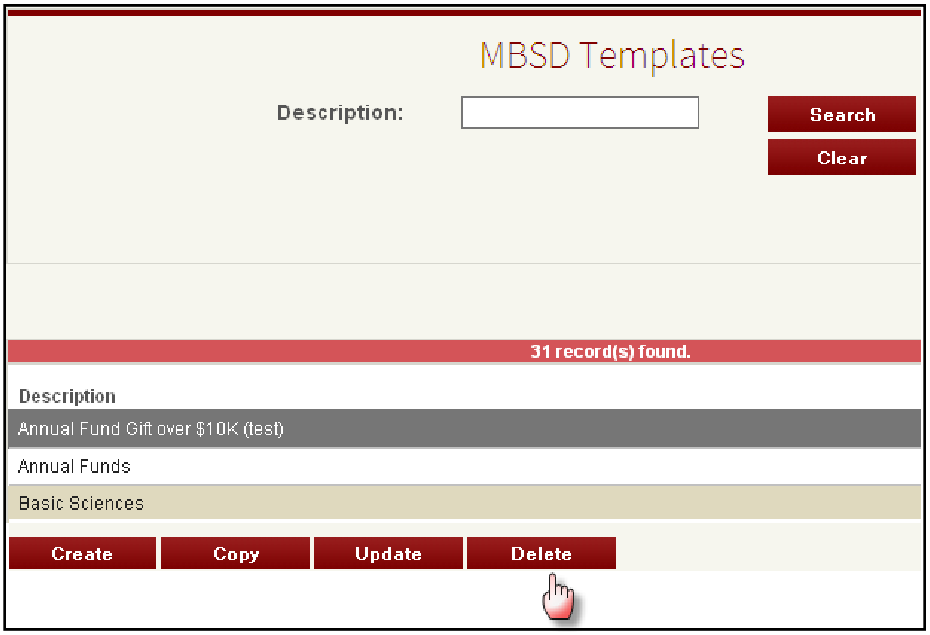
4. Select (highlight the row of) the template to delete.

Continued on next page

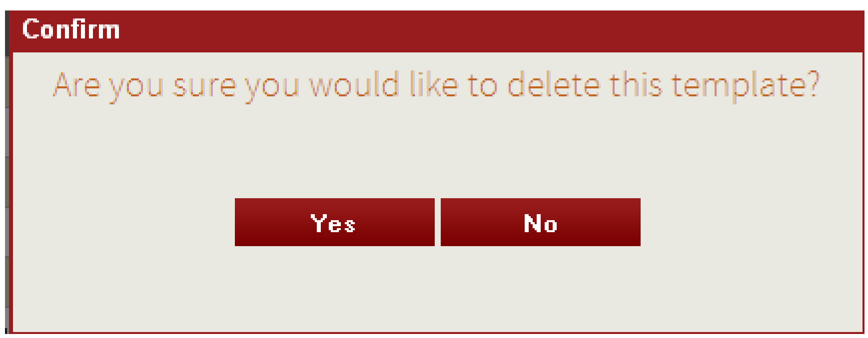
Maintaining Group Templates, Continued

Deleting a Template (continued)

5. Click **Delete**.



6. You are presented with a delete template confirmation dialogue box.



4. Click **Yes** to confirm or **No** to cancel the template deletion.

Maintaining Group Rules

Rules Explained

A group rule is used evaluate and filter gift data to the team that will handle the Acknowledgement processing, and send email notifications. A group rule may consist of one or more conditions. Only users with the Group admin role will be able to create and maintain group rules. A new or update group rule request should be sent to a group admin. Users without the Team admin role will be able to view the group rules. Other users will only be able to view the group rules list.

If a gift is considered in one of the rules, the system will automatically assign the team defined with the rule. Rules are set to execute everyday automatically; however, if a rule is modified or newly created a manual pull may be necessary.

If no assignment rule was satisfied, the gift will automatically have a status of Unassigned.

Rule Type	Definition
Delete Rule	A delete rule can be used to filter the gifts that will be evaluated or created in the system. Examples are gifts that are less than 1000, or gifts that were not given to user's group or division. For filtering purposes, deletion rule is advised to be created as the first rule for the group. **Another delete rule is to delete Unassigned acknowledgements created from Copy and Assign actions. An unassigned acknowledgement after the rules are executed, will be evaluated again when the rules get executed again, causing duplicate Acknowledgement assignment. This delete rule will delete all copied Unassigned acknowledgements that already have existing acknowledgements with Assigned status.**
Assignment Rule	An assignment rule is used to assign the acknowledgement to a team and a template with defined specific conditions. Examples are gifts that are greater than $10,000 will be assigned with Template 1 and to Team 1. Gifts from organization staffs will be assigned with Template 2 and to Team 2.

Continued on next page

Maintaining Group Rules, Continued

Rules Explained (continued)

Rule Type	Definition
Notification Rule	Email Notifications to assigned user, group admin or team admin, can be created as one of the rules to be executed. From notify assigned rule, a staff will received an email which includes all acknowledgements assigned to him per team and status. *A group rule may be a combined delete, assignment and notification rules. However, it is advised that group rules should be planned and analyzed accordingly before creating, to avoid conflicting results. Appendix D of this document shows sample screenshots of group rules.*

On the Group Rules admin page, you can do the following:

- Search group rules using the available search field(s)
- Sort the result list using the column headers
- Create a group rule
- Copy a group rule
- Update a group rule
- Re-organize order of execution of rules by clicking the Move Up or Move Down buttons
- Delete a group rule

Creating Rule Parameters

To create group rules:

1. Click on **Rules** from the navigation menu.

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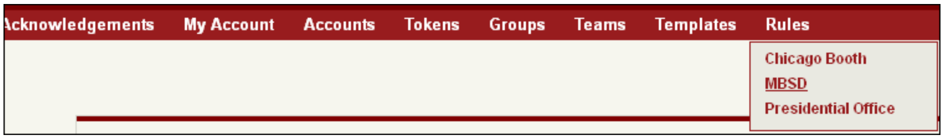
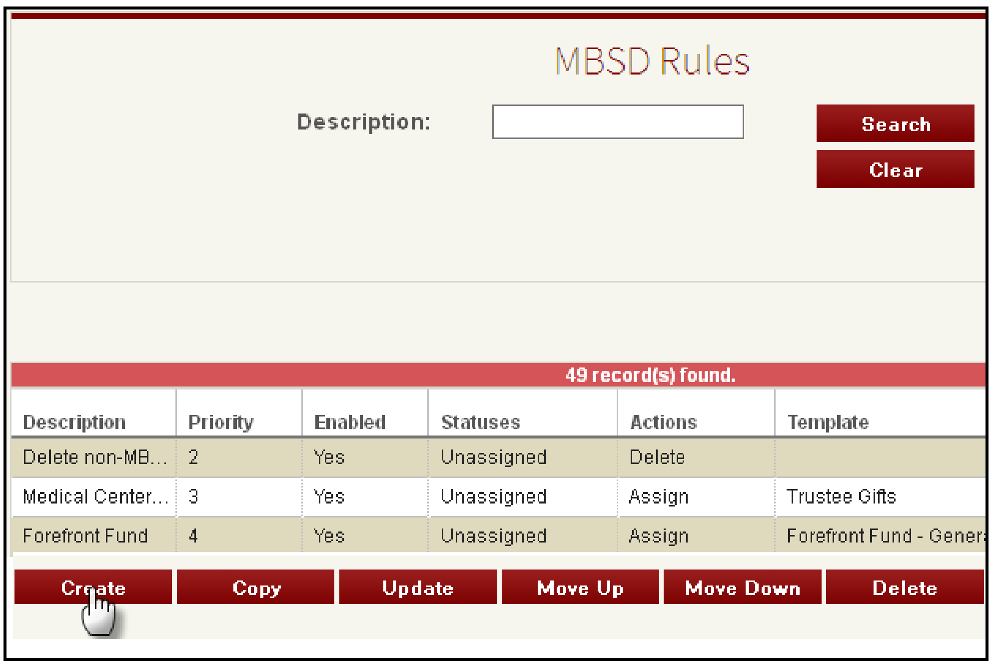
Maintaining Group Rules, Continued

Creating Rule Parameters Parameters (continued)



2. Select the group to create the assignment rule for. The list may have multiple group names available if you belong to more than one group in the system.

3. You are taken to Rules pages for the group selected. The page will display the list of rules with the record count of rules available for the selected group.



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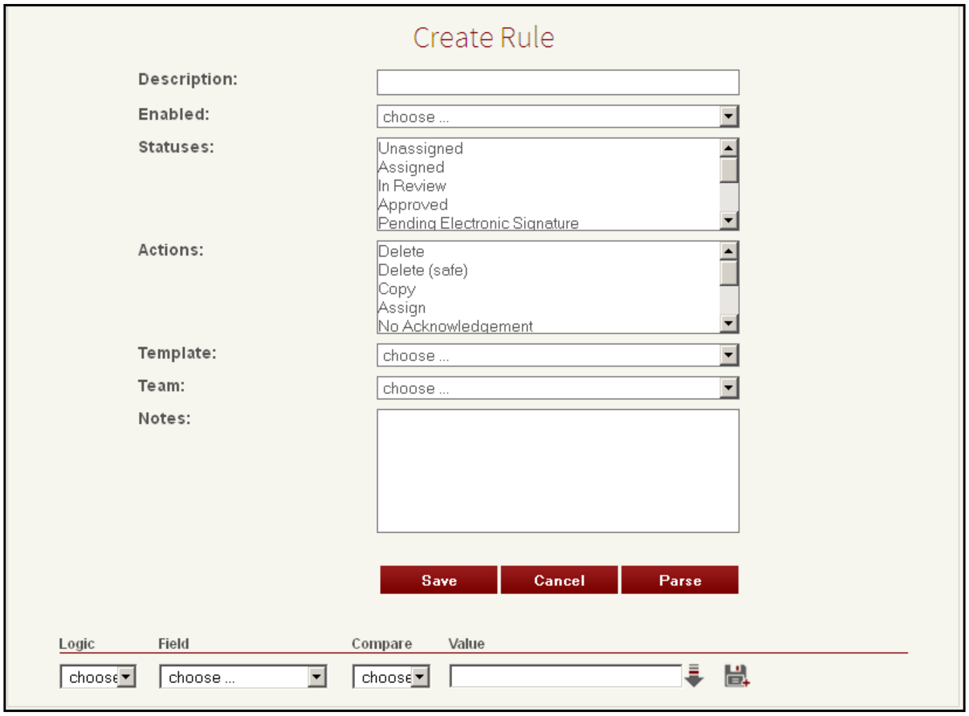
Maintaining Group Rules, Continued

Creating Rule Parameters Paramaters (continued)

4. Click **Create** to add a new group rule.



5. On the **Create Rule** page, specify the rule **Description**.

A group rule description does not have to be unique because each rule will be assigned its own sequence and priority number. Priority number is the order of which the rule will be executed in a group. Priority number is unique for each group rule.

6. Select the appropriate value from the **Enabled** field to enable/disable the rule.

7. Select the applicable status(es) for the group rule from the **Statuses** drop down list. Multiple applicable statuses can be selected by holding down Ctrl key and click on the additional status to evaluate.

8. Select from **Actions** according to the table below for the appropriate action to perform when the group rule is satisfied.

Continued on next page

Maintaining Group Rules, Continued

Creating Rule Parameters Parameters (continued)

Action	Description
Delete	Delete the acknowledgement; it will not be evaluated or acknowledged by the group.
Copy	Create a copy of the acknowledgement**,** inheriting the status, assigned template and team of the record being copied, if there is any. This action is selected in the case of creating multiple acknowledgements for a gift. Such gift satisfies one or more rules in the list. **If an Acknowledgement to be copied has an Unassigned status, it will be evaluated again when the group rules get executed. This action will create duplicate Acknowledgement assignment. To avoid this case, a Delete rule should be created at the end of the rule list, which selects acknowledgements with Status of Unassigned, and Action of Delete (safe).**
Assign	Assign the acknowledgement to the designated team.
No Acknowledgement	Assign No acknowledgement status indicating no acknowledgement is required for this gift. List of No Acknowledgement records can be displayed by filtering using Scope=All and Status=No Acknowledgement.

Continued on next page

Maintaining Group Rules, Continued

Creating Rule Parameters Parameters (continued)

<table>
<tr><th>Action</th><th>Description</th></tr>
<tr><td>Acknowledgement</td><td>Send acknowledgement update to the source system using the receipt number, indicating that an acknowledgement has been sent to the donor.</td></tr>
<tr><td>Notify Assigned</td><td>Send a notification to the team member who is responsible for the acknowledgement, depending on the user assignment role.
<table>
<tr><th>Ack Status</th><th>Notification will be sent to:</th></tr>
<tr><td>Assigned</td><td>Team Assignee(s)</td></tr>
<tr><td>In Review</td><td>Team Reviewer(s)</td></tr>
<tr><td>Approved</td><td>Team Support(s)</td></tr>
<tr><td>Pending Electronic Signature</td><td>Team Support(s)</td></tr>
<tr><td>Out for Signature</td><td>Team Support(s)</td></tr>
<tr><td>Complete</td><td>Team Support(s)</td></tr>
</table></td></tr>
<tr><td>Notify Group Admin</td><td>Send a notification to the group admin(s) with all acknowledgements that have a: In Review, Approved, Pending Electronic Signature, Out for Signature status.</td></tr>
<tr><td>Notify Team Admin</td><td>Send a notification to the team admin(s) with all acknowledgements that have a In Review, Approved, Pending Electronic Signature, Out for Signature status.</td></tr>
</table>

Appendix C of the DAS User Manual shows examples of email notifications.

9. From the **Template** field, select the template that will be used when the rule is satisfied.

No template assignment is needed if the rule action is set to Notification.

Continued on next page

Maintaining Group Rules, Continued

Creating Rule Parameters Parameters (continued)

10. From the **Team** field, select the Team that will be assigned to work on the acknowledgement.

No team assignment is needed if the rule action is set to Delete or Notification.

11. Enter information pertinent to the understanding of the rule in the **Notes** field.

Creating Rule Conditions

An assignment rule must have a least one rule condition.

To create rule condition(s):

1. Select the appropriate criterion value from the Logic field.

The user has to specify the relationship between criteria in a condition. This will be applicable to more than one criterion. If there is only one criteria, "And" should be the value for the logical operator.

2. Select the token that should meet the criteria from the **Field** menu. The field list contains the existing tokens in DAS.

3. Select the appropriate logical operator from the **Compare** field.

4. Enter each value on the Value textbox, separated by line, by pressing the Enter key after typing each value. .

*In the case a field has multiple values, use the "**in**" or "**not in**" compare operators*

5. Click the disk icon to save and add the condition to the group's rules.

Continued on next page

Maintaining Group Rules, Continued

Creating Rule Conditions (continued)

If a condition has an OR condition, it should be the first condition in the rule.

Use the Condition icons as outlined below:

Down Arrow
The down arrow is used to expand the value textbox.

Save and Add Condition
Save and add Condition button will save the current condition and add another condition row.

Move Up
Move the condition up in the sequence of conditions.

Move Down
Move the condition down in the sequence of conditions.

Edit Condition
Edit the condition row.

Delete Condition

6. Once you have completed the rule, click **Save** to save and exit the form. Click Cancel to exit from the page without saving the rule.

Continued on next page

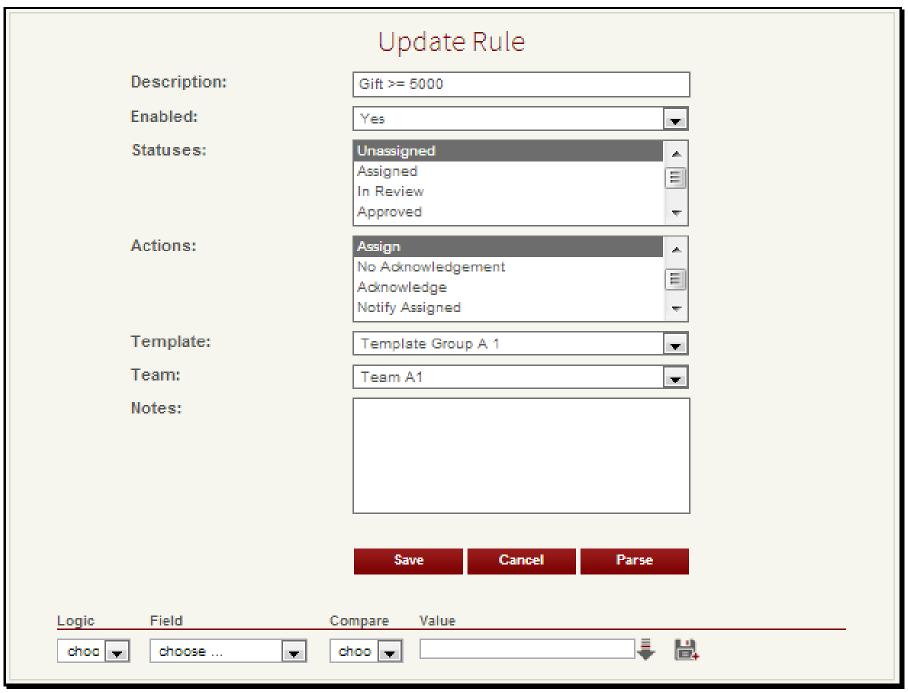
Maintaining Group Rules, Continued

Modifying Rules

To Update a rule:

1. On the group Rules page, double click the assignment rule to update from the Search result list.
   OR
   Select the assignment rule to update and click **Update** from the Rules admin page to open the Update Rule page.

2. Make the necessary changes to the rule.



3. Click **Save** to save changes.

4. Click **Parse** to review the rules in a form similar to that of a SQL statement.

5. Click **Cancel** to exit from this page without saving changes.

Continued on next page

Maintaining Group Rules, Continued

Copying a Group Rule

Clone allows the user to create a duplicate of an existing rule, make changes to it and save as a new rule.

To clone a group rule:

1. On the group Rules page, select the rule to be copied from the search result list.

2. Click on **Copy**.

3. A create rule page will be opened pre-populated with the conditions from the copied rule.

A group rule description is not required to be unique. Priority number is assigned to groups rules, which is unique for each rule. Priority number is the order in which the rules will be executed.

4. Make changes to the new rule.

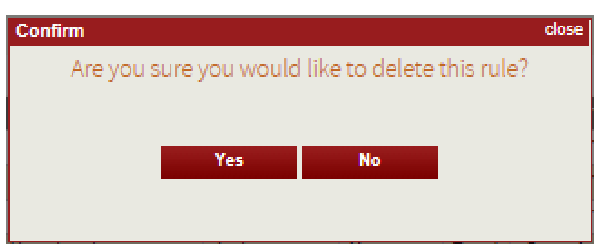
5. When the rule is completed, click **Save** to save and exit from this page. Click **Parse** to review the rules in a form similar to that of a SQL statement. Click **Cancel** to exit from this page without saving changes.

Deleting a Rule

To delete a group rule:

1. On the group Rules menu, select the group rule to delete.

2. A pop up form will be displayed, asking for confirmation to continue to delete or not.



Continued on next page

Maintaining Group Rules, Continued

Deleting a Rule
(continued)

3. Click **Yes** to continue with the deletion. Click **No** or **Close** to cancel the deletion of the selected assignment rule.

Executing a Manual Gift Data Pull

About Gift Data Pulls

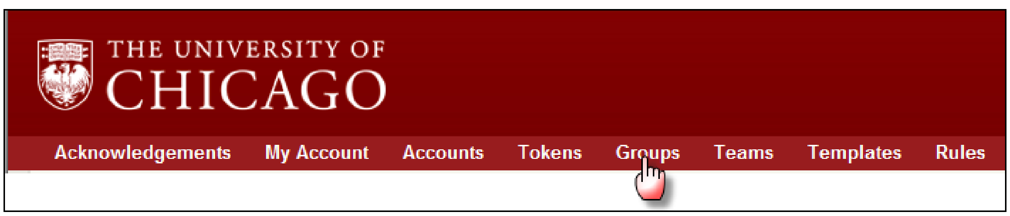
DAS has a scheduled automated process for creating acknowledgement records from gift data pulled from Griffin. Data that is pulled into DAS are gift receipts. In exceptional cases, gift data must be pulled manually to create acknowledgement records. Users with system or group administrator privileges will be able to perform this manual pull.

System administrators can perform this functionality for all groups in the system. Group administrators can only perform this function for the group the user is a member of.

Performing a Manual Gift Data Pull

To manual pull gift data into DAS:

1. Click the **Groups** button on the navigation menu.

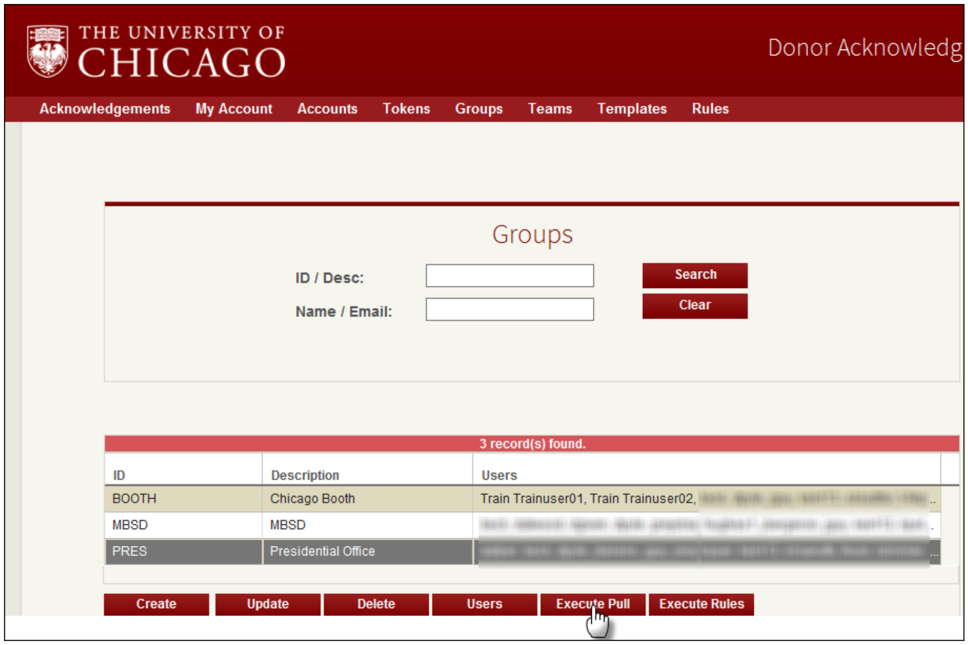


2. Select (highlight) the group to apply the data pull, from the search result list.

Continued on next page

Executing a Manual Gift Data Pull, Continued

Performing a Manual Gift Data Pull (continued)



3. Click **Execute Pull.** A confirmation dialogue box will appear.

4. Click on **Yes** to continue the data pull. Click on **No** to cancel the pull.

*If **Yes** is clicked from the confirmation message, 10 days of gift data will be pulled from the source system. With a successful data pull, a message will be displayed indicating how many acknowledgement records were created from the pulled gifts.*

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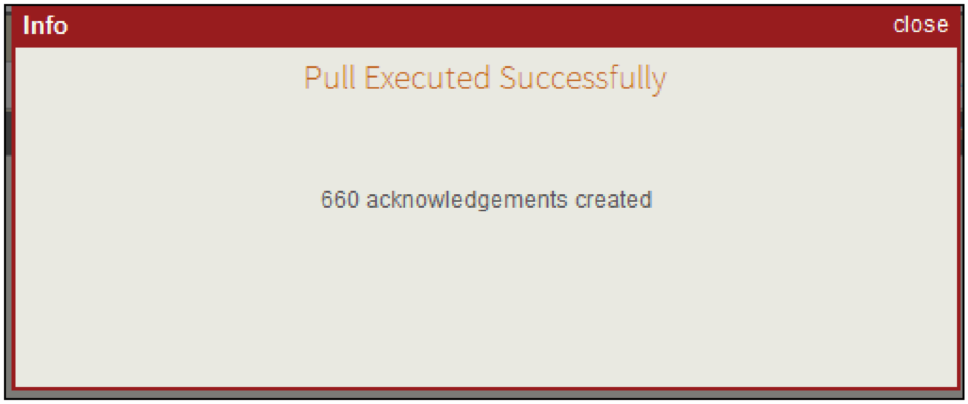
Executing a Manual Gift Data Pull, Continued

Performing a Manual Gift Data Pull (continued)



Chapter Three: Team Administration

Overview

As a team administrator and a group user, you can:

- View the team
- Update the team once the team has been created by the Group or system admin
- View team templates
- View group rules
- Add/Remove team users

Chapter Contents

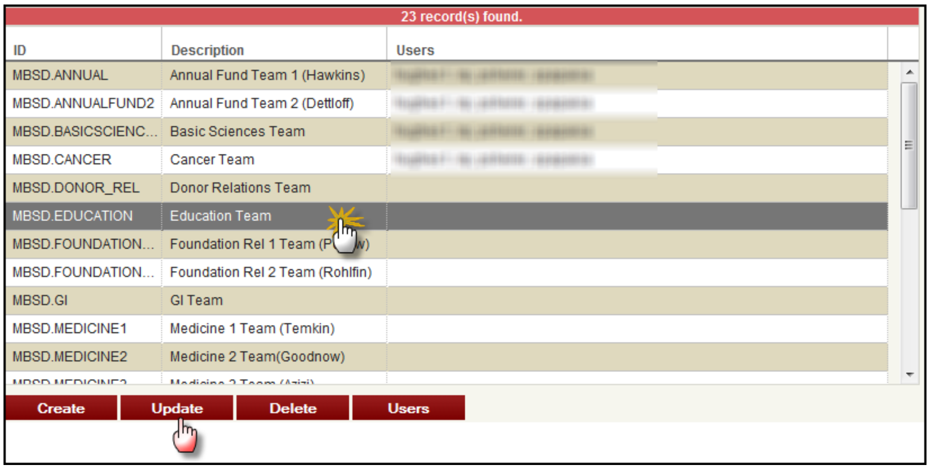
This chapter contains the following topics:

Modifying Teams

Updating a Team

To update a team:

1. On the Team admin page, double-click the Team name to update from the Search result list or highlight a team row and click **Update** to open the Update Team page.



2. You are taken to the **Update Team** form.

3. Make changes to the **ID, Description** and/or **Header Fields**. If fields are specified in the Header Fields, these fields will be displayed on the Acknowledgement detail page, overriding any fields specified on the Group header fields.

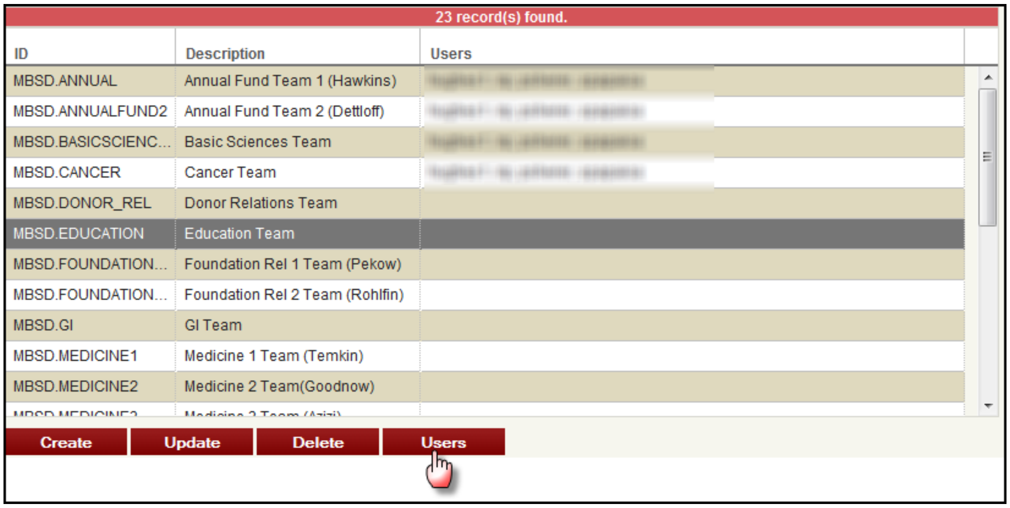
4. Click **Save** to save and go back to the previous page. Click **Cancel** to go back to Teams page without saving.

Managing Team Users

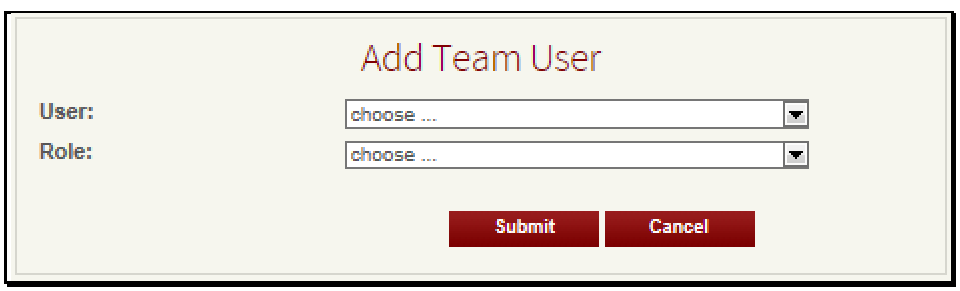
Add a Team Member

To add a Team user:

1. Highlight the team that you want the user to be a member of and click **Users**.



2. Click **Add** from the Team Users page to open the Add Team Users page.



3. Select the user to add from the User drop down list. The list will contain all the users in the selected group.

Continued on next page

Managing Team Users, Continued

Add a Team Member (continued)

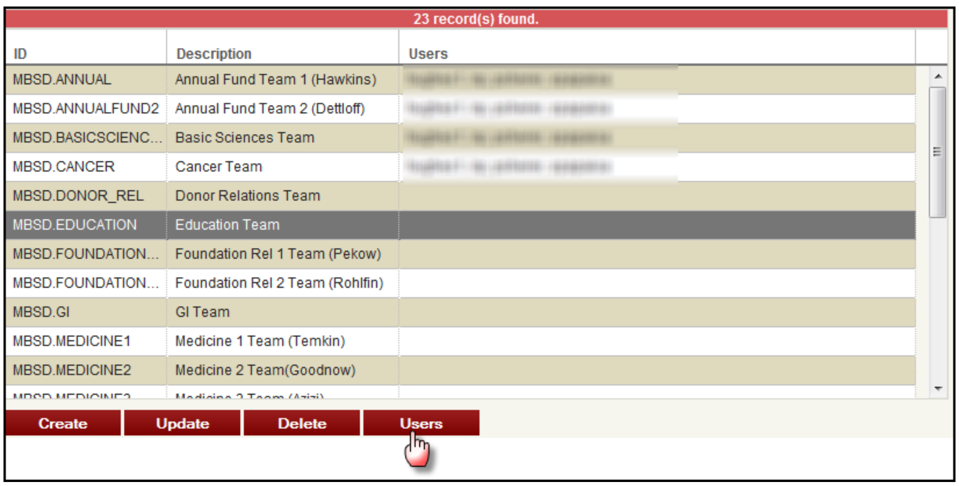
4. Select the **Role** of the user from the Role drop down list.

A user can have multiple team roles. To add another team role to a user, click on Add button again from the Team Users page. The list will display multiple rows for users with multiple team roles.

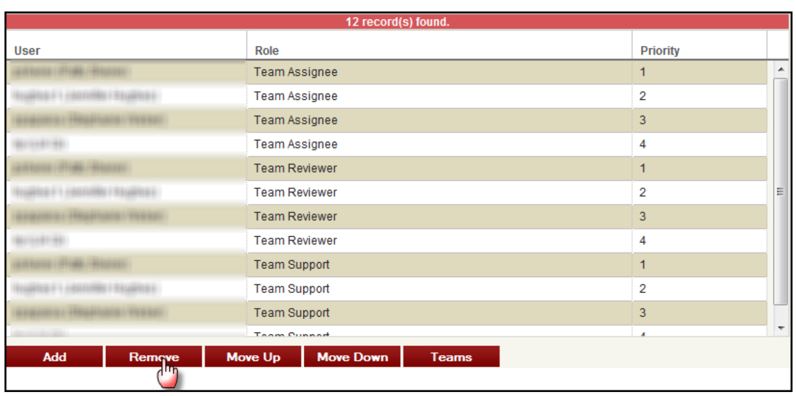
Delete a Team User

to delete a user from a team:

1. Highlight the team that you want to delete the user from and click **Users**.



2. On the Team Users page click **Remove**.



Continued on next page

Managing Team Users, Continued

Delete a Team User (continued)

3. A pop up form below will be displayed to confirm deletion of the selected user.

1. Click **Yes** if you are sure you want to delete the selected use or, click **No** or **close** to cancel the delete operation.

Appendix A: Administrator Privilege Matrix

User role	system admin	system user	group admin	group user	team admin	team user (non-admin)
My Account	✓	✓	✓	✓	✓	✓
User Accounts						
Create Account	✓					
Update Account	✓					
Delete Account	✓					
View Account	✓					
Tokens						
Create tokens	✓					
Update tokens	✓					
Delete tokens	✓					
View tokens	✓					
Groups						
Create group	✓					
Update group	✓					
Delete group	✓					
Add/Remove group users	✓		✓			
View group	✓		✓	✓	✓	✓
Execute pull	✓		✓			
Execute rules	✓		✓			
Teams						
>> Create team	✓		✓			
>> Update team	✓		✓		✓	
>> Delete team	✓		✓			
>> View team	✓		✓	✓	✓	✓
>> Add/Remove team users			✓		✓	
Templates						
Create template	✓		✓			
Update template	✓		✓			
Delete template	✓		✓			
View templates	✓		✓	✓	✓	✓
Rules						
Create rule	✓		✓			
Update rule	✓		✓			
Delete rule	✓		✓			
View rule	✓		✓	✓	✓	✓

Appendix B: Practice Exercises

Exercise 1: Creating a New User

Add Joe Prospect as a new DAS system user.

So each addition is unique, give your Joe Prospect your last or middle name as part of his display name.

Here's the information you have about Joe:

CNetID – Joe. Prospect
Email Address – joe.prospect@nowhere.com
Phone number – (773) 795-2121

Exercise 2: Adding a User to a Group

Add the user you created in exercise one to the group(s) you are a member of.

Exercise 3: Creating a Team

Create a team within your group and call it x.TRAININGXXX, where X is the name of your group in uppercase and XXX are your initials.
ex: MBSD.TRAININGGMJ

Add the following tokens to your header fields:

GIFT_AMOUNT
DONOR_PREF_MAIL_NAME
PRIMARY_RECTYPE
TRANSACTION_TYPE
ALUMNI_IND
ALLOCATION_NAME
DATE_OF_RECORD

Exercise 4: Adding a user to a Team

Add yourself as a member of the team created in the previous exercise.

Exercise 5: Assigning a Gift Record to a Team

1. Duplicate (copy) a gift record.

Continued on next page

Managing Team Users, Continued

Exercise 5:
Exercise 5:
Assigning a Gift Record to a Team (continued)

Pay attention to the record you select to copy. Click over the donor name or ID to group the copied record with the original record.

2. Assign the duplicate record to the team created in Exercise #3.
3. Select a template for the duplicate team.
4. Add a token such as the gift amount into the acknowledgement letter.