Gift Garden - Help Guide

Created Nov 2016

This document is a guide to help you learn Gift Garden more quickly. Eventually, this guide will be replaced by help pages within the system.

Comments? Questions? Please email Prof Bill at wtkrieger@noctrl.edu.

A. Getting Started

Gift Garden is designed to be easy to use. So, get started in two easy steps.
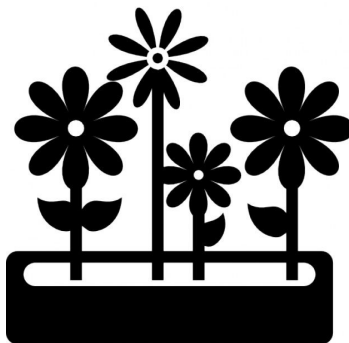
1. ## Login
2. ## Surf!

If you get stuck logging in, talk to your Admin.
If you get stuck surfing, then keep reading.

But try Gift Garden first… before reading this boring (yawn) Help document.
We bet you'll be able to figure it out, and you won't have to keep reading.
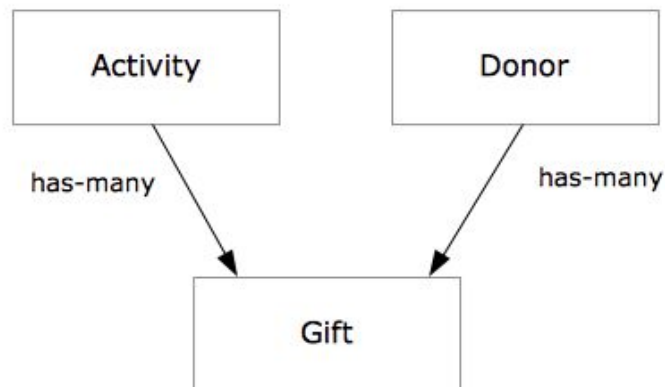Come back when you have a question you can't answer.

B. Activity, Donor, Gift

Gift Garden is built on a simple foundation. The application's data model consists of just three objects:
> ➢ **Activity** - an event or program your nonprofit holds to attract Gifts.
> ➢ **Donor** - a person or organization that donates Gifts to your nonprofit
> ➢ **Gift** - a contribution to your nonprofit

Here are the rules:
- A Gift is owned by exactly one Activity and one Donor.
- An Activity has many Gifts.
- A Donor has many Gifts.

So, the bottom line… before you create a Gift, make sure you have both an Activity and Donor to own it.

C. Surfing and Hyper Surfing

In Gift Garden, "surf" means visiting all your Activities, Donors and Gifts online so that you can view, edit, create, or delete them. While surfing, you can use the Filter/Sort options to refine which objects you are currently viewing and their order on the page.

Hyper Surf appears at the top of the Gift Garden screen. Enter a search term, and hit "Hyper Surf". Gift Garden will search every object in the system for a match and report it to you. It's very powerful. Try it!

Hyper Surf Term	**Hyper Surf**

D. New Gifts

Creating new Gifts is important; it appears directly on the Gift Garden home page.

This is pretty simple. Enter all the parameters of your Gift and hit Create at the bottom. But here are a couple of tricks to help you:
   - ➢ Click on Activity or Donor to see a list of all Activities or Donors. If your list is (hopefully) long, type the first couple characters to zoom down the list to your object.
   - ➢ When you click Create, Gift Garden stays at the New Gift page, waiting for another Gift. This makes it easier for you to enter many gifts in one batch. When you're done, select the "Done" button.

If you're curious about the gifts you created, Surf over and check them out. Or you can use Hyper Surf to find your Gift as well.

E. Reports

There are two groups of reports in Gift Garden:
- ❖ Basic Reports - information about Gift Garden's 3 objects: Activities, Donors, and Gifts
- ❖ Exotic Reports - more complex and directed reports with a specific goal, for example: "Report all new users this year"

All reports are PDF files.

F. Import/Export

There are three import/export options:
- ❏ Smart Gift Wizard - create Gifts in three steps, smartly validating donors as part of the process
- ❏ Import - read data into Gift Garden from an outside source
- ❏ Export - write data out of the program

Comma-Separated Value (CSV) files are used for all import/export data. This format is a common representation of data in spreadsheet programs like Microsoft Excel.

G. Site map

Here are all the web pages in Gift Garden:

> Login - First page
> Home - New Gifts, Surf, Reports and Import/Export
> New Gifts - Create one or many new Gifts
> Surf Activities - View all activities
>> New Activity - Create a new Activity
>> Edit Activity - Update an Activity or surf its Gifts
> Surf Donors - View all Donors
>> New Donor - Create a new Donor
>> Edit Donor - Update a Donor or surf all its Gifts
> Surf Gifts - View all Gifts
>> New Gift - Create a new Gift
>> Edit Gift - Update a Gift
> Reports - Executive reports that are quickly and easily created
>> *One page for each report*
> Import/Export - read and write data in and out of Gift Garden
>> Smart Gift Wizard - Follow 3 easy steps to import gifts
>>> 1. Download a CSV template
>>> 2. Validate your data
>>> 3. Import gifts
> Hyper Surf - search results from Hyper Surf
> Account/Admin - List all users (admin access only!)
>> New User - Create a new user (admin access only!)
>> Edit User - Change the user's password or level. The user can also be removed from the system.
> Account/Settings - Change your password
> About - Description of Gift Garden and its development team
> Help - This help page, pretty much

Q. Q&A - In the Weeds

Questions and answers about some of the more esoteric parts of Gift Garden.

Question #1 - Log out

Q - I'm stuck! How do I logout?

A - You are such a noob! But good question. Logout appears in the Account menu in the upper right.

Question #2 - Forgot my password

Q - I forgot my password. Help?!?

A - You need to get a new password from your Admin.

Question #3 - The General Activity

Q - What if we receive a Gift unrelated to any specific Activity?

A - Use the "General" Activity when creating this Gift. The General Activity is always available in Gift Garden.

Question #4 - Can't delete

Q - Why can't I delete Activities or Donors?

A - Activities and Donors can't be deleted if they own any Gifts. If you want to delete one of these, their Gifts must be deleted or changed first.

Question #5 - Oops. Un-delete!

Q - I accidentally deleted the wrong Gift. What can I do?

A - Any deletions in Gift Garden are placed in the Trash. Goto the Tash Report and you'll see any object you've deleted. Now, the format isn't pretty, but the data is there for you to recreate your Gift.

Question #6 - On an iPad

Q - Will Gift Garden work on my iPad or other tablet?
A - Absolutely! We're not an app, but you can run Gift Garden in a browser on your smartphone. It won't always looks so pretty on a small screen, however.

Question #7 - Hyper Search

Q - I'm nerd-curious. What exactly does Hyper Search do?
A - Getting this from JK…

Question last - HELP!

Q - I'm stuck. I've tried everything I can think of. HELP!
A - Gift Garden was designed and developed by the students of CSC 694 at North Central College. The best way to get help is to contact the professor of that call, Prof Bill Krieger at wtkreger@noctrl.edu. Thanks!

That's it. Thank you.

QOTD
Show me your garden and I shall tell you what you are.
- Alfred Austin, www.brainyquote.com/quotes/quotes/a/alfredaust169799.html