

Alert Extension Pack Overview

Cybergrants Webinar

Meet Your Trainer

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Learning Objective

To obtain a thorough understanding of the requirements and process involved with the Alert Extension Pack within CyberGrants. By the end of the session, you should have a clear picture of this process including your level of involvement and necessities in implementing this additional feature.

Agenda

Extensions Overview

Overview of the Alert Extension

Definitions, Abbreviations & Formatting

Functional Details

Assumptions, Dependencies & Next Steps

Overview of Extensions

Extension Packs



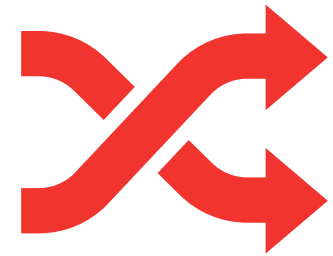
Enhancements to existing functionality



Pre-designed and templated for ease of integration



Yearly subscription fee for extension packs



Annual ability to tailor to your evolving needs

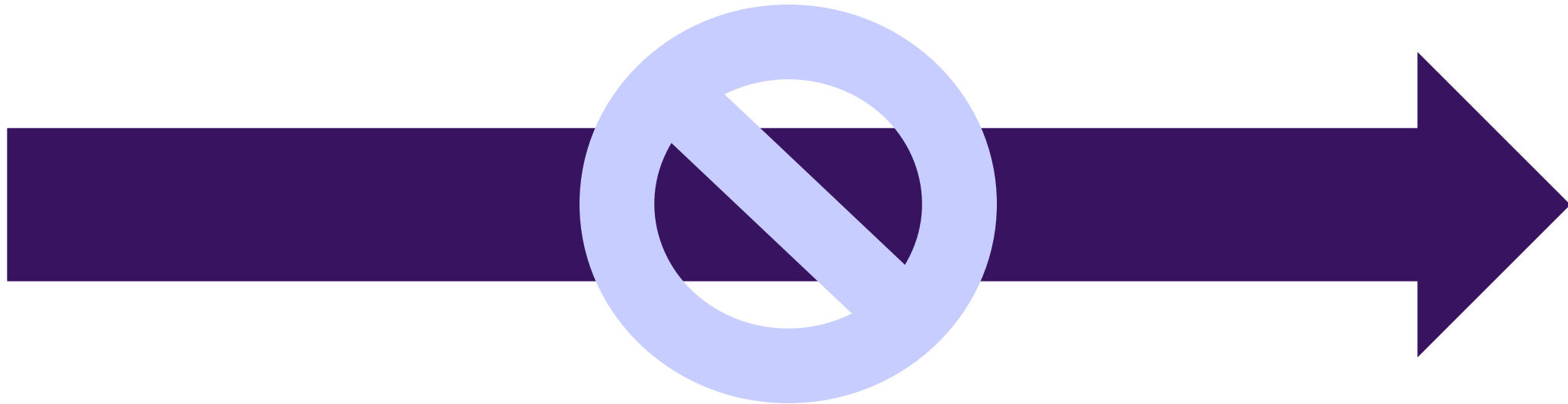
Alert Extension Overview

Alerts

Administrators can be alerted when a condition is not met in the system, allowing for notification and intervention when needed.

For examples:

- Impact Report is overdue
- Transaction involves an unacceptable tax status



Definitions, Abbreviations & Formatting

Definitions & Abbreviations

Client

- YOU! The program administrator or leading collaborator working with the Bonterra team.

Proposal Type

- Web-based application or form

EG Request

- A gift or a form submitted by an employee

Request

- A grant or a form submitted by an organization

EG Nomination

- An initial suggestion for an organization to be created, typically by a donor or an employee

Functional Details

Process

Alert Type



Critical Evaluation



Alert

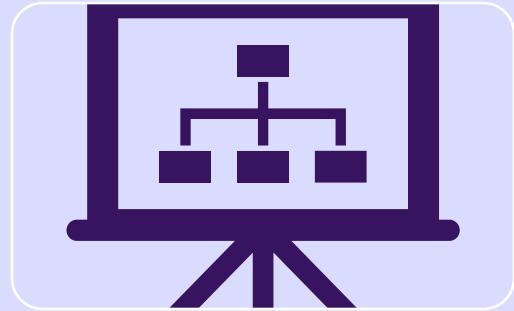


- Organization
- Grant Request
- Employee Giving Request
- Employee Giving Nomination

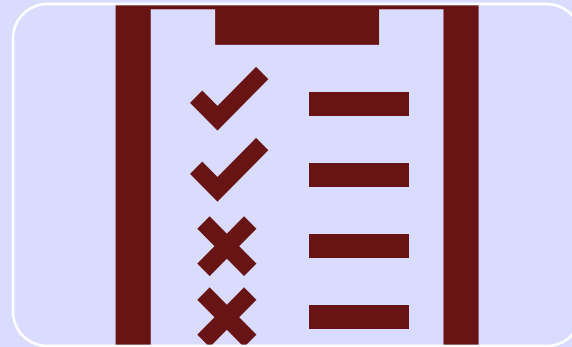
Assess the need for the alert

- Soft alert – user will see the message and continue with the process
- Hard alert – user will not be able to move forward with the process

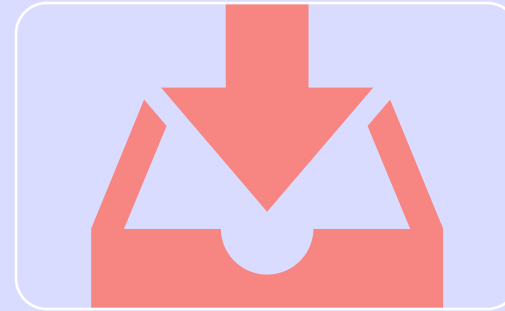
Example Scenarios



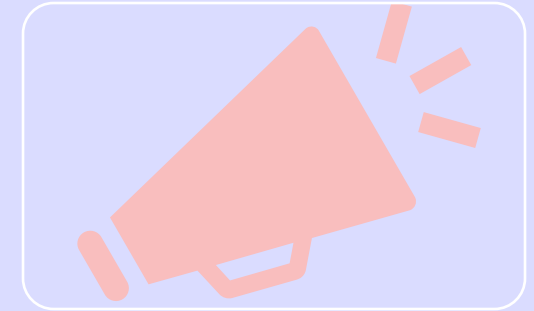
Reviewing
an
Organization



Reviewing a
Request



Reviewing
an EG
Request



Reviewing
an EG
Nomination

Assumptions, Dependencies and Next Steps

Assumptions & Dependencies

You will participate in User Acceptance Testing and will approve all changes prior to implementing in the Production environment

Anything outside of the original scope may result in additional costs and an extended timeline

Alert notifications are for internal use only

Alert messages are hard coded and cannot be dynamic

Merge fields are not allowed in alert messages

Your Next Steps



What do you need to address during implementation to ensure alerts can function properly?



Stay involved in the testing process to validate the alert system and ensure triggers are correct



Prepare to discuss this extension pack with your Business Analyst including management and governance

Additional Resources

- Help Center accessible from the top right hand user badge in CyberGrants

Additional Training Opportunities

- On-demand Videos available in our [Bonterra Academy](#)
- Additional webinars and training content to come!

Thank you for attending!

We hope to see you
in future trainings.