

DataBook Reference file

—All—



Thank you & hello!

Thanks for purchasing the DataBook software. This file provides a quick reference list of most of the features of the software version of the Foundation DataBook. Using the DataBook software, you can keep your own notes, track contacts with foundations, print one or more records, easily ' earmark' foundations and easily call up the marked list, quickly locate foundations of interest using the Alpha selection buttons and perform searches very quickly.

The software can make some tasks a lot easier than with just a book...for instance producing a list of all the foundation grants categorized as "Arts" which were greater than \$5,000 or an easy to make list of the ten best potential sources of support for your organization with two notes fields to keep track of your contacts, request submissions, things to remember and more.

There are lots of ways the software can enhance the DataBook's usefulness. Exploring this Reference File is a good place to start learning how to use the file to your best advantage. Feel free to print out this file...or copy the .pdf file over to your hard drive for ready reference if it did not install with the DataBook files. Much of what you will want to do is controlled by on-screen buttons or pop-up menus. If you are happy, send me an email and do the same if you are confused. Have fun and good luck raising support for your worthy cause!

Assumptions regarding computer use

—All—



ONE

While a significant attempt has been made to make this software easy to use and understand, basic competency in the general operation of computers is assumed. If terms like "boot up," "Save," "Quit," "Copy," "click over a field," "double-click," or "find the foundations in my geographic area which have funded projects or programs similar to mine" make your eyes glaze over, your mind thirst for coffee, or your hand reach for a cigarette, perhaps you should begin a process of employment (or volunteer) priority reassessment or review the Computer Operations Manual which may have come with your computer. (Or: Formulacalc("Back up to "+ImageAbove)), and this time it does not mean "copy to floppy".)

Documentation

—All—



This is the documentation for your DataBook CD-ROM. Documentation for Panorama, the database engine which runs the DataBook file is provided free of charge by Provue Development, www.provue.com, and you may have already downloaded it if you downloaded Panorama from the ProVue website (Mac- or Windows-specific downloads). Questions about Panorama can be answered by reviewing Provue's Panorama documentation. Questions about the DataBook software may be directed to DataBookQuestion@FoundationDataBook.com.

Installation

—All—



To install the DataBook, first download (for free) Panorama from the Provue website: www.provue.com. Be sure to choose the Windows or Macintosh version. You must choose Panorama 4 and not Panorama 3 which only works on older Macs or try out the new (beta) version 5 with new features (and works on Mac OSX). (Oregon is used as an example for the installation explanation.)

You do NOT need a serial number to install Panorama—see below—though you will need one to install the DataBook software.

After installing Panorama, insert the DataBook CD-ROM, locate the CD drive on your computer and open the DataBook Installer.pan file by double-clicking it. (Do NOT open the DataBook.bin file!) Click once on the DataBook file by area number 1, select the appropriate states (e.g., DBkOR7-Win or DBkOR-Mac) then click Install.

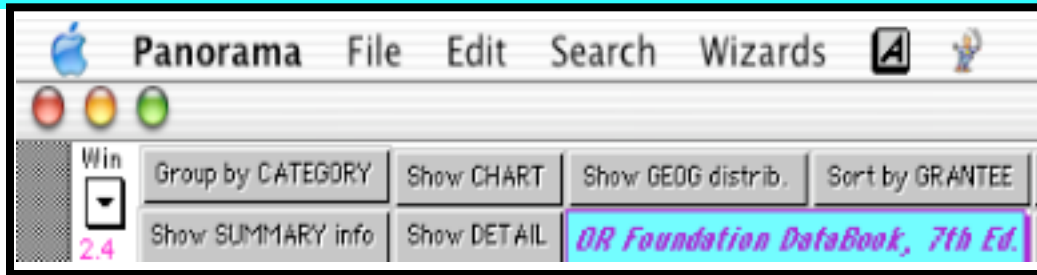
When prompted for a password, type in the case-sensitive password which came with your CD, then click OK. When the progress bar shows 100% your DataBook will have been installed in the Applications folder on a Mac as "DataBookOR7" or on your hard drive in MyComputer/Program Files/DataBookOR7.

Some Windows users may need to click on the "Re-Initialize" button in the Grants and once again in the Sources database for proper registration of some variables. If, the first time you open the file, you get a message that a variable was not found, click OK, then click the Re-Initialize button in the Sources and then in the Grants database. In the Sources database, click the SAVE button. These variables should stay initialized once you are fully installed.

NOTE: you may download Panorama for free from the Provue website. The DataBook software is yours to use without payment of additional fees, since C&D Publishing has paid a royalty to Provue Development for distribution of a "Panorama Engine" version of the DataBook file so that you do not need to pay anything additional. However, if you like Panorama and want to use it to develop additional databases for your own use, you may purchase a licensed version of Panorama from Provue. For databases of fewer than 250 records, you are free to develop and use the software; for larger databases, you may not print or save without clicking various places on a screen (nagware) unless you have paid the fee to Provue. It's a very cool program; runs in RAM so it is extremely fast; can handle text manipulation almost magically; has a learning curve but is lots of fun!

Menu bar

—All—



The elements of the Panorama menu bar at the top of the DataBook window show : File, Edit, Search, and Wizards. (Apple System X shown here; other operating systems will look slightly different.)

The File menu option is one place you can SAVE the file, QUIT Panorama or arrange windows (if you have a Wizard window open, for instance). Find/Select in the Search menu option is another commonly used tool from the menu bar, and notable because it is one of the only ways for you to search the entire database by choosing any field for the search. (Another option would be available using the 'Search any field' Wizard.)

Most of the Wizard choices are fun and won't get you into trouble. The full documentation for Panorama is included on the CD used to install the program or downloadable from the Provue website: www.provue.com; the documentation runs in excess of 2,000 pages and will explain everything. Might be a good idea to export all foundations' data to a text file periodically. (There is a button for this on the Sources main screen and the export will include your comments and biographical notes you may have entered...you are backed up, aren't you?)

Note: the "A" and image to its right are not part of Panorama and will not be visible for most users.

Button—General

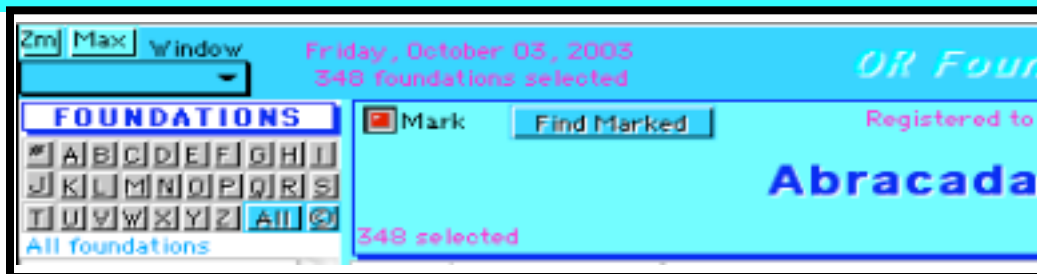
—All—



Buttons are used throughout the DataBook to perform various functions. From the area which has all the alphabetical buttons, try clicking the "©" button. It will cause a message box (dialog window, in this case, the "Splash" screen) to pop up, describing the DataBook and some other information. There is no "close" box...it is one big button...clicking on it will cause it to disappear or close. There are lots of buttons to try out...click them all now.

Buttons—Alpha

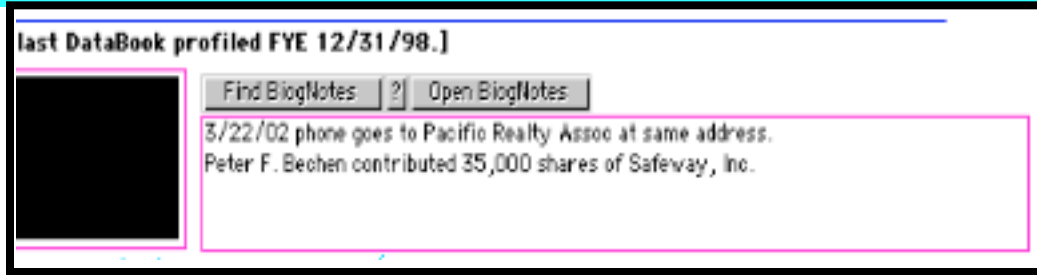
—Sources—



The Alpha buttons ("A," "B," "C" etc.) select a subset of foundations whose SortName begins with that letter, e.g. clicking the "Y" button in the Oregon Foundation DataBook, 7th Ed. Brings up two foundations: "Young, Juan Trust" and "Young, Trent & Kaye Foundation." The "©" (copyright) button presents the splash screen; clicking on it makes it disappear.

Button—BiogNotes

—Sources—



The "FindBiogNotes" button selects all foundations for which biographical notes have been entered, simultaneously opening a pop-up window for editing; the "?" button explains the "FindBiogNotes" and "OpenBiogNotes" buttons. You may also just double-click in the field and enter information if you wish. You can keep any type of note in here that you wish and the notes will be exported as text when you use the Export button and printed when you use the print form in the Sources database.

Button—Down

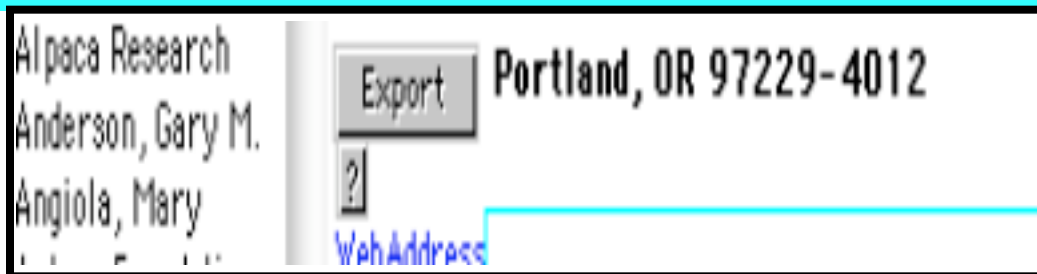
—Sources—



This button moves the location of the currently selected records down one record. If you are at the bottom record, you won't be able to move up any lower on the list. The author of this software is not "Button—Down."

Button—Export

—Sources—



The "Export" button allows you to export data from the Sources database so that you can pick it up for use elsewhere, for instance using a word processing program for a mail merge or for analysis in a spreadsheet program. This button will prompt you to name the file you are going to save, then save the data from the selected set of records as a tab-delimited text file, ready to display in your word processor or get sucked into a spreadsheet or database. The fields which are exported as a tab-delimited text file ("→" used here to represent the tabs) are: EIN → Source (name of the foundation) → Salutation → FirstName → LastName → Title → Address → City → State → Zip → Zip4 → AreaCode → Phone → FiscalYear → FundBalance (fair market value) → Revenue → Comments → BiogNotes → Trustees. The "?" button close to the Export button explains what the Export button does, similar to this Reference entry.

Button—Grants database

—Sources—



There are many buttons on the List form of the Grants database.

LIST LAYOUT—TOP ROW

- Win—this button (the little black triangle is the button) allows the user to switch from the current database window to any other open database window by selecting from the pop-up list associated with this button.
- "Group by CATEGORY"—this button is used as an alternate display when the grants of a particular foundation have been selected; it presents the grants as a bar chart by category.
- "Show CHART" button displays selected grants in bar chart format; same data as the summary records shown with Group by Category.
- "Show GEOG distrib."—this button shows summary information grouped by location of recipient grantee
- "Sort by GRANTEE"—allows a sort (select RemoveSummaries) by grantee name alphabetically.
- "Sort by AMOUNT" sorts selected grants by amount in descending order.
- "Go to SOURCES" removes all summaries and takes you over to the Sources database.
- "PrintForm" allows you to print the selected data.
- "Re-Initialize" has the same effect as opening the database (with summaries removed and either a blank record selected or all the grants in the entire database selected).

LIST LAYOUT—SECOND ROW

- "SHOW SUMMARY info" button is used when you want to view aggregate totals of grants for a particular foundation. (See also "Remove SUMMARIES" button.)
- "Show DETAIL" button reveals all the data which may have formerly been concealed as a result of using the "Show SUMMARY info" button.
- "DataBook, Edition" This button just shows the name of the DataBook and its edition, and also has the name and phone number of the Software Author, Engineer and Data Entry Drone.
- "Remove SUMMARIES" removes all summary records calculated by some other procedure.
- "Go SEARCH form" takes you to a different layout in the Grants database: the Search Form.

SEARCH FORM BUTTONS

- Search GRANTEE—allows you to search by Grantee; you get a dialog window in which you can type the grantee; part of this procedure asks the user whether to sort down by aggregate amount of grants or to sort alphabetically.
- Search by TOWN—allows you to search by location of grantee (i.e., grantee town).
- Sort by AMOUNT—allows you to sort by amount of the grant for the selected records
- Go LIST—changes to the List layout
- Remove SUMMARIES—removes all summary records, for instance if you have hit the Total button for a selected group of records
- To SOURCES—leaves the Grants database and takes you over to the Sources database (removing summaries as it goes)
- "Search by Category" buttons (Red) performs a search for one or more of the categories with little selection boxes on the Search Form. Click one or more of the category boxes the the Search by Category button to select all grants in the database which have the selected categories, e.g., all grants to Education.
- "Sort down by AMOUNT" sorts the selected grants in descending order by amount.
- "Sort up by FOUNDATION" sorts the selected grants alphabetically by SortName (not useful if "all the grants of this foundation" are selected; if you selected all the grants to the Arts, however, you may wish to sort them into an alpha list...and that's what this button does for you.
- "Sort up by GRANTEE" button sorts the selected grants by grantee.
- "Sort up by CITY" sorts the selected grants by city.
- "TOTAL these grants" provides a total amount for the selected grants.

Button—List the grants

—Sources—



The "List the Grants of this Foundation" in the Sources database switches over the Grants side, gathers the grants of a particular foundation, organizes them into groups by Category, sorts the grantees alphabetically within groups, calculates subtotals by categories and overall totals and puts them into a (printable) list!

Button—Mark

—Sources—



The "Mark" button toggles between "marked" which shows RED when marked; and "unmarked" which does not show red when marked. See the adjacent "Find Marked" button to select all marked foundations. In the image above, the Abracadabra and Adams Foundations are marked. In this image, the Mark button indicator is also marked but this means nothing.

Button—Notes

—Sources—



The notes field (MyNotes) allows you to keep individualized notes on each foundation in a couple of different ways...the "OpenNotes" button just opens the MyNotes field in a pop-up window; the "Open New Note with Date" button opens the pop-up and automatically slaps today's date in the field. Just double-clicking in the field itself will access your notes, but without the pop-up. The "?" button explains these features in abbreviated form. The "Find Notes button" will select only the subset of foundations for which notes have been entered. Later you can search within the MyNotes field for a particular date if you remember you made a note yesterday or the day before but can't remember which foundations you made the notes on. There's also a button to find all notes with data, the "Find Notes" button.

To close the pop-up editing box, use the Enter key or click outside the window.

Button—QUIT

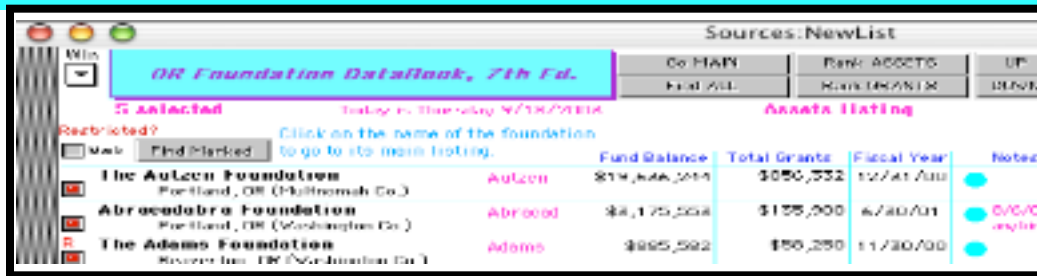
—Sources—



Use the QUIT button (image lower right) to quit using the DataBook software (or use the menu bar: File/Quit). If you have made changes to the database, you will be asked if you wish to save. You probably do.

Button—Rank ASSETS

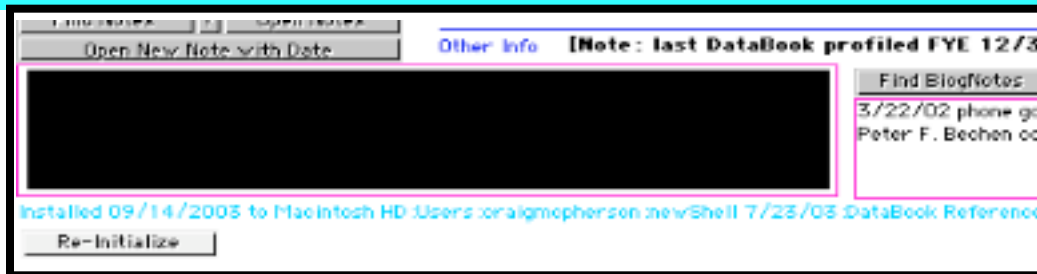
—Sources—



The "Rank ASSETS" button ranks the selected foundations by assets in descending order. You are given the opportunity to select all foundations or to rank only the selected ones. You may be able to print from this form using the File menu option at the top of the screen; otherwise use the regular print form. The "Rank ASSETS" button is available from the Main screen and the list layout as well, as this image shows. Ditto "Rank GRANTS."

Button—Re-Initialize

—Sources—



The Re-Initialize button (lower left corner of the image) re-initializes the database (sets some variables and parameters, selects all foundations, opens to the main screen and so forth). The very first time you open the database, try clicking over the Trustees field. If you get a message that a variable is not initialized, this would be an excellent time to click the Re-Initialize button! In that circumstance it would initialize the "fgViewer" variable, allowing you to see all the data in a field which has so much data that it might not all be visible at first.

Button—SAVE

—Sources—



Use the SAVE button to save the Sources database. If you have made changes to the Sources database you will be prompted to save, whether you have used the SAVE button or not, however it is always prudent when using a RAM-driven database, to save-early-save-often, as the saying goes. You may also use the "Save" option from the menu bar under "File." Panorama is very quick because it runs in RAM...so it does not have to constantly read from the hard disk and also write to the hard disk...it only writes to the hard disk when you tell it to do so. Periodically you may want to back up your files, and not just the DataBook files either.

Button—Up

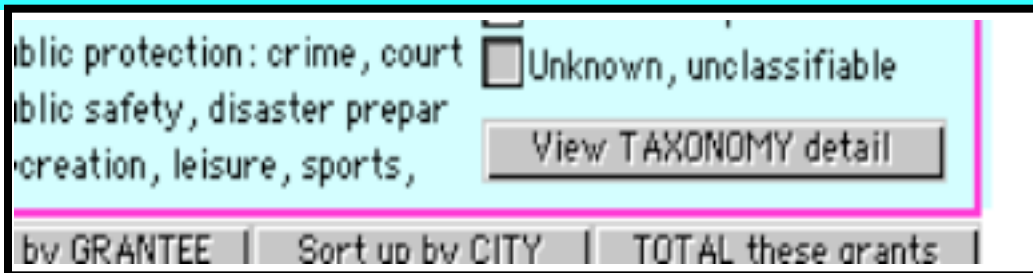
—Sources—



This button moves the location of the currently selected record up one record. Once at the top record (or if only one record is selected), you won't be able to move up any higher on the list. And if you're cold, Button—Up!

Button—View Taxonomy

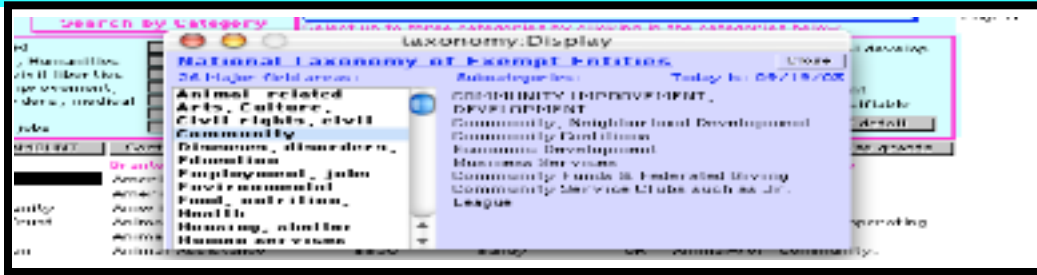
—All—



The image shows the button on the Search form for the Grants database which produces an detailed list of subcategories of the taxonomy used to classify grants in the Foundation DataBooks. Note that it is the Grantee which is categorized, not the "purpose" of the grant...thus a grant for a wrestling mat at the local high school would be classified as "Education" rather than "Recreation, leisure, sports, athletics." Only the 26 major classification codes are used to describe the grantees; the subcategories are presented for clarification only.

Button—View Taxonomy detail

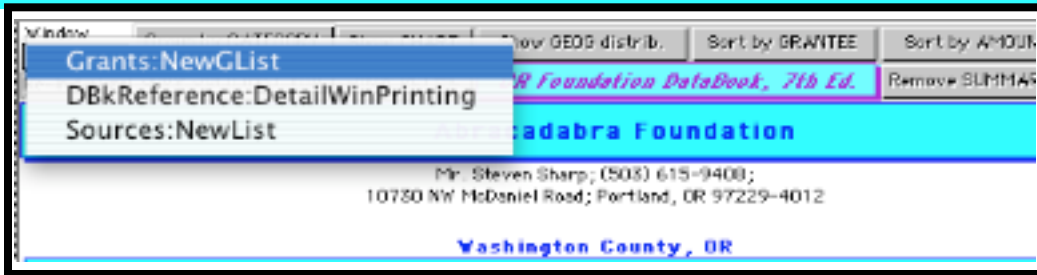
—All—



The image above shows what appears after clicking the "View Taxonomy detail" button: a list of the 26 major categories of the National Taxonomy of Exempt Entities (NTEE) Classification System are shown on the left of the window. Clicking one of those categories presents a description of the subsections of the NTEE categories; only the major codes are used to describe the grantees in the Grants database.

Button—Window

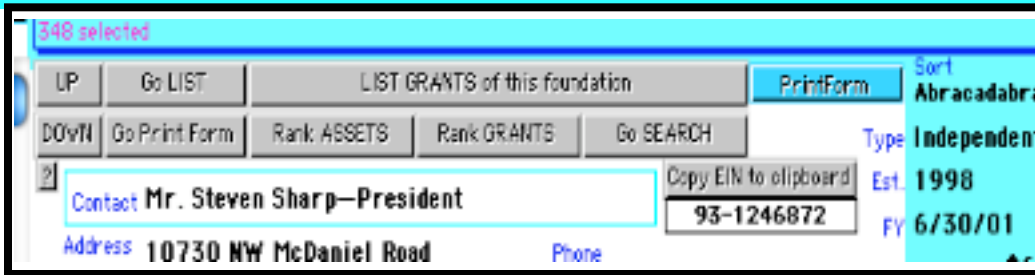
—Sources—



This button (just below "Window", upper left corner of the image; this button has been pushed, showing the available windows) displays the open Panorama windows; by selecting from the pop-up list which appears when you click on the black downward-pointing triangle, you can switch to the other database, for instance, from Sources to Grants or to a Wizard window. For most of the time only two Panorama windows will be open, but it is possible to have more windows open at one time.

Buttons—Go LIST et al

—Sources—



To the right of the UP button (which moves up one record in the Sources database, where the main data shown reflects information on one record) is the Go LIST button: it switched from the main data layout showing most information for a particular foundation to a list format which shows only a little data for a particular foundation but shows quite a few foundations at once. You are taken to the list form when you click the Rank ASSETS or Rank GRANTS buttons, also shown in this image.

The "LIST GRANTS of this foundation" button switches over to the grants database and looks up all the grants for a particular foundation, organizing them on the fly into composite figures for total amount, average grant size etc. and listing the grants within categorical groups, e.g., all the "animal-related" grants grouped together with total dollar amount for that category, average within the category, etc., followed by the remaining categories of grants for the particular foundation.

The "PrintForm" button takes you to another layout which presents data on one foundation per page formatted with your notes and/or biographical notes following the main information on the foundation (no grants listing) and allows you to print the form. You are allowed to cancel after the message indicating the number of selected foundations.

The Copy EIN to clipboard button copies the EIN (Employer Identification Number) to the clipboard. This is very handy for further research on a foundation when you want to locate it by its unique and unambiguous identifying number rather than the perhaps ambiguous phrase representing a foundation name, e.g., "Young Foundation" where there may be many Young Foundations.

The "Rank ASSETS" and "Rank GRANTS" buttons put the foundations in descending order by total grants (actually the amount shown as "Program Service" from page one of the 990 tax return for the foundation) and the assets of the foundation (actually the fair market value of the fund balance at the end of the fiscal year).

The "Go SEARCH" button takes you to the Grants database search form, ready for a one-button search or a fancier "Power Search" as described elsewhere in this file.

Use the "Go MAIN" button to move back to the main Sources database screen.

Buttons—Other Procs

—Sources—



This button (right side of image) causes a pop-up list of available procedures on the Mac and a scrollable list of procedures available from the PC layouts for both the DataEntry and list layouts. Clicking an element on the pop-up or scrolling list should invoke the procedure, for example, exporting address information or removing all summaries after a grouping or preparation of a report.

Buttons—Search buttons

—Grants—



There are many buttons on the Search form of the Grants database.

—Win—this button allows the user to switch from the current database to any other open database by toggling to the desired database using the pop-up list associated with this button.

—"Using the SEARCH menu above"—this pop-up explains very briefly how to use the menu bar selection to do a search

—"Refresh Screen" button is used to refresh the screen for updating the count of selected records etc.

—PrintForm—this button allows for printing of selected records.

—Re-Initialize—this button re-initializes (re-opens) the DataBook files.

—Search FOUNDATION—takes you over to the Sources database so you can search by foundation.

—Search GRANTEE—allows you to search by Grantee; you get a dialog window in which you can type the grantee you wish to search for.

—Search by TOWN—allows you to search by location of grantee (i.e., grantee town).

—Sort by AMOUNT—allows you to sort by amount of the grant for the selected records

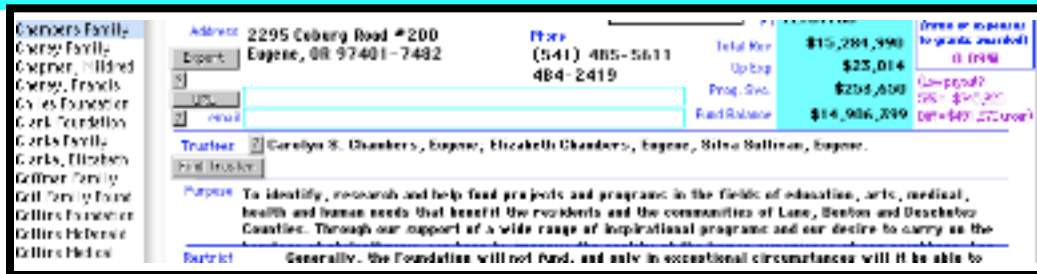
—Go LIST—changes to the List layout

—Remove SUMMARIES—removes all summary records, for instance if you have hit the Total button for a selected group of records

—To SOURCES—leaves the Grants database and takes you over to the Sources database (removing summaries as it goes)

Field pop-ups

—All—

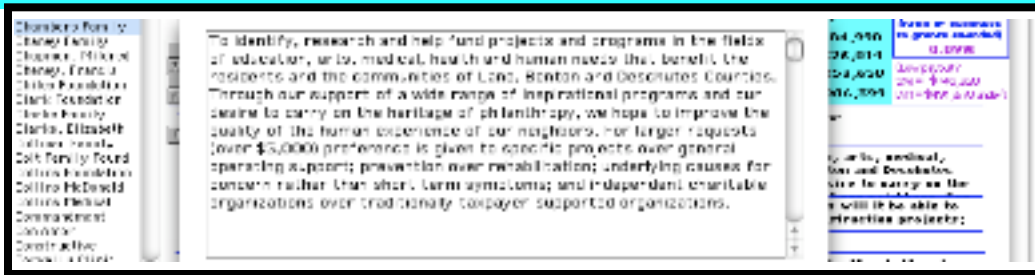


Sometimes there is more data than will fit in the pre-defined areas showing information about each foundation in the Sources database. In the image above, some of the data does not appear in the Purpose field...until you click over the field itself, which causes a pop-up window to appear displaying more of the field's contents. If you still cannot see it all, the window will include a scroll bar to navigate further down the window.

Hitting the Enter key will close the pop-up window. In this version of the DataBook software, you cannot alter the data in most of these fields...that way they correlate with the published versions of the DataBook.

Field pop-ups expanded

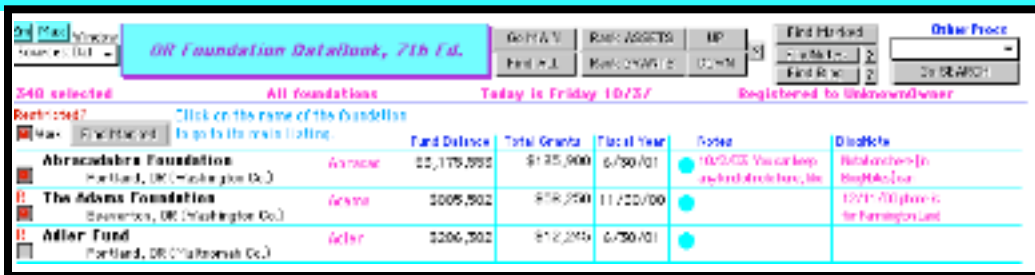
—All—



This image displays an expanded field pop-up with scroll bar on the right of the window. Clicking over the data in the Trustees, Purpose, Restrictions, Published Information or Other Information fields will "pop-up" a new window with an expanded view of the data. If you still cannot see all of the data, use the scroll bar to view it all. Hit the Enter key to close the expansion window.

Form—List

—Sources—



Both the Sources and Grants databases have a list form. Shown above is a list form for the Sources database, listing brief information on some or all of the foundations. Clicking the foundation name while in the list format will switch to the main layout showing more data but on just one foundation at a time, as is also true of the Sources print form, i.e., one foundation at a time.

Form—Search Form

—Grants—



The Search Form in the Grants database is used for searching for grants which fit certain criteria, for instance, by clicking one of the Category buttons on the Search Form, you can select all grants to a particular category. In the image above, all grants to the Arts have been selected with the Arts category button and then clicking on the red "Search by Category" button.

The "Sort down by AMOUNT," "Sort up by FOUNDATION," "Sort up by GRANTEE," "Sort up by CITY," and "TOTAL these grants" buttons perform the stated functions.

Form—Sources—Data Entry

—Sources—



The "Data Entry" form is the main form for the Sources database and it opens each time the database opens. The form name appears at the top of the window for any open database, as in the image above, just below the flag: "Sources:Data Entry" (Mac screen shown.)

In this layout, if you cannot view all the data in the Trustees, Purpose, Restrictions, Deadlines, Published Info, or Other Info fields, clicking over the field data will cause a pop-up window to display more of the data. If you still cannot view all the data, a scroll bar will provide the means for additional viewing.

Hitting the Enter key will seem to allow for additional data entry, however the data may not be written so that it will continue to correlate with the data in the published versions of the Foundation DataBooks.

Form—Splash

—Sources—



When the software first opens, the "Splash" screen pops up with information about the DataBook, including today's date; your registration information; what version of Panorama is running, which state DataBook you are using, etc. When you first open the files, the splash screen appears for a few seconds and then closes, however you can make it appear by clicking on the copyright symbol just to the right of the 'All' button in the upper left area of the Sources screen. When the splash screen has been displayed in this way, clicking on it will close it again.

Listing corrected...

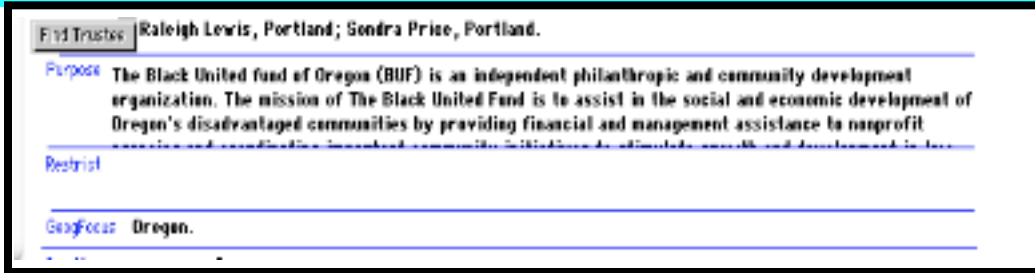
—Sources—



The phrase "Listing corrected by the foundation" appears for the listing of foundations which returned the proof sheet mailed to them prior to publication of the DataBook. This gives each foundation the opportunity to correct the listing or to provide additional details for the listing or for the grants.

Hidden data

—All—

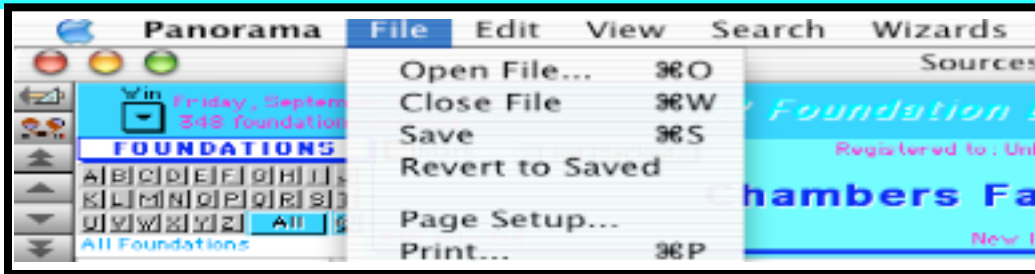


Sometimes there is more data than will fit in the pre-defined areas showing information about each foundation in the Sources database. In the image above, some of the data does not appear until you click over the field itself, which causes a pop-up window to appear which displays more of the field's contents. If you still cannot see it all, the window will include a scroll bar to navigate further down the window.

Hitting the Enter key close the pop-up window. In this version of the DataBook software, you cannot alter the data in most of these fields...that way they correlate with the published versions of the DataBook.

MenuBar—File—Close etc.

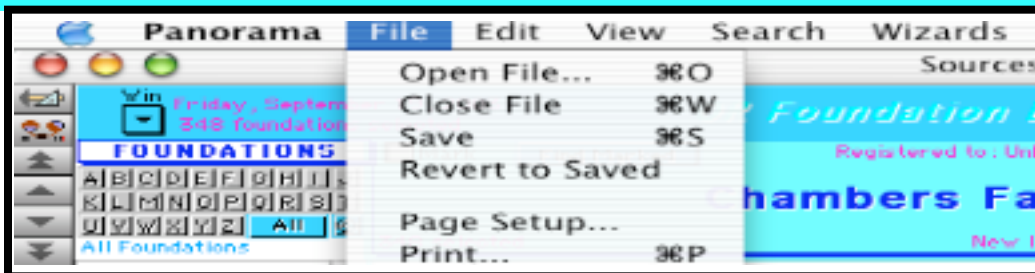
—Sources—



Closes the current file; if you have made changes, you will be prompted to save or not. Also good for saving, printing, etc. Image above shows those options and the author did not make separate images for every one of them. Sorry.

MenuBar—File—Open

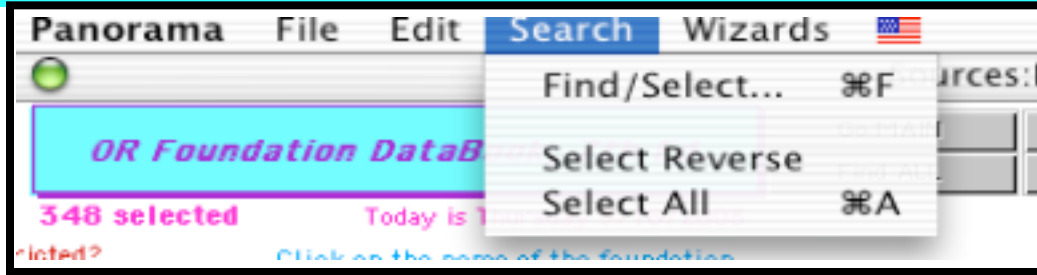
—Sources—



Opens a Panorama file. Key command uses the (lower case) letter 'o' and not the zero. Also useful for closing a file, Saving a file, quitting the program, etc. "Revert to saved" will revert to the last saved version. Save early, save often; you ARE backed up, aren't you?

MenuBar—Search

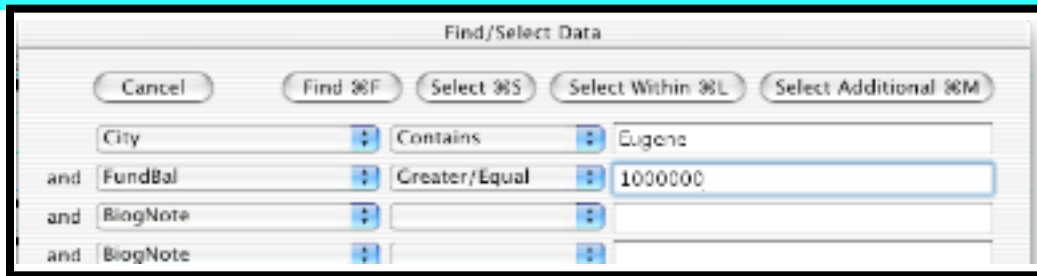
—Sources—



Allows "power searching" in either the Sources or Grants databases. See also MenuBar—Search operands and MenuBar—Search dialog. The SelectReverse option selects all records not currently selected. SelectAll selects all records.

MenuBar—Search dialog

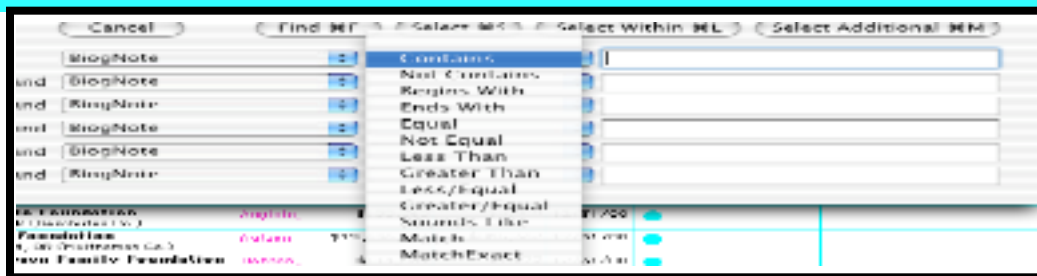
—Sources—



From the MenuBar, selecting Search presents a dialog box with several options. In the image above, the field City has been selected for the search from the pop-up menu where "City" appears. Click the up/down arrows for a pop-up list of fields to use for your search. Where "contains" appears selected on the first selection line, there is another pop-up list with options such as "

MenuBar—Search operands

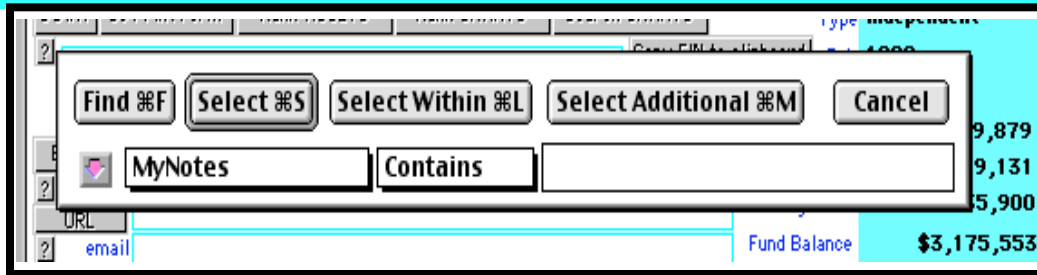
—Sources—



When performing a "power search," first select Search from the MenuBar and select what field you want to search in, then using the operands shown in the image above, select what you want to do, for instance, that a particular field be "Equal" to a value, such as Source Equal "Abracadabra Foundation" assuming you typed "Abracadabra Foundation" into the space to the right of the operand. This is a "hard match" and must be exactly correct. You might also search for Source CONTAINS "Abraca" and get the same results. A search for Source CONTAINS "young" would find both the "Trent & Kaye Young Foundation" and the "Juan Young Trust." Feel free to try out all the operands to get a feel for how they work. Oregon users: try Source SOUNDSLIKE "John Yung Trust" to get the same result as if you typed Source EQUALS "Juan Young Trust." Somewhat esoteric, but occasionally useful.

MenuBar—Search operands 'and/or'

—All—



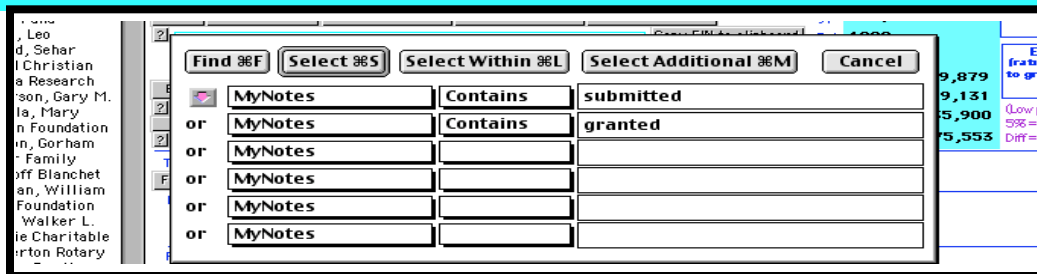
The search dialog box opens ready to search up to six search parameters at once. Current versions of Panorama display all six parameters; previous versions allowed the user to begin with one set of parameters or to click a down arrow button to expand the search to include more parameters. See also: MenuBar—Search operands and MenuBar—Search dialog.

This image shows the earlier version search dialog box. Clicking on the downward pointing arrow (left of the field "MyNotes" in image) expands the options (see image below). For an image of all six parameters in the newer version of Panorama, see MenuBar—Search operands, above.

This allows you control your search using an "AND" or "OR" condition for a search with more than one parameter, for instance a search for "City CONTAINS "Port" OR City CONTAINS "Eugene" could result in "Portland," "Port Angeles," and "Eugene" being found. On the other hand, a search for "City CONTAINS "Port" AND City CONTAINS "Eugene" would find nothing.

MenuBar—Search operands 'and/or' expanded

—All—



This image shows the expanded search options dialog box after clicking on the downward pointing arrow (See image for "MenuBar—Search operands 'and/or'" above.) and after clicking on the downward pointing arrow, selecting "or" as opposed to the "and" which appeared initially.

You may not have an "and" and an "or" condition at the same time, e.g., you cannot perform the search "MyNotes CONTAINS "submitted" OR MyNotes CONTAINS "granted" AND MyNotes CONTAINS "never submitted but still hoping."

New Listing

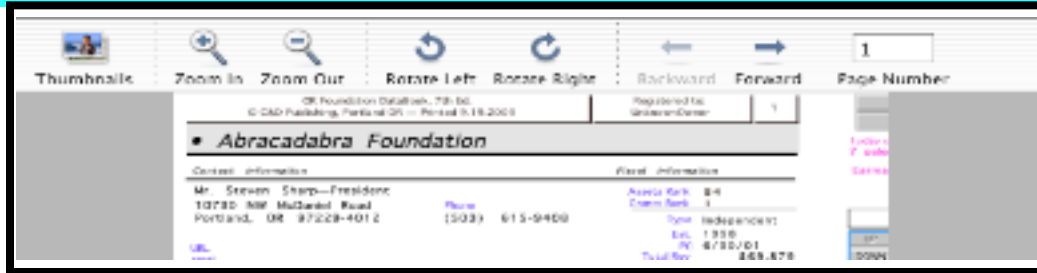
—Sources—



The phrase "New listing" appears for the listing of foundations which have appeared in the DataBook for the first time. See also the Established date in the financial area of the foundation's listing.

PrintPreview

—N.A.—



You can preview a printable form by using the File menu and selecting Print, then from within the dialog that opens, click on Preview (if available; not all operating systems support this feature). Close the Preview window using the close box on a Mac (upper left) or the close box on Windows (upper right) as standard procedure in those programs. There is no CloseWindow button in the Preview mode, however there is a close box. On some older systems, the print preview may not be available. On Mac OSX, for instance, the preview mode is available from within the print dialog box, which means using this method, you can print from any view, even in the Grants database.

Summary records

—Sources—

Total # of Grants:	42	Average Amount:	\$12,046	Largest:	\$20,000	
Total Amount:	\$539,524	Funded in Prior Edition:	14%	Smallest:	\$2,530	
	Prior Grant#	TOTAL, these grants	Amount	City	State	Purpose
Arts,		---	\$20,000			
Comment		---	\$36,500			
Education		---	\$241,549			
Health,		---	\$11,960			
Housing,		---	\$10,000			
Human		---	\$114,943			

If you have selected "List the grants of this foundation" and are presented with a list of grants, you can click the "View Summary records" button and view the category summaries for the foundation...this shows just the categories and their sub-totals as a quick overview of their spending priorities. Shown here, the largest category of grant support was for Education. Summary records appear in bold blue type, with grand totals (bold red type) at the bottom (not visible in this image). These are the same sub-total summary records displayed in the bar chart when using "Show Chart."

Summary records expanded

—Sources—

This image shows the summary totals for grantee categories for a foundation after the word "Education" was clicked: the grants of that summary record only are expanded. Clicking View Summary records button again will show only the summaries; clicking Remove All Summaries button will remove the (temporary) summary records and only show the detail for the selected records.

Technical Support.

—N.—



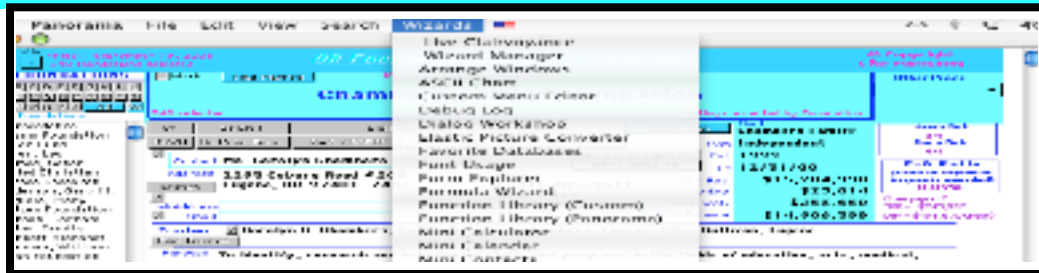
If you have downloaded Panorama, you may have also downloaded the Panorama Handbook file. It is free (see Wizards). There is an explanation of how the various Wizards work in the Panorama Handbook file (which is a little daunting by itself, but the explanations are good, and the sections on using the Wizards is straightforward).

Please read this DataBook Reference file thoroughly before requesting technical support.

If you need additional technical support, please email your request for help to Help@FoundationDataBook.com and include: your name and telephone; what kind of computer you use; what operating system you use (Mac X, Windows95, etc.); what version of Panorama you have installed. Upon receipt of your email information, I will try to contact you and work through any problems.

Wizards

—All—



The Wizards option on the MenuBar presents a list of the "Wizards" included with Panorama. The Wizards file has lots of fun things. You may enjoy the MiniCalendar Wizard (in which you can keep track of your own appointments or individualized application deadlines, for instance); the MiniContacts Wizard (which could become your main contact manager if you don't need a fancier one); and the MiniCorrespondence Wizard (which can be linked to your Sources database for word-merge purposes—see below).

The MiniContacts and MiniCorrespondence Wizards are worth the price of admission all by themselves. You could keep all your personal and work addresses, phone numbers, URLs, email addresses, passwords, birth dates, locker combinations, credit card numbers and personal statistics in the Contacts Wizard—just think of what you can do with the Correspondence Wizard! See the Panorama Handbook for additional explanation on using these Wizards.

Use the Wizard Manager Wizard to select just the Wizards you want to have regular access to just by clicking on the left side of the Wizard list in Wizard Manager. (See image below.)

Wizards—just the ones you want

—All—



Use the Wizard Manager to select only the Wizards you want to remain visible on the MenuBar. Shown above are the ones you might find enjoyable; many of the others relate to programming but there are many which are straightforward and fun...like the task timer or the new database wizards. See also the Panorama Handbook Wizard, which will open the handbook for learning to use Panorama, world's most fun database application!

Wizard—MiniCalendar

—Sources—



The Mini-Calendar Wizard is a great place to put reminders for upcoming deadlines for grant applications! You can also use it for your own personal calendar needs too. It opens to the current date and you can click to navigate from there. Double click above the calendar dates to begin editing or type in some new data. When data has been entered for a particular date, a small black triangle appears in the upper left corner of the area representing the date number. (Though hard to see, the 24th and 29th have these marks in the image above.) If you make changes, you will be prompted to save when you close the Mini-Calendar.

Wizard—MiniContact

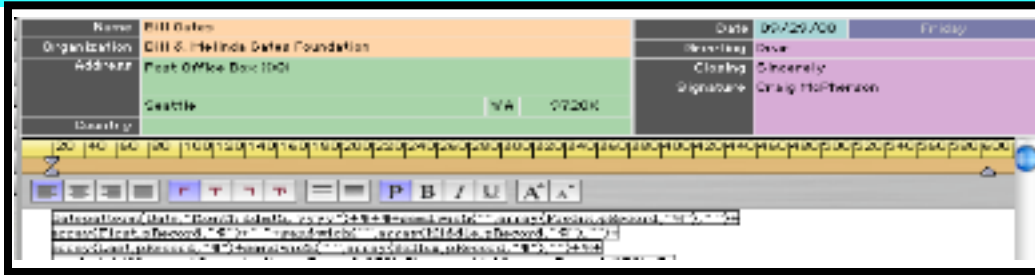
—Sources—



The Mini-Contact Wizard allows you to keep track of all your important contacts for foundations or for personal use. Use "Add new record" from the file menu when you have clicked somewhere on the Mini-Contacts Wizard window to make it active. Then just type in your contact information! You will be prompted to save any changes. Note that the form is "elastic." By resizing the window in the normal way, the form expands or contracts at the same time. Saving the Wizard after resizing the window should save the window settings and open the same way next time.

Wizard—MiniCorrespondence

—Sources—



Use the MiniCorrespondence Wizard for a quick way to prepare correspondence. Just click over existing type and view your letter using the controls within the MiniCorrespondence Wizard or create a new letter (see below). You can link your MiniCorrespondence Wizard to the Sources database very easily. This means that if you have the Sources database open and then choose MiniCorrespondence from the Wizard menu bar option, it will automatically grab the address information from the addresses in the Sources database and prepare that part as a formatted letter for you so you do not have to re-key the data!

With the Sources database open, just open the Mini Correspondence Wizard and select "Set Up" and then "Link to 'Sources'." You will get a window (Data Link; see image below) which shows which fields are going to link...readjust if needed. In the Sources database click on a foundation name and then select the MiniCorrespondence Wizard. You will be asked if you want a new letter to the contact person for the foundation. Bingo.

See Panorama Handbook for additional details.

Wizard—MiniCorrespondence letter

—Sources—



Image shows the effect after altering (just) the body of the letter that pops up in the MiniCorrespondence Wizard.

Wizard—MiniCorrespondence sample letter

—Sources—

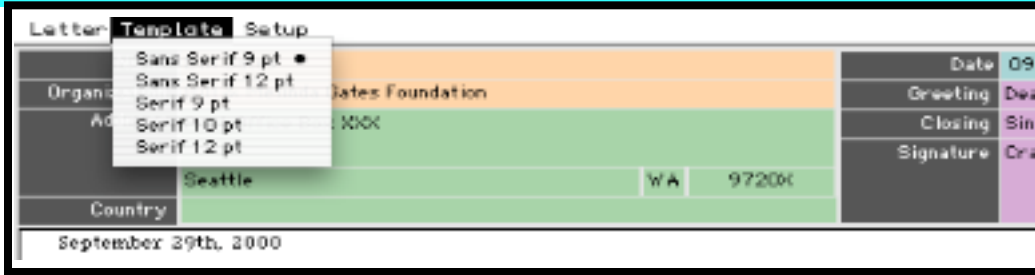


The Letter options allow the user to save the Wizard file, open a blank letter, open a letter to a specific foundation (the one which you selected in Sources), open a "list" format for viewing all the letters in the Wizard, send a "merge" letter to a group of foundations (your "marked" list?), change the page setup or print the letter.

Use the Letter options to display a list of other letters in the Wizard; click on one, then backspace to get a message confirming the deletion of that record.

Wizard—MiniCorrespondence options—Template

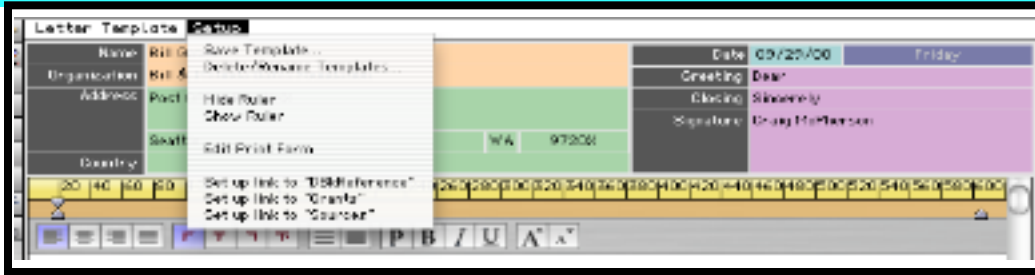
—Sources—



The Template option allows the user to select from five "standard font" options: two without letter squiggles (9 point and 12 point sizes) and three with letter squiggles (9 point, 10 point and 12 point sizes). With additional research using the Panorama Handbook the user can learn many additional ways to alter the appearance of the letter template layout going far beyond generic fonts!

Wizard—MiniCorrespondence options—Setup

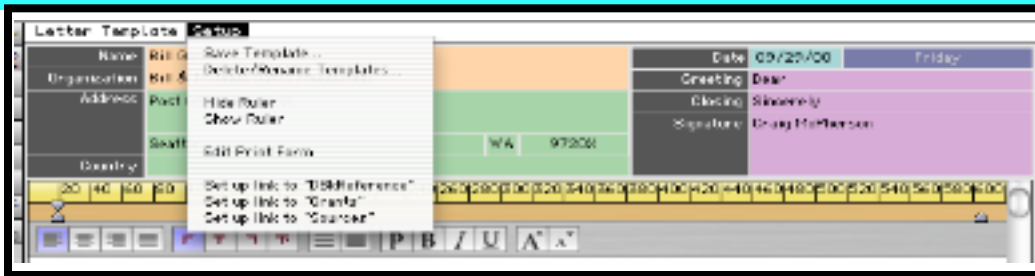
—Sources—



The Setup option in the MiniCorrespondence Wizard allows you to link the Wizard file with the Sources or another file. The Edit Print Form option allows the careful user to use the tools on the left of the editing form to make his or her own letterhead, add lines, etc. See Panorama Handbook for additional details on customizing the print form for the Wizard.

Wizard—MiniCorrespondence—Link to Sources

—Sources—



As noted above, you can easily link the MiniCorrespondence Wizard to the Sources database so it will be able to automatically compose a letter for you. With a specific foundation selected, going to the Wizard asks if you want a new letter to the contact person for the foundation. If you say "No," that's fine. You can still select from the wizards pull-down options. They are: Letter, Template and SetUp. Use the SetUp option to establish the link with the Sources database. (From the Letter Template Setup options in the MiniCorrespondence window, choose Setup:Set up link to "Sources.")

Wizard—MiniCorrespondence Data Link

—Sources—



After choosing to link to the Source database, the Wizard pops up a Data Link window to allow you to adjust fields in the Sources database to corresponding fields in the MiniCorrespondence Wizard Data Link window. If adjustment is needed, notice the little blue triangles on the left column of the Data Link window; this will pop up a list of the Sources fields, allowing you to select, for instance, the "Sal" field (for Salutation) to correspond to the "Prefix" field in the MiniCorrespondence Wizard. Once the changes have been made, the Wizard should allow printing using the proper fields.