FOUNDATION**SOURCE**

PRODUCT UPDATES:

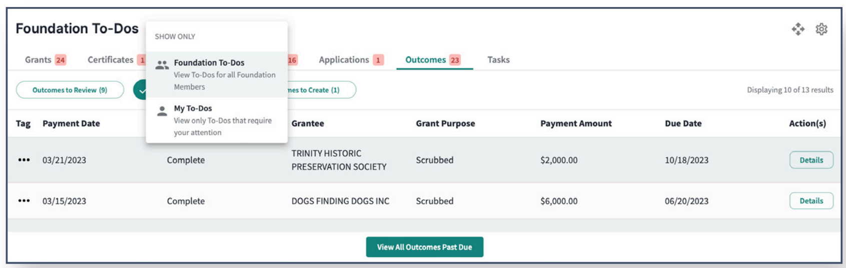
Stay on Track with To-Dos

The To-Dos dashboard tile provides a birds-eye view of tasks that need to be completed. There are two viewing options: the ability to see the entire foundation's tasks or items just meant for you. To-Dos ensure your entire organization is on the same page, work is streamlined, and everyone has the visibility needed to be productive.

Let's take a deeper dive into the differences between the two viewing options.

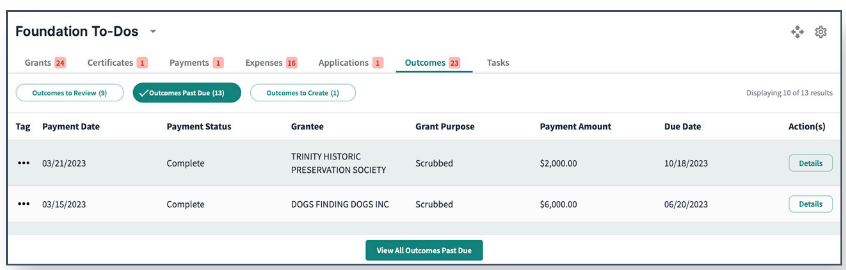
Multi-view Selection

The drop-down feature makes it easy to change views right from the dashboard. The central placements reduce the need for multiple clicks to toggle between the information, while making it clear which view you are using.



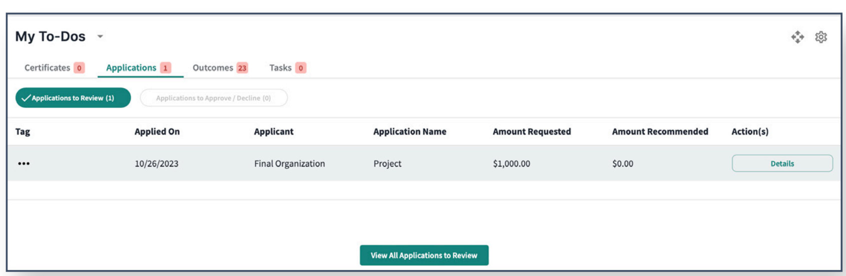
Foundation To-Dos

The Foundation To-Dos are a view of all outstanding items across the foundation. These To-Dos may show tasks that you have personally completed but are outstanding by others. This view maintains entitlements, so Foundation Members will not see anything they may be restricted from.



My To-Dos

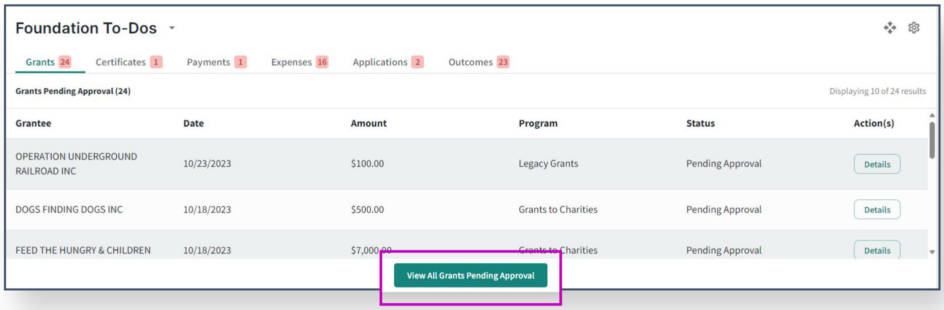
The My To-Dos feature was created so that each member can focus on tasks that are actionable to them. This includes their tasks, items that require voting and other open items that the Foundation Member can act on. It is possible that the two views may be different based on user permissions and actionable items.



Some elements are common between both views.

View All

Each subtab will show the first ten items in the To-Do tile. To 'View All' items, click the link at the bottom of each subtab. The item count will match the total on the dashboard.

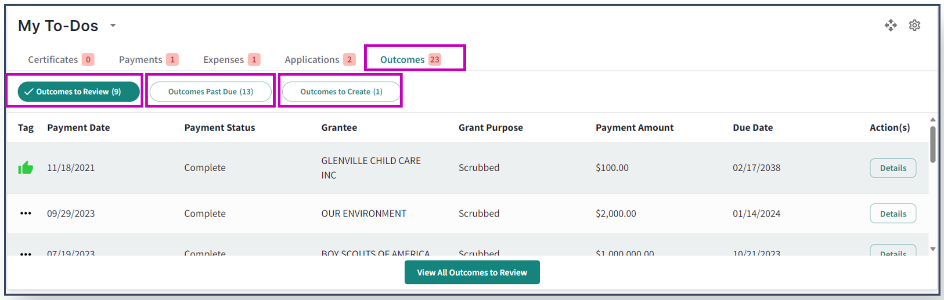


Notification Counts

Notification Counts will reflect the number of open items in each tab. If there are multiple subtabs, the parent tab will add them all together. For example:

Outcomes Tab Notification Count is 23:

- Outcomes to Review is 9
- Outcomes Past Due is 13
- Outcomes to Create is 1



Viewer Access

Access to viewing information is based on permission level. For a detailed listing, refer to the chart below.

Tab/Subtab	**Foundation ToDos** Based on User Permissions and Foundation Attributes	**My To-Dos** Based on User Permissions and Committees
Grants Require Voting	Foundation has committees	On at least one committee
Grant Certificates Require Voting	Foundation has committees	On at least one committee
Grant Certificates to be Printed	Member can view Grant Certificates	Member can view Grant Certificates
Payments to be Released	Member can View Grants	Member has hold/release permission
Expense Requiring Approval	Foundation has committees	On at least one committee
Expense Questions	N/A	User has Create Expense Entitlement
Applications Require Voting	Foundation has committees	On at least one committee
Applications to Review	Member can View Apps	Grant/Decline/Modify App Permission
Applications Grant/Decline	Foundation has committees	Grant or Decline App Permission
Outcomes to Review	Member can View Outcomes	User has Ask for Outcomes permission
Outcomes Past Due	Member can View Outcomes	Ask for Outcomes or Cancel Outcome
Outcomes to Create	Member can View Outcomes	Ask for Outcomes
Tasks	Refer to My Tasks	My Tasks

STILL HAVE QUESTIONS?

We're here to help! Contact your PCA today. Call 800.839.0054 or email us at **info@foundationsource.com**.

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