MicroEdge

It's not just a job. It's a calling.

FIMS

2012 Additional Classes

Training Catalog

Contents

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Additional Training Classes
The more you learn about effectively using your MicroEdge solution, the better it can help enhance and simplify your processes. Our comprehensive training services are designed to empower you with the knowledge to take full advantage of all the time-saving features available to you. To inquire about the additional training classes offered below, please email fimstraining@microedge.com.

Online Training Environment (classes are offered in two different formats).

- **Interactive Hands-On Labs** - Conducted via a virtual training lab - These classes begin with an interactive group lesson led by a MicroEdge trainer and include individual hands-on exercises for attendees to practice the lesson.

  Class Size and Participation
  Attendance is currently limited to a maximum of seven students per class. We ask that each organization allow no more than two people to register for the same class. The two students per organization restriction ensures that multiple organizations have the opportunity to participate, therefore providing a variety of user perspectives, interaction, and questions and answers. (Note: Larger foundations and corporate givers who have many users in need of training may wish to consider custom training.)

- **Webinars** - Conducted via GoToMeeting - A MicroEdge trainer will lead a group lesson covering tips, techniques, and best practices for using your MicroEdge solution.

  Class Size and Participation
  Each class will hold a maximum of 16 students from multiple organizations. We ask that each organization allow no more than 4 people to sign into each class. Each group can allow as many students to fit around a computer as possible for each course, but we ask for larger groups to delegate one person to sign into the web session and do the question asking and that the phone remains on mute in the interim to keep the class moving along.

  Larger foundations and corporations with many GIFTS users or with more than one office location are advised to allow only 4 people to sign in from your organization, per class. As stated above, the maximum class size is 16 students, so this 4 per organization restriction allows multiple organizations to join, thereby allowing a variety of interaction/Q&A.

2012 Additional Training Class Descriptions

AP02 - Optimizing Accounts Payable Processing

This session will focus on optimizing your use of the Accounts Payable module by presenting important features that you should be aware of and know how to use. Set up and apply credit memos; use terms and discount features; easily deal with vouchers paid from funds other than operating; write checks to transfer money (which should not impact GL). You will also learn how information from other places in FIMS flows to Accounts Payable, and about System Options. Share user tips with other attendees! Length: 1 hour.

DON01 - Tracking Prospects and Donors in FIMS

Learn all the ways FIMS can help you track information on your prospects and donors. This session includes detailed information on: what fields are useful for classifying prospects and donors and why; benefits of tracking relationships and grouping profiles; tracking bequests; keeping records of your contacts with donors, and reminding yourself to do things; using affiliation codes to indicate donor interests and other donor classifications; using affiliation codes and contacts for event management; professional advisor tracking; relating donors to funds; fields and records in the Fund Module for donor information including interests; and more. Note: Attend the companion session “Analyzing Your Development Efforts in Reports” to learn how to report on and analyze your data and results. Length: 1.5 hours.

DON02 - Analyzing Your Development Efforts in Reports

This session is designed as a follow-up to “Tracking Prospects and Donors in FIMS” but can also be attended as a standalone session. Learn how to report on and analyze your development efforts in reports. Answer questions like this (and more):

1. What is the big picture on a donor you are planning to visit (complete giving history, all contacts, relationships, notes, interests, and everything else in FIMS on them)?
2. Which donors have not given lately?
3. How many new funds have been created this year compared to last year, and how do the types compare?
4. What are the trends over the last four years for donations analyzed by types of donors, source, type, and purpose of gifts, types of funds, and solicitors?
5. How can I analyze my contacts with prospects and donors?
6. To which interest areas are my donor advisors recommending grants?

What questions would you like to answer in reports? Submit your questions ahead of time and they may be included in the session. Length: 1.5 hours.

FAC01 - Optimizing FACTS Processing

This session will focus on all the important and useful features of the FACTS module, which an advanced user of FIMS should know and understand. Learn advanced user information including fields that act as defaults, translation of journal key codes, adding or closing an investment account, retiring a fund versus closing a fund in a pool, accrued interest, keeping FACTS and General Ledger in balance, and reporting tips. Length: 1 hour.

GL04 - Optimizing General Ledger Features

This session will focus on all the important and useful features of the General Ledger and Fund modules, which an advanced user of FIMS should know and understand. Learn advanced user information including among many others, no mouse journal entry tips, why to batch entries, import routines (bring entries into FIMS from a spreadsheet!), setting up and using functional expense codes, utilities to clean up General Ledger accounts, how to mass change account descriptions or account type coding, and important things to understand about changing fund codes. Also learn about System Options that can save time and effort, one click fund statements, how to be notified when a fund requires special handling, overriding Fund Class defaults, viewing General Ledger asset and liability balances in the Fund Module, and much more. Length: 1 hour.

GL05 - Automating your Journal Entry Processes

Are you doing lots of journal entries by hand? Learn about all the ways you can auto-create journal entries from Automatic Entry Routines. Learn about cash management techniques and Asset Rebalancing module. Share user tips! Length: 1 hour.

GL06 - Cleaning up Your General Ledger Accounts

Did you inherit a General Ledger Account structure that was not optimal for what you need to do? Learn some tips and utilities for cleaning up your General Ledger accounts. Length: 1 hour.

GL07 - Everything in Reverse – How to Correct Anything Financial

In this session learn how to correct anything that affects your finances including gift adjustments and reversals, pledge adjustments and write-offs, many types of grant adjustments covering a multitude of scenarios, correcting administrative vouchers, reversing and correcting administrative fees or spending policy, unposting FACTS, and changing fund codes. Length: 1.5 hours.

GL08 - End of Year Processing

This workshop will show you how to run the FIMS End of Year Closing process and demonstrate how your system and your data are affected. We'll show you how and when to move dates forward, close posting for outer modules, and use the System Option for automatic End of Year processing. We'll also review a list of other financial and non-financial end of year tasks that you should remember to do. Length: 1 hour.

GLR01 - Focus on General Ledger Audit Reports

FIMS provides many standard reports that you can make available for your auditors. Many of these reports are also important for your own internal controls to make sure non-financial modules are staying in synch with General Ledger. You will also learn about yearly IRS reports such as 990's and 1099's. Length: 1.5 hours.

GLR02 - Designing Financial Statements

This session will teach you how to create your own financial statements (e.g. Balance Sheet, Profit & Loss Statement, etc.) using the Row & Column formatter in Design Statements. Learn all the Design Statement reporting options; understand all the fields and options for setting up row records and columns formats; set up the statement record; understand all the run-time options; learn how to auto-build or copy a row format; print the report from FIMS or export your data and merge in Word, or open in Excel; learn design tips for different types of statements; and learn how to set up a columnar financial statement. Discuss a financial report you want to create with the trainer and they can help you set it up. Complete training exercises on your own after the class to drive home the information. Length: 1.5 hours.

GLR03 - Designing Fund Statements

Learn how to create a Fund Statement using the Row & Column Formatter in General Ledger and print the report from FIMS. Also learn how to export the data, and create a Word merge document for presentation-quality statements you'll be proud to send to your fund holders. In addition, learn how to set up the Fund Statement Button in the Fund Module to auto-launch one statement, and combine funds (master/sub-fund) for fund statements. Discuss a fund statement you want to create with the trainer and they can help you set it up. Length: 1.5 hours. **Prerequisite:** *Designing Financial Statements* class or a basic understanding of row and column format setup.

GRA03 - Optimizing Grant Management Features

This session will focus on optimizing your use of the Grant Management module. Learn about system options, important features, and data entry time-savers. Understand what information flows into applications from other records. Learn how to set up automatic application duplicate checking; automatic logging into your Guidestar account; about features specific to donor advised grants and what exports to use for notifying donor advisors of awards from their funds.

Understand how to be notified of special handling for grants; get notifications for overspending available to grant amounts; manage grantee status so ineligible applicants do not get new awards; use grantee and grant folders for electronic document management; import grants; and learn multiple ways to auto-create grant applications. Also learn how to use condition records to prevent payments to those with outstanding conditions, remind of status reports, record follow-up results, and much more. Length: 1.5 hours.

GRA05 - Grant Adjustments, Cancellations, and Refunds

Learn everything you can about grant adjustments, from the Grant module to Accounts Payable and General Ledger. Understand how they impact reports and fund statements. Learn about the Grant Adjustment Helper! Length: 1.5 hours.

GRA06 - Streamlining Grantee Correspondence & Committee Reports

This session will focus on streamlining your grantee correspondence and committee report process, and will look at reports for unposted applications. Are you doing letters by hand? Or are you exporting and merging, but having difficulties? Learn the most efficient and effective way to handle correspondence and committee reporting needs. Discuss your current process, letters, and reports for unposted applications with the trainer and all attendees. The trainer will help each attendee improve and enhance their processing if needed. Learn processing techniques and tips from other users! Length: 1.5 hours.

GRA07 - Analyzing Your Grantmaking Efforts in Reports

Learn how to report on and analyze your grant-making efforts in reports. Understand which reports are best for grantee, grant, and fund detail; using data grids for analysis; getting summary information; and analyzing trends over time. Answer questions like this (and more):

1. What is the complete application history for a particular grantee?
2. Which grantees have not applied for a grant in a while?
3. Which grant conditions are outstanding?
4. Which payments are outstanding?
5. In which program areas are grants being awarded in for the year?
6. Which new applicants have not submitted one of the six required items, and which required items are out of date?
7. What are the trends over the last four years for grants analyzed by types of grantees, program area, region, population, project, and types of funds?

Also, learn tips and tricks for getting the information you're looking for. What questions would you like to answer in reports? Submit your questions ahead of time and they may be included in the session. Length: 1.5 hours.

GRA08 - Interfund Gift and Grant Processing

Learn everything about adding, processing, and reporting on interfund gifts & grants using the new Interfund Module in FIMS Version 12. Understand the best techniques and options to use for processing from start to finish. Answer questions like these and more: Should I use one profile for all interfund transactions, or create a profile for each fund? Is it necessary to print a check, or can I take advantage of the new automatic payment option for Accounts Payable? How can I get the fund name to show in the gift and grant detail of fund statements? Length: 1 hour.

GRA09 - Grantee and Donor 990 Reporting

Learn everything you need to know regarding running Grantee and Donor 990 reports in FIMS. Understand what recent enhancements to FIMS make it easier for you to track and report on the data you need. Learn tips and tricks. Length: 30-45 minutes.

GRA10 - Using FIMS to Track Available to Grant Amounts

Are you tracking the available to grant (spend) amount for your funds outside of FIMS? Or are you unsure if your General Ledger is set up correctly for tracking available to grant? FIMS was designed to easily track these amounts automatically in General Ledger. Learn how to take advantage of this important feature of FIMS. Length: 1 hour.

Working with Grant and Scholarship Conditions

Condition records can be added for grants or scholarships for many different purposes including conditions for approval, payment, or after payment. Learn how to report on conditions, how they can warn you if there's an outstanding condition before payment, and how to easily send reminders for outstanding conditions. Length: 1 hour.

SYS02 - Data Entry Shortcuts

Learn shortcuts to make your work quicker and easier: keyboard shortcuts; date key-strokes; copying and pasting information into other places; copying records to create new ones; setting up a template record and copying; using default application entry values; copying records from history, etc. Length: 1 hour

SYS03 - Creating Charts and Graphs in FIMS with Chart It

Would you like to analyze your data in FIMS without having to take it to Excel? You can by using Chart It. Chart It uses .NET technology to create pie charts and graphs right from your FIMS data grid. In this session learn the different types of charts and graphs you can create; customizing your charts by adding point labels and a legend box, changing colors, fonts, and backgrounds; saving your chart design for future use; copying and pasting into documents or PowerPoint slides; and comparing data in two ways on one chart (e.g. Gifts by Year and Source.) Prerequisite: *Creating Data Grids* (or a basic understanding of how to create a data grid). Length: 1.5 hours.

Additional Training Options

MicroEdge currently offers an array of training options for your staff - from traditional Live Classroom training to online training classes and custom training which can be taken right at your computer. Although this course catalog outlines our Online Orientation/Refresher Classes, there are additional training options available. Whether new to FIMS or an experienced user, there is a training option for you. Please review the following descriptions to determine which training environment might be best for you and your colleagues.

Online Training

Online Orientation/Refresher Classes

These web-based classes are designed to bring new staff/users up to speed with the use of MicroEdge core products. These orientations provide a basic overview of the system and how to use its main features, along with an introduction to MicroEdge. In addition our Module Orientations & Refreshers are ideal to help staff/users learn the basics or refresh their knowledge of modules that work with your MicroEdge system. Classes review product benefits, best practices and provide helpful tips and tricks. More detailed descriptions for each class are listed below.

On-Demand Training

On-demand training gives you the ability to work with MicroEdge directly to schedule the class that you need. Instead of waiting for us to schedule a specific class, you tell us when you want to take the class and we do our best to accommodate that day/time. The benefits to on-demand training are twofold; you get the training class that you need to enhance your job and you don't have to wait weeks or months for that class to be offered.

Custom Training

Our class offerings are designed to meet the needs of most clients. If you are interested in having a custom training program developed to meet your specific requirements, please contact us.

For more information about training services, contact
FIMS Training: 1.800.256.7772 or fimstraining@microedge.com

Cancellation Policy

Online Training

MicroEdge reserves the right to cancel an online class 48 hours or more prior to the start of the class without penalty. If fewer than 2 students are enrolled we may cancel within 48 hours. In this case, we will award one (1) training pass for an equivalent type of class.

If the client cancels their registration 48 hours or more prior to the start of the class, they can do so without penalty and will receive a full refund. If the client cancels their registration with less than 48 hours prior to the start of the class or does not show up to the class, the client is required to pay the full price for that class. The client is allowed to substitute one attendee for another at any time without penalty.