



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

FIMS

2012 On-Demand Training Catalog



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2012 On-Demand Training Classes

On-Demand Training Classes

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.

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 On-Demand Class Description & Fees

Note: an asterisk (*) signifies a hands-on class

***AP01 - Adding Payables and Printing Checks (REVAMPED)**

A finance officer is responsible for using the Accounts Payable module to enter and track information related to payables, both administrative and grant-related. *Adding Payables and Printing Checks* will teach you how to add and post vouchers, place vouchers on/off hold, print checks, add hand checks and make partial payments and run Accounts Payable reports. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisites: *Profile Entry and Maintenance, Part 1*
[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

***AP03 - Checking Account Reconciliation (New)**

Are you still reconciling your checking account outside of FIMS? Become more efficient using check account reconciliation in the Accounts Payable module. Several hands-on exercises will strengthen your understanding of these topics. Length: 1 hour. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Adding Payables and Printing Checks*
[On-Demand Inquiry Form](#)

***AP04 - Correcting Mistakes in Accounts Payable (REVAMPED)**

Have you ever tried to correct a mistake only to dig yourself into a deeper hole? This class will help you correct those mistakes by showing you how to void and unvoid payments, resolve check printing issues, correct check numbers, use a debit memo to remove an open item, change the vendor on an administrative voucher in history and perform a grant adjustment. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

***DGS01 - Creating Data Grids (REVAMPED)**

Data grids are the best thing that has ever happened to FIMS! They are an incredible tool for managing and analyzing FIMS data, allowing you to customize the fields you want to see and create ad hoc reports. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Running Reports and Exports*
[On-Demand Inquiry Form](#)

***DGS02 - Data Grids for Development Staff (REVAMPED)**

Learn how to customize your data grid views and perform ad hoc reporting and exporting specifically for prospect, donor, gift and fund information. You will learn that you don't always have to set up a new data grid -- you can make temporary changes to columns of information you see or your selection criteria. Also receive an introduction to creating graphs and pie charts

from data grids using FIMS Chart It. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Running Reports and Exports*

[On-Demand Inquiry Form](#)

***DGS03 - Data Grids for Program Staff (REVAMPED)**

Learn how to customize your data grid views and perform ad hoc reporting and exporting specifically for grantee and application information. You will learn that you don't always have to set up a new data grid -- you can make temporary changes in what columns of information you see or your selection criteria. Also receive an introduction to creating graphs and pie charts from data grids using FIMS Chart It. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Running Reports and Exports*

[On-Demand Inquiry Form](#)

***DGS04 - Data Grids for Finance Staff. (REVAMPED)**

Learn how to customize your data grid views and perform ad hoc reporting and exporting specifically for financial information. You will learn that you don't always have to set up a new data grid -- you can make temporary changes in what columns of information you see or your selection criteria. Also receive an introduction to creating graphs and pie charts from data grids using FIMS Chart It. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Running Reports and Exports*

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

***DON03 - Entering and Acknowledging Gifts (REVAMPED)**

Everyone with a role in Development should take this class. You will learn about the Gifts module and all the processes, reports, and workflows related to the Gifts module. Learn how to add gifts and non-gifts, understand the export for acknowledgements procedure, create a gift deposit form and run a gift report as well as process a gift to the General Ledger. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Profile Entry and Maintenance, Part 1*

[On-Demand Inquiry Form](#)

DON04 - Improving Donor and Gift Coding (REVAMPED)

Are you looking to restructure and improve your coding or would you like to take advantage of your existing codes? Knowing how to code your data is absolutely critical to effectively using FIMS. *Improving Donor and Gift Coding* will teach you what codes you need and how to effectively assign and use them. Discuss your own codes with the trainer who can make recommendations for improvements. Length: 1 hour. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

***FAC02 – Reconciling Investment Statements in FACTS (REVAMPED)**

The Fund & Account Tracking System (FACTS) performs timely tracking of balances and activity for participant funds and investment vehicles, and automatically allocates gains, income and fees proportionally to participant funds-ideal for organizations with multiple funds and other financial entities that combine assets to gain economies of scale for investments. This class will teach you about the data flow from FACTS to and from the General Ledger, how pools are set up, how to remove a fund from a pool and reconciling Investment Statements then posting the allocated earnings back to the General Ledger. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *General Ledger Design and Integration and Maintaining General Ledger*

[On-Demand Inquiry Form](#)

***FUN01 – Calculating Administrative Fees and Spending Policy (New)**

Administrative fees are the fees a community foundation charges to administer their funds. Even if you are new to FIMS, learn how to set up and calculate administrative fees and spending policy so you can easily track available to grant amounts for each fund. Several hands-on exercises will strengthen your understanding of these topics. Length: 1 hour. Cost: \$195 or 1 Client Care Training Pass

Prerequisites: *General Ledger Design and Integration and Maintaining General Ledger*

[On-Demand Inquiry Form](#)

***GL01 - General Ledger Design and Integration (REVAMPED)**

With financial data flowing to and from this financial module, the General Ledger is the heart of FIMS. This class will teach you how the General Ledger is designed as well as its code classifications and purposes. You will learn how to add a fund and understand how FIMS calculates the current fund balance and available to spend. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

***GL02 – Outer Module Integration to General Ledger (New)**

This class will provide you with a keen understanding of what Gifts and Grants fields integrate with the General Ledger. You will also learn about the gift and grant edit and post process and how to perform a gift and grant adjustment. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *General Ledger Design and Integration*

[On-Demand Inquiry Form](#)

***GL03 - Maintaining General Ledger (REVAMPED)**

The General Ledger is the heart of FIMS and it is important to keep it functioning effectively and efficiently. This class will teach you how to search for account balances and activity detail, enter and process manual journal entries, add and delete General Ledger accounts, maintain the Master Chart and run General Ledger reports and inquiries. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *General Ledger Design and Integration*

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

***GRA01 - Entering and Processing Grant Applications (REVAMPED)**

Everyone with a role in Programs should take this class. You will learn about the Grants module and all the processes, reports, and workflows related to the Grants module. Learn how to add contact records and grant applications as well as run the edit and post process. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours.

Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Profile Entry and Maintenance, Part 1*

[On-Demand Inquiry Form](#)

GRA02 - Improving Grantee & Grant Coding (REVAMPED)

Are you looking to restructure and improve your coding? Or would you just like to take advantage of codes you already have? Knowing how to code your data is absolutely critical to effective use of a database. Learn what codes you need and how to effectively assign and use your codes for your own particular needs. Discuss your own codes with the trainer who can make recommendations for improvements if needed. Length: 1 hour. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass
[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass
[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass
[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass
[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass
[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

***PRO01a - Profile Entry and Maintenance, Part 1 (REVAMPED)**

Learn basic profile entry and maintenance including searching for and finding profiles, using special features such as email and clip buttons, adding individual and organization profiles, adding affiliations, donor and grantee records and using address maintenance to update addresses in multiple places. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

***PRO01b - Profile Entry and Maintenance, Part 2 (New)**

A continuation of Profile Entry and Maintenance, Part 1, Part 2 focuses on adding alternative addresses, adding contacts and tracking reminders, adding and managing notes, relationships, and fund associations, running a profile report and export and mass emailing. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Profile Entry and Maintenance, Part 1*

[On-Demand Inquiry Form](#)

***PRO02 - Managing Profiles (REVAMPED)**

After you've learned the basics and had some experience with adding Profiles and related records, you're ready to expand your knowledge to further management. You need to understand when it is necessary to maintain nearly duplicate Profiles, how to manage them by grouping, identifying unnecessary duplicates and deleting or combining them, and identifying and deleting dormant Profiles. Also understand how to manage changes for divorced or deceased Profiles. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Profile Entry and Maintenance Part 1 and Part 2*

[On-Demand Inquiry Form](#)

***PRO03 - Managing Mailing Lists (REVAMPED)**

Are you having problems managing large mailing lists for your annual reports or newsletters? In this session you will determine the best policy for putting profiles on mailing lists, eliminate duplicate profiles from your mailing lists, manage people that appear on more than one profile and profiles with the same address. You will also learn to use coding in FIMS to manage your mailing lists, including managing affiliation codes, analyzing and cleaning up your current codes (including mass adding and deleting them). Find out how to keep your mailing list clean going forward, and get important tips on exporting data for mailings. Length: 1.5 hours.

Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Profile Entry and Maintenance Part 1 and Part 2*

[On-Demand Inquiry Form](#)

***PRO04 - Contact Management (REVAMPED)**

Keeping a record of contacts that individuals and organizations make with your organization and how to contact them is key to good constituent relationship management. FIMS provides you

with Contact and Tickle records to help you track this important information. *Contact Management* teaches you about the Contact record, including mass adding and deleting contacts, reminding yourself and others to perform tasks, setting recurring reminders, and using contacts and affiliations for event management. Several hands-on exercises will strengthen your understanding of these topics. Length: 1 hour. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Profile Entry and Maintenance Part 1*

[On-Demand Inquiry Form](#)

***REP01 - Running Reports and Exports (REVAMPED)**

Running Reports and Exports will teach you how to run reports in FIMS and export data out of FIMS for merge letters, reports, and spreadsheets. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours. Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Profile Entry and Maintenance Part 1*

[On-Demand Inquiry Form](#)

SYS01 - FIMS for System Administrators (REVAMPED)

Learn tools and tips for effectively setting up, using, and managing your FIMS database. This session will cover all the items a FIMS system administrator should know. Topics will include identifying the system administrator's job tasks, creating your own in-house procedure manual for FIMS, establishing data input procedures, coding your data, putting your own help information in FIMS, as well as setting security and other menu items under Tools and System Utilities, and more. Length: 1.5 hours. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

SYS04 - Understanding FIMS Tables and Fields (REVAMPED)

Understanding the FIMS database structure, including table and field names and table relationships is the key to successfully reporting on FIMS data. Becoming familiar with table names helps you to run standard FIMS reports and exports, configure User Defined Exports, create Data Grids, use Results Report Writer (the custom report writer that comes with FIMS), or create custom reports in other report-writing software such as Crystal Reports. This session will help you learn the most common tables and fields that are used in profile, gift, grant, and fund reports. You will also learn about financial tables and fields and receive tips for writing reports using financial data. Find out what tables are updated when records are posted and what kinds of statistics are automatically stored as fields in the database that you can use for reports. Length: 1.5 hours. Cost: \$165 or 1 Client Care Training Pass

Prerequisite: *Running Reports and Exports and familiarity with all FIMS modules*

[On-Demand Inquiry Form](#)

***SYS05 - Word Merging with FIMS Data (REVAMPED)**

Exporting data from FIMS allows you to automate the creation of labels, letters, envelopes, and even one-page reports and table-style lists in Microsoft Word. Automating these items saves a lot of manual time and effort. This training session will help you understand all the basics for exporting and merging in Word using data from the Profile record. The exercises in this session refer to Microsoft Word version 2007, but the same concepts apply to later versions. Several hands-on exercises will strengthen your understanding of these topics. Length: 1.5 hours.

Cost: \$195 or 1 Client Care Training Pass

Prerequisite: *Running Reports and Exports*

[On-Demand Inquiry Form](#)

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. Cost: \$165 or 1 Client Care Training Pass

[On-Demand Inquiry Form](#)

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.

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.