



MicroEdge

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

GIFTS[®]

2012 Live Classroom Training Catalog



Contents

- 2012 Live Classroom Trainings4
- 2012 Live Classroom Training Fees5
- 2012 Live Classroom Training Schedule7
- Additional Training Options8
 - Online Training8
 - Custom Training9
- Cancellation Policy10
 - Online Training10
 - Live Classroom Training.....10
- 2012 Online Courses – Tracks by Roles11
- 2012 Online Courses – Additional Training Tracks13

2012 Live Classroom Trainings

- **LIVE01: Introduction to GIFTS**

This class is designed for new users or those who haven't had formal training and who need to understand the system to be able to enter and retrieve data, work with Contacts and run GIFTS reports.

Prerequisites:

Familiarity with your organization's grantmaking process: In order to take full advantage of the Introduction to GIFTS class, it is important that attendees be familiar with their organization's grantmaking processes. It is strongly recommended that attendees have worked at your organization for at least one month prior to attending.

- **LIVE02: Tailoring Reports in GIFTS**

This training class is specially designed to help you learn about the features in GIFTS that allow you to create your own customized reports through GIFTS ad hoc reporting functions.

Note: This class is not intended for Essential GIFTS clients.

Prerequisites:

Introduction to GIFTS

- **LIVE03: Effective GIFTS Administration**

This training is a must for those responsible for the GIFTS system and data, with a focus on the tasks necessary to set up and maintain a GIFTS system with data integrity. It covers duplicate record consolidation, coding clean-up, regular data integrity checks, system preferences for streamlining data entry, how to set up email and letter templates, and so much more.

Prerequisites:

Introduction to GIFTS

Familiarity with your organization's grantmaking process: In order to take full advantage of the Introduction to GIFTS class, it is important that attendees be familiar with their organization's grantmaking processes. It is strongly recommended that attendees have worked at your organization for at least one month prior to attending.

- **LIVE05: Introduction to IGAM5**

This class is designed to provide you with an introduction to the amazing benefits of IGAM5. This day long class will cover the IGAM workflow, administrative settings, and IGAM form design.

Prerequisites:

Tailoring Reports in GIFTS

- **LIVE06: Introduction to ALTA**

In this two day course, the Introduction to Alta class offers an in-depth look at the ALTA system for the new user. You will learn how to navigate the ALTA interface using the Dashboard, Workspace, Reports and User Menus. Additionally, you will learn file structure, understanding Workflow, Entering Data for new organizations, requests and more; how to search and create views; creating correspondence, as well as an introduction to running reports and working with Contacts.

Prerequisites:

None

- **LIVE07: ALTA Reporting**

Learn the key concepts of accessing both standard and Ad Hoc reports in GIFTS Alta. This session will review how to apply criteria to report; it will review Searches and Views, then dive into a detailed look at creating and formatting Ad Hoc Detail, Summary and Top “N” reports. You will learn how to work with cross tab functionality, then save these new reports to the library to be used again and again. We will also cover how to export report data into different formats.

Prerequisites:

Introduction to ALTA

- **LIVE08: ALTA Administration**

Learn how to effectively administer the Alta system. You will learn how to work with Coding Sheets and System codes, as well as setup Users, Groups, and Permissions. We will cover system wide preferences, and learn how to create correspondence templates – both Email and Printed. You will learn how to maintain data in your system, including how to clean up duplicate entries.

Prerequisites:

Introduction to ALTA

Prerequisites for all sessions:

Basic computer skills: Attendees should be comfortable with standard computer and Windows concepts, including right clicking, double clicking, click and drag, minimizing and maximizing windows, using CTRL and Shift to select multiple items.

2012 Live Classroom Training Fees

MicroEdge offers a discount for GIFTS clients attending more than one Live Classroom Training class.

For classes held in our New York headquarters, the following fee structure applies:

Training Days	Fee	Savings
1 Day	\$550	NA
2 Days	\$995	\$105
3 Days	\$1425	\$225
4 Days	\$1795	\$405
5 Days	\$2245	\$505

For classes held in other major cities, the following fee structure applies:

Training Days	Fee	Savings
1 Day	\$675	NA
2 Days	\$1245	\$105
3 Days	\$1795	\$230
4 Days	\$2295	\$405
5 Days	\$2875	\$500

2012 Live Classroom Training Schedule

(This Schedule is Periodically Updated)

Class Title	Date	Location
Introduction to GIFTS	June 18-19, 2012	New York, NY
Effective GIFTS Administration	June 20, 2012	New York, NY
Tailoring Reports in GIFTS	June 21, 2012	New York, NY
Introduction to IGAM	June 22, 2012	New York, NY

Class Title	Date	Location
Introduction to ATLA	July 23 - 24 , 2012	New York, NY
ALTA Reporting	July 25, 2012	New York, NY
ALTA Administration	July 26, 2012	New York, NY
Introduction to IGAM5	July 27, 2012	New York, NY

To inquire about registration for GIFTS and ALTA Live Classroom Training, please complete and submit the [Training 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 GIFTS or an experienced user, there is the option of Live Classroom or Online learning for you. Please review the following descriptions to determine which standard training environment might be best for you and your colleagues.

Online Training

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 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.

2012 Online Courses – Tracks by Role

Starting in 2012 MicroEdge launched new Online Training Tracks. The Online Training Tracks have been developed to guide you to the course offerings that would be most beneficial to your current role and responsibilities.

Each of our Online Training Tracks is divided up into a few courses. Each course is subsequently composed of a series of classes. The courses have been developed to guide online training participants through a series of classes relevant to a particular topic or concept.

The majority of the courses offered in our Online Training Program are cumulative and therefore should be taken in the recommended order. In addition, the classes in each course should also be taken in order. [There are a few exceptions which are noted later in this course catalog.]

NOTE: The classes listed in the 2012 Online Courses – Tracks by Role below are a combination of Online Orientation/Refresher Classes and On-Demand Training Classes.

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

GIFTS Training: 1.800.899.0890, Option 3 or training@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.

Live Classroom Training

If you must cancel or reschedule your seat in a class, please call us at your earliest opportunity. You may cancel or reschedule up to 10 business days before the start of your class. If you reschedule within 10 business days, you may do so once at no charge. If you reschedule more than once, or cancel completely, there will be a 50% rescheduling/cancellation charge.

In the event that MicroEdge should need to cancel or reschedule a class, we will notify you as soon as possible. Unfortunately, we cannot be responsible for incidental or consequential costs under these circumstances such as non-refundable airline tickets, theater tickets, hotel reservations or other travel or related expenses.

Please contact the Training Department via email at training@microedge.com if you have any additional questions or concerns.

2012 Online Courses – Tracks by Roles

The charts below outline our GIFTS Courses and Tracks. Descriptions of each individual class can be found in the section above, or in the On-Demand Training Catalog.

Program Associate/Assistant Track (Track A)

This track is designed for Program Staff who will be working in GIFTS on a range of tasks. Those tasks may include data entry, processing of proposals, generation of correspondence, data retrieval, and some reporting. The following three courses have been developed with this particular role in mind. Each of the courses listed below consists of a series of classes that should be taken in sequential order.

Program Associate/Assistant Data Processing Course [PA001]

- **DATA01:** GIFTS Orientation 1 – Foundations of GIFTS
- **DATA02:** GIFTS Orientation 2 – Getting Started with GIFTS
- **DATA03:** GIFTS Data Entry
- **DATA04:** GIFTS Processing Requests & Generating Correspondence
- **DATA06:** GIFTS Tracking Contacts

Program Associate/Assistant Data Retrieval & Reporting Course [PA002]

- **REPORT01:** GIFTS Searching
- **REPORT02:** GIFTS Working with Views
- **REPORT03:** GIFTS Generating Standard Reports
- **REPORT04:** GIFTS Charting & Exporting

Program Associate/Assistant Ad Hoc Reporting Course [PA003]

- **ADHOC 01:** GIFTS Formatting Ad-Hoc Reports
- **ADHOC 02:** GIFTS Summary & Top N Reports
- **ADHOC 03:** GIFTS Cross-Tab Reporting

Financial Officer/Associate Track (Track B)

This track is designed for Financial Staff that will be working in GIFTS. Most financial staff will need an overall understanding of the system and a more in-depth understanding of the payment data that is tracked in the system. Additionally, financial staff frequently needs to search and report on the grant and payment data tracked in GIFTS. Each of the courses listed below consists of a series of classes that should be taken in sequential order.

Financial Officer/Associate Payment Processing Course [FA001]

- **DATA01:** GIFTS Orientation 1 – Foundations of GIFTS
- **DATA02:** GIFTS Orientation 2 – Getting Started with GIFTS
- **DATA05:** GIFTS Working with Payments

Financial Officer/Associate Data Retrieval & Reporting Course [FA002]

- **REPORT01:** GIFTS Searching
- **REPORT02:** GIFTS Working with Views
- **REPORT03:** GIFTS Generating Standard Reports
- **REPORT04:** GIFTS Charting & Exporting

Financial Officer/Associate Ad Hoc Reporting Course [FA003]

- **ADHOC 01:** GIFTS Formatting Ad-Hoc Reports
- **ADHOC 02:** GIFTS Summary & Top N Reports
- **ADHOC 03:** GIFTS Cross-Tab Reporting

Grants Manager Track (Track C)

This track is designed for Grants Management Staff, who will be the primary users of GIFTS and who will be responsible for performing a wide variety of tasks within the system. Additionally the Grants Management Staff is typically the user or group of users that oversees the entire GIFTS implementation, including maintaining the overall database. Therefore, this track includes the GIFTS Administration Course. Each of the courses listed below consists of a series of classes that should be taken in sequential order.

Grants Manager Data Processing Course [GM001]

- **DATA01:** GIFTS Orientation 1 – Foundations of GIFTS
- **DATA02:** GIFTS Orientation 2 – Getting Started with GIFTS
- **DATA03:** GIFTS Data Entry
- **DATA04:** GIFTS Processing Requests & Generating Correspondence
- **DATA05:** GIFTS Working with Payments
- **DATA06:** GIFTS Tracking Contacts

Grants Manager Data Retrieval & Reporting Course [GM002]

- **REPORT01:** GIFTS Searching
- **REPORT02:** GIFTS Working with Views
- **REPORT03:** GIFTS Generating Standard Reports
- **REPORT04:** GIFTS Charting & Exporting

Grants Manager Ad Hoc Reporting Course [GM003]

- **ADHOC 01:** GIFTS Formatting Ad-Hoc Reports
- **ADHOC 02:** GIFTS Summary & Top N Reports
- **ADHOC 03:** GIFTS Cross-Tab Reporting
- **ADHOC 04:** GIFTS Contacts Reporting and Mailings

Grants Manager GIFTS Administration Course [GM004]

- **ADMIN01:** GIFTS Coding Setup
- **ADMIN02:** GIFTS Maintaining Data Integrity
- **ADMIN03:** GIFTS Creating Correspondence Templates
- **ADMIN04:** GIFTS System Preferences & Security

Executive Officer/Light User Track (Track D)

This track is designed for Executive Staff or 'light' GIFTS users who will be primarily looking at data, running simple queries and reporting from the GIFTS system. The following courses have been designed to provide Executive Staff or light users with a high-level overview of the system and then go a little deeper into searching and reporting tips, allowing them to quickly report out on the data in GIFTS. Each of the courses listed below consists of a series of classes that should be taken in sequential order.

Executive Officer/Light User System Overview Course [LU001]

- **DATA01:** GIFTS Orientation 1 – Foundations of GIFTS
- **DATA02:** GIFTS Orientation 2 – Getting Started with GIFTS

Executive Officer/Light User Data Retrieval & Summary Course [LU002]

- **REPORT01:** GIFTS Searching
- **REPORT02b:** GIFTS Viewing Summary Data & Quick Reports
- **REPORT04:** GIFTS Charting & Exporting

2012 Online Courses – Additional Training Tracks

Transition to Online Applications & Requirements Track *(Track E)*

This track was created for users who recently purchased the tools to move their application process online or who are new to online applications and grantee reporting with GIFTS. With classes to help you design and create online Application Forms and Requirement Forms, you will be taking the next step in moving to a more streamlined, online process in no time. In this particular track the courses do not need to be taken in sequential order but the series of the classes within each course should be.

Getting Started with the IGAM Module [TOL001]

- **IGAM01:** IGAM Orientation
- **IGAM02:** Designing Online Application Forms
- **IGAM03:** Designing Online Requirement Forms
- **IGAM04:** Steps to Going Live with IGAM
- **IGAM05:** Retrieving & Processing Online Applications
- **IGAM06:** Publishing Online Requirements
- **IGAM07:** Searching & Reporting in IGAM

Working with Customizer & Document Manager Modules [TOL002]

- **CUSTOM01:** Customizer Module Orientation
- **CUSTOM02:** Customizer Module Hands-On Setup
- **DOC01:** Document Manager Orientation

GIFTS Module Classes *(Optional Module Track)*

In addition to the classes listed in the courses above, you can take any of our optional module classes to expand your overall understanding of the modules which are relevant to you and your GIFTS system.

<ul style="list-style-type: none"> • CUSTOM01: Customizer Module Orientation • IGAM01: IGAM Orientation • BUDGET01: Budget Module Orientation • BUDGET02: GIFTS Budget Set-Up • BUDGET03: GIFTS Budget Rollover • BUDGET04: Budget Charting & Reporting • MYGIFTS01: MyGIFTS User Orientation • MYGIFTS02: MyGIFTS Administration Orientation • REVIEW01: ReviewerCONNECT Orientation • AP01: Accounts Payable Module Orientation • BRANCH01: Branch Security Orientation • EG01: Matching Gifts Orientation • EG02: Volunteer Gifts Orientation 	<ul style="list-style-type: none"> • REF01: GIFTS Reporting Refresher: Getting Started with Ad Hoc Reports • REF02: GIFTS Reporting Refresher: Summary Reports • WNEW01: What's New in ReviewerCONNECT & MyGIFTS • PLUS - TW: Tax Status & Watchlists Plus • PLUS - BA: Batch Plus • PLUS - PR: Payments & Requirements Plus • PLUS - ELR: Email, Link & Reminders Plus
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Essential GIFTS User Track (*ESG Track*)

This track was created for Essential GIFTS users who will be responsible for performing a wide variety of tasks within the system. In addition to data processing and reporting most Essential GIFTS users also oversee the entire Essential GIFTS implementation, including the maintenance of the database. Therefore, this track includes the Essential GIFTS Administration Course. Each of the courses listed below consists of a series of classes that should be taken in sequential order.

ESG Data Processing Course [ESG001]

- **ESG01: Foundations of Essential GIFTS**
- **ESG02: Essential GIFTS Data Entry**
- **ESG03: Essential GIFTS Processing Requests & Generating Correspondence**
- **ESG06: Essential GIFTS Contacts***

ESG Data Retrieval & Reporting Course [ESG002]

- **ESG04: Essential GIFTS Searching**
- **ESG05: Essential GIFTS Running Standard Reports**
- **ESG07: Essential GIFTS Working with Views & Ad Hoc Reporting**

ESG Administration Course [ESG003]

- **ESG08: Essential GIFTS Creating Correspondence Templates**
- **ESG09: Essential GIFTS System Preferences**
- **ESG10: Essential GIFTS Coding Setup**

*This class is designed for Essential GIFTS clients with the optional Contacts Module