



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

GIFTS[®]

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 Training Class Descriptions & Fees

*Indicates Hands-On Interactive Class

***DATA03: GIFTS Data Entry**

Learn hands-on the key concepts and tips for entering Organizations, Requests, Requirements and Activities. We will explore the essential fields for tracking information in GIFTS.

Length: 2 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***DATA04: GIFTS Processing Requests & Generating Correspondence**

This course covers approving and declining Requests for funding, creating Payments while approving, rolling Requests back to Pending and updating them as they move through your process. Learn how to save time by generating acknowledgement letters, award letters, and check requests directly from GIFTS.

Length: 2 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***DATA05: GIFTS Working with Payments**

Learn how and when to use all of the different Payment statuses: Void, Refund, Canceled, Contingent, Paid and Scheduled. Understand the grant amendment process and why it is important for accurate reporting. Using the Plus Pack, learn how to quickly modify payment schedules.

Length: 2 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***DATA06: GIFTS Tracking Contacts**

Learn how to effectively manage Contacts and key Affiliations in GIFTS. This class will cover Contact record creation, Primary Contact Affiliations, plus tracking Board Members, Consultants, Payees and more.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***REPORT01: GIFTS Searching**

The key to any database reporting is searching, also called querying. Learn how to use the Quick Find to locate the records you need to generate reports, correspondence and charts. Learn how to create and use saved searches to have your most frequent searches at your fingertips.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass

***REPORT02: GIFTS Working with Views**

See the data you need, right on your screen. Customizing the layout of data in GIFTS can help you work with maximum efficiency, since you will be able to instantly see the data most important to you without having to open a record. Learn how to change columns and sort options to create and save customized views to help you easily get information.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***REPORT02b: GIFTS Viewing Summary Data & Quick Reports**

This class is designed to help you get quick sums or totals for your data in GIFTS. You will also learn how to take the data you have retrieved in GIFTS and utilize the Quick Reports feature.

Length: 1 hour Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***REPORT03: GIFTS Generating Standard Reports**

Learn the key concepts of generating standard reports that come with the GIFTS Report Library. Review the most popular reports that help other organizations get the information they need. Learn how to apply search criteria and saved searches to reports to quickly get the information you need.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***REPORT04: GIFTS Charting & Exporting**

Take your data and reporting to the next level by using the Charting and Exporting tools in GIFTS. Learn how you create quick and easy pie, bar, and line charts. Learn how to utilize additional reporting features with our Export to Excel and HTML features.

Length: 1 hour Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ADHOC 01: GIFTS Formatting Ad-Hoc Reports**

Learn how to create reports customized to the reporting needs of your organization and then save them in the GIFTS Reports Library for future use. This class will cover the key concepts in creating and saving reports, including changing columns, sorting, grouping, basic formatting and important concepts to keep in mind when determining what criteria should be added to the report when saving it. Topics include combining columns, grouping options, data prefix and suffix, and more.

Length: 2 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ADHOC 02: GIFTS Summary & Top N Reports**

Detail ad hoc reports are just the beginning. Learn about the other two types of custom reports that you can create through ad hoc reporting, including how to convert the reports and special formatting considerations.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ADHOC 03: GIFTS Cross-Tab Reporting**

This class will focus on the concept of including calculated columns in your reports to enhance the level of your ad hoc reports by pulling data from multiple tabs in GIFTS into one report. Additionally you will learn formatting tricks that will take your reports from ordinary to extraordinary!

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ADHOC 04: GIFTS Contacts Reporting and Mailings**

Learn hands-on how to create and assign mailing lists and report on all of your Affiliations. Examples include Board Member term reports; Event Attendee lists, current grant contact lists and more.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ADMIN01: GIFTS Coding Setup**

To maximize your GIFTS system and produce meaningful reports, it is important to customize your database with codes that are pertinent to your organization. Learn how and when to add, replace, and deactivate codes, as well as how to add your own code tables to GIFTS.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ADMIN02: GIFTS Maintaining Data Integrity**

As a GIFTS Administrator it is important to make sure that the data in your system is consistently entered and processed. In this class you will learn tips for finding and maintaining the data in your system, including how to clean up old, inaccurate records, coding and duplicate entries.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ADMIN03: GIFTS Creating Correspondence Templates**

Practice the fundamentals of creating emails, letters and write-ups and learn how to incorporate the expanded correspondence features of GIFTS 6, including inserting saved views as a merged table and selecting addressees based on their role.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

ADMIN04: GIFTS System Preferences & Security

Learn how to effectively use the GIFTS System Preferences to customize your GIFTS program and streamline data entry. In addition learn how to control access to your system with customized permission sets and user groups.

Length: 2 hours Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

IGAM02: Designing Online Application Forms

Learn how to use the Form Design Wizard in IGAM to create or edit your online applications. This class will take you through the concepts of designing application forms including general properties, eligibility quizzes, fields/questions, codes, links, general design and uploading your logo.

Length: 1.5 hours Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

IGAM03: Designing Online Requirement Forms

Now is the time to move your Grantee Reporting process online with Requirements Forms. Learn how to design Grantee Reporting forms for Progress Reports, Final Reports, Contracts, Surveys and more. This session will take you through the tools available with Requirement Form Design Wizard.

Length: 1.5 hours Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

IGAM04: Steps to Going Live with IGAM

You have designed your Application and Requirement Forms in IGAM and now you are ready to starting using them. In this session we will explore the items you need to consider as you take the final steps to going live with IGAM. Learn tips on how to roll out your new process to your grantees and make the transition from paper-heavy to paperless as smooth as possible.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

IGAM05: Retrieving & Processing Online Applications

This session walks you through the steps of Retrieving & Processing Online Applications. Learn how to set retrieval preferences, link the records to GIFTS and Consider and Reject applications in IGAM.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

IGAM06: Publishing Online Requirements

Once they are designed, you will need to provide your grantees access to your new reporting forms. In this session you will learn how to “publish to the web” and get tips for communicating your new process to your grantees.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

IGAM07: Searching & Reporting in IGAM

Learn how to search and report on the online Application and Requirement Forms you have been processing in IGAM. In addition to a handful of Standard Reports available in IGAM, you will learn how to search for records and customize your view in IGAM to create your own reports.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***CUSTOM02: Customizer Module Hands-On Setup**

Learn how to add custom fields to your GIFTS database with the Customizer Module. We will cover how to add database fields, create calculated fields and design your Customizer tabs.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***BUDGET02: GIFTS Budget Set-Up**

The Budget Module allows you to enter your pre-planned Budget at the beginning of the fiscal year and then track your actual giving against the Budget as the year progresses. Learn how to Create a Budget Year, Allocate Funds, Open the Budget Year and Resolve Payments against the Budget.

Length: 2 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

BUDGET03: GIFTS Budget Rollover

The Budget Rollover saves data entry time by creating a new Budget Year that can include your Line Items, Reserve Funds, and Scheduled Payments. Learn how to use this time saving feature of the Budget Module.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

BUDGET04: Budget Charting & Reporting

This session introduces you to the Standard Charts and Reports available through the Budget Module. In addition to Standard Reports you will also learn how you can create your own Ad Hoc Reports in the Budget Tab of GIFTS. Take advantage of the ability to report on budgeted vs. actual dollars as well as detailed reports on budgeted and unbudgeted line items.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

PLUS - TW: Tax Status & Watchlists Plus

This session teaches you how to verify the tax status of Organizations in your GIFTS database as well as how to look up tax exempt organizations that are not in your database yet. Additionally you will learn how to use Watchlists Plus to streamline the process of researching organizations and contacts on several international watchlists.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

PLUS - BA: Batch Plus

Learn how to save time by updating Coding Sheets, Meeting Dates, Request Types and more in batch using Batch Plus.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

PLUS - PR: Payments & Requirements Plus

This class will take you through the process of creating and updating payment schedules for a single Request or batches of Requests in GIFTS. In addition the session will also cover the ability to create grant requirement schedules for a single Request or batches of Requests and payment requirement schedules for a single Payment or multiple Payments in GIFTS.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

PLUS - ELR: Email, Link & Reminders Plus

This session introduces you to the options available when sending emails and reminders directly from GIFTS. You will learn how to send emails including attachments using Email Plus. You will also discover the possibilities available when using Link Plus for use with Outlook which allows you to link emails from Outlook back into GIFTS. Additionally you will see how you can use Reminders Plus to send reminder emails to grantees and staff regarding Requirements and Activities in GIFTS.

Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass

[On-Demand Inquiry Form](#)

2012 Essential GIFTS On-Demand Training Class Descriptions & Fees

ESG01: Foundations of Essential GIFTS

Learn the key concepts of Essential GIFTS that will allow you to master the program. We will review the File Structure of Essential GIFTS and how all of the records relate to each other. Learn how to use Essential GIFTS to track the workflow of Requests at your organization. Learn how to navigate Essential GIFTS folders and the power of Zooming. Length: 1 hour Cost: \$165/Client Care Package – Requires Online Training Pass

[On-Demand Inquiry Form](#)

***ESG02: Essential GIFTS Data Entry**

Practice the key concepts for entering Organizations, Requests, and Requirements. We will review the critical fields for tracking information in Essential GIFTS.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass

[On-Demand Inquiry Form](#)

***ESG03: Essential GIFTS Processing Requests & Generating Correspondence**

Learn how to approve and decline Requests for funding, create Payments while approving, roll Requests back to pending and update Requests as they move through your process.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass

[On-Demand Inquiry Form](#)

***ESG04: Essential GIFTS Searching**

The key to any database reporting is searching, also called querying. Learn how to use the Quick Find to locate the records you need to generate reports, correspondence and charts. Learn how to create and save searches to have your most frequent searches at your fingertips.

Length: 1 hour Cost: \$195/Client Care Package – Requires Online Training Pass

[On-Demand Inquiry Form](#)

***ESG05: Essential GIFTS Running Standard Reports**

Learn the key concepts of generating standard reports out of the Essential GIFTS Report Library. Review the most popular reports that help other organizations. Learn how to apply search criteria and saved searches to reports to get the information you need.

Length: 1 hour Cost: \$195/Client Care Package – Requires Online Training Pass

[On-Demand Inquiry Form](#)

***ESG06: Essential GIFTS Contacts**

Learn the foundations of managing Contacts, including entering Contacts properly, changing Primary Contacts on Organizations and Requests and affiliating Contacts to Organizations and Requests.

* This class is designed for Essential GIFTS clients with the optional Contacts Module
Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ESG07: Essential GIFTS Working with Views & Ad Hoc Reporting**

Customizing the layout of data in Essential GIFTS can help you work with maximum efficiency, since you will be able to instantly see the data most important to you without having to open the record. Learn how to change columns and sort options to create and save customized views to help you easily work with the data. Once you have mastered views you can easily create ad hoc reports with the information.

Length: 2 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ESG08: Essential GIFTS Creating Correspondence Templates**

Learn the fundamentals of creating letter templates and write-up templates in Essential GIFTS.

Length: 2 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

ESG09: Essential GIFTS System Preferences

Learn how to effectively use the Essential GIFTS System Preferences to customize your Essential GIFTS program and streamline Essential GIFTS Data Entry.

Length: 2 hours Cost: \$195/Client Care Package – Requires Online Training Pass
[On-Demand Inquiry Form](#)

***ESG10: Essential GIFTS Coding Setup**

In order to produce meaningful reports and queries, it is necessary to classify or code the records in your database. Learn how to add, replace and deactivate codes in your Essential GIFTS program.

Length: 1.5 hours Cost: \$195/Client Care Package – Requires Online 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 On-Demand Training 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.

Live Classroom Training

Interested in attending training in a traditional classroom environment? MicroEdge offers live classroom training throughout the year in major cities across the United States so you can share ideas and network with colleagues while you learn hands-on with a MicroEdge expert. Click the Live Classroom Training button on the MicroEdge [training homepage](#) for schedule and registration information.

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.

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 Online Orientation/ Refresher Classes 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 |
|--|---|

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