



MODALITY

- » Instructor-Led Event

DURATION

- » 5 Days

DELIVERY METHOD

- » Regional Classroom (Group Live)

PREREQUISITES

- » Review FIMS Orientation Videos

ADVANCE PREPARATION

- » None

CONTINUING EDUCATION CREDITS

- » 6 CPE Credits per day attended
- » Program Level: Basic
- » Field of Study: Information Technology – Technical

COURSE OVERVIEW

This five-day instructor-led classroom event provides a comprehensive view of FIMS for all users including Admin, Program, Development, and Finance staff. Each day consists of a single learning session. Attendees must register for each session they wish to attend. All registrants must attend the Day 1 session (or have the equivalent knowledge required) in order to attend any subsequent sessions.

We start with an overview of the basics of FIMS, with hands-on exercises designed with you in mind. Learn to navigate, process, and optimize profiles, grants, and gifts. Financial users learn to navigate and manage financial statements, and gain expertise in FIMS modules including General Ledger, Accounts Payable, Fund Management, and FACTS. Each day of learning focuses on reporting, analyzing, and optimizing data grids, relative to the administrative role highlighted in the learning session.

Scroll down to view details about each day of this regional event, or click a title in the table below to register for a particular session.

Training Session Title	Program Users	Development Users	Finance Users
FIMS: Navigation and Overview (Day 1)	X	X	X
FIMS: Grants (Day 2)	X		
FIMS: Gifts (Day 3)		X	
FIMS: Introduction to Finance (Day 4)			X
FIMS: Advanced Finance (Day 5)			X

Continued...

For additional information, visit www.blackbaud.com/training



REGIONAL EVENT DAYS

[FIMS: Navigation and Overview \(Day 1\)](#)

Learn best practices for maintaining profiles and mailing lists, sending mass emails, mass adding contacts and reminders, displaying data in multiple formats (reports, exports, and data grids), and learn how to merge FIMS data with Microsoft® Word®.

Learning Objectives

- Entering profiles
- Managing profiles and contacts
- Running reports, exports, and mailings
- Creating and using data grids

Target Audience: All FIMS users. This session provides the required foundational knowledge to attend the subsequent session days.

[FIMS: Grants \(Day 2\)](#)

Optimize your grantmaking efforts, such as creating program focused data grids, learning data entry time-savers, restructuring and improving your grant coding, and learning different purposes for adding condition records for grants or scholarships. This day of training is a must for Program staff in your organization.

Learning Objectives

- Entering and processing grant applications
- Working with Scholarship and Grant conditions
- Optimizing grant coding and features
- Analyzing program reports and data grids

Target Audience: All Program users. *FIMS: Navigation and Overview* (Day 1) or equivalent knowledge is required to attend this session.

Continued...

For additional information, visit www.blackbaud.com/training



[FIMS: Gifts \(Day 3\)](#)

Streamline development efforts in your organization by creating data grids and using affiliation codes to indicate donor interest. Learn to use reporting efficiently to determine which donors have not given recently or how many new funds have been created this year. You'll also learn how to restructure and improve your development coding.

Learning Objectives

- Entering and acknowledging gifts
- Tracking prospect and donor information
- Analyzing your development efforts with reports and data grids
- Optimizing donor and gift coding

Target Audience: All Development users. *FIMS: Navigation and Overview* (Day 1) or equivalent knowledge is required to attend this session.

[FIMS: Introduction to Finance \(Day 4\)](#)

Learn the basics of the financial modules, including how the General Ledger is designed and how the outer modules integrate with the General Ledger. Learn to add and post vouchers, print checks, reconcile checking accounts, create your own financial statements, and reconcile investment statements.

Learning Objectives

- Navigating and entering in General Ledger
- Integrating a fund with General Ledger
- Adding payables, printing checks, and account reconciliation
- Designing financial and fund statements
- Reconciling investment statements in FACTS

Target Audience: All Finance users. *FIMS: Navigation and Overview* (Day 1) or equivalent knowledge is required to attend this session.

Continued...

For additional information, visit www.blackbaud.com/training



[FIMS: Advanced Finance \(Day 5\)](#)

A deeper dive into the FIMS financial modules is provided in this training. Best practices include: the flow of data in FIMS to Accounts Payable; calculating administrative fees and spending policy; keeping the General Ledger and FACTS in balance; pledge and grant adjustments; unposting FACTS; cash management techniques; changing the vendor on an administrative voucher in history; and time-saving system options.

Learning Objectives

- Analyzing data grids for Finance staff
- Optimizing Accounts Payable and General Ledger
- Automating your journal entry processes
- Correcting financial errors
- Calculating administrative fees and spending policy

Target Audience: All Finance users. *FIMS: Navigation and Overview* (Day 1) and *FIMS: Introduction to Finance* (Day 4 session) or equivalent knowledge is required to attend this session.

VIEW ADDITIONAL INFORMATION

- [Registration information](#)
- [Refunds, complaints, cancellations, and attendance policies](#)
- [Official NASBA statement and FAQs](#)

For additional information, visit www.blackbaud.com/training