

IRIS Training

IRIS Donor Strategy & IRIS Member Strategy

Standard Training Courses v2011-2

2011 Details



Details of all training courses delivered by IRIS's Not for Profit Division are available from your IRIS Account Manager.

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This Prospectus is correct at the version date shown. Courses can be subject to change as the software advances. Where there are deviations in course content from that shown in the latest published Course Prospectus, client will be informed at the time of booking.

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Version	Date	Comments	Edited by	Reviewed by
2011 v2	09/11		Jacqui Smyth	Ian Crossley

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1. Public Training Course Schedule 2011 Q4

Month & Start Date	J	F	M	A	M	J	J	A	S	O	N	D
BUSINESS SKILLS												
Training Skills for Trainers (3 days)											15	
NG USER COURSES	J	F	M	A	M	J	J	A	S	O	N	D
IDS/IMS User Introduction										03, 26		07
IDS/IMS Income & Donation Management											16	
IDS/IMS Reporting, Mailing & Electronic Communications										05, 12		
IDS/IMS Events												

2. Introduction

IRIS Donor Strategy & IRIS Member Strategy is often referred to in this manual as 'IDS' and 'MS'

2.1. Training from IRIS

2.1.1. Public Training Courses

The courses described in this document are all offered on the specified dates and are available for any of IRIS clients' staff to attend. Courses will run **subject to a minimum number of bookings being received** three full weeks prior to the Monday of the course week.

2.1.2. In-house Training Courses

The same courses are available to be delivered exclusively to a group from one client, either at IRIS's Fleet Street Centre or at another suitable venue. We will use standard training materials, but will be able to make minor customisation in delivery to take account of your own configuration or working practices. Please contact your IRIS Account Manager for details and prices.

2.1.3. Bespoke Training Courses

Versions of our standard training courses which require more significant alteration, or courses developed in conjunction with you to meet your own requirements, fit into the bespoke category. Please initially discuss your needs with your IRIS Account Manager.

3. Changes

3.1. What else is happening?

3.1.1. More Trainers

- The last eighteen months have been busy ones for our training team. We've expanded the number of Trainers within the division with IRIS Donor Strategy and IRIS Member Strategy, have been revising and improving our course literature, and have been developing some "on demand" recorded training courses. These are ongoing programmes and we are working towards further developments in the coming months.

3.1.2. More Courses

- We are continuing to invest in our training offerings, grow our portfolio of available courses and to find new and innovative ways to bring education services to you, delivering training at the point of need.

3.1.3. On-line delivery

- Our WebEx delivered, live courses have become increasingly more popular. These give you the benefit of:
 - the live advice of a Trainer
 - a lower per course cost
 - a focused and shorter learning time commitment
 - the ability to have your course recorded so you can watch it again and again.

Whether we're training you online, at your offices or at our specialist training suite in Fleet Street, London, we hope to be empowering you to get the most from your investment in IRIS Donor Strategy and IRIS Member Strategy soon.

4. General Course Information

4.1. Structure of the course

Morning and afternoon sessions will be divided by appropriate breaks. Most of the course is 'hands on', each delegate using a PC to do what they are shown, reinforcing the learning with exercises.

4.2. Getting the best from the course

Delegates should

- Plan to arrive at least 15 minutes early, for registration and a coffee.
- Try to leave their work behind for the day.
- Plan to stay until the end of the course
- Plan some follow up time when back at their own office (see below).

4.3. Materials included

Delegates will be supplied with course materials which will provide the structure for the course delivery, and be a desk side reference tool once back at their own office.

4.4. Using the course materials

Guidance on using the course materials both during and post course will be provided during the course.

4.5. Post course study time

There is a lot of information to assimilate during this course. In our experience, delegates will multiply the effectiveness of the course if, with the support of their line manager, they make provision for an hour each day of revision exercises for the 5 working days following the course.

4.6. Equipment required by the learner

All equipment, including notepads & pens, will be provided for courses delivered at IRIS's Fleet Street Centre.

5. Courses and Timings

Course	Duration	Timings at Fleet Street
User Introduction Day	1 day	10:00-16:00
Finance	0.5 day	10:00-12:30 or 13:30-16:00
Managing Regular Income	0.5 day	10:00-12:30 or 13:30-16:00
Gift Aid Focus	0.25 day	Timings to be arranged
Membership Management	1 day	10:00-16:00
Managing Legacies	0.25 day	Timings to be arranged
Grant Applications	0.25day	Timings to be arranged
Filters & Reports (Beginners)	1 day	10:00-16:00
Filters & Reports (Intermediate)	1 day	10:00-16:00
Core Events & Campaigns	0.5 day	10:00-12:30 or 13:30-16:00
Managing Ticketed Events	0.5 day	10:00-12:30 or 13:30-16:00
Managing Sponsored Events	0.25 day	Timings to be arranged
Managing Telephone Campaigns	0.5 day	10:00-12:30 or 13:30-16:00
Merchandise & Publications Module	0.5 day	10:00-12:30 or 13:30-16:00
Alumni	0.25 day	Timings to be arranged
Major Donor Relationships	0.5 day	10:00-12:30 or 13:30-16:00
Volunteer Management	0.25 day	Timings to be arranged
Collection Box Management	0.25 day	Timings to be arranged
Getting the most from your Database	0.5 day	10:00-12:30 or 13:30-16:00
Getting the most from your Database	0.5 day	10:00-12:30 or 13:30-16:00
System Management (Basic)	0.5 day	10:00-12:30 or 13:30-16:00
System Management (Intermiediate)	0.5 day	10:00-12:30 or 13:30-16:00
Administering Web Connect (Basic)	0.5 day	10:00-12:30 or 13:30-16:00
Administering Web Connect (Intermediate)	0.5 day	10:00-12:30 or 13:30-16:00
Training Skills for Trainers	3 days	09:00-17:00

6. Booking on a Public Training Course

6.1. Before you contact us

Please review the information about the course contained within this document, paying attention to the Prerequisites and the Learning Objectives.

6.2. Questions about the course?

If you wish to speak to someone about the course content, or want advice about which course is best for you, please get in touch with your IRIS Account Manager.

6.3. Making a Provisional Booking by phone or e-mail

If you wish to find out availability or hold a place on a course, please contact your IRIS Account Manager. Please ensure that you have the information listed below before you contact us.

6.4. Confirming a booking

Provisional bookings must be confirmed with a signed Statement Of Work (which we'll email to you) and if appropriate a Purchase Order number, when we'll request the following information

Course

1. Name of Course
2. Date of Course

Person making the booking

3. Name
4. Job position
5. E-mail address
6. Telephone number

Delegate(s)

7. Name
8. Job position
9. E-mail address
10. Telephone number
11. (If available) Any dietary preferences

BUSINESS SKILLS COURSES

7. Training Skills for Trainers

7.1. Duration – 3 days

7.2. Purpose of the course

Training is a skill that can be applied across a variety of workplace disciplines. This course will equip attendees to prepare and deliver training courses.

7.3. The course is designed for

Anyone who will be imparting skills, concepts knowledge & understanding to colleagues in a structured environment.

7.4. Prerequisites

None

7.5. Learning objectives

At the end of the course, delegates will understand:

- A variety of Adult Learning Styles
- How their own learning style is likely to influence their preparation & delivery
- Some simple models of the learning process
- Strategies for dealing with difficult students
- Various forms of evaluation of training.

Delegates will be able to:

- Create appropriate Learning Objectives•
- Design a Course Outline
- Demonstrate effective communication & presentation skills
- Demonstrate the use of Questioning skills
- Interact with delegates and build a learning community.

7.6. Equipment required if run on your site

Delegates will require:

- PCs with access to the Internet and Office software.
- A network folder, accessible by all delegates, for course materials.



IDS/IMS USER COURSES

8. User Introduction Day

8.1. Duration – 1 day

8.2. Purpose of the course

How to navigate around and have a good basic understanding of IRIS Donor Strategy and IRIS Member Strategy

8.3. The course is designed for

All general users of IRIS Donor Strategy will benefit from attending this course.

8.4. Prerequisites

Attendees must be computer literate

8.5. Learning objectives

At the end of the course, delegates will understand:

- Navigating the database
- Searching and Sorting Methods
- Local Filtering
- Creating Records
- Maintaining Records
- Managing Correspondence
- Categories
- Alerts
- Bulk Updating with Properties

Delegates will be able to:

- Navigate through the system
- Have an understanding of where data is held
- Add records
- Perform basic searches
- Maintain and manage records and relationships
- Profile and Categorise records
- Create and record Correspondence

8.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a train login.

9. Finance Module

9.1. Duration – 0.5 day

9.2. Purpose of the course

How to manage promises, process donations and manage Gift Aid Reclaim, with IRIS Donor Strategy and IRIS Member Strategy

9.3. The course is designed for

Fundraisers who enter details of Pledges and promises, including Major Donor Fundraisers, Finance Staff who need to enter Income and perform Gift Aid Claims, Fundraising Managers who enter income or need to know how it is achieved.

9.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day**.

9.5. Learning objectives

At the end of the course, delegates will understand:

- Recording Gift Aid Declarations
- Entering Receipts
- Attributing Income to others
- Associating Income to Events and Campaigns
- Creating Batches
- Creating a Tax Claim

Delegates will be able to:

- Manage Gift Aid Declarations
- Receipt Income
- Allocate Income
- Batch receipts to aid reconciliation

9.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a train login.

10. Managing Regular Income Commitments

10.1. Duration – 0.5 day

10.2. Purpose of the course

This course will facilitate creating Regular Transactions, Standing Orders as well as covering the management of Direct Debit Processing with IRIS Donor Strategy and IRIS Member Strategy

10.3. The course is designed for

Fundraisers, Finance Staff or Fundraising Managers who are responsible for entering and maintaining and managing Direct Debits, Standing Orders or other forms of Regular Giving/Regular Transactions.

10.4. Prerequisites

Attendees on this course should have attended the User Introduction Day.

10.5. Learning objectives

At the end of the course, delegates will understand:

- Creating Regular Giving Commitments
- Processing Standing Order Income
- Generating Regular Transactions
- Direct Debit Wizard
- Creating a BACS Export/BACS Submission File
- Importing a BACS Reject File
- Processing Direct Debit Income

Delegates will be able to:

- Create a Direct Debit
- Create a Standing Order
- Process Standing Order Payments
- Generate a Direct Debit run
- Create a Direct Debit BACS Submission File
- Handle Direct Debit Rejections
- Process Direct Debit Payments
- Batch Direct Debits

10.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a train login.

11. Gift Aid Focus

11.1. Duration – 0.25 day

11.2. Purpose of the course

Managing Gift Aid Claims with IRIS Donor Strategy and IRIS Member Strategy

11.3. The course is designed for

Finance Assistant, Finance Manager, Fundraiser, Fundraising Manager or any user who needs to generate a Gift Aid claim who has not attended the Finance course. Anyone who needs a refresher on how to generate a Gift Aid claim.

11.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day**.

11.5. Learning objectives

At the end of the course, delegates will understand:

- What makes a Receipt eligible for Claim
- Generating a General Donations Claim
- Generating a Sponsorship Participation (Event) Claim
- Reprinting a Claim
- Adjusting a Claim

Delegates will be able to:

- Identify receipts eligible for Gift Aid
- Generate Gift Aid Claims for Donations and Sponsorship
- Administer a Claim

11.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

12. Membership Management

12.1. Duration – 1 day

12.2. Purpose of the course

How to manage your Membership Schemes and Members with IRIS Donor Strategy and IRIS Member Strategy

12.3. The course is designed for

Membership Secretaries, Fundraisers, and Fundraising Managers who need manage Membership Schemes and Members.

12.4. Prerequisites

Attendees on this course must have attended the **User Introduction Day**.

12.5. Learning objectives

At the end of the course, delegates will understand:

- Creating Membership Schemes and Types
- Creating Membership Options
- Creating Memberships for existing Contacts
- Receiving Payments
- Generating Renewal Requests/Invoices
- Generating Reminder Letters
- Renewing Memberships
- Extending, Lapsing and Cancelling Memberships

Delegates will be able to:

- Create Membership Types and associated Membership Subscriptions
- Create New Members
- Add Membership to existing Contacts
- Receipt Membership Subscriptions
- Run Renewals and Reminders
- Manage the Membership lifecycle

12.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

13. Managing Legacies

13.1. Duration – 0.25 day

13.2. Purpose of the course

How to manage Legacies with IRIS Donor Strategy and IRIS Member Strategy

13.3. The course is designed for

Legacy Fundraisers, Fundraisers and Fundraising Managers who need manage Legacies.

13.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day** and may have attended the **Finance** course.

13.5. Learning objectives

At the end of the course, delegates will understand:

- Creating a Legator
- Creating the Legacy
- Associating the Legacy with a Campaign
- Tracking Legacy Income
- Writing a Letter from an existing Template

Delegates will be able to:

- Create a new Contact and record a Legacy against their record
- Allocate the Legacy to a specific Campaign
- Manage and analyse Legacy Income
- Create Legacy Letters from existing Templates

13.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

14. Grant Applications

14.1. Duration – 0.25 days

14.2. Purpose of the course

How to manage Grant Applications with IRIS Donor Strategy and IRIS Member Strategy

14.3. The course is designed for

Trust Fundraisers, Fundraisers and Fundraising Managers who need manage Grant Applications.

14.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day**.

14.5. Learning objectives

At the end of the course, delegates will understand:

- Creating a Funding Trust
- Creating a Grant Application
- Using Alerts to meet deadlines
- Associating the Grant with a Campaign or Pledge
- Tracking Grant Income
- Writing a Letter from an existing Template

Delegates will be able to:

- Create an Organisation record as a Funding Trust
- Create and maintain Grant Applications
- Manage Grant Applications timelines with the use of Alerts
- Link the Grant to a Campaign or Pledge
- Manage and analyse Grant Income
- Create Legacy Letters from existing Templates

14.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

15. Filters & Report Writing (Beginners)

15.1. Duration – 1 day

15.2. Purpose of the course

How to create basic Filters, Listing Reports, Label Reports and Letters in IRIS Donor Strategy and IRIS Member Strategy

15.3. The course is designed for

Fundraisers, Fundraising Managers and anyone who needs to generate Reports, Letters or make Selections using Filters.

15.4. Prerequisites

Attendees on this course must have attended the **User Introduction Day** and may benefit having attended the **Finance** course.

15.5. Learning objectives

Delegates will be able to:

- Using the Easy Filter
- The difference between AND, OR and NOT selections
- Using Filters to select a Category
- Using Filters to select a Condition
- Using the Report Wizard to create:
 - Address Labels
 - Letters Reports
 - Listing Reports
- Creating a Letter Template
- Copying (and basic amendments to) existing Reports and Letters

Delegates will be able to:

- Filter data in the browse grids
- Use filters as part of a report
- Create Bulk Mailings
- Create Labels
- Create basic Listing and Summary reports

15.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database with a Train login.

16. Filters & Report Writing (Intermediate)

16.1. Duration – 1 day

16.2. Purpose of the course

How to create Prompts and more in-depth Filters, Reports and Letters in IRIS Donor Strategy and IRIS Member Strategy

16.3. The course is designed for

Fundraisers, Fundraising Managers and anyone who needs to generate Reports, Letters or make Selections using Filters.

Prerequisites

Attendees on this course must have attended the **Filters & Report Writer (Beginners)** course.

16.4. Learning objectives

At the end of the course, delegates will understand:

- Creating a Filter using the Filter Wizard
- Creating Prompts for Filters
- Creating Expressions in Listing Reports
- Creating Joins in Reports
- Using Intelligent Paragraphs in Letters
- Using Recurring Paragraphs in Letters

Delegates will be able to:

- Create bespoke Filters
- Create bespoke fields in Listing Reports
- Add special formatting into Letter Reports

16.5. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

17. Core Events and Campaigns

17.1. Duration – 0.5 day

17.2. Purpose of the course

How to maintain details of Events and Campaigns and associate Contacts with them, with IRIS Donor Strategy and IRIS Member Strategy

17.3. The course is designed for

Fundraisers, Event Managers and Fundraising Managers who need to record and manage Events and Event Attendee Lists. Fundraisers, Finance Staff and Fundraising Managers who need to set and monitor Targets.

17.1. Prerequisites

Attendees on this course should have attended the **User Introduction Day**.

17.2. Learning objectives

At the end of the course, delegates will understand:

- Campaign and Event Structures
- Creating a Campaign
- Creating an Event
- Managing Event Locations and Roles
- Using the Event Diary
- Assigning a single Contact to an Event
- Inviting multiple Contacts to an Event
- Managing Event Participants and Attendee Lists
- How Receipts can be associated with Campaigns and Events
- Campaign and Event Expenditure
- Campaign and Event Summaries

Delegates will be able to:

- Create and manage Events
- Manage and maintain Attendee lists
- Allocate Income to an Event
- Analyse Event Expenditure

17.3. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

18. Managing Ticketed Events

18.1. Duration – 0.5 day

18.2. Purpose of the course

How to create tariffs, allocate tickets and process ticket income with IRIS Donor Strategy and IRIS Member Strategy

18.3. The course is designed for

Fundraisers, Event Managers and Fundraising Managers who need to record and manage Ticketed Events. Fundraisers, Finance Staff and Fundraising Managers who need enter Ticket Income.

18.1. Prerequisites

Attendees on this course must have attended the **Core Campaigns and Events** course.

18.2. Learning objectives

At the end of the course, delegates will understand:

- Inviting multiple Contacts to an Event revisited
- Creating Ticket Types and Tariffs
- Allocating Tickets
- Recording Ticket Income
- Passing Ticket Income to Receipts

Delegates will be able to:

- Manage and maintain Attendee lists
- Create and allocate Event Tickets
- Record Income against Receipts

18.3. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database, using a Train login

19. Managing Sponsored Events

19.1. Duration – 0.25 day

19.2. Purpose of the course

How to maintain details of those being Sponsored and those that are Sponsoring them, including the entry of Sponsorship Income, with IRIS Donor Strategy and IRIS Member Strategy

19.3. The course is designed for

Fundraisers, Event Managers, Fundraising Managers and Finance Staff who need to record and manage Sponsored Events. or enter Sponsorship Income and generate Gift Aid Claims.

19.4. Prerequisites

Attendees on this course must have attended the **Core Campaigns and Events** course.

19.5. Learning objectives

At the end of the course, delegates will understand:

- Inviting multiple Contacts to an Event revisited
- Managing Event Participants
- Entering Sponsorship Income
- Generating an Events Gift Aid Claim

Delegates will be able to:

- Manage and maintain Attendee Lists
- Allocate income to Sponsorship Events
- Generate a Sponsorship Gift Aid Claim

19.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

20. Managing Telephone Campaigns

20.1. Duration – 0.5 day

20.2. Purpose of the course

How to run and manage Telephone Campaigns with IRIS Donor Strategy and IRIS Member Strategy

20.3. The course is designed for

Fundraisers, Campaign Managers and Fundraising Managers who need to record and manage Telephone Campaigns. **Collecting Box Managers** who wish to use the Telephone Campaigns to recruit box holders.

20.4. Prerequisites

Attendees on this course must have attended the **Core Campaigns and Events** course.

20.5. Learning objectives

At the end of the course, delegates will understand:

- Creating a Campaign
- Creating and using a Script
- Inviting multiple Contacts to a Campaign revisited
- Making a Call
- Managing Call Statuses
- Initiating Donations, Pledges and Regular Giving Commitments
- Set the external packages

Delegates will be able to:

- Create and maintain Campaigns
- Create and access Call Scripts
- Mark Contacts as being targeted in a certain Campaign
- Make and record the outcomes of a Call
- Create and maintain Donations, Pledges, Direct Debits and Standing Orders

20.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

21. Merchandise & Publications

21.1. Duration – 0.5 day

21.2. Purpose of the course

How to manage your Merchandise Sales and Publications Distribution, including stock management, fulfilment and payment processing with IRIS Donor Strategy and IRIS Member Strategy

21.3. The course is designed for

Fundraisers, Merchandise Managers, Publications Managers and Fundraising Managers who need manage Merchandise Sales and/or Publications Distribution. Order Processors (or those who will train them) will also benefit from large elements of this course.

21.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day** and may have attended the **Finance** course.

21.5. Learning objectives

At the end of the course, delegates will understand:

- Creating Stock Items
- Creating Postage Rate Matrices
- Order Entry and Processing
- Stock Control
- Despatching Orders and Invoicing
- Processing Payments
- Cancelling Orders and Refunds

Delegates will be able to:

- Create and maintain Stock Items
- Process Stock Orders
- Maintain Stock Levels
- Despatch Stock Orders
- Process Stock Payments
- Cancel Orders and Refund money

21.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using a Train login.

22. Alumni

22.1. Duration – 0.25 day

22.2. Purpose of the course

How to manage details of former students, their academic details and associated information, with IRIS Donor Strategy and IRIS Member Strategy

22.3. The course is designed for

Fundraisers, Alumni Officers or Former Pupil Managers who need to record and profile their former students and communicate with them.

22.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day**.

22.5. Learning objectives

At the end of the course, delegates will understand:

- Education History
- Awards
- Qualifications
- Categories
- Finding Alumni
- Running existing Label, Letter and Listing Reports

Delegates will be able to:

- Record and maintain Education History, Awards and Qualifications
- Create and maintain Categories.
- Search for Alumni
- Run reports for Alumni

22.6. Equipment required if run on your site

Delegates will require:

PCs with access to an IDS or IMS training database using a Train login.

23. Major Donor Relationships

23.1. Duration – 0.5 day

23.2. Purpose of the course

How to manage and nurture your Major Donor Relationships with IRIS Donor Strategy and IRIS Member Strategy

23.3. The course is designed for

Major Donor Fundraisers, Fundraisers, and Fundraising Managers who need manage and nurture Major Donor and Prospective Major Donor Relationships..

23.4. Prerequisites

Attendees on this course must have attended the **User Introduction Day**.

23.5. Learning objectives

At the end of the course, delegates will understand:

- Essential Parameters
- Identifying Stakeholders and Relationship Managers
- Identifying a Supporter as a prospective Major Donor
- Assigning Stakeholders and Relationship Managers to Major Donors
- Recording Contact and Correspondence
- Climbing the Status Ladder
- Creating Pledges and Receipts
- Managing Stewardship

Delegates will be able to:

- Mark an individual as a Major Donor (actual or potential)
- Associate a Primary and Secondary Relationship Manager with the aforementioned Major Donor
- Specify the level, status, capacity and inclination to give of a Major Donor
- Detail interactions with a Major Donor
- Locate and apply existing Major Donor filters
- Locate and run existing Major Donor reports

System Administrators will be able to:

- Determine which users can access and/ or configure the Major Donor Relationships module
- Determine which users can be assigned as Relationship Managers and stakeholders
- Configure the various lists used to manage and monitor relationships with Major Donors

23.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using an Admin login.

24. Volunteer Management

24.1. Duration – 0.25 day

24.2. Purpose of the course

How to manage Volunteers with IRIS Donor Strategy and IRIS Member Strategy

24.3. The course is designed for

Volunteer Managers, Event Fundraisers, Event Managers and Fundraising Managers who need manage Volunteers and nurture the relationships with them.

24.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day**.

24.5. Learning objectives

At the end of the course, delegates will understand:

- Creating a basic Volunteer Contact Record
- Recording the Availability of a Volunteer
- Recording Volunteer Skills
- Recording Volunteer Checks
- Locating Volunteers using existing Filters and Facilities
- Placing Volunteers in Roles within Events

Delegates will be able to:

- Use Security to restrict access to sensitive information
- Identify Individuals as Volunteers
- Setup and maintain Volunteer Preferences, Availability, Interests and Skills
- Use a Filter for Skill to Need Matching

24.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using an Admin login.

25. Collection Box Management

25.1. Duration – 0.25 day

25.2. Purpose of the course

How to manage Collecting Boxes with IRIS Donor Strategy and IRIS Member Strategy

25.3. The course is designed for

Collecting Box Managers, Fundraisers and Fundraising Managers who need manage Collecting Boxes and the associated income.

25.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day**.

25.5. Learning objectives

At the end of the course, delegates will understand:

- Essential Parameters
- Recruiting a Collecting Box
- Despatching Boxes
- Monitoring Active Boxes
- Quick Receipting of Income
- Generating associated Letters and Certificates

Delegates will be able to:

- Set the Parameters that govern the use of the module
- Record the recruitment of Collecting Boxes
- Manage the processes required to despatch the Boxes
- Record income received from Boxes
- Generate Thank You correspondence

25.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using an Admin login.

26. Getting the most from your Database

26.1. Duration – 0.5 day

26.2. Purpose of the course

A refresher course combined with how to exploit special time-saving features IRIS Donor Strategy and IRIS Member Strategy

26.3. The course is designed for

Any IRIS Donor Strategy User who has a good understanding of the areas they use and wish to learn tips and tricks to get the most from IRIS Donor Strategy. This course allows for extra time to ask general questions.

26.4. Prerequisites

Attendees on this course must have attended the **User Introduction Day**.

Any attendee who wishes to pose a specific question that may have a complex answer should disclose this prior to booking.

Learning objectives

At the end of the course, delegates will understand:

- Local Filtering
- Shortcuts
- Making the most from Alerts
- Browser Highlighting
- Using Maps
- Merging Records

Delegates will be able to:

- Apply Local Filtering
- Use Hotkeys as Shortcuts
- Apply Alerts to records to aid workflow
- Use Filters to apply highlighting to certain records in a Browse Grid
- Use Map View
- Merge duplicate records

26.5. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using an Admin login.



IDS/IMS ADMINISTRATOR COURSES

27. System Management (Basic)

27.1. Duration – 0.5 day

27.2. Purpose of the course

How to manage security, permissions and the parameters of IRIS Donor Strategy and IRIS Member Strategy

27.3. The course is designed for

System Managers, Database Managers and Fundraising Managers who wish to restrict access to their databases and tailor the database to their requirements.

27.4. Prerequisites

Attendees on this course should have attended the **User Introduction Day**.

Learning objectives

At the end of the course, delegates will understand:

- System and User Parameters
- Creating Users
- Local Filters
- Allocating Existing Profiles
- Renaming Reference Fields
- Using the Import Wizard
- De-Duplication

Delegates will be able to:

- Create and set System and User Parameters
- Create and manage Users using Local Filters to restrict the records available and existing Profiles to restrict access
- Rename and customise Reference
- Import records from other data sources using the Import Wizard
- Maintain database integrity using the De-duplication tool to merge or purge duplicate records

27.5. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using an Admin login.

28. System Management (Intermediate)

28.1. Duration – 0.5 day

28.2. Purpose of the course

How to manage security, permissions and the parameters of IRIS Donor Strategy and IRIS Member Strategy

28.3. The course is designed for

System Managers, Database Managers and Fundraising Managers who wish to restrict access to their databases and tailor the database to their requirements.

28.4. Prerequisites

Attendees on this course must have attended the **User Introduction Day** course.

28.5. Learning objectives

At the end of the course, delegates will understand

- Creating Access Codes and Restricting Access
- Field Level Security
- Working with Field Mappings
- Using the Screen Designer:
 - Creating Tabs
 - Altering Screen Layouts
- Using the Data Server
- Loading Upgrades

Delegates will be able to:

- Create and apply custom Access Codes to restrict access to the system down to Records and Fields
- Customise Fields
- Customise Screens
- Apply Upgrades

28.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS training database using an Admin login.

29. Administering Web Connect (Basic)

29.1. Duration – 0.5 day

29.2. Purpose of the course

How to manage information exchange between Web Connect and IRIS Donor Strategy/ IRIS Member Strategy and update your Web Connect pages

29.3. The course is designed for

Fundraisers and Fundraising Managers and anyone who needs to update and manage Web Connect.

29.4. Prerequisites

Attendees on this course must have attended the **User Introduction Day** course and have a Web Connect site.

29.5. Learning objectives

At the end of the course, delegates will understand:

- Using Themes (Template Model only)
- Using the Change Log
- The Publish Queue (WC v4.1 – v4.7)
- Updating Web Connect Pages

Delegates will be able to:

- Administer and manage the Change Log
- Make text changes to existing Web Connect pages
- Load Logos into Web Connect (Template Model only)
- Adjust colour schemes (Template Model only)
- Use Web Groups for Basic

29.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS database using an Admin login
- Access to the Internet
- Access to the Web Connect Site as an Administrator

30. Administering Web Connect (Intermediate)

30.1. Duration – 0.5 day

30.2. Purpose of the course

How to amend Menu Structures and implement Design Changes with Web Connect for IRIS Donor Strategy and IRIS Member Strategy

30.3. The course is designed for

Fundraisers and Fundraising Managers and anyone who needs to update and manage Web Connect.

30.4. Prerequisites

Attendees on this course must have attended the **Administering Web Connect Basic** course. This course is usually run to coincide with a specific need to change the Web Connect site. Should this be the case, we will require details of what changes you intend to make prior to booking.

30.5. Learning objectives

At the end of the course, delegates will understand:

- Amending Menu Structures
- Making Design Changes to Active Data Pages
- Collection of Data
- Publishability of Fields

Delegates will be able to:

- Customise the Menu contents and navigation orders
- Add page links to Menus
- Create new Pages
- Adjust the access permissions of Pages and create Web Groups

30.6. Equipment required if run on your site

Delegates will require:

- PCs with access to an IDS or IMS database using an Admin login
- Access to the Internet
- Access to the Web Connect Site as an Administrator