

Welcome to the GIFTS Online Video Training Agenda. This document will help walk you through the optimum timeline of when to watch each of the training videos.

For optimized viewing, please download the video before watching.

Week 1: Familiarize Yourself with the GIFTS Online Basics

Total Learning Time: Approximately 30 minutes

1. Introduction to the GIFTS Online Standard Workflow- (6:14)

<http://1drv.ms/Rnxk3Z>

This video walks you through the standard GIFTS Online Workflow

2. Navigating the Standard Dashboard- (5:02)

<http://1drv.ms/1mCo8IV>

Learn the basics of the standard GIFTS Online dashboards

3. Introduction To The Dashboard, Workspace, & Details Pages- (5:59)

<http://1drv.ms/1mCmmRN>

Learn how to navigate through your GIFTS Online Dashboard, Workspace and Details Pages

4. Utilizing Refresh, Logout, & Forgot Password Functionalities- (1:16)

<http://1drv.ms/1mCr0PK>

Learn how to refresh the page, logout of GIFTS Online, and what to do if you forget your password

5. Using The User Menu- (2:39)

<http://1drv.ms/Rnzi4r>

Learn the basics of using the user menu in GIFTS Online

6. Types of Records- (6:40)

<http://1drv.ms/1mCu0Ky>

Learn the basics of each type of record in GIFTS Online: Requests, Organizations, Contacts, Reviews, Activities, Requirements, Documents, and Payments

7. Using The Ribbon Menus- (2:39)

<http://1drv.ms/1mCroxF>

Learn about the New, Launch, Admin, and Actions Ribbon menus in GIFTS Online

Week 2: Learn How to Add and Process Data to GIFTS Online

Total Learning Time: Approximately 1 Hour

1. Getting Started with GIFTS Online- (28:21)

<http://1drv.ms/1mcECkL>

This introduces you to the GIFTS Online system structure. You will learn about entering data into the system, uploading documents, processing proposals, working with contacts and more.

2. Adding A New Organization & Utilizing The Tax Lookup Feature- (1:58)

<http://1drv.ms/1mCowB1>

Learn how to add a new organization to GIFTS Online by using the Tax Status Verify function

3. Creating A New Request- (6:50)

<http://1drv.ms/RnoiEh>

Learn how to enter a new request in GIFTS Online

4. Entering a New Activity- (5:35)

<http://1drv.ms/1mCk4ID>

Learn about the types of activities and how to enter a new one in GIFTS Online

5. Uploading & Editing Documents- (4:12)

<http://1drv.ms/1mCuRfl>

Learn how to manage documents in GIFTS Online

6. Utilizing Requirements- (4:32)

<http://1drv.ms/1mCvAO9>

Learn how to create and update requirements in GIFTS Online

7. Approving A Proposal- (3:24)

<http://1drv.ms/1mCjdI9>

Learn how to approve a proposal that is pending in GIFTS Online

8. Declining A Proposal- (2:11)

<http://1drv.ms/SaeA8y>

Learn how to decline a proposal that is pending in GIFTS Online

9. Processing Payments- (4:24)

<http://1drv.ms/RntWWW>

Learn how to schedule and pay payments on GIFTS Online

Week 3: Understand How to Search the Database and Run Reports **Total Learning Time: Approximately 48 minutes**

1. Visualizing And Retrieving Your Data With GIFTS Online- (47:44)

<http://1drv.ms/1mCsdqm>

In this video we show you how to use the variety of search features to retrieve the data you are looking for. We will then show you how to customize your onscreen views by selecting columns and using sorts to visualize the data to best suit your needs. You will also learn about working with the standard reports that come with you GIFTS Online system.

Week 4: Know How to Use the Administrator Functions of GIFTS Online (Grants Managers Users Only) **Total Learning Time: Approximately 1 Hour**

1. Effective GIFTS Online Administration- (40:14)

<http://1drv.ms/RnqJqk>

This video is designed for GIFTS Online Grant Managers. In this video you will learn how to effectively manage your Templates, Dashboards, Watch-Lists, classifications and remove duplicate records.

2. Managing Dashboards- (4:35)

<http://1drv.ms/1mCo2ed>

Learn how to share your GIFTS Online dashboard with other users, as well as edit other users' dashboards

3. Configuring Coding- (18:40)

<http://1drv.ms/1snO7Q3>

Why is coding important? Not only will this video answer this question, it will also walk you through how to configure your GIFTS Online system's coding sheets.

Week 5: Explore Your Additional Modules (If Applicable)

Budget

Total Learning Time: Approximately 20 minutes

1. Setting Up & Planning A Budget- (19:09)

<http://1drv.ms/1pG3EsD>

Learn how to effectively plan out your budget and set up the Budget Module.

Online Applications and Requirements

Total Learning Time: Approximately 1 Hour and 20 minutes

1. Navigating The Forms Manager- (3:14)

<http://1drv.ms/1snOI4b>

Walk through the basics of navigating your Forms Manager. Learn the differences between your application and requirement forms, active and inactive forms, and form and account URLs.

2. The Account Designer- (14:17)

<http://1drv.ms/112YHp3>

Set up your grantee portal account using the account designer. Manage the system messages and emails as well as the look and feel.

3. Setting Up A Single Stage Application- (50:51)

<http://1drv.ms/1snOZ7q>

Take an in depth look at how to create a single stage application. Design, functionality, and best practices are all discussed!

4. Generating A Stage 2 Application- (12:45)

<http://1drv.ms/SkkRP8>

Learn how to create and process a 2 stage application with GIFTS Online.

Reviewers

Total Learning Time: 5 minutes

1. Assigning An Internal Reviewer- (4:35)

<http://1drv.ms/1paKY3V>

This video will teach you how to assign an internal reviewer to a request.