

Financial Edge ELearning Library Recommended Lessons for all Users (by Category)

ELearning Library is made up of 3 Main Categories: General Ledger Topics, Accounts Payable Topics and Common Topics. Under each Category there are sub-categories. To view the lessons available in each sub-category click on the sub-category name. To begin a lesson click on the lesson name. As a guide, in this document, next to each lesson name it says whether the lesson is considered a beginner, intermediate or advanced lesson.

ELearning lessons typically have anywhere from 15 to 30 slides and take approximately 10-30 minutes to complete. The time varies so greatly because during a lesson you can pause, go back, go forward or repeat any of the slides. At the end of some lessons you are given the opportunity to practice the process you just learned through e-learning, we highly recommend you use this feature. You can take a lesson as many times as you like whenever you would like. You can stop a lesson at anytime by clicking on the M button which will bring you back to the main menu.

Below is a screen shot of the Financial Edge ELearning Library Main Page:

The screenshot shows a Mozilla Firefox browser window with the address bar displaying <http://www.blackbaud.com/files/training/wbt/ellFE/index.aspx>. The page content includes a header for "Blackbaud eLearning Library" with navigation controls. Below the header is a "Welcome" section with the text "Master a new tool. The eLearning Library." and a background image of an abacus. A section titled "How do you want to learn today?" lists three categories of topics:

General Ledger Topics	Accounts Payable Topics	Common Topics
<ul style="list-style-type: none">Introductory ConceptsRecordsJournal EntryVisual Chart OrganizerReports	<ul style="list-style-type: none">ConfigurationAdministrationIntegration with The Raiser's EdgeAllocation Management	<ul style="list-style-type: none">Introductory ConceptsRecordsBanksReports and MailConfigurationAdministration
		<ul style="list-style-type: none">Introductory ConceptsQuery & ExportReportsDashboardAdministrationOptions

At the bottom of the page, there is a message: "Please install the latest version of the Flash Player if you are having trouble viewing this page." with a "Get macromedia FLASH PLAYER" button. Below this is the copyright notice: "©2004 Blackbaud, Inc. All rights reserved."

1. General Ledger Topics

a. Records

- i. Learning the Basics of General Ledger Records – Learn the major features of General Ledger records. (Beginner)
- ii. Displaying Account Activity – Learn how to view summary account information on the activity tab. (Beginner to Intermediate)
- iii. Defining General Ledger Record Options – Learn how to set personal preferences for General Ledger records. (Beginner to Intermediate)

b. Journal Entry (Recommended for Journal Entry Processors)

Note: In addition to taking the Journal Entry lessons there are 6 Journal Entry Procedure documents available on the Controller's website under Policies and Procedures.

- i. Learning the Basics of Journal Entry – Learn the major features of Journal Entry. (Beginner)
- ii. Creating Batches – Learn how to create regular and recurring batches. Note-can skip over recurring batch screens if you want. (Beginner)
- iii. Posting Batches – Learn how to validate regular batches. Note-can skip over screens for how to post a batch if you want. (Beginner)
- iv. Working with Batches – Learn how to globally change transactions, copy a batch and reverse a posted batch. Note-you can skip over screens for import a batch and change the status of a batch. (Intermediate)

c. Reports

- i. Creating General Ledger Reports – Learn how to create an income statement report. (Intermediate)

2. Accounts Payable Topics

- a. Most users of Financial Edge do not have access to this module therefore these lessons are not recommended.

3. Common Topics

a. Introductory Concepts

- i. Navigating in Financial Edge – Learn to effectively navigate in Financial Edge. (Beginner)
- ii. Using the Home Page – Add favorites on the Home page and respond to action reminders. (Beginner to Intermediate)

b. Query and Export

- i. Learning the basics of Query and Export – Learn the major features of query and export. (Beginner)
- ii. Creating Queries – Learn how to define criteria, determine output, identify sort order, run a query, define query options and query properties. (Beginner)
- iii. Understanding Query Operators – Learn the meaning of query operators and how to use each one. (Intermediate)
- iv. Modifying Queries – Learn how to edit an existing query's criteria, output and sort order and how to modify an existing query to create a new query. (Beginner to Intermediate)
- v. Creating Exports – Learn how to extract data from Financial Edge through the Extract menu option. (Advanced)

c. Reports

- i. Learn the Basics of Financial Edge Reports – Learn the major features of reports and the types of reports available in Financial Edge. (Beginner)

d. Options

- i. Learn the Basics of Financial Edge Options – Learn the personal options available in Financial Edge and understand their significance in maximizing the performance of your system. (Beginner to Intermediate)
- ii. Defining Common Financial Edge Options – Learn how to set personal preferences for general, home, query, export, reports, administration, color, printing and file locations. Note-can skip over screens for export, administration, printing and file locations. (Intermediate)