

Training Catalog

We offer a wide variety of training options geared to fit your needs and budget. Our mission is to help you use our software to maximize your ministry and to fulfill your goals.



shelby**systems**[®]

Training Options

Onsite Training

1

Schedule onsite training at your location for “hands-on” experience, using your data and training agenda. Shelby trainers instruct in a one-on-one format or train your entire staff for a daily trainer fee plus travel-related expenses. Select the level of training to best meet your unique training needs.

Live Online Training

2

Spend one or two hours online with a Shelby trainer via the Internet and learn how to get the most from your Shelby software. The trainer can show you step by step how to set up a new module or polish existing skills to make your position more valuable and effective. Talk to the trainer on the phone as he takes control of your cursor and points out the features of your system.

Shelby Webinars

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Shelby Webinars combine audio and visual instruction to create a great method of learning without ever having to travel. You will be watching online from the comfort of your own office. You can watch live with other Shelby users or access on-demand webinars at your convenience.

Regional Workshops

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Shelby training workshops are held regionally in spring and fall and are organized to meet individual skill levels. Instruction is offered on specific modules in a step-by-step format. Multiple dates and locations allow you the flexibility to consider training time frames that are convenient and appropriate.

Shelby Custom Workshops

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Shelby Custom Workshop is a new training option that gives you more control over your choice of training dates and curriculum. Patterned after our Regional Workshops, Custom Workshops can be scheduled in a time frame that works for you and your staff. You may also choose the number of days you need as well as choose the curriculum so that it best meets the needs of your staff.

Memphis Workshops

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Shelby hosts Shelby101 training in its corporate office in Cordova, TN the first full week of each month, except June. An in-house computer lab is the perfect setting to learn how to get started on Shelby v.5 Non-Financial and Financial software. Receive the benefit of hands-on training supported by comprehensive training manuals. Network with other Shelby customers and meet the Shelby team who supports you everyday.

Certified Associate Shelby Trainer (C.A.S.T.)

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A Certified Associate Shelby Trainer is an employee of your organization who is trained by a Shelby consultant to teach your local staff how to use Shelby software and stay current on its features. Your organization is then equipped with a higher level of Shelby software knowledge to meet its ministry needs and focus.

Shelby v.5 Reporting Services Workshop

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Shelby Systems is now offering a workshop for those ready to take their custom reporting to another level. If you have attended Extreme Reporting and want more, then this is for you. We will show you how to build reports using the powerful tools found in Microsoft SQL Server. We will pull data directly from the ShelbyDB database using SQL queries.

International Shelby Conference

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Join us each June for Shelby’s premier training event. Meet and learn with Shelby users and staff from all over the world. Choose from over 200 training sessions covering a variety of topics and modules. Expand your ministries and improve your skills while having a wonderful time!

Onsite Training

Onsite Training is tailored to the specific needs of your organization. A Shelby trainer comes to your site ready to equip you with comprehensive, hands-on training. Receive one-on-one instruction or train your entire staff. The added benefit is that the training takes place at your facility with *your* data.

Choosing the Right Trainer to Meet Your Needs

Shelby Certified Trainer - Tested and knowledgeable in the core Shelby modules; provides assistance with your basic Shelby skills, implements the software for your ministries, and helps you learn more after your Shelby software is installed and operational.

Shelby Master Trainer - Certified as a Master Trainer after extensive testing and additional proven skills, including basic SQL knowledge; this trainer can take you and your group to a more advanced level of use into the deep resources of Shelby software. All Donor Organization training requires at least a Master Trainer.

Shelby Consultant - A select group of trainers with the ability to analyze an organization's needs and provide operational solutions using Shelby software and other related tools. Not only are our Consultants certified in all Shelby modules, but they can expand a user's Shelby knowledge to produce special reports through Shelby Report Writer and Excel®. All ShelbyHQ training requires a Shelby Consultant. Implementation Planning and Data Consulting also require this level of service.

Planning for Onsite Training

Our trainer will help you in determining the best training environment for your staff based on your specific needs and your facility setup. You may wish to train individual staff members in a one-on-one type session or include a larger group of staff in a computer-lab type setting. The trainer will be happy to advise you and help you plan your training agenda in a way that will be the most beneficial to your staff.

If onsite training is the option of choice, please consider how best to protect this training time for your staff. Calls and interruptions should be kept to a minimum. This may mean getting a volunteer to answer the telephone and take messages during the training time.

In addition to the daily rate for Onsite Training, organizations are responsible for the trainer's travel-related expenses, i.e. airfare and rental car or mileage at the current IRS rate, lodging, and meals. These expenses are payable to the trainer.

Note: Training is conducted during regular business hours on Monday through Friday. After hours and weekend training may be available with some independent trainers/consultants for an additional fee.

Live Online Training

Whatever the reason (a new employee, a change in staff duties, or just a refresher course) explore the possibilities of Online Training. Connect with a trainer online for focused, one-on-one help, or consider training a group by attaching a projector to your computer and inviting your entire staff to listen in on speaker phone.

With today's technology and online tools, you can schedule a few hours of personal training via the Internet. Your online trainer sees your computer screen and gives you step-by-step instructions on how to get the most from your Shelby software.

While accessing the software, talk with the trainer live on the phone as you walk through new program features or learn particular processes. Ask questions and watch as the trainer uses your database to demonstrate Shelby. By sharing your screen online, you can show the trainer your Shelby setup instead of describing it over the phone!

Whether you and your staff are new to Shelby or experienced Shelby veterans, your online trainer customizes the training to fit the specific needs of your organization.



Requirements

- Access to the Internet
- Phone access to talk live with the trainer
- Access to Shelby software

You will need to give the trainer permission to control the cursor during the session

Shelby provides step-by-step instructions for connecting to your Shelby online trainer prior to your scheduled appointment.

Scheduling Online Training

Online Training may be scheduled in one-hour or two-hour increments, with one hour being the least amount of time that may be scheduled. Any additional time above the initial hour will be billable in 15-minute increments.

LIVE Online Training can be used in many different ways such as:

- Help with Chart of Accounts
- Help set up a new Attendance organization
- Help with your database clean-up
- Help with set up of reports

Shelby Webinars

Shelby Systems is giving you the opportunity to learn from your desk with our Shelby Training Webinars.

- Only \$39 per topic (includes both LIVE and ON DEMAND versions).
- Purchase a scheduled Live Webinar then access it again and again via the On-Demand versions at your convenience.
- Each webinar has a link to an accompanying handout geared to increase your learning.
- Shelby Training Webinars are an economical way to get training on a variety of topics.

While webinars are common and used as a learning tool by many today, there are plenty of people who really do not understand what a webinar is or how it works. It is just another option Shelby offers you for training your staff.

Some things to know about Shelby Training Webinars:

- 1) They are presented in lecture format.
- 2) The LIVE Webinars are offered at a specific day and time (usually at 2:30 p.m. Central Time on Mondays or Tuesdays). This method requires you to log in and register prior to the LIVE event.
- 3) The On-Demand Webinars are offered via a recorded format that can be viewed numerous times by your staff. This allows you to reinforce your learning over and over. View them at home or over a weekend when you have fewer distractions. You can share them with other members of YOUR organization.
- 4) Webinars are an inexpensive and time-efficient way to learn.
- 5) Webinars are not for everyone. Some of us need face to face dialogue to learn. It is often best for an organization to have a trainer come onsite to work with its own database and with its own issues.

A few of over FIFTY Archived Webinars are:

Webinars on Tracking People

- Selections & Listings: A Good Look at the Basics
- Selections & Listings: Going Beyond the Basics
- Selections & Listings: Tips & Tricks
- Basic Membership: Adding Records
- Membership: Tips & Tricks, Part 1
- Membership: Tips & Tricks, Part 2
- Fixing Data Mistakes in Shelby Non-Financials
- Attendance Part 1: Bldg. new Attendance Organization
- Attendance Part 2: Promotions & Prep for New AT Year
- The Power of Profiles
- Servant Part 1: How does Servant Work?
- Servant Part 2: Setting up Servant
- Registrations & e-Registrations: Setup for Success

Webinars on Tracking Financials

- Year-End Tips, Pt 1: Closing Contribution Year and running Giving Statements
- Year-End Tips, Part 2: Closing Financial Year and Running Year End Reports
- Bank Reconciliation
- Credit Card Tracking in Accounts Payable
- Budgeting in General Ledger
- Tracking Pledges & Campaigns in Contributions
- Making the Most of Contributions Reports
- Fixing Financial Mistakes in Shelby
- 1099's: Everything You Need to Know to Get Them ready Without Losing Your Mind
- General Ledger: The Power of Projects

Regional Workshops

Regional Workshops offer you different options tailored to meet your skill level. Because they are held regionally and over a range of class dates, workshops offer you the flexibility to consider the dates and locations that are convenient for you. Training Workshops:

- Are held regionally within driving distance of most users.
- Offer instruction on specific modules and provide step-by-step examples.
- Allow you to interact with other Shelby users from your area.
- Are offered on multiple dates and at multiple locations allowing you the flexibility to consider training that fits your schedule.
- Offer you different options tailored to meet your skill level.
- Are hands-on with a detailed workbook that becomes excellent resource material for future reference

Four Workshop Levels

Shelby101 is designed to teach new users how to perform everyday office tasks using Shelby core modules. Step-by-step instructions, workbook exercises, and trainer assistance make this 101-type class unique in presentation and execution.

Who should attend? This workshop is a beginning level workshop designed to assist anyone who wants to learn by following step-by-step instructions. It also includes exercises to reinforce each lesson.

Extreme Reporting I is a two-and-a-half day workshop that teaches you where your data is stored in the Shelby database and how you can extract it and present the information in customized reports that you design.

Successful completion allows users of non-financial and financial data to produce reports outside the report tools built into each Shelby module.

Who should attend? This workshop is designed for individuals who want to create their own reports using ShelbyQUERY, Excel®, and Shelby Report Writer. Users who want to produce professional reports from their live data will find this workshop very helpful.

Shelby201 is designed for Shelby users who have mastered topics and techniques covered in Shelby101. Special attention is given to reporting and to enhancing attendee's skills in building better reports. Detailed explanation of Shelby's v.5 design concepts provides the participant with a fuller understanding of the program.

Who should attend? This workshop is designed for experienced users who know the basics of Shelby v5 and want to learn more about the program's capabilities. As a part of the course, a template and several ideas will be offered helping organizations to implement a policy and procedures manual, custom designed for their church's own ministries.

Extreme Reporting II is a one-and-a-half day workshop that picks up where Extreme Reporting I leaves off. In this workshop you will learn more functions to aid you in reporting by dates, handling null values, simplifying WHERE statements, reporting on the financial tables, and more!

Who should attend? This workshop is designed for those who have attended the Extreme Reporting I workshop or who already have a grasp of query fundamentals. If you have written queries and want to know how to do even more with ShelbyQUERY, then this is the workshop for you.

Shelby Custom Workshops

*With the challenge presented by our current economy, Custom Workshops are a great solution to save money and increase the skills of your staff. Help each member of your team become even more effective and efficient with his or her time and energy. Reduce frustration and increase productivity, by “**Building Your Own Workshop!**”*

What are the advantages of building my own customized Workshop?

- Have the training on dates that work for you and your team.
- Have the workshop at your own location – a great convenience for your staff.
- Choose and customize the curriculum, specific to your staff needs, from our catalog of choices.

As the “Host Church”, what do I have to do?

1. Visit our website (www.shelbyinc.com/training) and select from the wide array of topics (days) available.
2. View your calendar and determine what time frame will work best for your staff.
(Please allow enough lead time for Shelby Systems to secure a trainer and ship materials.)
3. Call the Shelby Systems training line 800-654-1605 and say “I want to build My Own Workshop.”
4. Mark your calendar, assemble your team, and we will take care of the rest.

Okay, what is the cost?

- For the “Host Church” the cost is \$800 per day. This fee includes:
 - Workbooks and other training materials for five attendees
 - A skilled Shelby Trainer (a Master level trainer or above)
 - Your choice of dates and curriculum
 - Food is on your own
- Additional attendees (from the host organization) are \$50 extra per person, per day (i.e. six attendees would be \$850 per day; seven attendees would be \$900 per day, etc.).
- Host church is responsible for the travel/lodging/meal expenses for the trainer.
- For attendees of other churches/organizations the cost is \$200 per person per day. This fee includes:
 - Workbooks and other training materials for each person
 - A skilled Shelby Trainer (a Master level trainer or above)
 - Food is on your own

Shelby Custom Workshops

What are my choices?

Pick from any of these days. (Each topic is one day's worth of material)

Course	Topic	101	102	Blend	Extreme
Non-Financial Day	Membership & Attendance	X	X		
Non-Financial Day	Selections and Listings	X	X		
Non-Financial Day	Membership & GlobaFILE	X	X		
Financial Day	General Ledger and Contributions	X	X		
Financial Day	General Ledger, AP, and Bank Rec.	X	X		
Financial Day	General Ledger and Payroll	X	X		
Financial Day	AP, Bank Rec., and Payroll	X	X		
Financial Day	Contributions, AP, and Bank Rec.	X	X		
Mixed Day	Membership and Contributions	X	X		
Lecture Style	Financial Reporting			X	
Lecture style	Database Maintenance and Cleanup			X	
Lecture style	Prospects to Membership			X	
Lecture style	Selections and Listings			X	
Lecture style	Profiles and Organizations			X	
Lecture style	Profiles and Servant			X	
Extreme Reporting 1 (Part 1)	Query Basics and Query Builder				X
Extreme Reporting 1 (Part 2)	Report Designer				X
Extreme Reporting 1 (Part 3)	Linking Shelby Data to Microsoft Office				X
Extreme Reporting 2 (Part 1)	Advanced SQL Techniques				Wow!
Extreme Reporting 2 (Part 2)	Using VBScript with Report Designer				Wow!

The choices for the days and the order you offer them is up to you. Pick titles from our list of days to make a workshop that correctly meets the needs of your team.

Here are some examples of what you might do...

	Monday	Tuesday	Wednesday	Thursday	Friday
First Church, KS	Selections & Listings 101	Selections & Listings 201	GlobaFile & Membership 101	GlobaFile & Membership 201	General Ledger & Contributions
St. Peters Church, TN		General Ledger & Contributions	Financial Reporting	Building Queries	
Trinity Church, CA			Profiles & Organizations	Selections & Listings (lecture)	

Do you want to reduce your cost?

Then open your Custom Workshop to other churches and organizations in your area. Invite other churches who are interested in the same classes to attend. You can still set the dates, control the curriculum, and have the workshop at your location, but you can offset some of your expense.

- For every two guests that register at the full rate of \$200 per person, per day, the host receives one free attendee. So, if you include ten or more outside guests, you can have five staff members attend free. These can be additional attendees above your allowed five or can include them. This means that if you include enough outside attendees, you will only have to cover the trainer's travel expenses.
- We will help you advertise on our website and via an e-mail targeted to other users in your area.
- Anyone attending from outside your organization will then register directly with us.
- This is a great way to meet your staff's training needs, yet save money at the same time.

Memphis Training

Memphis Workshops take place at our corporate headquarters in Cordova, TN, during the first full week of every month (except June). Classes are designed for new Shelby customers, Shelby users who need a refresher course, or experienced users who have changed staff positions.

Course content includes Shelby101 Training on Non-Financials and Financials, setup for Shelby modules for proper startup, comprehensive training manuals, and hands-on exercises in a computer lab setting.

Workshop Content

Non-Financial Workshop:

- Set up non-financial modules including GlobaFILE, Membership, Selections & Listings, Organizations and Attendance
- Customize and use GlobaFILE
- Customize Membership
- Use Membership, Prospects, and Miscellaneous Names
- Use profiles, organizations, life events, custom dates, and custom tabs
- Use Selections and Listings to create Membership reports
- Use levels in Organizations

What is provided?

- Shelby101 Training on Shelby v.5 Non-Financial and Financial software modules
- Setup for Shelby modules for proper startup
- Comprehensive training manuals
- Hands-on exercises in computer lab setting
- Networking with other Shelby customers
- Lunch on each full day of attendance
- Coffee breaks in morning and afternoon

Financial Workshop:

- Set up financial modules including General Ledger, GlobaFILE, Accounts Payable, Contributions, Bank Reconciliation, Check Express, and Payroll
- Create and modify a Chart of Accounts
- Enter opening balances in General Ledger
- Create financial reports
- Set up and create budget reports
- Print and e-mail Contributions statements
- Print vendor activity reports
- Run Payroll
- Print W2 and 1099 forms

Dates and Times

First full week of each month (except June).

Non-Financials:

Monday - 8:30 am to 4:30 pm

Tuesday - 8:30 am to 4:30 pm

Wednesday - 8:30 am to 12:00 pm

Financials:

Wednesday - 1:00 pm to 4:30 pm

Thursday - 8:30 am to 4:30 pm

Friday - 8:30 am to 12:00 pm

Certified Associate Shelby Trainer

The **Certified Associate Shelby Trainer** program was created to equip your organization with a higher level of Shelby software knowledge.

As a participant in this program, an employee of your organization is trained by a Shelby consultant and equipped with the necessary tools to teach your local staff when and where you choose.

Benefits

In addition to receiving Shelby training, coaching, and certification of your designated employee to become a Certified Associate Shelby Trainer, you will enjoy these benefits:

- Operate on the most current release of Shelby software
- Stay in the loop with direct access to all Training information
- Maximize your church's ministry with continuously well-trained, efficient staff
- Establish and maintain best practices specific to your organization
- Elevate a qualified staff person who has the gift to teach and empower your Shelby users

Reasons to sign up for the Certified Associate Shelby Trainer program

Access to the resources available to Shelby trainers

- Free enrollment at the International Shelby Conference when accompanied by a paid attendee from your same organization.
- Free admission to the Regional Workshops.
- Free session for any of the Shelby Institute classes (for personal use).
- Free access to the On Demand versions of the Training webinars.
- Access to help on the Trainer Toll Free Line.

Certified Associate Shelby Trainer Requirements

The proposed Associate Trainer must meet the following requirements:

- Must be employed by your organization
- Must be able to teach and empower other users on your staff
- Must serve in a position that is entrusted with the responsibility for training your users on the Shelby database, establishing procedures and practices for using the program, and enforcing compliance to local procedures
- Must enroll in and successfully complete the Certified Associate Shelby Trainer Program

Shelby v5 Reporting Services

Shelby Systems is now offering a three-day workshop for those ready to take their custom reporting to another level. If you have attended Extreme Reporting and want more, then this is for you. No reporting tools (Selections & Listings) within the Shelby v5 software will be used. Instead we will show you how to build reports by using the powerful tools found in Microsoft SQL Server. We will pull data directly from the ShelbyDB database using SQL queries.

What is Shelby v5 Reporting Services?

- Reporting Services is a Microsoft tool that is part of SQL Server (the data engine that runs the Shelby v5 database.)
- Reporting Services is used to transform raw query results into a wide variety of report formats
- Reporting Services and SQL Server are used in the workshop, but they are not products of Shelby Systems, Inc.

Who Should Attend a Shelby v5 Reporting Services Workshop?

- Those who have completed the Shelby Extreme Reporting Workshop or a Shelby class/webinar on ShelbyQUERY
- Those with a working knowledge of queries, data tables, table joins, and the elements of a query (SELECT, FROM, WHERE)
- Those from organizations running SQL Server Express 2005 or later. (You may have to download and install some free add-ons as Reporting Services is not automatically loaded.)

What You Will Learn.

- How to create a wide array of report styles (lists, cross-tabulations, and graphs)
- How to have criteria appear when the report runs so the end user can control the output using dates, events or other limiters
- How to create subscriptions that deliver reports automatically to one or several staff members on any schedule you choose. (Includes information such as giving, attendance, upcoming birthdays, etc.)

What is the daily agenda for the Shelby v5 Reporting Services Workshop?

Day One

- An overview of Reporting Services
- Installation requirements and procedures
- The differences between 2005 and 2008 versions, and between Standard and Express editions
- Creating Projects, Data Sources, and Data Sets (SQL queries) in Visual Studio
- Creating reports using the Wizard
- Adjusting the report formatting

Day Two

- Adding Filters and Parameters
- Designing reports without the Wizard
- Displaying results with graphs, maps, Sparklin Charts, and key performance indicators
- Publishing reports from Visual Studio to Report Manager

Day Three

- Creating reports with Report Builder
- Using Report Manager to administer and run reports
- Taking report snapshots over time
- Subscribing to reports
- Managing Subscriptions
- Administering Reporting Services

Please note: While this is an advanced level workshop, no advance preparation is required. There are no specific prerequisites for this workshop, but the attendee should be familiar with SQL Query language.

International Shelby Conference

International Shelby Conference brings together like-minded people to equip them for ministry-related vocations. To learn new and efficient ways to perform daily tasks with integrity and reliability. To do their best for Kingdom purposes.

Be part of an extraordinary event that not only enhances your skills and knowledge but also boosts your confidence and initiates friendships that will last a lifetime. ISC capitalizes on comprehensive training, professional networking, and joyful camaraderie for an annual experience you won't want to miss.

You may be a new Shelby user or a power user—International Shelby Conference is structured for all levels of Shelby participants. Over 200 classes are taught by experts in their respective fields, covering all Shelby modules as well as topics on church finance, administration, church-related tax issues, technology, headquarters management, Shelby data interface options, communication, group interaction, ministry emphasis, and much more. Some of the sessions are hands-on. All of them are fun and informative.



ISC Highlights

- Interact with other Shelby users from across the country and internationally.
- Be empowered with approximately 200 learning sessions that help you perform at your best.
- Receive personal direction from one-on-one sessions with Shelby Support, Training, Programming, and Headquarters staff.
- Learn how to make ministry relevant through Shelby reports and queries.
- Add value to your ISC experience by visiting with Exhibitors who represent additional services.
- Refresh, relax, and renew your commitment to service and ministry at ISC. Learn new skills and develop your talents for doing your best job at your organization.
- Enjoy the hospitality of the host city and hotel.

ISC Training Options

Lecture-Style Classes

International Shelby Conference consists of approximately 200 lecture classes covering all modules and topics within the Shelby software. These classes are included in the registration fee.

One-on-One Sessions

Schedule thirty minutes of quality time with Shelby personnel: trainers, support technicians, programmers, and headquarters specialists. Bring your questions to ISC and work through them with Shelby experts. These sessions are included in the registration fee.

Pre-ISC Classes

Arrive on Tuesday and cover specific Shelby v5 modules in half-day (3.5 hour) sessions. You can choose morning or afternoon sessions. Computers and workbooks are included. These sessions are available at an additional cost.

Hands-On Classes

Enjoy additional hands-on training opportunities throughout ISC. Each 1.25 hour session is held in a computer lab and provides you with the opportunity to use a computer to follow along with the instructor. Each session includes the computer and workbook. These classes are available at an additional cost.

Pricing

Onsite Training (pg. 1)

Shelby Certified Trainer	\$475 per day*
Shelby Master Trainer	\$575 per day*
Shelby Consultant	\$750 per day*

The cost for Onsite Training is the trainer's daily rate as outlined above plus travel-related expenses, i.e., airfare and rental car or mileage at the current IRS rate, lodging, and meals. These expenses are payable to the trainer.

LIVE Online Training (pg. 2)

1 hour of online training	\$125
Each additional 15 mins.	\$31.25

The call is toll-free so there are no long distance charges.

Shelby Webinars (pg. 3)

\$39 per webinar (gets you both LIVE and On-Demand version of a webinar)

Regional Workshops (pg. 4)

Shelby101 and Shelby201

Non-Financial Workshop	\$399 per person (before early registration cut-off date)
Financial Workshop	\$399 per person (before early registration cut-off date)

Extreme Reporting

Extreme Reporting I	\$599 per person (before early registration cut-off date)
Extreme Reporting II	\$249 per person (before early registration cut-off date)

Custom Workshops (pg. 5)

Please contact us for custom pricing.

Memphis Workshop (pg. 7)

Non-Financial Workshop	\$425 per person (before early registration cut-off date)
Financial Workshop	\$425 per person (before early registration cut-off date)

Certified Associate Shelby Trainer (pg. 8)

The cost for the Certified Associate Shelby Trainer program is determined by the number of modules and Shelby users of the requesting organization. To receive a quote for your organization, please contact Shelby Systems at cast@shelbyinc.com.

Shelby v5 Reporting Services Workshop (pg. 9)

Three Day Workshop	\$749 per person (before early registration cut-off date)
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Please note that while this is an Advanced level workshop, no advance preparation is required. There are no specific prerequisites for this workshop, but the attendee should be familiar with SQL Query language.



Contact us to schedule or ask
about any of our training options.

phone:

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website:

www.shelbysystems.com/training