

The Raiser's Edge 7 Tools For The Power User

Blackbaud Training

This is a three-day course designed to help users with experience in **The Raiser's Edge® 7** develop their basic skills to use the system more efficiently. It includes instruction on the intricacies of some of the more complex processes included in Query, Export, Import, and Mail, and uses realistic scenarios to facilitate learning. It also addresses common problems and identifies helpful tips for avoiding them.

COURSE OBJECTIVES

Upon completion of this course, you will be able to:

- Troubleshoot problems with Query, Export, Import, and Mail
- Create complex queries
- Create import new records, update existing records, and use Import to extract data
- Explain address and Head of Household processing
- Create conditional mail merges and segmented mailings
- Create complex exports for use with other programmes
- Identify the benefits of standard statistical and demographic reports
- Compare and contrast the purposes, advantages, and disadvantages of Query, Import, Export, and Mail
- Recognise ways to use **The Raiser's Edge® 7** to maximise efficiency

WHO SHOULD ATTEND

This course is designed for those users who have mastered the basic tasks in **The Raiser's Edge 7** as taught in *The Raiser's Edge Essentials I and II* or *The Raiser's Edge 7 Essentials for version 6 Users*, and are ready to build on those skills. This includes database administrators, supervisors, power users, and other individuals responsible for analysing, exporting, and manipulating data in **The Raiser's Edge 7**.

COURSE CONTENT

- **Query**
 - Group the right data with complex queries
 - Narrow filtering criteria with combining operators and apply filters to summary criteria fields
 - Combine the results of two separate queries by merging queries
- **Import**
 - Prepare for using import by analysing how import works and identifying pre-import checklist items
 - Import new records into **The Raiser's Edge 7**



- Update existing records with an import file and create import files to use in other applications
- Master Import by identifying common problems and helpful tips, tricks, and hints
- **Mail**
 - Discuss Address/Head of Household processing
 - Improve the addresses in your database
 - Prepare conditional mail merges using Microsoft Word integration
 - Segment mailings to avoid sending duplicate mail pieces
 - Master Mail by identifying common problems and helpful tips, tricks, and hints
- **Export**
 - Identify each export format and when to use them
 - Recognise the significance of the differences between flat and relational style exports
 - Manipulate the output of an export based on filter criteria of one-to-many and summary fields
 - Master Export by identifying common problems and helpful tips, tricks, and hints
 - Choosing the Right Process
 - Compare and contrast the purposes, advantages, and disadvantages of Query, Import, Export, and Mail
- **Efficiency and Organisation**
 - Access and organise frequently used records, functions, links, and reports on your Home Page
 - Create action records and assign action tracks to monitor a predefined series of tasks
 - Create Custom Views to see only the data you need in a personalised format
 - Define Business Rules to standardise and simplify data processing
 - Identify the benefits of statistical and demographic reports

PREREQUISITES AND ADVANCED PREPARATION

Before attending this class, you must be competent in the basic skills of **The Raiser's Edge 7** and have completed one of the following Blackbaud courses:

- *The Raiser's Edge 7 Essentials - Part II*
- *The Raiser's Edge 7 Essentials for version 6 Users*

For on-site training, this course assumes that you have installed **The Raiser's Edge 7** and that your computers meet the Detailed System Requirements listed on the Blackbaud website at www.blackbaud.co.uk.



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To purchase a seat in this course, contact a Blackbaud representative at 0845 658 8590 or at training@blackbaud.co.uk.

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