

# Beyond the Basics

## The Raiser's Edge® Training



### Blackbaud Training

*The Raiser's Edge: Beyond the Basics* takes the essentials classes to the next level. This three-day course will help experienced Raiser's Edge users develop their skills and become more efficient when using the program. Participants will explore topics introduced in previous classes and learn advanced features including data entry and extraction techniques to increase efficiency.

### Course Objectives

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

- Use the Import function to add and update records
- Create complex queries to group records
- Update or delete groups of records using global functions
- Streamline manual data entry
- Create and assign action tracks to build relationships with constituents
- Export data from The Raiser's Edge
- Create mail merge letter templates and configure them for use on records
- Create reports to analyse data and provide information to stakeholders
- Manage complex mailings with The Raiser's Edge

### Prerequisites and Advanced Preparation

*The Raiser's Edge: Beyond the Basics* is an intermediate-level course designed for users who have mastered basic tasks in The Raiser's Edge and want to build on those skills. Database administrators, supervisors, power users, and other individuals responsible for analysing, exporting, and manipulating Raiser's Edge data will benefit from this course.

Because this course builds on topics learned in previous Blackbaud training, participants must first attend *The Raiser's Edge Essentials: Part II* or be comfortable navigating in The Raiser's Edge and using standard Raiser's Edge functionality.

## Course Content

### Navigation

- Log in to and out of The Raiser's Edge
- Navigate to key functional areas in The Raiser's Edge
- Locate Blackbaud Help resources in The Raiser's Edge and online

### Fundamentals of Importing

- Create an import file using Microsoft® Excel®
- Import records to the database
- Create an import file formatted for The Raiser's Edge using the Import function
- Update existing records with new information using the Import function

### Grouping Records with Query

- Create queries with multiple criteria using combining operators and parentheses
- Create queries that can be customised using the Ask operator
- Define summary field criteria to group records based on summary data
- Apply advanced user options that affect filters for summary fields
- Create a query by merging queries
- Create a query based on another query using query options
- Apply soft-credit and matching-gift processing options to affect the results of a gift query
- Refresh a static query
- Delete queries from the database

### Modifying Large Groups of Records

- Describe the administrative functions used to modify large groups of records
- Add information to a group of records
- Change information on a group of records
- Delete information from a group of records
- Delete a group of records

► To learn more about Blackbaud training for The Raiser's Edge®, contact your account representative.