

Essentials: Part II

The Raiser's Edge® Training



Blackbaud Training

The Raiser's Edge: Essentials Part II is a three-day course that builds on the concepts introduced in *The Raiser's Edge: Essentials Part I*. Through instructor-led scenarios, class discussion, and hands-on practice in the sample data, participants learn to group records and generate output in *The Raiser's Edge*. After taking this class, participants will be able to create mailings, evaluate data using reports and dashboards, group records with queries, export database information, and manage data using global functions.

Course Objectives

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

- Log in to and navigate *The Raiser's Edge*
- Create mailings using *Raiser's Edge* data
- Generate reports to analyse *Raiser's Edge* data
- Create dashboards that display summary data
- Group records in the database using queries
- Export data from *The Raiser's Edge* for use in other applications
- Manage data using global functions

Prerequisites and Advanced Preparation

This course is designed for those responsible for maintaining data and generating database output in *The Raiser's Edge*. Before attending this class, participants must attend *The Raiser's Edge: Essentials Part I*, and should also be comfortable working in a Microsoft® Windows® environment.

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

Communicating with Constituents Using Mail

- Describe the role of Mail in The Raiser's Edge
- Create basic mailings
- Create mail merges for mailings
- Describe user options for Mail

Analysing Data Using Reports

- Describe the role of Reports in The Raiser's Edge
- Locate reports in report categories
- Define report parameters
- Preview report results
- Create a report from a record
- Describe user options related to reports

Viewing Information with Dashboard

- Describe the role of Dashboard in The Raiser's Edge
- Locate dashboard summaries for a variety of analysis needs
- Create dashboards
- Update dashboards

Grouping Records with Query

- Describe the role of Query in The Raiser's Edge
- Create queries by selecting the appropriate type, format, criteria, output, and sort order
- Create queries using summary fields
- Create a query by merging queries
- Describe options that affect queries

Fundamentals of Exporting

- Describe the role of Export in The Raiser's Edge
- Create an export file
- Create a mail merge using the Export feature
- Send an export file in an email
- Describe Export user options

Introduction to Global Functions

- Update a field value on multiple records at once
- Add the same information to multiple records at once

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