

Training Without the Travel

Blackbaud Distance Learning Training



Whether you're a new customer, a new employee, or just in need of a refresher course, Blackbaud distance learning training is a great way to master **The Raiser's Edge**. Stay in the comfort of your office by attending training online!

Instructor-led

Delivered via the Internet, our instructor-led online training is like being in a virtual classroom. It features live interaction between you, other students across the region, and a trained Blackbaud instructor. After logging into the training, you will see a list of participants and a training agenda. The instructor will lead you through a series of instructional slides and will use other tools such as practical exercises, whiteboards, and web safaris to instruct you on the selected topic.

Convenient

All you need is a web browser, a PC headset, access to The Raiser's Edge, and a few hours. The knowledge you gain can be put to use immediately! Converse with peers from across the Asia-Pacific region and ask your instructor any questions you wish.

Live Application Sharing

Online training also features live application sharing. This means instructors can launch a program such as The Raiser's Edge on their computers while you view the program at your location. The instructor can also turn control of the application over to training participants. This allows you to use a program in the training – even if it is not installed on your computer!

Courses

Training sessions cover a range of supplemental material, including module- and task-specific functionality. They generally last two to four hours.

Pricing

Training pricing varies based on the length of the training. Prices are per person and are subject to change. For specific training details and prices, please contact your account manager.

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Course Offerings

The Raiser's Edge: Essentials Part I Refresher (4 hours)

Review the content covered in The Raiser's Edge: Essentials Part I class. Revisit and solidify basic knowledge relating to creating and maintaining records in The Raiser's Edge by practicing in the sample database and sharing information with the instructor and your peers.

Target Audience: Users who need to refresh their skills, reaffirm what was learned in training, and ensure they are using the software correctly. *Note:* Participants must have attended The Raiser's Edge: Essentials Part I beforehand.

The Raiser's Edge: Essentials Part II Refresher (4 hours)

Review the content covered in The Raiser's Edge: Essentials Part II class. Review and solidify key concepts covered in the Essentials training and strengthen your skills via practice in the sample database and information-sharing with peers and the instructor. Content includes methods of data extraction such as query, mail, and reports.

Target Audience: Users who need to refresh their skills, reaffirm what was learned in training, and ensure they are using the software correctly. *Note:* Participants must have attended The Raiser's Edge: Essentials Part II beforehand.

Query: Essentials (3 hours)

Cover the fundamental concepts of query design and how to translate those ideas to The Raiser's Edge. Through the use of instructor-led scenarios, class discussions, and hands-on practices in the sample database, learn to navigate within Query, select the correct type and format for your queries, and build basic queries including the operator and summary criteria.

Target Audience: This course is designed for users of The Raiser's Edge with little or no experience with Query. Users who have never created a query or who have experienced trouble creating the queries they need, will benefit from this class. Because queries are based on records, attendees should be familiar with basic record functionality in The Raiser's Edge. Participation in class exercises requires prior installation of The Raiser's Edge sample database.

Query: Beyond Essentials (3 hours)

Build on the fundamental concepts of the Query: Essentials class. Further develop your existing skills to include multiple criteria and merging queries. Through the use of instructor-led scenarios, class discussions, and customer practices in the sample database, learn how to use combining operators and parentheses to define queries with multiple criteria. You will also learn how to simplify the process of creating complex queries by combining existing queries to create a new merged query.

Target Audience: This class is an extension of the Query: Essentials class. To attend, participants should understand the basic concepts of Query in The Raiser's Edge. Specifically, attendees should be familiar with navigation in Query, basic query terminology, and creation of simple queries. Because queries are based on record fields, a general understanding of records is beneficial. Access to The Raiser's Edge sample database is necessary for attendees to fully participate in the practices provided in the class.

Continued

Reports and Dashboards: Essentials (3 hours)

Discuss how to use reports and dashboards to analyse and present your data from The Raiser's Edge. Through the use of instructor-led scenarios, class discussions, and hands-on practices in the sample database, learn to design and run a variety of reports and dashboards. As part of the process, select the records included in, identify the fields that display on, and define formatting for reports and dashboards.

Target Audience: This course is designed for users of The Raiser's Edge with little or no experience creating reports and dashboards. Users with questions about defining parameter files will benefit from the opportunity to practice creating reports and dashboards. Because reports and dashboards are based on record fields, attendees should be familiar with the basic record structure in The Raiser's Edge. Participation in class exercises requires prior installation of The Raiser's Edge sample database.

Analytical Reporting in The Raiser's Edge (3 hours)

Analyse very specific information on selected subjects, such as the giving habits of your constituents, the performance of your solicitors, and the effectiveness of your appeals. You will learn to generate year-over-year donor comparisons, donors by category, and top donors.

Target Audience: This course is for executives, development officers, and individuals responsible for analysing and monitoring any aspect of their organisation's fundraising success and day-to-day operations. Participants should have access to The Raiser's Edge to practice.

Lists, Demographic, and Statistical Reports in The Raiser's Edge (3 hours)

Summarize information useful in determining how, when, and where gifts were raised. You will learn to generate summary totals, percentages, and averages of gifts or donors based on the fields you select to include in the report.

Target Audience: This course would benefit executives, development officers, and individuals responsible for analysing and monitoring any aspect of their organisation's fundraising success and day-to-day operations. Participants should have access to The Raiser's Edge to practice.

Financial and Pledge Reporting in The Raiser's Edge (4 hours)

Evaluate the financial position of your organization and your donors' giving histories. The variety of reports covered provides several ways of viewing financial information. You will learn how to view a breakdown of your general ledger accounts, generate detailed reports focusing on specific donor giving information, and list all gifts based on their type. Many of the reports also include detail and summary versions, helping you meet every evaluation need. Additionally, you will learn to handle anonymous gifts and to report on all aspects of pledge information, including payments, past-due pledges, write-offs, and cash flow.

Target Audience: Executives, development officers, and individuals responsible for analysing and monitoring any aspect of their organisation's fundraising success and day-to-day operations would find this course useful. Participants should have access to The Raiser's Edge to practice.

Gift Batch in The Raiser's Edge (3 hours)

Discuss how to use Gift Batch to add multiple gift records to The Raiser's Edge in a spreadsheet format. Through the use of instructor-led scenarios, class discussions, and hands-on practices in the sample database, participants learn to set up, validate, and commit gift batches in The Raiser's Edge.

Target Audience: This course is designed for users of The Raiser's Edge with little or no experience with Gift Batch. Users who are responsible for entering donations in The Raiser's Edge will benefit from this class. Because batches are based on record fields, familiarity with standard record functionality is required. Participation in class exercises requires prior installation of The Raiser's Edge sample database.

Continued

Import: Essentials (3 hours)

Learn how to import new data from external sources into The Raiser's Edge and how to update existing Raiser's Edge data using the Administration import facility. *Note:* This is a beginner-level class.

Target Audience: This course is for individuals who are in charge of importing data, but have no previous import experience. Familiarity with The Raiser's Edge, specifically with records, is required. Participants should have The Raiser's Edge installed to complete practice exercises.

Import: Beyond Essentials (3 hours)

Cover advanced import topics including troubleshooting, multiple import types in one file (such as addresses, phone numbers, attributes and spouse information), importing pledges with installments and payments, and addressee/salutations.

Target Audience: As an advanced class, participants should be familiar with importing data and creating import files, and should have access to their sample database and to Microsoft Excel® to be able to practice.

Export: Essentials (3 hours)

Cover the fundamental concepts of Export and how to translate those ideas to The Raiser's Edge. Through the use of instructor-led scenarios, class discussions, and customer practices in the sample database, participants learn how to plan and create export files that meet their needs. As part of the export process, customers learn to select the appropriate export type and format, differentiate between one-to-one and one-to-many fields, define field criteria, and use summary options.

Target Audience: The Export: Essentials class is designed for users of The Raiser's Edge with little or no experience with Export. Because exports are based on records, familiarity with record functionality is required. To fully participate in the practices provided in the class, attendees need to have access to The Raiser's Edge sample database.

Mail: Essentials (6 hours)

Discuss Mail in The Raiser's Edge. Through instructor-led scenarios, class discussion, and hands-on practice in the sample data, learn to identify mail types, create reusable parameter forms, and generate simple and conditional mail merges.

Target Audience: This class is designed for those with little or no experience creating mailings in The Raiser's Edge. Users who are responsible for generating envelopes, labels, and letters will benefit from this class. Before attending, participants should attend The Raiser's Edge: Essentials Part I class or have a working knowledge of program navigation, record structure, and data entry tasks in The Raiser's Edge. Participation in class exercises requires prior installation of The Raiser's Edge sample database.

Mail: Beyond Essentials – Donor Acknowledgement Letters and Receipts (4 hours)

Build on your basic mail skills of setting mail parameters and building both simple and conditional mail merges. Further develop the skills you already have and learn how to create, update, and run donor acknowledgement letters and receipts, using the function of Mail. Observe and practice a variety of tasks associated with these functions.

Target Audience: In order to attend this class, participants should be familiar with concepts of Mail in The Raiser's Edge, specifically, setting up a mail parameter and creating both conditional and simple mail merges. As donor acknowledgement letters and receipts are based on gifts, a basic understanding of the fields on a gift record is also beneficial. Access to both The Raiser's Edge sample database and Microsoft Word® are needed for attendees to fully participate in the ample practice opportunities provided in this class.

Continued

Managing Campaigns, Funds, and Appeals (5 hours)

Learn how to set up a campaign, fund, and appeal structure to easily support, track, and report on your fundraising initiatives. You will also learn how to set up relationships between campaigns, funds, and appeals that encourage accurate gift entry. Please plan for the class to last six hours, as we allow one hour for lunch.

Target Audience: This class is designed for those responsible for setting up, monitoring, and reporting on campaigns, funds, and appeals in The Raiser's Edge. We recommend attending The Raiser's Edge: Essentials Part I and The Raiser's Edge: Essentials Part II prior to attending this class. We also recommend that attendees be knowledgeable about their organisation's fundraising structure and reporting needs.

Database Doctor (4 hours)

Protect your software investment by maintaining a healthy Raiser's Edge database. Topics include merging and archiving records, efficiently updating and changing record information, consolidating table entries, and tips on how to keep your data more manageable.

Target Audience: This class is designed for users responsible for maintaining data integrity, such as database and record managers. To fully benefit from this class, participants should have access to The Raiser's Edge sample database to practice in class.

Moves Management (3 hours)

Do you visit prospects, create proposals, and solicit and cultivate donors? Learn how to design cultivation strategies with the moves management-like action tracks, track prospect data, assign solicitors to prospects, and report on your goals and solicitor performance.

Target Audience: This course would benefit executives, development officers, and other individuals involved in constituent relationship management who are responsible for creating a strategy in The Raiser's Edge. A working knowledge of the program and access to it is recommended for maximum benefits.

Events: Essentials Part I (4 hours)

This class lays the foundation for using **RE:Event** and teaches the various ways of entering and maintaining event, participant, and gift information in The Raiser's Edge. Starting with the basic architecture of the program, you will identify how The Raiser's Edge stores, structures and organizes event information using event records, and how the program can accommodate information specific to any event type including event location, description, type, goals, dates, campaign associated with the event, registration fees, expenses, and much more. Event record setup is followed by participant record setup and the relationship between constituent records and participant records, how to register participants, and how to enter registration fees and other donations. Tools that streamline and speed up data entry such as default sets, user options, business rules, and batch entry are also covered. Users with previous RE:Event experience and/or training will also benefit from this class as it includes seating setup and the multi-event registration capabilities available in The Raiser's Edge as well as more opportunities for practice.

Target Audience: This class is designed for end users responsible for entering and maintaining information related to special events and participants, registering participants, and processing event gifts. No previous experience with RE:Event is required; however, attendees should be familiar with constituent and gift records in The Raiser's Edge.

Continued

Events: Essentials Part II (4 hours)

This class builds upon the concepts introduced in Events: Essentials Part I class and covers the powerful features of The Raiser's Edge that enable you to query and extract event and participant data for reporting, mailings, and use in other software applications.

Target Audience: This class is designed for individuals responsible for processing mailings and for analysing, reporting, and manipulating event and participant data. Participants should have attended Events: Essentials Part I and The Raiser's Edge: Essentials Part II training. Alternatively, participants should have experience with event and participant records and be able to perform data retrieval tasks in The Raiser's Edge.

Events: Beyond Essentials – Managing Gala Events (2 hours)

This class is a follow-up of the Events: Essentials classes and is ideal if your organisation hosts galas, black tie dinners, and other types of seated events that require seating and meal setup. Not only will you learn to maximise the use of the program as it applies to your specific needs, you will also examine best practices and tips and tricks to make gala events successful. The goal of this class is to apply the concepts covered in previous training to real-world situations using a process-based approach that includes pre- and post-event activities as well as milestone tracking. You will learn to manage your events from beginning to end – from planning to evaluation – and take advantage of the features best suited for gala events including logistics such as production tasks, media and materials, invitations, registration, attendance, budgeting, event photos, sponsorship, and vendors. Topics include how to arrange and name tables, sit guests, move guests to new seats or tables, automatically fill in seats and tables with unseated participants, and identify seating conflicts, as well as how to designate menus and indicate guest dinner preferences.

Target Audience: This class is designed for individuals responsible for managing, planning, or coordinating all aspects of a fundraising or cultivating gala, dinner, or similar event. Class participants should have completed any one of the Raiser's Edge: Essentials training sessions or have experience with constituent and gift records, as well as creation of parameter files for reporting and mailing purposes. Attendance to the Events: Essentials class is recommended.

Volunteer: Essentials (3 hours)

Focus on the data entry and record structure in the RE: Volunteer optional module. Through the use of instructor-led scenarios, class discussions, and customer practices in the sample database, discover how to set up volunteer and job records, assign volunteers to jobs, track availability and interests, and produce volunteer reports in The Raiser's Edge. In addition to the content covered during class, class materials contain information on additional aspects of volunteer management and functionality in The Raiser's Edge provided for participant's reference.

Target Audience: This class covers the **RE: Volunteer** optional module. To attend, participants should have the RE: Volunteer module, and want to use it in their volunteer management. Individuals responsible for entering and tracking volunteer and assignment data will benefit from the class. Attendees should be familiar with basic navigation and record structure in The Raiser's Edge. Access to The Raiser's Edge sample database is necessary for attendees to fully participate in the practices provided in the class.

Managing Prospects (2 hours)

Cover the **RE: Search** optional module through the use of instructor-led scenarios, class discussions, and customer practices in the sample database, and discover how to enter prospect data such as financial information, interests, and proposals in The Raiser's Edge. Also learn how to link existing gifts to the proposals that generated them in order to later analyse the success of your prospect research program.

Target Audience: This class covers the RE: Search optional module. To attend, participants should have the RE: Search module, and want to use it in their prospect research process. Individuals who enter prospect data or record gifts resulting from proposals will benefit from this class. Attendees should be familiar with basic navigation and record structure in The Raiser's Edge. Access to The Raiser's Edge sample database is necessary for attendees to fully participate in the practices provided in the class.

Continued

Managing Memberships (4 hours)

Efficiently manage your membership program using the **RE:Member** additional module. You will learn about the options available for setting up membership programs, tracking and managing memberships, producing membership cards and renewal notices, and generating various membership reports.

Target Audience: This class is designed for users who manage membership programs in The Raiser's Edge, including program setup and the daily activities related to member data entry, relationship management, and membership activity management. Previous experience using The Raiser's Edge is necessary.

Managing Tributes (2 hours)

Designed to help you manage honoured and memorialised constituents, this class includes setting up multiple tributes for constituents, entering tribute acknowledgees as relationships, and preparing tribute mailings and reports.

Target Audience: Individuals responsible for managing tribute information would find this course useful. Completion of any Raiser's Edge class or working knowledge of The Raiser's Edge is required. To complete class exercises, participants should have The Raiser's Edge sample database installed.

The following four courses are part of the Policies and Procedures series that deals with the documentation and maintenance of policies and procedures for The Raiser's Edge. While not required, attendees are encouraged to attend all classes in the series for a comprehensive view of the entire documentation process including 1) constituent data entry, 2) gift management, 3) configuration and administration, and 4) data processing and retrieval.

Policy and Procedures for Constituent Data Entry (3 hours)

This class focuses on constituent data entry issues such as donor coding and address, relationships, and contact management.

Policy and Procedures for Gift Management (3 hours)

This class focuses on the records that support your fundraising structure and the gift records associated with them. You will learn key considerations when setting up campaigns, funds and appeals, and when gifts are entered and processed.

Policy and Procedures for Configuration and Administration (2 hours)

In this class you will learn key considerations when configuring the program and performing routine database maintenance tasks.

Policy and Procedures for Data Processing and Retrieval (2 hours)

In this class you will learn key considerations for the processing and retrieval of data using Query, Export, Reports, and Mail functions.

Target Audience: These four classes are designed for individuals in charge of developing, enforcing, and managing a set of operating rules for The Raiser's Edge.

► To learn more about Blackbaud's Training, visit www.blackbaud.com.au or contact your Blackbaud account representative.