

## **072104**

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# Checklist to Get Started on The Raiser's Edge 7

You just installed *The Raiser's Edge 7*. Are you wondering what to do next? Use this Checklist to get started on *The Raiser's Edge 7* after converting from version 6.x or another software program, or if you are a brand new user. This list is for users with Supervisor rights in the program, database administrators, IT departments, or anyone setting up the program.

- Get trained on the software. You can purchase on-site customized training, attend regional trainings, or go to classroom training in Glasgow or London. If you cannot get classroom or on-site training immediately, check out our online eLearning Library and other training options at [training.blackbaud.co.uk](http://training.blackbaud.co.uk).
- Set up **Security** for your system and change your password from "Admin". On the Raiser's Edge bar, click **Admin**. Then click the **Security** link. Click the link at the bottom of the page to read the Security chapter of the *Configuration & Security Guide*.
- Set up a plan/schedule to back up your data. (We recommend every evening.) For more information about backing up your system, see Knowledgebase solution BB52243. Access it at [kb.blackbaud.com](http://kb.blackbaud.com). In addition, see the *Database Administration Guide* for instructions on backing up your data using the Blackbaud Management Console. Test the backups immediately, then monthly for three months, then quarterly thereafter.
- Determine what information you need to get out of *The Raiser's Edge*. For example, think about what reports you run and mailings you send. Base this determination on what you did before, anything you'd like to change about previous processes, and what *The Raiser's Edge 7* can now do for you that you could never do before. First determining what you want to get out of the program helps you decide how to enter information properly. This is vital to getting accurate results and using the program efficiently. Use the sample database that comes with the program to experiment with different options.
- Decide how data should be entered in *The Raiser's Edge* by all users at your organisation. These data entry protocols ensure accuracy and consistency in what you put in, and in turn, get out of the program. Create your own *Data Entry Protocol* or *Policies and Procedures* manual and use it as a training guide for new employees and volunteers or as a resource for handling infrequent tasks. For more information, see the Data Entry Protocol chapter of the *Program Basics Guide*. To access the user guides, select **Help, User Guides** from the menu bar in *The Raiser's Edge* or visit [userguides.blackbaud.com](http://userguides.blackbaud.com). To see examples of other organisations' policies and procedures manuals, go to [shareddocs.blackbaud.com](http://shareddocs.blackbaud.com).

C h e c k l i s t

- Set up **Tables** in *Configuration* for items such as **Phone Types** and **Actions**. This is part of your data entry protocol. Have users select table entries in fields with drop-down lists, not create a new entry each time. Having everyone follow this procedure cuts down on data inaccuracy and ensures your data is entered, accessed, used, and reported on properly and consistently. For more information, see the Configuration chapter of the *Configuration & Security Guide*.
- Set up **Business Rules** for each area of the program. For example, you can set a warning to appear when you add gifts from constituents who have outstanding balances. Business rules affect all workstations using *The Raiser's Edge* and help ensure users work in the program the same way. On the Raiser's Edge bar, click **Configuration, Business Rules**. See the Configuration chapter of the *Configuration & Security Guide* for more information.
- Each user should set up **User Options** for each area of the *The Raiser's Edge*. From anywhere in the program, select **Tools, User Options** from the menu bar at the top of the screen. User options are defined for each user and appear on any workstation you log into using your user name and password. If you don't define your own, default settings are used. For more information, see the *Program Basics Guide* and the User Options section of each user guide for every area of the program.
- Set up Campaigns, Funds, and Appeals. On the Raiser's Edge bar, click **Records**. Click **Campaigns, Funds, or Appeals**. See the *Campaigns, Funds, & Appeals Data Entry Guide* for more information. If your conversion created the basic records, take the time to complete the other fields in these important records.
- Create and save queries, exports, *Reports* and *Mail* parameter files to reuse for similar reports and mailings you run often. Also create templates in *Batch*. This saves you time and effort. If you are converting from *The Raiser's Edge for Windows version 6.x*, use the control reports you printed out to recreate these settings. See the *Reports Guide, Sample Reports Guide, Mail Guide, Query & Export Guide, Creating Custom Crystal Reports Tutorial, The Raiser's Edge & Microsoft Office Integration Guide*, and the *Batch Guide* for more information about each area of the program.
- Each user should set up his **Home page** and **Favourites** to easily access the tasks and areas of the program he uses most frequently. For more information, see the *Program Basics Guide*.
- To make *The Raiser's Edge* perform as efficiently as possible for your unique needs, consider these additional setup options for all users of the system: **Constituent Letters, Action Tracks, Default Sets, Custom Views, and Profiles**. For more information, see the *Configuration & Security Guide, Constituent Data Entry Guide, Program Basics Guide, Custom View Guide,*

and *Reports Guide*. Each user can also set up Open screen **Options**, columns in grids, and **Summaries**. See the *Program Basics Guide* and the *Summaries Guide*. If you have the modules *Queue for Task Scheduling* and *NetSolutions*, click **Admin** to set them up. See the *Queue for Task Scheduling Guide* and the *Netsolutions Guide*.

## Other Helpful Information

- ◆ If at any point you have a question, press **F1** on your keyboard to access the help file.
- ◆ If you want more in-depth information and aren't sure which user guide to open, click the **Which Guide Should I Read?** link on the User Guides page. (Select **Help, User Guides** from the shell menu bar at the top of screen in *The Raiser's Edge*.)
- ◆ You can access the latest user guides, technical bulletins, and Frequently Asked Questions (FAQs) at [documentation.blackbaud.com](http://documentation.blackbaud.com) or from [www.blackbaud.co.uk](http://www.blackbaud.co.uk), select **Support, Documentation**.
- ◆ Use Knowledgebase to enter a question and search for a possible answer. Access it from [www.blackbaud.co.uk](http://www.blackbaud.co.uk) by selecting **Support, Knowledgebase** from the menu bar or go to [kb.blackbaud.com](http://kb.blackbaud.com).
- ◆ The first time you enter the Support area of Blackbaud's Web site to access user guides and Knowledgebase, you are asked to enter your user name and password. To have this information sent to you, click **Customer Login Lookup** on the Login page.