

You recently installed *The Raiser's Edge 7* or received the email notification with your hosted database credentials. Now, what do you do? Regardless of whether you update from a previous version or are new to *The Raiser's Edge*, use this checklist to get started.

This checklist is for users with Supervisor rights, database administrators, IT departments, or anyone responsible for the implementation of *The Raiser's Edge 7*.

Get Started

- Enroll in training on the software.** For your convenience, Blackbaud provides several training options. You can attend live classroom training in a regional location, attend instructor-led distance learning classes, or schedule customized training, conducted remotely or on-site at your organization. For your organization's ongoing training needs, you may also invest in a **Blackbaud Learn** training subscription. To search for an upcoming class or for additional training information, visit <http://training.blackbaud.com> or call our training hotline at 800-468-8996, option 3.
- Set up security for your system and change your password.** From *Administration*, click **Security**. Add users or edit the permissions of users who enter or view data. All users who enter or view data must have his or her own user account in *The Raiser's Edge*. For information about how to add or edit users, see the *Configuration and Security Guide*.
- Back up your database daily.** If Blackbaud hosts your data, your database is backed up every 15 minutes for you. If you install and maintain *The Raiser's Edge* database on your own servers, set a schedule to back up your database. We recommend you back up your database every day. After you perform the first few backups, test them immediately. If the backups perform as expected, test them monthly for three months. After three months, we recommend you test your backups quarterly. For information about how to back up your database, see Knowledgebase Solution BB52243 at <http://www.blackbaud.com/kb/>. To learn how to back up your database with the Blackbaud Management Console, see the *Database Administration Guide*.
- Think about your work processes and what information you need from The Raiser's Edge.** To use *The Raiser's Edge*, it helps to decide what information you need from the program. Before you begin, are there any work processes you would like to change based on new features in *The Raiser's Edge*? What reports and mailings do you already send and need to set up? When you determine what you need to enter in the program and learn from the program, and how you would like to improve your work processes, you can enter data more efficiently and accurately based on your current organizational needs. For example, to track more information about major gifts, you can set practices in place before you use the program to ensure accurate data is entered and maintained. You can also set up reports to run regularly. You can review all *The Raiser's Edge 7* user guides on the Blackbaud website at <http://www.blackbaud.com/support/guides/re7.aspx>.
- Decide how all users need to enter data in The Raiser's Edge.** Data entry protocols ensure accuracy and consistency, which can in turn help ensure accurate reports and data analysis in the program. Create your own Data Entry Protocol or Policies and Procedures manual as a training guide for new employees and volunteers, or as a resource for infrequent tasks. For information about how to create a Data Entry Protocol Guide, see the Data Entry Protocol chapter of the *Program Basics Guide*. You can also refer to examples from other organization's Policies and Procedure manuals. To view the manuals, go to <http://www.blackbaud.com/support/forums/forums.aspx> and click **The Raiser's Edge**. In The Raiser's Edge forum, click **Shared Client Documents: Policies and Procedures**.

- Import your existing data into The Raiser's Edge 7.** You can use the import template available from Knowledgebase Solution BB713361 to convert constituent and gift records into the database. For assistance on how to convert legacy data from your database into *The Raiser's Edge*, you can purchase conversion services for an additional charge. For more information, contact your account representative.
- Configure The Raiser's Edge 7 to meet your organization's needs.** Review the following *Configuration* items. For more information, see the *Configuration & Security Guide*.
 - From *Configuration*, click **General**. Enter your organization's information, *Blackbaud Payment Service* credentials, fiscal year information, and Federal Tax ID.
 - From *Configuration*, click **Business Rules**. Set up Business Rules for each area of the program. For example, you can set up a warning to appear when you add gifts from constituents who have outstanding balances. Business rules affect all users of *The Raiser's Edge* and help ensure users use the program consistently.
 - From *Configuration*, click **Addresses/Salutations**. Review the addresses and salutations and decide how to address individuals in your mailings and emails. Addresses and salutations are part of your data entry protocol. Confirm you have all the addressees and salutations you need and sort them according to their frequency of use.
 - From *Configuration*, click **Tables**. Configure tables for data entry, such as the Constituent Codes, Phone Types, and Solicit Codes tables. Tables are part of your data entry protocol. Instead of a new entry field where users enter text, you use tables to provide a pre-populated list for users to select from. To save you time on data entry but also ensure your users enter data accurately, update your tables with the correct information from your organization.
 - From *Configuration*, click **Fields**. Configure fields to determine the field settings for data entry. You can change the field status from optional to required. For example, you may want to require certain fields are complete before a record saves, such as first name, last name, and gender. You can also choose to hide fields you do not use, rename fields, or change fields from a standard field to a lookup or search field.
- Each user needs to set up his or her user options for each area of The Raiser's Edge.** User options are unique for each user and available on any workstation when you enter your user name and password. If you do not set user options, the default settings are used. To set your user options, select **Tools, User Options** from the menu bar. For information about how to set up user options, see the *Program Basics Guide*.
- Set up your campaigns, funds, and appeals.** Campaigns help you create objectives to raise money; funds show the specific purpose for the money you raise. Appeals document the promotions and solicitations that brought in gifts. Together, campaigns, funds, and appeals help you raise and track the money your organization receives. For information about how to set up campaigns, funds, and appeals, see the *Campaigns, Funds, and Appeals Data Entry Guide*.
- For the reports and mailings you run often, create and save queries, exports, report parameter files, and mail parameter files to use.** We recommend you also set up your donor acknowledgements and receipts. When you set up your mailings and reports in advance, you save time and prepare for upcoming tasks. If you converted from *The Raiser's Edge 6*, use the control reports to recreate your report settings. For help on how to set up and manage your reports and mailings see the *Reports Guide, Sample Reports Guide, Mail Guide, Query & Export Guide, Creating Custom Crystal Reports Tutorial*, and *The Raiser's Edge and Microsoft Office Integration Guide*.

- Each user needs to set up his or her Home page and Favorites.** When you set up your Home page and Favorites, you can easily access the tasks and areas of the program you use most frequently. For information about how to personalize your Home page and favorites, see the *Program Basics Guide*.
- If possible, we recommend you set up the following:**
 - Set up the common letters you send to constituents. For information about how to set up your letters, see the *Configuration & Security Guide*.
 - Set up action tracks for your constituent, event, and appeal records. Action tracks define a specific set or series of actions required for your records. For example, you require all new constituents receive a phone call, newsletter, and welcome packet. For information about how to set up action tracks, see the *Constituent Data Entry Guide*.
 - Set up your default sets. When you configure your default sets, you define a set of values to automatically default on new records. For information about default sets, see the *Program Basics Guide*.
 - Create custom views of your individual and organization constituent records in your database. Custom views enable you to show only the information your organization needs to see and use. For information about how to set up custom views, see the *Custom View Guide*.
 - To provide your staff and board with specific information about your data, set up your profile reports. For information about profile reports, see the *Reports Guide*.
 - To track the progress or performance of your organization's solicitors, campaigns, funds, and appeals, set up summaries. For information about how to set up summaries, see the *Summaries Guide*.

More Helpful Information

- If you have a question, on any screen in **The Raiser's Edge** press **F1** to access the help file. Almost all screens contain help specific to the area of the program in which you are working.
- Not sure which user guide you need? Review the *Which Guide Should I Read?* tutorial to help you find the correct guide to use.
- On the Blackbaud website, you can access support information. The website contains all **The Raiser's Edge 7** user guides, technical bulletins, Frequently Asked Questions (FAQs), Knowledgebase, Support newsletters, blogs, and forums. With Knowledgebase, you can enter a question or problem to find an answer in all of our help content, which includes Knowledgebase solutions and user guides. To access our support content, go to <http://www.blackbaud.com/support/support.aspx>. The Support section of our website requires your website user name and password. If you do not know your user name and password, click **Need your User Name?** or **Need your Password?** to have your credentials sent to you.
- Need more training? Search for and register for upcoming training classes or find additional training information at <http://training.blackbaud.com>.