

Getting to Know Your Raiser's Edge® Data

This document guides you through a series of simple but informative downloads from your Raiser's Edge system. The tables detailed in these reports form the heart of your database and their correct use can help you tap the full potential of this powerful tool. Evaluating these tables and their values is an area where Heller Consulting can bring great value to your use of this system. If you would like more information about how our expertise can help you streamline your database, please contact us through the information provided at the end of this document.

Note: We have found it convenient to compile all of the downloaded information into a single Excel Workbook for ongoing use and reference. To compile a single workbook, open each report, right-click on the tab at the bottom of the worksheet (usually "Sheet 1"), choose "Move or Copy," under the "To book" menu choose the main workbook you'll be using, and choose OK. If this process is unclear, simply keep each report as a separate workbook.

Constituency Codes

These are key codes for providing information about your donors and prospects. In addition, some very valuable reports are based on these codes. When these codes are clean and accurate, they can provide some excellent information.

Downloading the Constituent Code Information

1. Open Reports.
2. Under Report Types choose Demographic and Statistical Reports, under Report Names choose Tallies.
3. Click New Tallies and fill in the Tabs as follows:

General	Include = All records Include These Constituents = Check all boxes
Fields	Field to use: Constituency code Use Selected Field Values Only = uncheck
Columns	<ul style="list-style-type: none"> ▪ Number of constituents ▪ Percent of total constituents ▪ Primary value
Filters	Include All
Attributes	Leave blank
Format	Click on Detail in the left column: For Constituents with Multiple Field Values: click in the radio dial next to "Include constituent for all field values".

4. Click the Export icon on the toolbar.
5. Select a Format of Excel 8.0 (leave Destination as Disk File) and click OK.
6. Save the file with the name *ConsCode.xls*.

Attributes

Though a simple process, you can download a list of your attributes (see below) and tables (next section). You can then evaluate the use and value of each attribute and table, and record

your decisions regarding each on the worksheets. Finally, you can prioritize the cleanup of each attribute or table and use the results to guide your streamlining efforts.

Downloading the Attributes Information

1. Open Configuration.
2. Select the Attributes Option.
3. From the File Menu, choose Preview-Attributes Report.
4. From the Print Preview window, click the Envelope/Export Button.
5. Select a Format of Excel 8.0 (leave Destination as Disk File) and click OK.
6. Save the file and name it *attributes.xls*.

Tables

A list of all your table values serves as a convenient reference. You can also make notes regarding individual values in each table, indicating which should be kept, discarded, or moved to another field.

Downloading the Table Information

1. Open Configuration.
2. Select Tables.
3. From the File Menu, choose Preview.
4. Check Include Selected Tables.
5. Use double right arrow to send over all tables.
6. Uncheck all boxes below list of tables.
7. Click the Envelope/Export Button.
8. Select a Format of Excel 8.0 (leave Destination as Disk File) and click OK.
9. Save the file with the name *Tables.xls*.

Creating a Constituent Attribute File

If you're working with Heller Consulting to analyze your data, we'll use this file to create tallies of how often each of your attributes is used and, for tables and yes/no fields, how often each value is used. This information can help us determine the relative usefulness of different values.

1. Open Administration.
2. Choose Import.
3. Under Constituent, select Constituent Attribute.
4. Click on New Import.
5. Fill in the tabs as follows.

General	<p>What do you want to do? = Create import file Include = All Records What file do you wish to create? = Click on the gray box on the right; change the Files of Type field to Text Files; name the file AllCat.csv, select the appropriate folder to save it in and click Open. What ID field do you want to use? = Use the Import ID. What is the format of this import file? = Delimited - Characters separate the fields.</p>
File Layout	Field Separators and Text Qualifiers = Comma

	Text Qualifier = Quotation Import Field = Field names will be on the first line of the import.
Fields	Select all fields except Constituent SSN.
Summary	Leave blank.

6. Then click Create Now.
7. Compress the file using the Windows Compression utility (available by right-clicking on a file and choosing Send To: Compressed File or using the Winzip software (available at www.winzip.com)).

Campaigns, Funds and Appeals

Campaign, Fund, and Appeal codes are at the heart of your financial data and reporting. Clarifying these codes and developing an effective coding scheme can result in an excellent set of reports. The process for gathering information on each of these codes is straightforward. The reports below list all values that have been used, along with the number of gifts and total dollars attributed to each value. To get an accurate view of the full use of each code, we recommend running the Performance reports without any date or value restrictions, so that every gift in the database that has been assigned a value is counted. The Four Year Summary reports show which codes have been most active most recently, and when combined with the Performance reports, also indicate which codes have not been used for years (and can likely be marked inactive). Because of the broad parameters, these reports can take a while to run. You may want to consider running them after hours or during periods when few people are on the database and on the fastest computer you have. If you have recently had problems with the system crashing while processing large requests, you may want to delay running these reports until those issues have been resolved.

Downloading the Campaign and Fund Performance Reports

1. Open Reports.
2. Under Report Types choose Campaigns, Funds and Appeals Reports, under Report Names double click on the following:
 - A. Campaign Performance Analysis
 - B. Fund Performance Analysis
3. Fill in the Tabs as follows:

General	Include = All Records Date to Use = Gift Date Date = Include All Dates Soft Credit Gifts To = Donor Matching Gifts = Credit to MG Company (This will result in the inclusion of all gifts.) Include These Constituents = Check all boxes
Filters	Include = All
Gift Types	All Gift Types (Don't mark any of the boxes.)
Attributes	Leave Blank
Graph	N/A
Format	Click on Details in the left column. Put a check in the box next to Include campaigns or funds with zero amounts.

4. Click the Export to Disk Button.
5. Select a Format of Excel 8.0 (leave Destination as Disk File) and click OK.
6. Save the file in the appropriate folder with the following name:

- A. CampPerf.xls
- B. FundPerf.xls

Downloading and Integrating the Four-Year Summary Reports for Campaigns, Funds and Appeals

1. Open Reports.
2. Under Report Types choose Demographic and Statistical Reports, under Report Names choose: Comparisons and Summaries
3. Run this report three times – one each for Campaigns, Funds and Appeals - filling in the Tabs as follows:

General	Include = All Records Include These Constituents = Check all boxes Soft Credit Gifts To = Donor Matching Gifts = Credit to MG Company (This will result in the inclusion of all gifts.) Mark the box "Summary"
Fields	Field: <ol style="list-style-type: none"> A. Gift campaign B. Gift fund C. Gift Appeals Use Selected Field Values Only = uncheck box (to include all) Columns: Total Given, Number of Gifts, Percent of Total Gifts
Filters	Include All
Gift Types	All Gift Types (Make sure the only box checked is Use Gift Balance instead of Gift Amount)
Attributes	Leave Blank
Report Periods	Open Config/General and note the month listed after Fiscal Year Ends. Choose either calendar year or fiscal year ranges based on the fiscal year end listed there. Enter three periods with the following start and end dates: <ul style="list-style-type: none"> • 07/01/03 – 06/30/04 OR 01/01/04 – 12/31/04 • 07/01/04 – 06/30/05 OR 01/01/05 – 12/31/05 • 07/01/05 – 06/30/06 OR 01/01/06 – 12/31/06 • 07/01/06 – 06/30/07 OR 01/01/07 – 12/31/07 (After entering the first date range, press Autofill Dates button and enter number of periods=4 and period = year)
Format	Title: Type in the following: Campaign Summary Fund Summary Appeal Summary Check box Put Organization Name in Header

4. Click the Export to Disk Button.
5. Select a Format of Excel 8.0 (leave Destination as Disk File) and click OK.
6. Save the file in the appropriate folder with the following name:

- a. Camp4yr.xls
- b. Fund4yr.xls
- c. Appeal4yr.xls

Downloading and Integrating Pledge Reports

Unpaid pledges can be a source of confusion and reporting irregularities. Review the results of the report below to determine which pledges you'll likely collect, and which should be written-off.

1. Open Reports.
2. Under Report Types choose Pledge Reports, under Report Names choose: Campaign Report
3. Fill in the Tabs as follows:

General	Include = All Records Include gifts made after: choose Specific date 1/1/2000 or 7/1/2000 (depending on FY) Include These Constituents = Check all boxes Soft Credit Gifts To = Donor Matching Gifts = Credit to MG Company Mark the box "Summary"
Filters	Include All
Gift Types	All Gift Types Check box marked Exclude zero amount gifts
Attributes	Leave Blank
Format	Title: Type in the following: Pledge Summary Check box Put Organization Name in Header Criteria: Check box dates to include only Check box first page of report

4. Click the Export to Disk Button.
5. Select a Format of Excel 8.0 (leave Destination as Disk File) and click OK.
6. Save the file in the appropriate folder with the following name: *Pledge Summary.xls*

Creating a Duplicates Report

Run this report twice with the following two different sets of duplicate criteria:

- A. Likely Family Members: Ind Last Name (10), Address (6), Org Name (20)
- B. Very Targeted and Likely Matches: Ind Last Name (10), First Name (5), Address (6), Org Name (20), Org Address (15)

1. Open Configuration.
2. Click on Business Rules.
3. Click on Duplicates in the left hand column.
4. Click on Individuals.
5. Change the duplicate criteria (right of the screen) to reflect one of the sets outlined above. For Organizations, click on Organizations in the left hand column and use Org Name instead of Last Name, and ignore the First Name guidelines.
6. Open Administration.
7. Select Duplicate Constituents.
8. Next to show, select Individual criteria.

9. Click the "Run Report Now" button.
10. Export the report to Excel and name it either DupesA.xls or DupesB.xls.

Optional Reports

Outstanding Proposals Report (if Prospect module is present)

1. Open Reports.
2. Under Report Types choose Prospect Research Reports; Under Report Name choose Outstanding Proposal Report.

General	Include = All Records Base Analysis on: Date asked (include all dates) Include These Constituents = Check all boxes Include proposals with no date asked: yes
Filters	Include All
Attributes	Leave Blank
Ind. Address	Choose None
Org. Address	Choose None
Format	Check box Put Organization Name in Header Sort/Break: Select Proposal Status and check the box to break the report by the sort field.

3. Click the Export to Disk Button.
4. Select a Format of Excel 8.0 (leave Destination as Disk File) and click OK.
5. Save the file in the appropriate folder with the following name: *Outstanding Proposals.xls*.

Membership Statistics by Category (if Membership module is present)

Depending on the size of your membership base and the power of your workstation, this report may take some time to run.

1. Open Reports.
2. Under Report Types choose Membership Reports; under Report Name choose: Membership Statistics by Category.

General	Include = All Records Include memberships by: Membership dates for this fiscal year Include only memberships that are linked to gifts: yes Include These Constituents = Check all boxes Include only active memberships in 'Membership as of' counts: yes
Filters	Include All
Attributes	Leave Blank
Graph	Report Only
Format	Check box Put Organization Name in Header Sort/Break: Select Category. Optional Columns: Select Start Memberships, Lapsed Memberships and Total Paid

3. Click the Export to Disk Button.
4. Select a Format of Excel 8.0 (leave Destination as Disk File) and click OK.
5. Save the file in the appropriate folder with the following name: *Membership Stats.xls*.

Now that you've seen your data...

Would you like help interpreting what you find, or figuring out what to do next? Or maybe you'd like the whole project taken off your plate, so you can stay focused on raising money.

Let us help you! Through our experience at over 600 organizations across the nation, we've developed a clear, sound process for optimizing our clients' use of the Raiser's Edge software. Our services include system assessments, data conversions, data cleanup (including codes / tables and duplicates), process design and documentation, query and report setup, and training. For our clients with advanced needs, we can develop Crystal Reports, integrate with other databases and perform custom programming. These services provide our clients a solid foundation for effective use of this powerful fundraising tool. Contact us today to find out how we can help!

For more information

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