

Customizing The Raiser's Edge 7 with VBA/API

Customizing The Raiser's Edge 7 with VBA/API is a three-day class designed to expose you to the Visual Basic for Applications (VBA) and Application Programming Interface (API) additional modules of The Raiser's Edge 7. After this class, you will have an introductory understanding of the object model and object-oriented programming. You will also be able to construct basic programs using VBA and API. The **Customizing The Raiser's Edge 7 with VBA/API** class is a technical class.

CLASS OBJECTIVES

Understand basic field structure and functionality in The Raiser's Edge 7.

- Learn to use The Raiser's Edge 7 Object Model and understand its relation to Object Oriented Programming.
- Understand the interface between The Raiser's Edge 7 and third party applications.
- Use this knowledge to create business rules and macros within The Raiser's Edge 7.
- Create standalone applications, custom forms, and plug-ins for third-party applications that interface with The Raiser's Edge 7.

CLASS CONTENT

The Raiser's Edge 7 Overview

- Understanding Records and the fields within records
- Understanding the functionality of Query, Export, Reports, and Mail
- Setting Security and Business Rules

Object Oriented Programming

- Using The Raiser's Edge 7 Object Model and understanding its relation to Object Oriented Programming
- Defining and understanding fundamental programming concepts of The Raiser's Edge 7
- Understanding the interface between The Raiser's Edge 7 and Third Party Applications

Custom Business Solutions Case Studies

- Creating Business Rules and Macros by declaring and setting variables, creating conditional statements, and utilizing Visual Basic functions
- Creating a Standalone Application by creating custom forms, utilizing existing forms in The Raiser's Edge 7, and linking them to The Raiser's Edge 7 objects through API
- Creating a Plug In using an interface with a Third Party Application



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DAY ONE

- Overview of The Raiser's Edge
- Overview of custom solutions: What can and cannot be done, what types are there?
- Raiser's Edge Object fundamentals
- Data object hierarchy
- Managing Constituents through the API
- Utilizing the RE UI
- Managing Gifts through the API
- Using Service Objects
- Writing to the Gift Batch

DAY TWO

- Actions, Notepads, and other auxiliary objects
- Collections and Queries
- Managing Relationships through the API
- Attributes and Code Tables
- Import Lab
- Plug-ins Overview
- Plug-ins Lab

DAY THREE

- Meta Fields
- Database Text Stream
- Properties of the RE Session Context
- Custom View Parts Overview
- Custom View Parts Lab
- VBA
- VBA Labs
- Miscellaneous Topics

PREREQUISITES AND ADVANCED PREPARATION

A working knowledge of Visual Basic programming language is required. You can use the following list of terms to determine if this class is appropriate for your skill level. If you are familiar with most of these terms, you should be able to successfully complete this class:

Terminology:

Object Oriented Programming	Module
Parent Object	Scope
Child Object	Message Box
Collection	Code Construction
Methods	If Then ElseIf EndIf
Events	For Each
Properties	With
Control	Select Case
Variable	
Dim	Type Conversions:
Sub Procedure	CStr
Function Procedure	Cdate
Event Procedure	CLng

SUGGESTED READING

VBA For Dummies®. Cummings, Steve. IDG Books Worldwide. 1999 (for beginning users)

Practical Visual Basic 6. Reselman, Bob et al. MacMillan Computer Pub. 1999 (for intermediate and advanced users)

VB and VBA in a Nutshell: The Languages. Lomax, Paul. O'Reilly & Associates. 1998