TheRaiser'sEdge®

Configuration & Security Guide

Configuration & Security Guide

Contents

What Is In This Guide?

In the *Configuration & Security Guide*, you learn how to establish settings that affect all *Raiser's Edge* users. You can learn about the following.

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How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser's Edge* by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.

The notepad symbol designates a note or tip related to the information in the main text column.

The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.

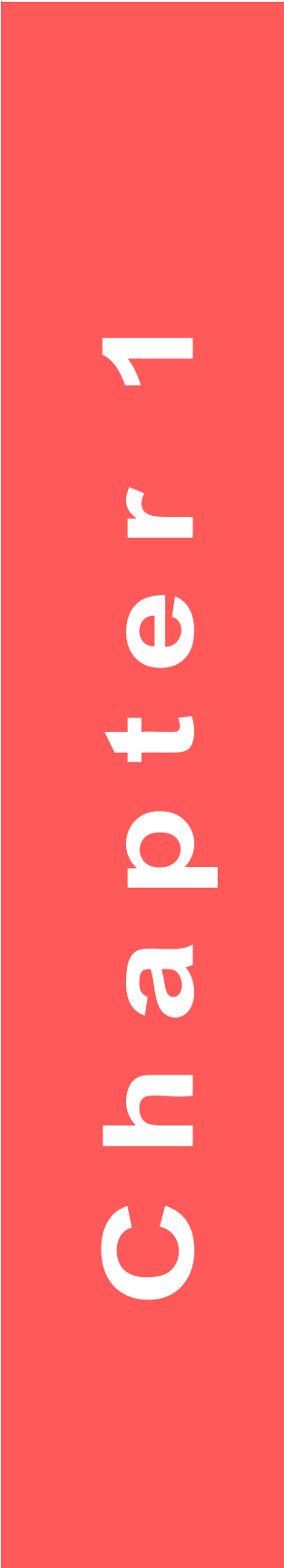The clock symbol designates a shortcut or timesaving action.

The dictionary symbol designates the definition of a frequently used term.

Configuration

Contents

Procedures

Your selections in *Configuration* affect functions, defaults, and settings throughout **The Raiser's Edge**. Use *Configuration* options to speed data entry, increase the efficiency of your record keeping, and generally optimize the performance of the program.

You can define addressees and salutations; rename fields and change their characteristics by making them hidden, required, or lookups; and set up tables you can use to enter data quickly and consistently in all areas of the program. Create business rules to control a wide variety of functions such as defaults for adding gifts and messages to appear when you open or add certain records. Use *Configuration* to identify letters in your word processor for merges with **Raiser's Edge** fields in your mailings, enter financial institution information, and specify currency and address block formatting information for other countries. You can also customize the program by creating special categories of information called attributes and attaching them to your records.

If you have the optional module *Membership Management*, you can set up membership categories to establish different giving levels for your memberships and use the categories to analyze all aspects of your memberships in reports. If you have Blackbaud's **General Ledger**, you can configure a link between the two programs which enables you to enter gifts a single time for both programs instead of into each separately. This dramatically reduces time spent on gift entry. If you do not have **General Ledger**, you can store account information from other accounting software in **The Raiser's Edge**.

Configuration and *Security* are closely linked. You should limit *Configuration* security access to only those with Supervisor rights. The **Business Rules** link is automatically accessible only to users with Supervisor rights. With table entries in particular, it is important you limit access to adding and editing rights to maintain consistency in your database.

Because your selections affect everyone who uses the program, proper configuration plays a key role in allowing your organization to take full advantage of all the features **The Raiser's Edge** has to offer. If you take time now to customize *Configuration* to meet your specific needs, you can increase your organization's future efficiency.

Configuration Links

To access *Configuration*, on the Raiser's Edge bar, click **Config**. The Configuration page appears.

The Configuration page contains the following links:

General. Use this link to add and edit your organization address, phone, company ID, and fiscal year information. If you have the optional module *Volunteer Management*, you can also add information about your volunteer year.

Tables. Tables are fields where you can predefine entries to save time and promote consistency for your data entry. Use this link to add, edit, and delete entries for all tables in the program and to create new Donor Category tables. Although this link provides a central location for all table functions, if you have security rights, you can add and edit table entries from anywhere in the program. You can also make table entries inactive to ensure they are not used on any additional records.

Addressees/Salutations. An addressee is how a constituent name appears on mailing labels, reports, and the inside address of letters. A salutation is how you greet a constituent in letters or other mailings. For example, an addressee could be "The Honorable H. B. Smith," while the salutation is [Dear] "Judge Smith." Use this link to add, edit, and delete addressee/salutation formats for mailings and reports.

Attributes. Attributes are bits of useful information you can attach to a record. Because you create attributes, you can use them to customize *The Raiser's Edge* to suit your organization's specific needs. Define categories of useful information and create entries within these categories to include with your records. For example, you can create a category called "Interests" with entries for "Golf", "Tennis", and "Photography". You can then use this information to target your appeals. For example, you can make sure all constituents with an interest in golf are invited to play in your annual golf tournament.

Financial Institutions. Use this link to add and edit address, phone, and branch information for banks. If you have the optional module *RE:EFT*, you can define information to be used in electronic fund transfers.

General Ledger. If you have Blackbaud's *The Financial Edge* accounting software, you can use this link to establish a connection between it and *The Raiser's Edge*. Connecting the databases of the two programs maximizes your gift entry efficiency by giving you the ability to enter gifts once for both programs. You can also define General Ledger distributions that default onto new fund records. If you do not have Blackbaud's *The Financial Edge*, you can use this link to store account information from other accounting software in *The Raiser's Edge*.

Letters. On the Letters page, add letters for your mailings and give them corresponding descriptions in *The Raiser's Edge*. You can select existing, or create new exports containing *The Raiser's Edge* fields you want to include in mail merges. If you have *Microsoft Word*, you can use the *Office* integration features of *The Raiser's Edge* to create *Word* documents containing the merge fields in your export for your mailings.

International. You can define address formats and currency settings for other countries. These formats are used when you enter the country in an address for a constituent. You can enter exchange rate information so *The Raiser's Edge* converts gifts given in foreign currencies to the currency amount of the country where your organization is located.

Business Rules. Business rules are ways for you to control functions and displays throughout *The Raiser's Edge*. Business rules affect all users of the program. Using pre-defined rules, you can mark a series of checkboxes to affect functions such as how ID numbers for records are generated, how you define duplicate records, and who receives soft credit for gifts in reports and mailings.

Use queries to define your own rules for messages to display when certain constituent records are opened, or gift or action records are added. For example, you can run a query that includes all your board members, then use it to create a rule that appears when a board member record is opened advising you to handle the record with extreme care.

Fields. (visible only to users who have been given Supervisor rights in **Security**). Fields are areas where you enter information into *The Raiser's Edge*. You can use this link to change field status from optional to required, so a field must have an entry before a record can be saved. You can hide fields you do not use to make them invisible to your users. You can also change fields from standard to lookup. You can define standard entries for lookups like you do for tables. Once you make a field a lookup, it appears in the list of tables in the **Tables** link.

Membership Categories. (visible only if you have *Membership Management*). A membership category defines the level of giving required by a constituent to gain membership in one of your categories or clubs. For example, you can establish categories for "Lifetime Member", "Corporate Member", and "Individual Member".

Interfund Entries. (visible only if you have Blackbaud's *General Ledger* and you have established a connection between it and *The Raiser's Edge* from the **General Ledger** link of *Configuration*.) If the first two numbers of a *General Ledger* debit and credit account are different, the *General Ledger* funds to which they belong are different. In this case an interfund transfer account must be specified. Use this link to specify a pool of transfer accounts between *General Ledger* funds that you can enter easily and quickly on the GL Distribution grid of *The Raiser's Edge* fund records. To learn more about transfer accounts, see the *General Ledger User's Guide*.

Custom Views. Use custom views to create a customized view of constituent records in your database, making it possible to view records containing only the information you want to see. By creating these customized screens, you can select and view only what is important and functional for your organization. Every field currently available on a constituent record may not be useful to you. Using *Custom View*, you can easily select and organize only the fields you want to appear for a constituent record. For more information, see the *Custom Views Guide*.

Toolbars

Some screens in *Configuration* contain toolbar buttons to help you carry out commands quickly and easily without having to use the menu bar. If you have security rights to change user options, you can mark the **Show Tooltips** checkbox on the General tab of User Options so a description of the button's function displays when you move the cursor across it.
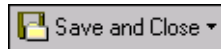
Save and close the current record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)

Save the record and keep the record open

Delete selected information

Go to the previous record

Go to the next record

Access help contents

Search for a specific field or record

View Properties

Run Macro (visible if you have the optional module *RE:VBA*)

General

Use the General page to enter basic information, such as your organization's address and phone number. To determine how information appears in some reports, specify when your organization's fiscal year ends and, if you have the optional module *Volunteer Management*, when your volunteer year starts. Enter your Company ID number for use with electronic fund transfer files.

➢ **Adding or editing general information about your organization**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **General** link. The General page appears.

The name of your company comes pre-loaded into your program and is not editable. To change it, contact Customer Support by phone at 1-800-468-8996 or via email at resupport@ blackbaud.com.

3. Enter the **Country** of your organization. For a list of possible entries, click the down arrow. The default is the country to which the program is shipped. Your entry here affects certain gift and address record defaults. If you type in a new entry, the new country is added to the **International** link of *Configuration* and address formatting remains the same as that of the default entry.

4. Enter the **Address**. Your entry here appears as the return address on envelopes. To start a new line in this field, press **ENTER**.

5. Enter your organization's **City**, **State**, and **ZIP** information.

6. Enter the **Phone number**, including the area code. This field, unlike other phone type fields throughout the program, has no default formatting. Enter the phone number as you would like it to appear on envelopes and reports.

7. Specify the month your organization's **Fiscal year ends**. Your entry here impacts which gifts appear on some summaries and reports. For example, you can break down a Giving Summary to show only gifts from constituents for a certain fiscal year.

8. If you have the optional module *Volunteer Management*, the **Volunteer year starts** field appears. Enter the month and day on which your volunteer year starts. Your entry here defines the beginning of the volunteer year in the Volunteer Summary report. If you leave the field blank, the volunteer year begins with the current system date on your computer.

9. If you have the optional module *Electronic Funds Transfer*, the **Immediate destination** field appears. Enter an eight digit number to be used when you create a transmission file for direct debits with *Electronic Funds Transfer*.

   Even if your bank provides a nine digit Transit/Routing Number, enter only the first eight digits here. *The Raiser's Edge* calculates and places the last number of the Transit/Routing Number in the transmission file when it is created.

10. If you have the optional module *Electronic Funds Transfer*, the **Company ID** frame appears. Select either **Federal Tax ID** or **User defined ID**. The Federal Tax ID is numeric only, but an ID you define can be alpha-numeric. Enter the number in the **ID** field. You can use the information in the **Company ID** frame to create an electronic fund transfer file with *Electronic Funds Transfer*.

11. To return to the Configuration main page, click the word "Configuration" in the page title bar below the shell menu bar. When you leave the General page, your selections are automatically saved.

Tables

Tables (also called code tables) increase data entry speed and accuracy throughout *The Raiser's Edge*. When you enter information into a field with a table, you can quickly access a list of possible entries for that field, select an entry, and place it directly into the field rather than typing it in manually.

Some tables, such as the **State** table, contain predefined values. For others, such as **Campaign Category**, you define the entries. Your use of table entries helps maintain consistency in your data entry. For example, one of your users could enter "10% shop discount" in the **Benefits** table of an appeal record, while another user could enter "ten percent shop disc." Using the **Tables** link of *Configuration*, you can make "10% Shop Disc." the standard entry for all your users, thereby making the information easy to retrieve from your database in queries and reports.

Your accountant or primary financial institution can supply you with your Federal Tax ID number.

From the **Fields** link of *Configuration*, you can make a field a "lookup." Like a table, you can create a list of entries for a lookup. The only difference between tables and lookups is that a lookup does not have the down arrow on the right. You must press **F7** on your keyboard to view, add, edit, and delete the entries. The lookup appears in the list of tables on the Tables screen and in the Code Tables section in the **Security** link of *Administration*.

To keep your entries uniform, it is extremely important that you limit rights for your users to add and edit table entries. You can do this from the **Security** option of *Administration*. Limiting rights to add, edit, or delete table entries to only a few key users is vital to ensure the validity of your database and consistency of your data entry. This increases the accuracy of your records and reports.

A table is identifiable by a down arrow on the right side of a field. You can click the arrow or press **F4** on your keyboard to view a drop-down list of entries for a table. You can also place the cursor in the field and click the down arrow on your keyboard to scroll through the entries. You can enter text directly in the field. If the program does not recognize the text as a valid entry, it asks if you want to add the text as a new entry. Finally, you can press **F7** on your keyboard while the cursor is in a table field to access a screen where you can view, add, edit, and delete entries.

In addition to defining entries for existing tables, you can create new Donor Category tables to track cumulative giving levels for your constituents in Donor Category Reports. You can also create new Attribute tables through the **Attributes** link of *Configuration* to associate additional information with your records. For more information, see "Define an attribute" on page 53.

In a few special instances, you can create new tables to track information for which no field already exists in *The Raiser's Edge*. For example, when you create a new **Ratings** table entry (available with *Prospect Research Management*), you can create a new table with entries that further define the new **Ratings** entry. If the **Ratings** entry is "Prospects for 2001", you can link it to a new table with entries such as "Good Prospect" or "Potential Major Donor." You can delete only tables you create. To ensure consistency, you cannot rename or delete program-defined table entries. Any tables or table entries you define cannot be deleted if they are used on any records in the program.

Adding Entries and Tables

You can add and edit entries for standard tables. Standard table entries require you to enter only a description. Entries for some tables, such as **Phone Types** and **Benefits**, require additional information. You can create and name new Donor Category tables and define entries for them.

➢ **Adding a table entry**

You can add entries to a table. Some table entries appear with a long description; others give you the option of displaying either a long or short description. When you add a new entry, it appears at the bottom of the list of entries for the table.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

You can create a new Attribute table through the **Attributes** link of *Configuration*. The new table then appears in the list of tables on the Tables page. On the Tables page you can add new entries.

If you have security rights to add and edit tables, you can do so directly from any area in the program by pressing **F7** on your keyboard when the cursor is in a field with a table. A screen appears where you can add and edit entries for the table. When you type directly into a field with a table, if *The Raiser's Edge* does not recognize your entry, it asks if you want to add it as an entry.

2. Click the **Tables** link. The Tables page appears.
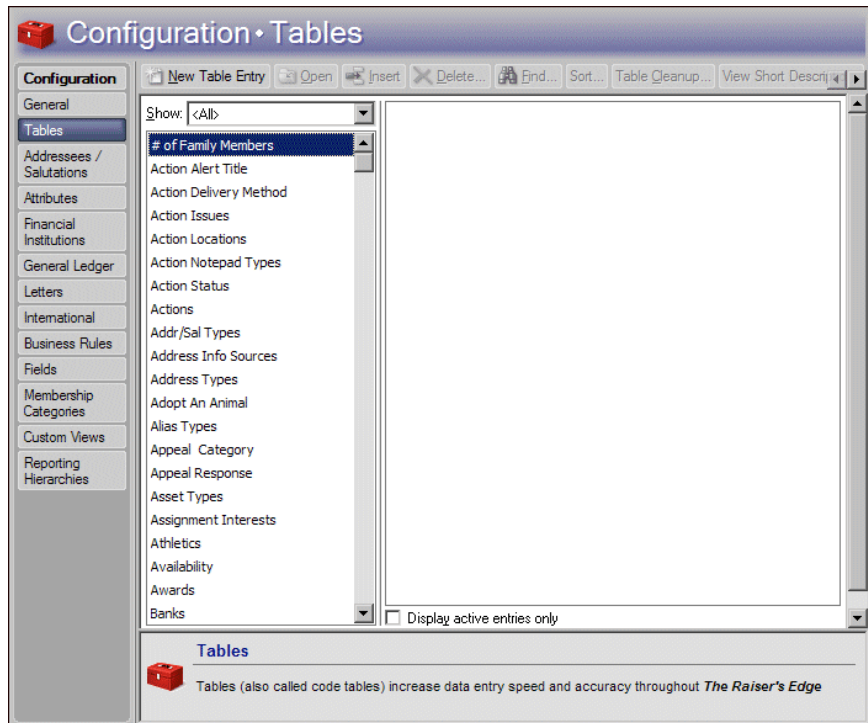
The default entry in the **Show** field is <All> which lists all tables in the program.

3. To filter the tables that appear in the Tables box, use the **Show** field. For example, if you select Biographical in the **Show** field, all biographical tables from the constituent record appear in the Tables box.

4. When you select a table in the Tables box, a list containing each entry for that table appears in the Table Entries box on the right. For example, if you select **Constituent Codes** in the Tables box on the left, all entries you have defined for that table appear in the Table Entries box.

5. When you mark **Display active entries only**, entries you have made inactive do not appear in the Table Entries box.

Only **New Table Entry** is enabled for both the Tables box and the Table Entries box, all other action bar options (such as **Open**, **Insert**, and **Delete**) function only for highlighted entries in the Table Entries box.

6. In the Tables box, select the table for which you want to create a new entry. On the action bar, click **New Table Entry**. The New Table Entry screen appears.

For some table entries, you define only a **Description**; for others. you must define both a long and **Short description**. For tables with both, you can display either description (see "Viewing table descriptions" on page 27). For example, you can create an entry for the **Constituent Code** table that displays a **Long description** of "Board Member" and a **Short description** of "BM."

With the exception of the **Suffixes** table (used to add suffixes such as ", Jr." and ", Ph.D." to addressee/salutations), table entries cannot begin or end with a space. When you add the entry, any leading or trailing spaces are removed by the program.

7. When you mark **Inactive**, you make the entry unavailable for use. If you mark **Display active entries only** on the Tables page, the table entry does not appear in the Table Entries box or when the table entries are viewed from another area of the program. When you mark this checkbox, you ensure the entry is not used on any further records without actually deleting it from your database.

8. To save the new entry, click **OK**. The new entry now appears in the Table Entries box on the Tables page. It also lists when you click the down arrow in the table field. The new entry appears at the bottom of the list. To place a new entry in a selected spot in the list, see "Inserting a new table entry" on page 22.

Donor Category Tables

Donor Category tables differ from other tables in the program. With Donor Categories, not only can you create new table entries for the three provided tables, you can create and name your own tables. These tables reflect different cumulative giving award categories for your donors and specify a minimum amount a donor must give to become a member of this category.

For example, you can create a donor category called "Major Donors" and for that table, you can create entries for "VIP" with a minimum cumulative giving amount of $10,000, "Benefactor" with a minimum amount of $5,000, and "Friend" with a minimum amount of $1,000.

When you establish donor category tables and entries, you can run a Donor Category report to evaluate your donor levels. For example, you can see how many of your donors fall into the "VIP" category with gifts totaling at least $10,000. For more information about Donor Category reports, see the *Reports Guide*.

➢ **Adding a new Donor Category table**

To add a new Donor Category table, you must right-click your mouse in the Tables box.

Your university needs to create a donor category for major donors to its annual fraternity Olympics charity fund-raiser. In keeping with the Olympic theme, the category will be called Medalist.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

The **Short description** can usually be no longer than six characters. The **Long description** can be no greater than 50 characters.

Even though you cannot delete table entries that are in use, you can ensure an entry is not used again by making it inactive and marking **Display active entries only** on the Tables page.

Donor categories and Membership categories are not the same. Donor categories define cumulative giving clubs or levels. Membership categories are available only if you have the optional module *Membership Management* and define levels of giving necessary to gain membership in one of your categories or clubs.

The right-click shortcut menu in **Tables** is different from the standard right-click shortcut menu. You can access the New Donor Category screen through the right-click menu.

3. Place the cursor anywhere in the Tables box on the left and right-click the mouse. A menu of short cut options appears.

4. From the menu, select **New Donor Category Table**. The New Donor Category Table screen appears.

5. In the **Name** field, enter "Medalist".

6. To save the new "Medalist" table, click **OK**. It now lists alphabetically in the Tables box.

➢ **Adding a Donor Category table entry**

You can add entries to a Donor Category table the program has defined or to any Donor Category tables you create.

Now that you created a new category of donor, you need to establish entries for your new Medalist table. Your school needs to create entries for a "Gold Club" with a minimum cumulative giving amount of $10,000, a "Silver Club" with a minimum amount of $5,000, and a "Bronze Club" with a minimum amount of $1,000.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. Select Medalist from the Tables box on the left.

4. On the action bar, click **New Table Entry**. The New Donor Category Table Entry screen appears.

5. In the **Name** field, enter "Gold Club".

You do not need to enter a currency symbol in the **Minimum amount** field. It defaults based on the country of your organization entered on the General screen of *Configuration*. Decimal placement and a thousands separator are determined on the International page of *Configuration*.

6. Enter the amount $10,000 as the **Minimum amount** to qualify a donor for the new donor category entry. Repeat these steps to create entries for a "Silver Club" and "Bronze Club" with the appropriate minimum amounts.

7. To save the new entries, click **OK**. They now appear in the Table Entries box on the Tables page.

Benefits Table Entries

Benefits table entries also differ from standard table entries in the program. You can use these entries to track different premiums, such as tote bags or coffee mugs, your organization gives to constituents based on their giving response to an appeal, or (if you have the optional modules *Membership Management* or *Event Management*) as a reward for purchasing a membership or attending an event. In addition to a description of the benefit, you must enter its cost.

When you edit a **Benefits** table entry, any default benefit already assigned to an appeal or membership is not affected. For example, if you enter a default benefit with a unit cost of $5 for an appeal, when you enter gifts on that appeal, the benefit defaults on the gift with a unit cost of $5. If the cost of the benefit rises to $6 and you update the **Benefits** table, the unit cost of $5 does not change on gifts that already have the benefit, only on new gifts added to the appeal.

➢ **Adding a Benefits table entry**

You can add **Benefit** table entries to track the premiums you give to constituents as rewards for giving to your organization.

   Your organization is giving a t-shirt to each constituent who donates to your annual Spring Phonathon Appeal. You pay $5.00 for each shirt.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
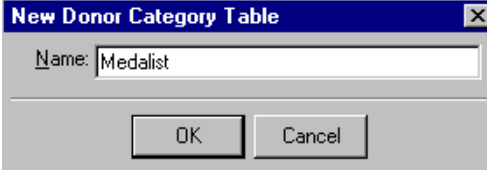
2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, select **Benefits**.

4. On the action bar, click **New Table Entry**. The New Benefits Table Entry screen appears.

5. In the **Description** field, enter "T-shirt".

6. Enter the amount $5.00 as the **Unit cost** per shirt.

7. To save the entry click **OK**. It now appears in the Table Entries box on the Tables page.

Phone Type Table Entries

Phone Type entries differ from standard table entries in that you can establish different phone types and determine how they display. You can also specify that entries of a specific type can be shared among constituents.

Sharing Phone Numbers

Phone type table entries include a **Do not share phones of this type** checkbox. When you mark this checkbox, phone entries or email addresses of this type cannot be shared among constituents in *The Raiser's Edge*.

When you link (share) addresses, certain rules determine whether phone numbers are shared.

- On a **Phone Type** table entry, when you mark **Do not share phones of this type**, Cannot be Shared appears on records in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type, and the field is locked.

  When you unmark **Do not share phones of this type**, Not Shared, Do Not Share, and Shared appear as selections in the dropdown list of the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type. Not Shared appears as the default until you change the status of a particular phone number.

- When you copy and link (share) an address, all phone numbers designated as Shared in the **Shared** column of the **Phones/Email/Links** grid on the record from which you copy (source record) are copied and shared. All numbers designated as Not Shared change to Shared.

- When you add a phone number that is a duplicate type on a shared address record, the existing number on the shared address record is overwritten.

- You can unlink a phone number at any time by changing the value of Shared in the **Shared** column of the **Phones/Email/Links** grid to Not Shared or Do Not Share.

- If an address is linked and you add a new phone number that is shareable, the number is automatically shared on all linked addresses.

- On a linked address record, beside a phone number in the **Phones/Email/Links** grid, when you change a Not Shared status in the **Shared** column to Shared, the phone number is added to all shared address records.

  On a linked address record, beside a phone number in the **Phones/Email/Links** grid, when you change a Shared status in the **Shared** column to Not Shared, the link for the phone number is broken only for that address record.

- When you break the link between shared addresses, all shared phone numbers change to Not Shared.

- If you change a shareable phone type to not shareable (by marking **Do not share phones of this type**), all links for that phone type on all shared addresses are broken. On records, the status in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type changes from Shared or Not Shared to Cannot be Shared.

  If you change a not shareable phone type to shareable (by unmarking **Do not share phones of this type**), the status in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type changes from Cannot be Shared to Not Shared.

Phone Number Formats

Phone type entries contain fields for a type of number and a format. For example, you can create entries for "Home" and "Business" with a format of "#(###)### - #### Ext ####." All the formats contain spaces for extensions. Because home phone numbers usually do not contain extensions, *The Raiser's Edge* formats numbers according to the number of digits you enter.

- If you enter seven digits, the program interprets the first three as the prefix and the next four as the number.

- If you enter ten digits, the program interprets the first three as the area code, the next three as the prefix, and the last four as the number.

- If you enter more than ten, but less than sixteen digits, and the first digit is one or zero, the program interprets the first digit as the long distance prefix, the next three as the area code, the next three as the prefix, the next four as the number, and any remaining as the extension.

- If the first digit is not a one or zero, the first three digits are interpreted as the area code with the remainder formatted as in the previous sentence. If the number is not one of the previous examples, *The Raiser's Edge* performs no formatting.

➢ **Adding a Phone Type table entry**

You can specify different phone types and format how phone numbers display throughout the program.

> You need to create a separate entry in the **Phone Type** table for "Business Fax." You want to include an extension number prefaced by "Ext" and parentheses around the area code in the format for the new entry.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the right, select **Phone Types**.

4. On the action bar, select **New Table Entry**. The New Phone Type screen appears.

5. In the **Description** field, enter "Business Fax".

6. In the **Phone number type** field, click the down arrow and select "Fax Number".

7. In the **Phone number format** field, click the down arrow and select "#(###)### - #### Ext ####".

Be careful when you select a **Phone number format**. Different formats can affect query results. For example, if you need to run a query to change an area code, you would get different results for numbers formatted with parentheses around the area code and ones formatted without parentheses.

When you select "Email" as the **Type** in the **Phones** grid on a record and enter an email address, a right-click shortcut menu enables you to send email to that address directly from the record.

When you enter a phone number on a record, you must also select a **Phone type** before you can save the record.

8. If you do not want to share this type of phone number when you copy and link (share) addresses from one constituent record to another, or from constituent records to relationship records, mark **Do not share phones of this type**.

9. To save the new entry, click **OK**. It now appears in the Table Entries box on the Tables page.

Awards Table Entries (Available with Volunteer Management)

If you have the optional module *Volunteer Management*, the Awards table is available. You can use Awards table entries to define awards you give to volunteers based on the amount of time they donate to your organization.
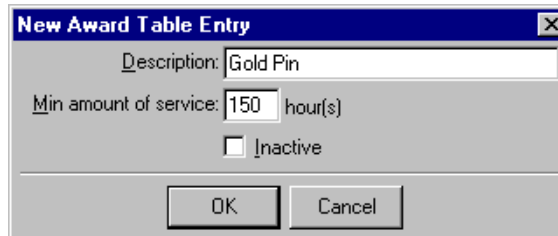
➢ **Adding an Awards table entry**

If you have *Volunteer Management*, you can give awards to your volunteers based on the amount of time they donate to your organization.

You need to add a gold pin as an award for volunteers who work at least 150 hours for your organization.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box, select **Awards**.

4. On the action bar, select **New Table Entry**. The New Award Table Entry screen appears.

5. In the **Description** field, enter "Gold Pin".

6. In the **Min amount of service** field, enter "150".

7. To save the new entry, click **OK**. It now appears in the Table Entries box on the Tables page.

Ratings Table Entries (Available with Prospect Research Management)

If you have the optional module *Prospect Research Management*, ratings tables are available. Ratings table entries are used in conjunction with outside ratings companies for prospect research. This table differs from a standard table in that you can define the data type for the new entry. For example, you might create a table based on how much a prospect is likely to give, and choose a data type of currency to create entries for the table.

➢ **Adding a new Ratings table entry**

To track information for your organization's prospective donors, you can add entries in the **Ratings** table.

You need to create a new **Ratings** table entry for your prospects for the year 2005. To help define prospects, you want to create a new table to work in conjunction with the new entry.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, select **Ratings**.

4. On the action bar, select **New Table Entry**. The New Ratings Entry screen appears.

5. In the **Description** field, enter "Prospect for 2005".

6. In the **Data Type** field, select "Table". The **Table name** field is enabled.

7. In the **Table Name** field, click the down arrow and select "[Add New table]." The Add New Table screen appears.

8. Enter "Ratings for 2005" as the **Name** of the new table.

   You can define entries such as "Good Prospect" and "Potential Major Donor" for this new table.

9. To save the new table, click **OK**. You return to the New Ratings entry screen.

10. To save the entry, click **OK**. It now appears in the Table Entries box on the Tables page.

Eliminating Duplicate Table Entries

Maintaining consistency in your table entries enables you to get the most accuracy in your queries and reports. However, even if you take great care in creating table entries, occasionally you can wind up with multiple entries that actually represent the same thing. For example, you may have **Action** table entries of "Phone Call" and "Telephone Call." A query based on "Phone Call" would not show the action entries of "Telephone Call" and therefore might not show all the records you would like included.

The Table Cleanup utility enables you to replace duplicate table entries. You select the entry you want to be replaced and the entry you want to replace it with. In the previous example, you may decide to replace the "Phone call" entry with "Telephone Call" in all records on which it appears. Additionally, you can specify that the entry you are replacing be deleted from *Configuration*, so it cannot be added to any new or edited records.

➢ **Cleaning up table entries**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. Select the table on the left that contains entries you want to clean up. In the action bar, click **Table Cleanup**. The Table Cleanup screen appears.
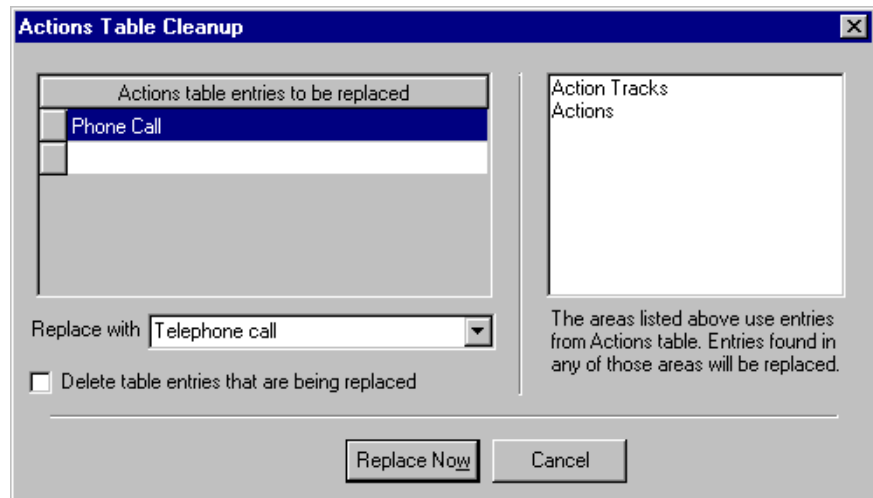
The box on the right displays the areas of the program that use entries in the selected table.

4. In the **Table entries to be replaced** grid, select the table entry to replace. This entry will be replaced on all records on which it currently appears.

5. In the **Replace with** field, select the entry you want to use to replace the entry you selected to be replaced.

6. When you mark **Delete table entries that are being replaced**, the entries are not only replaced on existing records, the old entry is deleted from *Configuration* so it cannot be added to any new or edited records.

If you enter a new table entry in the **Replace with** field, a message appears asking if you want to add the new entry for the selected table.

7. To change the table entries according to your selections, click **Replace Now**. You return to the Tables page of *Configuration*. If you mark **Delete table entries that are being replaced**, the entries you replaced no longer appear on the Tables page or on dropdowns or table lookups on records.

Managing Tables

You can edit table entries, insert new ones into selected spots in the grid, delete entries, delete user defined tables, print lists of entries, quickly find entries in the grid, sort and move entries, and view table descriptions.

➢ **Editing a table entry**

You can open an existing table entry and make changes to it. When you change a standard table entry, all records with the old entry update automatically to include the new entry. However, when you change an entry on a non-standard table such as **Benefits**, the change does not affect records that already contain the entry. Any changes you make appear only on records to which you add the entry after editing.

> Your organization created a **Committees** table as a constituent attribute. The table has an entry titled Strategic Planning. You need to change the name of the committee to Long Term Planning.
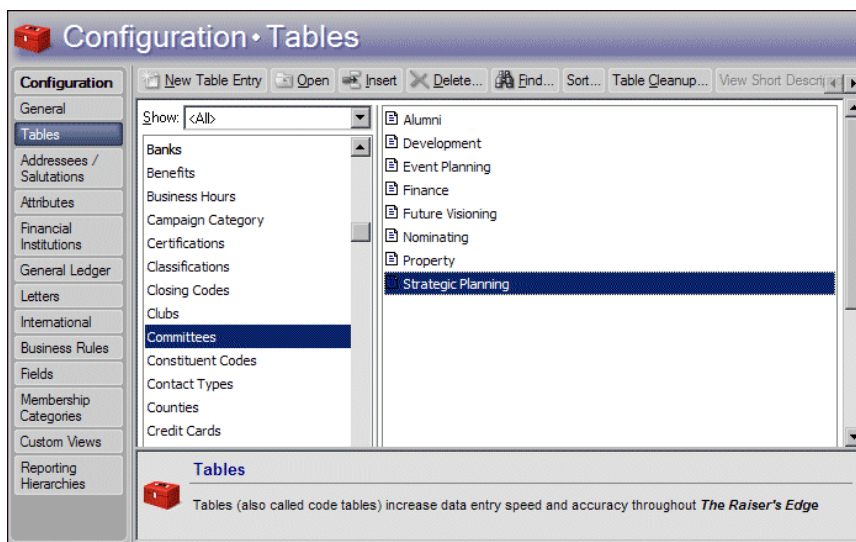
1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, select the **Committees** table.

4. In the Table Entries box on the right, select "Strategic Planning".

You cannot select the same entry in the **To be replaced** grid and the **Replace with** field. If you do, when you click **Replace Now**, a message appears informing you that you must change one of the entries.

5. On the action bar, click **Open**. The Edit Table Entry screen appears.

> **Edit Table Entry**   ☒
>
> Description: Strategic Planning
>
>   ☐ Inactive
>
>   [OK]   [Cancel]

6. Change the **Description** to "Long Term Planning".

7. Click **OK**. You return to the Tables page. The changes are automatically saved and you can now place the new entry on a record. The new "Long Term Planning" entry replaces the old "Strategic Planning" entry on all records.

➢ **Inserting a new table entry**

A table entry created with **New Table Entry** appears at the bottom of the list of entries. You can use **Insert** to create an entry and automatically place it in a selected spot on the list.

You can add an entry to a table. Your entry will always appear above the entry you select.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, select the table into which you want to insert a new entry.

4. In the Table Entries box on the right, select the entry above which you want to insert a new entry.

5. On the action bar, click **Insert**. The New Table Entry screen appears.

> **New Table Entry**   ☒
>
> Short description: BM
>
> Long description: Board Member
>
>   ☐ Inactive
>
>   [OK]   [Cancel]

6. Enter a **Description**. For some table entries, you define only a **Long description**; for others, you must define both a long and **Short description**. For tables with both, you can display either description (see "Viewing table descriptions" on page 27).

Even though you cannot delete table entries that are in use, you can ensure that an entry is not used again by making it inactive and marking **Display active entries only** on the Tables page.

When you mark **Inactive**, you make the entry unavailable for use. It does not appear when table entries are viewed from another area of the program. If you mark **Display active entries only** on the Tables page, the table entry does not appear in the Table Entries box.

7. To save the new entry, click **OK**. You return to the Tables page. The new entry now appears in the Table Entries box above the entry you selected in step four.


➢ **Deleting a table entry**

You can delete a table entry from the grid on the Tables page in *Configuration*; however, you can only delete entries that are not in use anywhere in the program.

You want to clean up your **Constituent Code** table by deleting codes you no longer use. You decide to eliminate the Friend entry. The entry is currently in use on several records.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, select **Constituent Code**.

4. In the Table Entries box, select "Friend".

5. On the action bar, click **Delete**. A confirmation message appears.
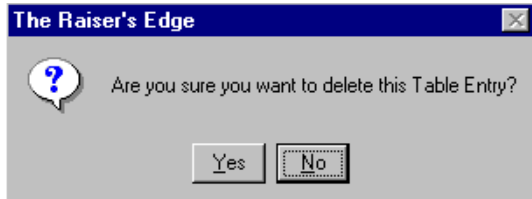
6. To delete the entry, click **Yes**. If the entry is in use anywhere in the program, the entry cannot be deleted. When you attempt to delete Friend from the **Constituent Code** table the following message appears.
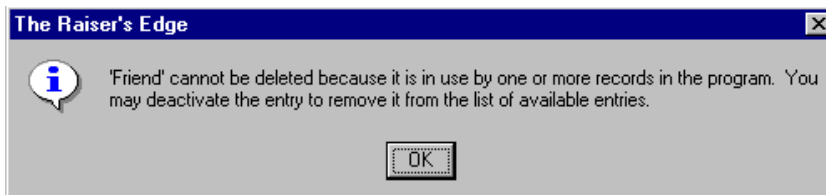
7. Click **OK**. You return to the Tables page. You must remove the entry from all records before you can delete it. As an alternative, we recommend you make the entry inactive so it cannot be added to any further records.

➢ **Deleting a user defined table**

You can delete only tables you defined, such as **Donor Category** or **Attribute** tables. You cannot delete a table if any of its entries are in use on a record. Before you can delete a table you defined, you must delete all its entries even if none of them are currently in use on a record. To delete a table from the right-click menu, select **Delete Code Table**.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, select a table you created.

4. With the cursor anywhere in the Tables box, right-click your mouse. A shortcut menu appears.

Only tables you create can be deleted. To delete them, you must use the right-click menu or select **File**, **Delete** from the menu bar. **Delete** on the action bar is enabled only for table entries.

5. If you defined no entries, or deleted all entries for a table, **Delete Code Table** is enabled in the shortcut menu. Select **Delete Code Table**. A verification message appears.
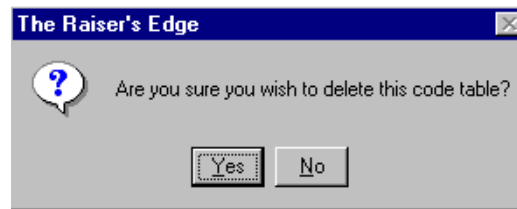
6. To delete the table, click **Yes**. You return to the Tables page.

➢ **Printing a list of table entries**

You can print a list of all your table entries to keep in your files or to use when creating a procedures notebook for your organization.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Table Entries box on the right, right-click anywhere. A shortcut menu appears.

4. From the shortcut menu, select **Print**, **Code Tables Report**. The Code Table Report screen appears.
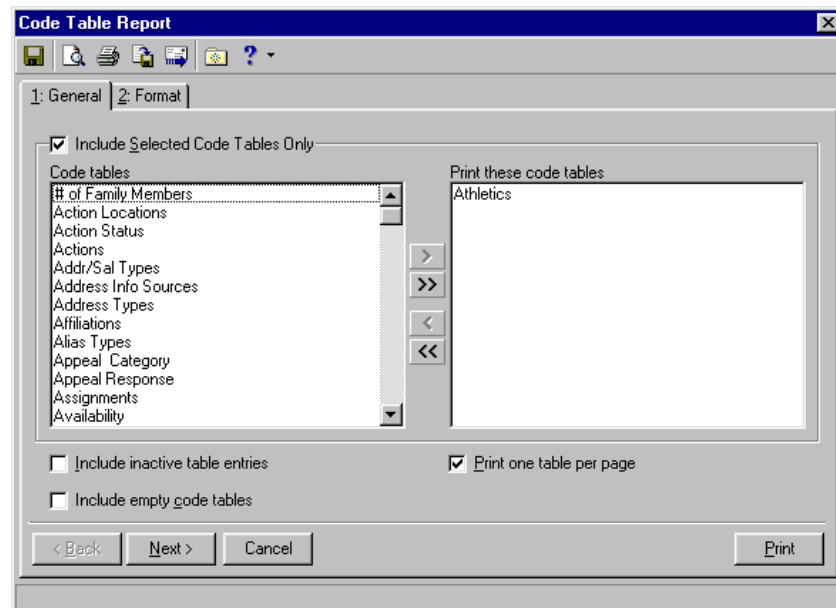
5. On the General tab, mark **Include selected code tables only** if you do not want to include all tables in the report.

6. To move the tables you want to print from the **Code tables** box into the **Print these code tables** box, use the arrows. You can also double-click a table to move it from one box to another.

7. To print entries you made inactive, mark **Include inactive table entries**. To print the names of tables for which you have defined no entries, mark **Include empty code tables**. To print each table on a separate page, mark **Print one table per page**.

8. Select the Format tab.
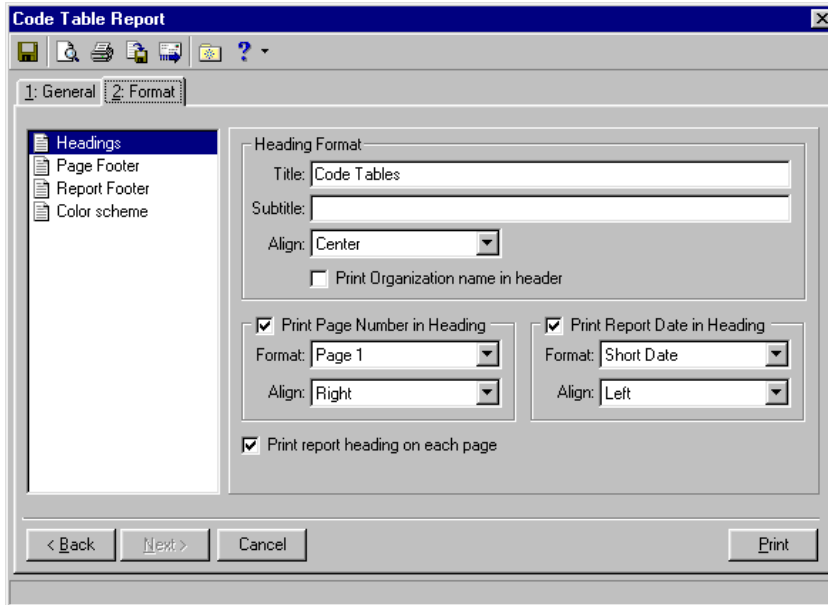
The Format tab contains a wide variety of settings you can use to customize the report. For more information about the Format tab, see the individual report guides.

9. To print the report, click **Print**.

➢ **Finding a table entry**

On the Tables page in *Configuration*, you can find any existing table entry in the program. You can search for entire entries or certain words or parts of entries. This is useful for tables that contain so many entries all are not visible on the screen at the same time.

You created a number of entries for the **Constituent Code** table. All entries are not visible in the Table Entries box at the same time. You need to find an entry for Current Parent in your table. Use this method as an alternative to scrolling through all the entries.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, select the **Constituent Code** table.

Find in the action bar always searches for table entries. However, if you right-click in the Tables box, you can use **Find** in the shortcut menu to find a table.

4. On the action bar, click **Find**. The Find screen appears.
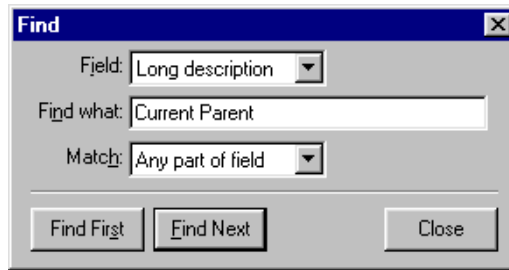
5. The entry in **Field** defaults to long or short description based on the current view you are using on the Tables page.

6. In the **Find what** field, enter the entry name or part of the name. Because you are searching for the constituent code Current Parent, enter a "c" in the **Find what** field.

7. In the **Match** field, select whether you want your entry in the **Find what** field to match: Any part of field, Whole field, or Start of field. In this case, select "Start of field".

8. Click **Find First** to find the first match that meets your search criteria. The first entry beginning with c (in the order the entries are listed, not alphabetically) is highlighted in the Table Entries box.

9. When you click **Find Next**, any subsequent entries beginning with c highlight in the Table Entries box.
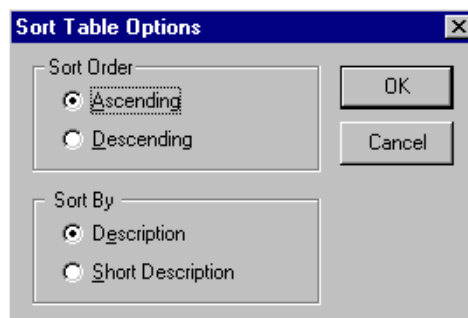
➢ **Sorting and moving table entries**

You can set the order in which table entries appear in the drop-down list. For tables with numerous entries you may want to sort the order alphabetically so you can quickly find particular entries. For your tables with easily recognizable short descriptions, you can sort by those descriptions. Tables with entries defined by the program, such as **State**, do not allow sorting. If you try to sort one of these tables, a message appears stating "A table with system-defined entries cannot be sorted."

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, highlight the table you want to sort.

4. On the action bar, click **Sort**. The Sort Table Options screen appears.

You can speed your data entry for tables with large numbers of entries by sorting the entries alphabetically. This makes individual entries easier to locate. Or, you can use the up and down arrows to place the most frequently used entries at the top of the list to save time when scrolling through it.

When you add new entries to a table using **New Table Entry**, they appear at the bottom of the list even if you already sorted the table entries. You must sort the table again to include the new entry in a sort order.

5. In the **Sort Order** frame, mark **Ascending** if you want the table entries to be in alphabetical order from A-Z. Mark **Descending** if you want them to be in reverse order from Z-A.

6. In the **Sort By** frame, mark **Description** if you want to sort the table entries by long descriptions. To sort them by short descriptions, mark **Short Description**.

7. To save your settings, click **OK**. You return to the Tables page.

8. On the Tables page, use **Up** and **Down** on the action bar to move a highlighted entry up or down one line in the list. You can save time scrolling through entries by placing the most frequently used ones at the top of the list.

➢ **Viewing table descriptions**

This option is enabled only for tables that contain entries with both a long and short description. You can select whether long and short descriptions of table entries appear in the list. You may want to view long descriptions first to learn your table entries. Then, once you become familiar with the long descriptions, you can view short descriptions to save time.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Tables** link. The Tables page appears.

3. In the Tables box on the left, select a table with both a long and short description, such as **Constituent Codes**.

4. On the action bar, click either **View Long descriptions** or **View Short Descriptions**. The buttons are enabled only when you select a table that has both long and short entries. The available command depends on which view you are currently using.

> The view you select here does not affect how these entries appear in data entry (by long or short description). You can select how the entries display on records on the General tab of User Options.

Table Descriptions

The following pages contain a list of tables in *The Raiser's Edge* along with descriptions and examples of each. The examples column is not meant to be a definitive list. The table descriptions are helpful in setting up your tables. When you create an attribute with a data type of table, you add tables not listed on the following pages. Additionally, when you make a field a "lookup" it appears in the list of tables in *Configuration*. For more information about making fields lookups, see the Fields section of the Configuration chapter of this book.

An asterisk (*) indicates that a table is available with an optional module.

Table Name	Location	Description	Examples
Action Location	Action record, General tab	Describes where an action such as a lunch meeting will take place.	Any location in which an action can take place. For example, Chamber of Commerce, Board Room, hotel, and restaurant.

Table Name	Location	Description	Examples
Action Status	Action record, General tab	Describes the state of progress for an action.	Open, Closed, Pending, and Continuous. The Tickler Report (one of several Action Reports) can be processed based on an action's status. The Tickler Report can only be processed for Open actions (for example, a list of pending tasks).
Action	Action record, General tab	Describes any action taken toward a constituent on a specific date. Also used to track the entire cultivation and solicitation process.	Lunch Meeting, Dinner Meeting, Follow-Up Call, Sent Black Tie Invite, Accepted Black Tie Invite, Declined Black Tie Invite, Attended Black Tie Dinner.
Addr/Sal Types	Constituent record, Addressees/Salutations tab	Defines the purpose of a particular addressee or salutation.	You can define Addr/Sal Types for reporting and for different mailings. Examples may include: Alumni Mailing, Informal Salutation, Informal Addressee, Spouse Salutation, and Invitation Mailing.
Address Info Sources	On screens containing address information	Identifies the origin of the address information.	Post Office, Mailing House, Survey, Membership Form, and Telephone Book.
Address Types	On screens containing address information	Identifies the purpose or type of address for information purposes.	Home, Vacation Home, Winter Home, Business, and Rental Property Address.
Affiliations	This table is not currently used anywhere in the program. It contains values for the Affiliations tables from *The Raiser's Edge* 6.x if those values were converted. You can use information as an attribute table in version 7.	Defines a constituent's association with a business, club, or other organization. You can identify constituents' involvement in local professional associations, service on the board of another nonprofit, or the church in which they are a member	Charitable Society, Financial Institution, Healthcare Organization, Religious Organization, and School.
Alias Types	Aliases screen (via the Alias button on screens where name information can be entered)	Defines another name which an individual or organization might use, such as an acronym for an organization.	Stage Name for an individual and Annual Report Name for an organization.

Table Name	Location	Description	Examples
Appeal Category	Appeal record, General tab	Groups appeals together. For example, you may have several different appeals aimed at major donors.	Continuous, Direct Mail, Major Donor, and Prospect.
Appeal Response	Constituent Record, Appeals tab	Indicates how a constituent responded when contacted during an appeal.	Received, Requests removal from mailings, Interested at a later date, and Attended.
Assignment Interests*	Constituent record, Volunteer tab; Job record, Details tab	Identifies areas in which volunteers are interested in working.	Information Desk, Newsletter Staff, Photography, Seniors, Soup Kitchen, Phonathon, and Gift Shop.
Awards*	Constituent record, Volunteer tab	Tracks past awards and hours toward the next award level.	500 hrs. Gold Pin, 200 hrs. Silver Pin, and 100 hrs. Bronze Pin.
Banks	Configuration, Financial Institutions link; Constituent records, Relationships tab	These entries define banks with which you conduct business such as eft or other transactions. Do not confuse these institutions with banks you may enter into your database as constituents.	Any financial institution. For example, Lexington State Bank, Federal Credit Union, and Bank of the Nation. After you add the institution, you can add individual branches within the bank.
Benefits	Configuration, Membership Categories; Constituent record, Memberships tab; Membership record, Memberships tab; Appeal record, General tab; Packages, General tab; Event Participant record, Registration Fees/Donations tab	Tracks different premiums received by constituents based on their membership level(s) or giving response to appeals.	10% Discount, Free admission, Newsletter, Coffee mug, T-shirt, and Calendar.
Campaign Category	Campaign record, General tab	Groups campaigns together. For example, you may have a number of different campaigns in the "Operating" category.	Annual, Capital, Operating, and Event.

Table Name	Location	Description	Examples
Campaign Goal	This table is not currently used anywhere in *The Raiser's Edge.* You can associate it with an attribute if you want to establish certain goals for your campaigns.	Defines levels of success you hope to reach with a campaign.	Exceed last year by 10%, Exceed last year by 20%, and Exceed last year by 50%.
Certifications*	Constituent record, Volunteer tab; Job record, Details tab	Tracks any certification volunteers have received qualifying them for a job. For example, if volunteering to teach CPR classes, the volunteer would need to be CPR certified.	Real Estate License, Certified Public Accountant, and Certified Lifeguard.
Classifications*	Constituent record, Prospect tab	Identifies and classifies prospects.	Individual, Corporate, Organization, and Major Donor.
Constituent Codes	Constituent record, Bio 2 tab or Org 2 tab; Gift record, Miscellaneous tab	Constituent codes define the relationship(s) or connection a constituent has to your organization. Every constituent should have at least one constituent code to explain why he is in your database. Constituent codes classify groups of constituents for analysis throughout the program in queries, reports, and other functions.	Board Member, Alumni, Current Parent, Student, Volunteer, Staff, Employee, Corporation, Foundation, and Matching Gift Company.
Contact Types	Constituent record, Relationships tab (organizations only).	Defines the purpose of the contact relationship for an organization.	Primary, Social, Mailing, Corporate Donations, and Volunteer Coordinator.
Counties	On screens containing address information	Defines counties in which constituents live, financial institutions are located, etc.	Charleston, Orange, Berkeley, and Dorchester Counties.
Credit Cards	Constituent record, Bio 2 tab; Gift record, Miscellaneous tab	Stores information about a donation made by credit card.	American Express, Visa, and MasterCard.

Table Name	Location	Description	Examples
Currency Types	Accessed through Configuration, International link	Tracks the associated currency for different countries. Your native currency symbol is established in the Windows Control Panel.	Dollars, Pounds, Drachma, and Yen.
Degrees*	Education record, School tab (via Constituent record, Bio 1 tab, Education button)	Tracks a constituent's level of education.	Bachelor of Arts, Bachelor of Science, Masters, and Ph.D.
Departments*	Constituent record, Volunteer tab; Job record, Volunteers tab	Identifies the office or department where a volunteer is assigned to work.	Business, Education, Public Safety, Community Service, and Maintenance.
Divisions*	Sport Information screen (via Participant record General 1 tab, More Info button)	Part of a participant's assignment information, for a sporting event. Divisions can be used as to group participants or teams of participants in an event.	Majors Division, Minors Division, Employees Division, and Corporate Division.
Donor Age Analysis Codes	This table is used for Demographic and Statistical Reports	Donor Age Analysis Codes use the Birth date field on the Bio 1tab of the constituent record to calculate age groups. The Statistical Report by Age Group uses this information to analyze giving by age.	Donor Age codes should be entered in ascending order. Enter an age and when reports are processed, the program establishes ranges between each age entered. For example, if you have two entries, 50 and 60, the report calculates the age range 50-60.
Donor Categories – Table 1	This table is used for the Donor Category Report	Donor Categories identify "cumulative" giving clubs with a required amount of giving. Categories are established (in the table) in descending order. The Donor Category Report is an Analytical Report. If you have the optional module *Membership Management*, be sure you do not confuse Donor Categories with Membership Categories.	Gold Club with a required amount of $10,000, Silver Club with a required amount of $5,000, and Bronze Club with a required amount of $1,000.

Table Name	Location	Description	Examples
Donor Categories – Table 2	This table is used for the Donor Category Report	This is an additional table to use if you need to measure cumulative giving in more than one predetermined set of giving ranges. You can set up your giving levels in any one of three tables. The Donor Category Report is an Analytical Report. If you only need to measure one set of giving levels, you only need to use one table.	Diamond Club with a required amount of $10,000, a Ruby Club with a required amount of $5,000, and an Emerald Club with a required amount of $1,000.
Donor Categories – Table 3	This table is used for the Donor Category Report	This is an additional table to use if you need to measure cumulative giving in more than one predetermined set of giving ranges. You can set up your giving levels in any one of these three tables. If you only need to measure one set of giving levels, you only need to use one table.	Sustainer with a required amount of $10,000, Benefactor with a required amount of $5,000, and Sponsor with a required amount of 1,000.
Education Status*	Constituent record, Bio 1 tab, Education button	Describes the current status of a constituent's higher education.	Graduated, Registered, Dismissed, Probation, Internship Program, Current Student, and Transferred Out.
Ethnicity	Constituent record, Bio 2 tab	Classifies constituents by their ethnicity.	African American, Hispanic, Asian, and Caucasian.
Event Awards*	Participant record (accessed through the event or constituent record), More Info button	Awards presented to participants at an event.	Golfing pass, Golf Clubs, Gift Certificate, and Volunteer Award.
Event Expenses*	Event record, Expenses tab	Any expenses incurred from holding a special event.	Table Rental, Catering, Room Rental, Green Fees, Photography, Printing, Supplies, and Postage.
Event Groups*	Event record, General tab	Used to group events of a similar type together. For example, you may hold several Dinner events each year.	Summer Series of Fun, Dinner, Alumni, Auction, and Yearly Gala Balls.
Event Menu Items*	Dinner event record, From menu bar, select Event, Menu	Any food items you serve at a dinner event.	Caesar Salad, Potato Salad, Vegetables, Beef Wellington, and Trout Almondine.

Table Name	Location	Description	Examples
Event Notepad Types*	Event record, Notes tab	You can create different categories for event notes. Security settings can be based on different types of notepads.	Alternate Location Information, Prospect Notes, Location Notes, Participant Notes, and Agenda.
Event Types*	Event record, General tab	Describes the type of event being held.	Golf Tournament, Grand Opening, Seminar, Yearly Gala Ball, and Volunteer Appreciation.
Event Units*	Event record, Prices tab; Participant record, Registration Fees/Donations tab; Constituent Record, Events tab, Registrant Fees/Donations tab	Describes what the participant purchased for the event. The units you use will vary according to the type of event you are holding.	Individual, Foursome, Hole in One Sponsor, Corporate Sponsor, Couple, Family, Group, Adult, and Child.
Expense Types	Appeal record, Attributes/Expenses tab	Any expenses incurred from fundraising through a specific appeal.	Catering, Printing, Postage, Phone Charges, and Mailing List.
Financial Data Types*	Constituent record, Prospect tab, Financial button	Tracks prospects' assets.	Real Estate, Stock Holdings, and Net Worth.
Fund Categories	Fund record, General tab	Categories group funds together. For example, an Equipment Fund, Computer Fund, and a Library Fund can all be considered a part of the General Operating Fund Category. Queries can be created based on Fund Category information.	Annual, Capital, Scholarship, Endowment, Restricted, Unrestricted, and Membership.
Fund Goal	This table is not currently used anywhere in *The Raiser's Edge.* You can associate it with an attribute if you want to establish certain goals for your campaigns.	Defines levels of success you hope to reach with a fund.	Exceed last year by 10%, Exceed last year by 20%, and Exceed last year by 50%.

Table Name	Location	Description	Examples
Gift Codes	Gift record, Miscellaneous tab	Used to track gift characteristics. For example, if your organization recognizes certain constituents for their gifts by placing their names on a plaque, you can add a gift code of "Donor Wall" to gifts that meet the requirements. Because you are tracking whether a constituent should be included on the donor wall, you can use this information to create a query or a mailing for individuals who qualify for the donor wall.	Donor Wall, Hall of Fame, and Special Honors.
Gift Size Analysis Codes	This table is used for reporting purposes.	Allows you to run Statistical Reports by Gift Size. These reports analyze the number of gifts within your gift amount ranges. Gift amounts are entered in descending order.	If the table has a gift amount of $0 and another for $99, the Statistical Report by Gift Size automatically reports on these amounts as a range (i.e., 0-99). You received x amount of gifts from x amount of donors totaling x amount of dollars. This report determines the mean gift size constituents donate and other statistics.
Gift Notepad Types	Gift record, Miscellaneous tab	You can create different categories for gift notes. Security settings can be based on different types of notepads.	Planned Giving, Large Donation, Solicitation Information, and Property.
Gift Subtypes	Gift record, Gift tab; Fund record, GL Distributions tab	Establish gift subtypes to further define your gift entry. For example, if your organization receives frequent donations of computers, you can select Gift-in-Kind in the Gift type field and enter a Gift subtype of Computers.	Annuity, Bequest, Charitable Lead Trust, and Acreage.

Table Name	Location	Description	Examples
Income	For an individual: Constituent record, Bio 1 tab, Business button; for an organization: Constituent record, Bio 2 tab	Indicates an individual's or an organization's net worth. Income Level on the business screen of an individual's record tracks the salary level for that constituent. This table should be set up in ranges of amounts in descending order. The Statistical Report by Income Range uses this information.	Income ranges include $15,000-$19,999, $20,000-$24,999, and $25,000-$29,999. These ranges can be based on any increment your organization tracks.
Industries	For an individual: Constituent record, Bio 1 tab, Business button; for an organization: Constituent record, Bio 2 tab	Industry tracks the type of business.	Transportation, Computers, Healthcare, Construction, Finance, Legal, Research, and Insurance.
Information Sources*	Prospect record (via Constituent record, Prospect tab, Financial button)	Tracks the source used to gather information about your prospect's financial/asset information.	Tax Assessor, Prospect Research Firm, SEC, and S&P.
Instruments*	Prospect record (via Constituent record, Prospect tab, Proposal button)	Further defines the Type of Gift (e.g., for a Planned gift when preparing proposals).	DGA, IGA, CRAT, CRUT, NIMCRUT, and PIF.
Job Category*	Job record, General tab	Links similar jobs under the same umbrella. For example you may have several different jobs that are all for events.	Coordinator, Event, Office Staff, Maintenance Staff, and Instructors
Job Task*	Job Assignment screen (via Job record, Volunteers tab; Constituent record, Volunteer tab)	Defines the type of task called for in a specific job	Counseling, Data Entry, Facilitate Class, and Meal Server
Locations*	Job Assignment screen (via Job record, Volunteers tab; Constituent record, Volunteer tab)	The name or specific address of a location where a job will take place.	Emergency Service Department, Mission and Shelter,
Lodgings*	Participant record, General 2 tab	Lodgings are part of a participant's assignment information, which identifies special table, seating, lodging, or team assignments for a participant in a special event.	Name of the hotel or other facility to which the participant is assigned. For example, Dorms, Campsite, Cabins, and Off Campus.

Table Name	Location	Description	Examples
Mail Types	On screens containing address information	Identifies the type of mail the constituent receives at the associated address. You can choose to send All Mail Types, Selected Mail Types, or No Mail for each address.	Newsletter, Acknowledgment Letter, Receipt, Reminder, Solicitation Letters, and Birthday or Christmas Cards.
Major/Minor*	Education record, School tab (via Constituent record, Bio 1 tab, Education button)	Identifies constituent's area of study.	Accounting, Biology, Business, Chemistry, English Literature, and Theology.
Marital Status	Constituent record, Bio 1 tab	Defines a constituent's current marital status.	Married, Widowed, Divorced, Single, Separated, Partner, and Significant Other.
Media Type	Constituent record, Media tab; Event record, Media tab; Proposal record, Media tab	Identifies the type of media record you are viewing or adding.	Video, Picture, Clipping, Document, and Map.
Membership Card Types*	Membership record, Card Information screen (via Membership tab, Members & Cards button)	Identifies the type of membership card available with a membership.	Joint, Child, Corporate, Guest, and Temporary.
Membership Categories*	Membership record, Membership tab (Membership Categories are established in Configuration)	A membership category defines the level of giving required for a constituent to gain membership in one of your categories or clubs. You can define membership categories based on program titles, minimum and maximum dues amounts, and number of members.	Lifetime, Student, Patron, Senior, Corporate, Sustainer, Benefactor, Individual, and Family.
Membership Programs*	Membership record, Membership tab (Programs are established in the Membership Categories link of Configuration)	Programs are used to group membership categories under the same umbrella. For example, you may have an Education Program that includes the Sustainer, Individual, and Family categories.	Education, Individual, Business Level, and Friends of the Museum.

Table Name	Location	Description	Examples
Membership Subcategories*	Membership record, Membership tab (Subcategories are established in the Membership Categories link of Configuration)	You can use subcategories to further define membership categories. For example, you may have a Student category, with subcategories of High School and College.	High School, College, Preservation Society, and International.
Notepad Types	Constituent, Event, and Gift records, Notes tab	Defines the information stored on the Notepad record. These types can be used to limit security access.	Director's Notes, Solicitor's Notes, Career Notes, Confidential Notes, and Family Notes.
NZ Cities	Biographical	Used when importing or otherwise manipulating addresses located in New Zealand.	Any city in New Zealand.
NZ Suburbs	Biographical	Used when importing or otherwise manipulating addresses located in New Zealand.	Any suburb in New Zealand.
Organization Type*	Constituent record, Prospect tab	Indicates the type of organization to which a prospect has given in the past.	Medical, Education, Environmental, and Youth Development.
Package Category	Appeal record, Packages Tab	Package categories are a way to group similar packages together. For example, you can group packages for booklets, brochures, newsletters, and postcards under the Mailing category.	Newspaper, Website, Radio, and Newsletter.
Participant Status*	Event record, Participants tab	Track a special event participant's status.	Paid, Not Paid, and Complimentary.
Participation*	Event record, Participants tab	Indicates a special event participant's level.	Captain, Individual, Team Member, and Couple.
Phone Types	Individuals: Constituent record Bio 1 tab (Home, Alternate, and Business Address); Organizations: Constituent record Org 1, and Contacts tabs	Classifies the phone number by type. Since every address can have multiple telephone numbers, the type lets you classify each. Telephone numbers should be entered in descending order of importance.	Home, Car, Beeper, Home Fax, Summer Home, Winter Home, Business, Business Fax, Main Office, and E-mail.

Table Name	Location	Description	Examples
Professions	Relationship General 1 tab. (individuals via Constituent record, Relationships tab or Bio 1 tab, Business button; organizations via Constituent record, Contacts tab)	Identifies a relationship's profession or general area of employment.	Administration, Banking, Computers, Government, Medicine, Law, and Engineering.
Proposal Reasons*	Proposal record, General tab (via Constituent record, Prospect tab, Proposal button in action bar)	Indicates the reason a proposal is being made to the constituent. For example, she may have recently received a salary bonus or increase.	General, Inheritance, Salary Bonus, and Sale of Business.
Proposal Status*	Proposal record, General tab (via Constituent record, Prospect tab, Proposal button in action bar)	Indicates the standing of a proposal.	Initial Contact, Pending, Accepted, and Rejected.
Prospect Interests*	Constituent record, Prospect tab	Identifies areas or specific programs to which a prospect is interested in giving.	Cancer Research, AIDS Research, Children's Programs, and Athletic Programs.
Prospect Status*	Constituent record, Prospect tab	Indicates the standing of a prospect.	Accepted, Active, Cultivation, Pending, Rejected, and Solicited
Purposes*	Proposal record, General tab (via Constituent record, Prospect tab, Proposal button in action bar)	Identifies the intended use of a proposed donation once received.	West Wing Cancer Center, Research Current, Research Endowment, and Discretionary.
Ratings*	Constituent record, Prospect tab	Prospect ratings are obtained from research firms. Prospect ratings can vary depending on your source of information.	Excellent Prospect, Hesitant, Needs Cultivation, Very Good, and Excellent.
Reason *	Drop Membership screen (via Constituent record, Membership tab, Drop button on the action bar)	Tracks why a membership was dropped.	Moved, Program Ended, Failed to Complete Payment Schedule, Member Request, and Check Returned.

Table Name	Location	Description	Examples
Regions	On screens containing address information	Identifies the geographic location of the address.	Pacific Northwest, Northeast, Southeast, MidWest, and Europe.
Registration Response*	Event record, Participant (registrant) record, General 1 tab	Indicates how a registrant responded to an event invitation.	Accepted, Declined, Requested More Information, and Tentative.
Relationship	Constituent record, Relationships tab	Relationships describe the associations a constituent has with other individuals or groups.	Mother, Daughter, Father, Sister, Brother, Friend, Attorney, Executor, Golfing Partner, and Business Partner.
Religions	Individual Constituent record, Bio 2 tab	Identifies a constituent's religious affiliation or preference.	Baptist, Catholic, Jewish, Lutheran, and Muslim.
School Types	Individual Constituent record, Bio 1 tab, Education button	Classifies educational institutions.	Community College, Technical College, Junior College, University, Law School, and Medical School.
Schools	Individual Constituent record, Bio 1 tab, Spouse tab, Education button	Defines the specific name of an educational institution.	The Citadel, Duke University, Yale, Harvard, and University of Washington.
Solicit Code	Constituent record, Bio 1 or Org 1 tab	Indicates whether or how often a constituent can be solicited.	One solicitation annually, Do not solicit, Do not phone, Do not mail, Removed by request, and No mail temporarily.
Solicitor Goal Categories	Solicitor Information screen, Goals tab (via Constituent record, Bio 1 tab, Details button)	These categories group unspecified goals (those not associated with a campaign or fund). For example, you may have a category called Flowers, for the purpose of covering the expense of flowers or plants your organization purchases as condolence or congratulatory gifts for constituents.	Food Costs, Flowers, and Mailing Fees.
Solicitor Type	Solicitor Information screen, Assignments tab (via Constituent record, Bio 1 tab, Details button)	Specifies the sort of solicitor for a specific assignment.	Annual, Campaign, Event, Fund, Membership, Staff, and Volunteer.

Table Name	Location	Description	Examples
Sources	Constituent record, Prospect tab.	Identifies the organization that provided a prospect rating.	Forbes, General Research, Marts & Lundy, The Whelan Group, and Econometrics
Special Interests	This table is not currently used anywhere in *The Raiser's Edge.* You can associate it with an attribute if you want to track interests for your constituents.	You can use this table to track areas of interest for your constituents. For example, you could target invitations to golf tournament event to constituents with the special interest of "Golf."	Boating, Photography, Reading, and Soccer.
Sporting Event Location	Sport Information screen (via Participant record General 1 tab, More Info button)	Indicates the location of a particular participant for a sporting event. For example, your golf tournament may be held at a country club with more than one course. You can select which course a participant is scheduled to play on here.	Sea Gull Course, Osprey Course, Track A, and Track B.
Sporting Event Position	Sport Information screen (via Participant record General 1 tab, More Info button)	Indicates the position a participant is assigned for a sporting event.	Captain, Pitcher, Second base, and Goalie.
States	On screens containing address information	Indicates state in an address	All states
Suffixes (This table is established when the program is installed. You can change or add to this table when the need arises.)	For individuals: Constituent record, Bio 1, Spouse, and Relation tabs. For organizations: Constituent record, Contacts tab	A suffix is an addition to the constituent's name. It appears after the last name.	Jr., Sr., II, and MD. Any punctuation that should print before the suffix should also appear in the table.
Targets	Constituent record, Bio 2 tab	Indicates the amount you hope will be donated per year. This table establishes ranges for amounts in descending order. An Analytical Report, Actual vs. Target Report, compares the targeted amount with the actual amount donated.	$10,000-$14,999, $15,000-$19,999, and $20,000-$24,999. These ranges can be based on any increment your organization tracks.

Table Name	Location	Description	Examples
Teams*	Sport Information screen (via Participant record General 1 tab, More Info button)	Used to group constituents participating in an event as a team.	Teams for a golf tournament, a walk, or a run.
Titles (This table is established when the program is installed. You can change or add to this table when the need arises.)	For individuals: Constituent record, Bio 1, Spouse and Relation tabs. For organizations: Constituent record, Contacts tab	Identifies a constituent's "titles." You do not need one title for "Mr. and Mrs." Instead, place the constituent's title in the first title field and the spouse's title on the Spouse tab.	Mr., Reverend, Dr., Mrs., Judge, Father, and General.
Travel Name*	Participant record, General 2 tab	Indicates how a participant will be travelling to an event.	Delta, American, Southwest, or Amtrak.
Travel Type*	Participant record, General 2 tab	Indicates method of transportation a participant will use to travel to an event.	Airline, Train, Taxi, and Limousine.
Tribute Types*	Tribute record (via Constituent record, Honor/Memorial tab; Gift record, Tribute tab)	Indicates why a tribute gift is being given.	For the Benefit of, In Bequest of, In Honor of, In Special Recognition of, and In Support of.
Types of Gift*	Proposal record (via Constituent record, Prospect tab, Proposal button)	Identifies the form of payment the prospect will donate to fulfill a proposed donation.	Cash, Pledge, Planned Gift, Annuity, Trust, and Bequeath.
Vendor Purpose*	Participant record, Participation tab	Indicates what a participant vendor will be providing at an event.	Registration, Florist, Caterer, Awards, Parking Services, and Provide appetizers.
Vendor Rating*	Participant record, Participation tab	Indicates the merit of a vendor at an event.	Four Star, Highly Recommended, and Excellent.
Volunteer Checklist*	Constituent record, Volunteer tab; Job record, Details tab	Indicates items a volunteer must complete before she can be assigned to a job.	Complete Application, Attend Orientation, Tetanus Shot, and Health and Sanitation Class.
Volunteer Checklist Letters*	Constituent record, Volunteer tab	Indicates which letter should be sent to a volunteer as thanks or acknowledgement for completing a checklist item.	Orientation Letter, Application Letter, Health Letter, and Checklist Thank-you.
Volunteer Courses*	Constituent record, Volunteer tab; Job record, Details tab	Tracks special training/courses a volunteer has completed or that are necessary to perform a job.	CPR, Historic Preservation, Water Safety, First Aid, and Job Skills Assessment.

Table Name	Location	Description	Examples
Volunteer License Type*	Constituent record, Volunteer tab; Job record, Details tab	Identifies special licenses a volunteer possesses or that are necessary to perform a job.	Class 1A, Red Cross Certified, Driver's License, CPR Certified, and Contracting License.
Volunteer Medical Information*	Constituent record, Volunteer tab; Job record, Details tab	Indicates medical information which might qualify or disqualify a volunteer for a job.	TB Test, Tetanus Shot, Diabetes, and Heart Condition.
Volunteer Positions*	Constituent record, Volunteer tab; Job record, Volunteers tab	Indicates a job title or type of work a volunteer will be assigned to on a job	Supervisor, Runner, Food Server, and Greeter.
Volunteer Skill Levels*	Constituent record, Volunteer tab; Job record, Details tab	Tracks levels for a volunteer's skills. For example, if typing is a skill a volunteer needs, you can track the number of words/minute the volunteer can type.	Average, Above Average, Highly Skilled, Expert, and Minimal Training.
Volunteer Skills*	Constituent record, Volunteer tab; Job record, Details tab	Identifies special skills/experiences the volunteer possesses or that are required to perform a job.	Typing, Construction, Plumbing, Artistic, and Interpreter.
Volunteer Special Needs*	Constituent record, Volunteer tab; Job record, Details tab	Identifies special needs that may disqualify volunteers from performing certain jobs.	Wheelchair, Wheelchair Access, and Baby sitting Service.
Volunteer Status*	Constituent record, Volunteer tab	Identifies the volunteer's current standing.	Active, Inactive, Former, In Training, and Part time.
Volunteer Types*	Constituent record, Volunteer tab; Job record, Volunteers tab	Defines the volunteer's purpose for volunteering.	Office Staff, Phonathon, Corporate, Interpreter, Medical Staff, and Office Staff.
Volunteer Vehicle Type*	Constituent record, Volunteer tab	Indicates the type of vehicle to which a volunteer has access.	Car, Truck, Four Wheel Drive, and SUV.

Addressee/Salutations

From the Addressee/Salutation page, you can view, add, edit, and delete formats for the Addressee/Salutation tab of the constituent record.

An addressee is how a constituent name appears on mailing labels, reports, and the inside address of letters. A salutation is how you greet a constituent in letters or other mailings. Standard entries are included with *The Raiser's Edge*, but you can add to or change the formats currently in the program as necessary.

You can add characters and words to the list of choices for fields in your addressees and salutations. For example, you can add **Guest** as a field so you can create addressees or salutations of "Mr. Smith and Guest" for any event that involves guests.

➢ **Adding an addressee/salutation**

You can add new addressee/salutation formats to those already in the program.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Addressee/Salutations** link. The Addressee/Salutations page appears.
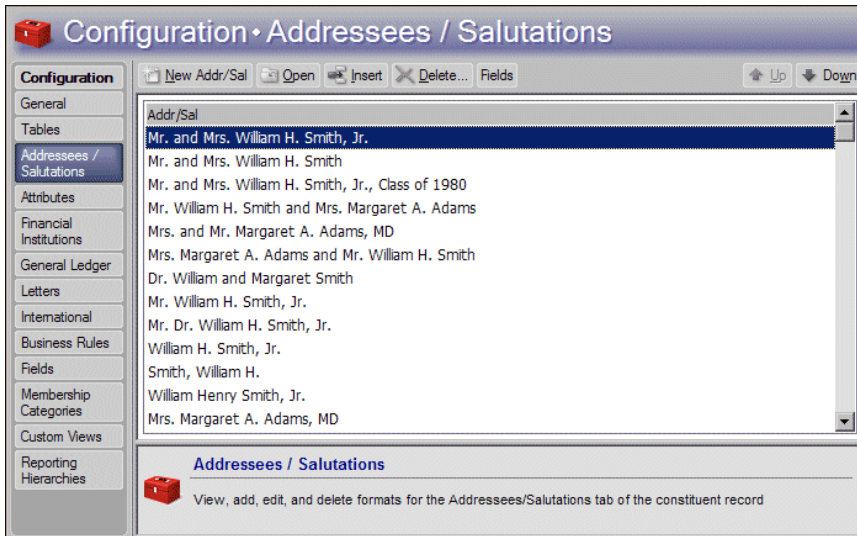
The grid lists all defined addressees and salutations in the program.

3. On the action bar, click **New Addr/Sal**. The New Addressee/Salutation screen appears.
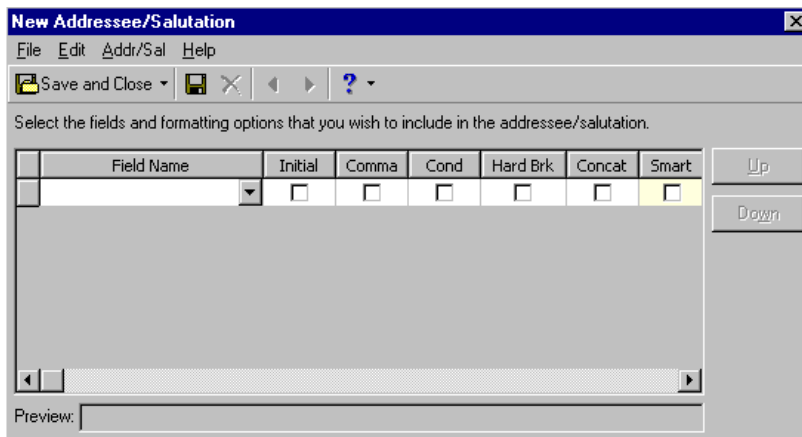
The Addressee/Salutation examples listed are sample formats. The names used are fictitious and are meant only to provide examples of available formats.

An addressee/salutation created using **New Addr/Sal** appears at the bottom of the list in the Addressee/Salutations grid. You can use **Insert** to create a new addressee/salutation and place it wherever you want in the grid. You can also use the Up and Down arrows to change the order of the addressee/salutations in the grid.

4. To view a list of the fields you can use to build a new addressee/salutation, place your cursor in the top field of the **Field Name** column and click the down arrow. An addressee of "Mr. and Mrs. William H. Smith, Jr." appears as:

Field Name	Initial
Title 1	☐
and	☐
Spouse Title 1	☐
First Name	☐
Middle Name	☑
Last Name	☐
Suffix 1	☐
	☐

You can add to and edit the selections available in this column, see "Adding fields as addressee/salutation choices" on page 50.

5. When you select **Constituent Addr/Sal** as an entry in the **Field Names** column, you create an embedded addressee/salutation. With embedded addressee/salutations, you define the **Const Addr/Sal** field each time you use the addressee or salutation.

For example, you can select Constituent Addr/Sal and attach it to another field such as Position. This creates an embedded addressee/salutation.

Field Name
Constituent Addr/Sal
Position

When you select this embedded addressee/salutation on a constituent record, you can then select any other defined addressee or salutation, and the program automatically places the entry from the **Position** field of the constituent's Business record behind it. So you could have an addressee/salutation of "Mr. William Smith, President".

6. On the toolbar, click **Save and Close**. You return to the Addressee/Salutations page.

Formatting an Addressee/Salutation

You can apply a variety of formatting options to your addressees and salutations. By marking a checkbox, you can activate any of the following options: initial, comma, conditional break, hard break, concatenate, and smart.

Initial

When you mark this checkbox, the corresponding field is initialized. For example, to make a constituent's middle name appear as an initial followed by a period, select the **Middle Name** row, then mark the checkbox under the **Initial** column. Instead of "Mr. and Mrs. William Horace Smith", the middle name is abbreviated and appears as the initial "H" followed by a period. The **Preview** box displays an example of an addressee/salutation with your formatting selections.

Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart	
Title 1	☐	☐	☐	☐	☐	☐	
and	☐	☐	☐	☐	☐	☐	
Spouse Title 1	☐	☐	☐	☐	☐	☐	
First Name	☐	☐	☐	☐	☐	☐	
Middle Name	☑	☐	☐	☐	☐	☐	
Last Name	☐	☐	☐	☐	☐	☐	
Suffix 1	☐	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	☐	

Preview: Mr. and Mrs. William H. Smith, Jr.

Comma

When you mark this checkbox, the program inserts a comma and space before the corresponding field. For example, if you want to place a comma between the last name and constituent code in an addressee/salutation, select the **Constituency Abbrev** row and mark **Comma**.

Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart	
Title 1	☐	☐	☐	☐	☐	☐	
First Name	☐	☐	☐	☐	☐	☐	
Last Name	☐	☐	☐	☐	☐	☐	
Constituency Abbrev	☐	☑	☐	☐	☐	☐	

Preview: Mr. William Smith, AL

Conditional Break

When you mark a checkbox in the **Cond** column, the program starts a new line of text at a specified point only if the addressee/salutation is too long to fit on a mailing label. For example, if you have a couple with different last names, the addressee/salutation may be too long to fit on one line of a label, so you can set up the addressee to read as follows:

Mr. William Henry Smith and
Mrs. Margaret Anne Adams

Any checkbox that appears in color is locked as unmarked. If you have security rights, you can determine the color in which locked items display on the Color tab of User Options.

The program breaks the addressee/salutation after the field with the marked checkbox. To make a line break after "and", select the **and** row and mark **Cond**. If the addressee/salutation can fit on one line, the program does not make the line break after "and".

	Field Name	Initial	Comma	Cond	Hard Brk	Concat	Sma
	Title 1	☐	☐	☐	☐	☐	☐
	First Name	☐	☐	☐	☐	☐	☐
	Middle Name	☐	☐	☐	☐	☐	☐
	Last Name	☐	☐	☐	☐	☐	☐
	and	☐	☐	☑	☐	☐	☐
	Spouse Title 1	☐	☐	☐	☐	☐	☑
	Spouse First Name	☐	☐	☐	☐	☐	☑

Preview: Mr. William Henry Smith and Mrs. Margaret Anne Adams

Hard Break

When you mark a checkbox in the **Hard Brk** column, a new line of text always starts after the specified point. For example, if you have an addressee of "Mr. William Smith and Mrs. Margaret Adams" and mark the hard break option on the same line as **and**, the program always forces a line break after "and". Even if the entire addressee/salutation fits on one line of a label or envelope, the program breaks it into multiple lines.

	Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart
	Title 1	☐	☐	☐	☐	☐	☐
	First Name	☐	☐	☐	☐	☐	☐
	Last Name	☐	☐	☐	☐	☐	☐
	and	☐	☐	☐	☑	☐	☐
	Spouse Title 1	☐	☐	☐	☐	☐	☐
	Spouse First Name	☐	☐	☐	☐	☐	☐
	Spouse Last Name	☐	☐	☐	☐	☐	☐

Preview: Mr. William Smith and Mrs. Margaret Adams

Concatenate

When you mark a checkbox in the **Concat** column, the program removes the space after the selected field. This is especially useful for constituents with hyphenated names. For example, with an addressee of "Mrs. Margaret Adams - Smith", when you select the concatenate option for **Spouse Last Name** and **hyphen**, the space after each of these fields is removed. This results in an addressee of "Mrs. Margaret Adams-Smith").

	Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart	
	Spouse Title 1	☐	☐	☐	☐	☐	☐	
	Spouse First Name	☐	☐	☐	☐	☐	☐	
	Spouse Last Name	☐	☐	☐	☐	☑	☐	
	-	☐	☐	☐	☐	☑	☐	
	Last Name	☐	☐	☐	☐	☐	☐	
		☐	☐	☐	☐	☐	☐	

Preview: Mrs. Margaret Adams-Smith

Smart

When you mark this checkbox, the program removes any field you included in the addressee/salutation that does not contain an entry on the constituent record. The program also removes connecting fields such as "and". For example, if the addressee is "Mr. and Mrs. William Smith" and you select **Smart** by the **Field Name** Spouse Title 1, "and" is eliminated if no entry appears in the **Spouse** field of a constituent record to avoid an addressee of "Mr. and William Smith".

	Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart	
	Title 1	☐	☐	☐	☐	☐	☐	
	and	☐	☐	☐	☐	☐	☐	
	Spouse Title 1	☐	☐	☐	☐	☐	☑	
	First Name	☐	☐	☐	☐	☐	☐	
	Last Name	☐	☐	☐	☐	☐	☐	
		☐	☐	☐	☐	☐	☐	

Preview: Mr. and Mrs. William Smith

Managing Addressee/Salutations

You can edit existing addressee/salutations, or, if they are not in use on any records, delete them from the program. You can insert a new addressee/salutation at a specified point in the grid on the Addressee/Salutations page. You can also increase the versatility of your mailings and reports by specifying fields as additional choices when you build new addressee/salutations.

➢ **Editing an addressee/salutation**

You can edit addressee/salutations already in the program. Usually, you will probably want to create a new addressee/salutation rather than change an existing one. However, at some point you may need to change an established entry.

You need to change the addressee/salutation "Dr. William and Margaret Smith" to include a spouse title. You have a relatively small database and do not think your organization will ever use the addressee/salutation in its current format. You would rather edit it than create an entire new addressee/salutation.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Addressee/Salutations** link. The Addressee/Salutations page appears.

3. In the grid, select Dr. William and Margaret Smith and click **Open** on the action bar. The Addressee/Salutation screen appears.
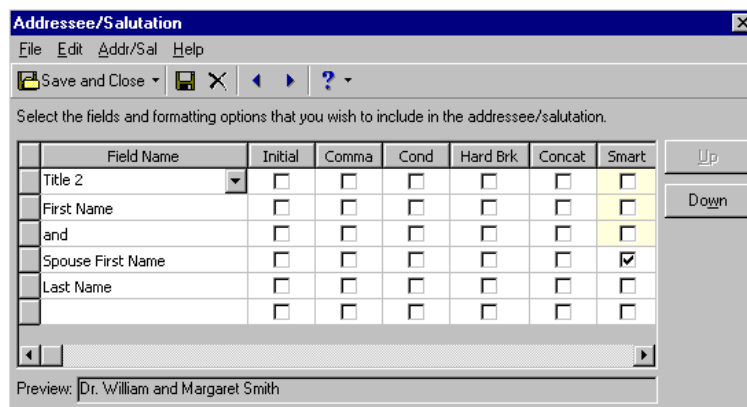
4. Click in the box on the far left of the **Spouse First Name** row. The entire row highlights.
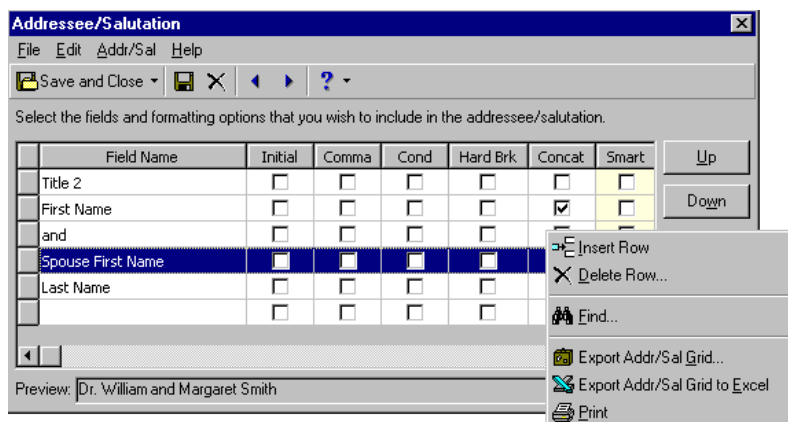
5. Right-click. A shortcut menu appears.

6. From the shortcut menu, select **Insert Row**. In the grid, a new row appears above the **Spouse First Name** row.

7. Click in the **Field Name** column of the new row. The down arrow appears. Click the down arrow to see a list of field choices. Select "Spouse Title 1" from the list. The **Preview** shows the edited addressee/salutation.

8. In the **Smart** column, mark the checkbox for the **Spouse Title 1** row and unmark it in the **Spouse Last Name** row. This avoids salutations of "Dr. and Smith" when you use the addressee/salutation with a constituent record that contains no entry for a spouse.

9. Click **Save and Close** on the toolbar to save your changes. You return to the Addressee/Salutations page. The edited addressee/salutation now appears in the list.

➢ **Inserting an addressee/salutation into the Addressee/Salutation grid**

You can create a new addressee/salutation and insert it above an entry you select in the grid. If you are creating an addressee/salutation that will be used frequently, you can place it at the top of the grid to speed data entry.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Addressee/Salutations** link. The Addressee/Salutations page appears.

3. In the grid, select the entry above which you want to place the new entry.

4. On the action bar, click **Insert**.

5. Follow the steps for "Adding an addressee/salutation" on page 43.

6. To save the new addressee/salutation, click **Save and Close** on the toolbar. You return to the Addressee/Salutations page. The new addressee/salutation appears in the grid above the entry you selected at the beginning of this procedure.

➢ **Deleting an addressee/salutation**

You can delete only addressee/salutations that are not currently in use.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Addressee/Salutations** link. The Addressee/Salutations page appears.

3. Select the entry you want to delete.

When saving changes to an addressee/salutation, all records using that addressee/salutation that are not marked as editable are updated. If this involves a large number of records, a message appears showing the number of records affected and asks if you want to continue. Any record specified as editable that you later make not editable is also affected by the change.

4. On the action bar, click **Delete**. A verification message appears.
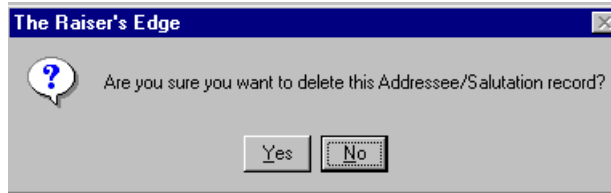
5. To delete the addressee/salutation, click **Yes**. If the addressee/salutation is in use on a record, a warning message appears.
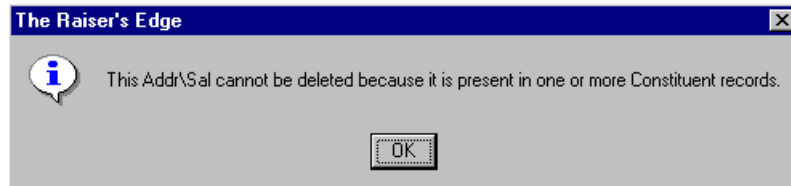
6. Click **OK**. You return to the Addressee/Salutations page.

➢ **Adding fields as addressee/salutation choices**

You can add new symbols or words to use with your addressees and salutations.

> You need to create a new addressee/salutation of "Mr. Smith and Guest" for invitations to your galas, parties, and other events. You need to add **Guest** as a field choice to create the new addressee/salutation.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Addressee/Salutations** link. The Addressee/Salutations page appears.

3. In the action bar, click **Fields**. The Addressee/Salutation Fields screen appears.
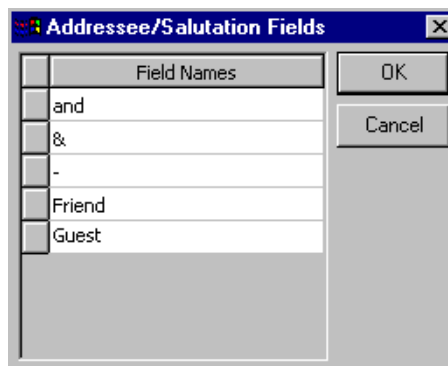
4. Scroll down to the bottom of the **Field Names** grid. In the last cell, enter **Guest**.

5. To save your addition, click **OK**. You return to the Addressee/Salutations page. **Guest** now appears in the list of choices in the **Field Name** column when you edit an existing addressee/salutation or create a new one.

➢ **Printing addressee/salutations**

You can print a list of all your addressee/salutations to keep as records for your files or to create a checklist for mailings. You can also print separate detail reports for your addressee/salutations showing all the formatting options you selected for each of them.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Addressee/Salutations** link. The Addressee/Salutations page appears.

3. Right-click anywhere in the Addressee/Salutations grid. A shortcut menu appears.

4. Select **Print**. A submenu appears.

5. If you want to print a list of all the addressees and salutations in the grid, select **Grid only**. Your printer produces a list of the addressee/salutations in the grid.

6. If you want a more detailed report, including the formatting options selected for each addressee/salutation, select **Addressee/Salutations Report** from the submenu. Your printer produces the detailed information for each addressee/salutation defined in the program.

➢ **Moving an address/salutation up or down in the grid**

You can adjust the order addressee/salutations list in the grid.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Addressee/Salutations** link. The Addressee/Salutations page appears.

3. In the grid, select the addressee/salutation to move.

4. Click the up arrow to move the addressee/salutation up one line or the down arrow to move it down one line in the grid.

You can use this procedure to place the most popular entries at the top of the grid. Then, they appear at the top of the list when you click the down arrow in an Addressee/Salutation field. This saves you time scrolling through less used entries.

Attributes

To add flexibility to your record keeping, use attributes to define and store special information about a wide variety of record types. You can identify a category for the attribute and then store an entry specific to that category.

Make sure you do not confuse attributes with information such as constituent codes. We recommend that at least one constituent code appear on each constituent record to explain why it is in your database. For example, you can code constituents as Volunteers, Prospects, Alumni, or any other entry to specify why someone is a constituent. For information about constituent codes, see the *Constituent Data Entry Guide*.

Use attributes to define specialized information about your constituents and track information for which no field exists in *The Raiser's Edge*. For example, to more accurately target your solicitations, you can set up an "Interests" table for your constituents with entries such as Golf or Gardening.

Attributes are available on many screens and are specific by type. For example, attributes for a gift type are available only for gifts, not constituents or other records.

Attribute Types

Constituent Attributes. Use constituent attributes to track specialized information on constituent records, such as categories for "Special Interests", "Committees", and "Important Dates".

Gift Attributes. Use gift attributes to track specialized information on gift records, such as "Deposit Dates" and "Designations".

Action Attributes. Use action attributes to track specialized information on action records. For example, you can use a category for phone calls called "Phone Call Outcome" with entries such as "Busy — call again", "Left message with service", and "Left message with person".

Event Attributes. If you have the optional module *Event Management*, use event attributes to track specialized information on event records. For example, for a charity auction you can use a category called "Items Donated" to list the items to be auctioned as entries.

Participant Attributes. If you have the optional module *Event Management*, use participant attributes to track specialized information on participants in your events. For example, for a banquet, you can use the category of "Seating Preference" to enter any considerations for a participant.

Education Attributes. Use education attributes to track specialized information on constituent education records. For example, you can create a category named "Academic Honors" with entries such as "Phi Beta Kappa", or "Dean's List".

Campaign Attributes. Use campaign attributes to track specialized information on campaign records. For example, you can specify who the campaign manager is or whether the campaign targets major donors only.

Fund Attributes. Use fund attributes to track specialized information on fund records. For example, a hospital Equipment Fund may specify restrictions for what types of equipment can be purchased with proceeds from the fund.

Appeal Attributes. Use appeal attributes to track specialized information on appeal records. For example, you can specify different lists you purchased for a mailing so you can later determine which was most effective.

Package Attributes. Use package attributes to track specialized information on the Packages tab of appeal records. For example, if you have a package for a mailing of a glossy brochure, you can add a category called "Contacts" and add names of the employees you deal with at the printing company.

Address Attributes. Use address attributes to track specialized information on constituent address records. You can create a category called "Mail Types" and enter the type of mailing such as "Newsletter" or "Thank you letter" that should go to each specific address on a constituent record.

Job Attributes. If you have the optional module *Volunteer Management*, use job attributes to track specialized information on job records. For example, you can track the level of education required for a job — whether the job calls for a college or technical education, a high school education, or has no special education requirements at all.

Membership Attributes. If you have the optional module *Membership Management*, use membership attributes to track specialized information on membership records. For example, you can track why a membership is upgraded or downgraded (such as child went to college, new baby, or couple separated) or the origin of a membership (such as walk-in, mailing, or promotion).

Individual Relationship Attributes. Use individual relationship attributes to track specialized information for individual relationships of individual or organization constituents. When you add an individual relationship record to a constituent record, you can define special information such as interests, academic honors, or committees for the relationship.

Organization Relationship Attributes. Use organization relationship attributes to track specialized information for organization relationships of individual or organization constituents. When you add an organization relationship record to a constituent record, you can attach information such as the business hours of a company or whether the company is a public or private organization.

Account Attributes. Use account attributes to track specialized information for your bank accounts such as the specific purposes of an account, contacts at financial institutions, and who opened the account.

Proposal Attributes. If you have the optional module *Prospect Research Management*, use proposal attributes to track specialized information for your proposals such as specific interests of the prospect the proposal targets.

Define Attributes

You can create an entry for any type of information your organization tracks. You assign a category to each attribute. For example, you can assign a category of "Committees" to your constituent records. You can also add comments to the attribute such as "Constituent is a lifetime member of the Planning Committee."

➢ **Define an attribute**

You can identify the types of information to store and create new tables for your attributes.

You want to create a constituent attribute to track your constituents' interests. The attribute needs to be in the form of a table so you can define entries to help target your appeals.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click **Attributes**. The Attributes page appears.
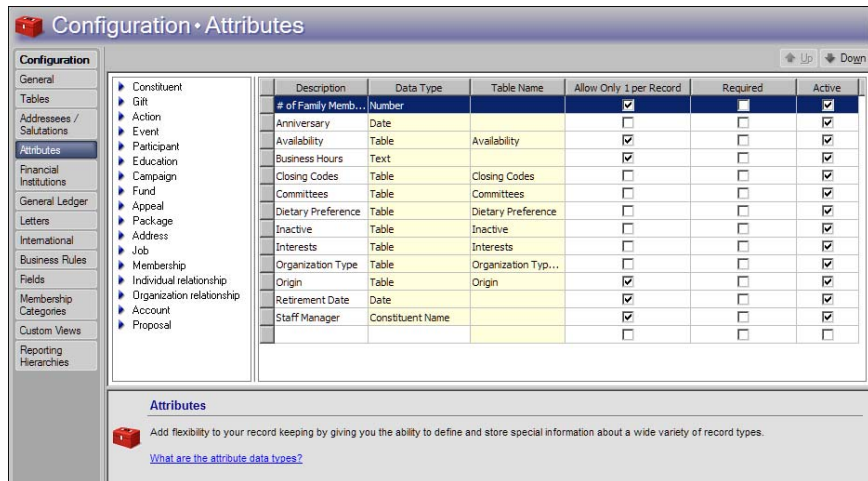
On the left, a list of attribute types appears. On the right, the attributes grid appears.

3. From the list, select the type of attribute to define, such as **Constituent**.

4. In the grid, click in the first available row in the **Description** column.

5. In the **Description** column, enter a category for the attribute, such as "Interests".

6. To move your cursor to the **Data Type** column, press **TAB** on your keyboard.

7. In the **Data Type** column, select the format for the attribute. For example, to select the attribute entry from a table, select "Table". For information about the data types, see "Attribute Data Types" on page 56.

8. If you select "Table" in the **Data Type** column, the **Table Name** column is enabled. To move your cursor to the **Table Name** column, press **TAB** on your keyboard. In the **Table Name** column, select an existing table with which to link the attribute or create a new table.

To create a new table for the attribute:

a. In the **Table Name** column, select "[Add New Table]". The Add New Table screen appears.
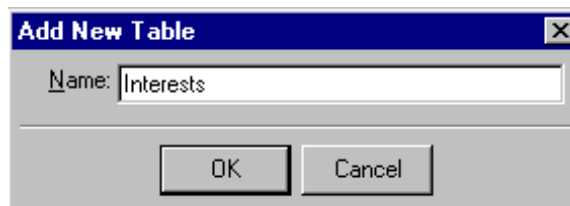
b. In the **Name** field, enter a unique name for the table such as "Interests".

c. Click **OK**. You return to the Attributes page. The new attribute entry appears in the grid.

The description you enter for an attribute in the grid on the Attributes page becomes the category on the Attributes grid in a record.

You cannot change the data type on attributes with existing data.

You can create Attribute tables through the **Attributes** link; however, you add entries to the table through the **Tables** link of *Configuration*.

9. To allow users to attach only one attribute to a record, such as only one interest to a constituent record, mark the checkbox in the **Allow Only 1 per Record** column.To allow users to attach multiple attributes to a record, do not mark this checkbox.

10. To require users select an entry for an attribute before they can save a record, mark the checkbox in the **Required** column. To not make an attribute entry a requirement to save a record, do not mark this checkbox.

11. To allow users to select the attribute on records of the applicable type, mark the checkbox in the **Active** column.

    To not display the attribute on records of the attribute type, such as if your organization no longer tracks the attribute, unmark this checkbox. When you unmark this checkbox, the attribute no longer appears as a selection on records of the attribute type.

12. If you add a new table as the data type, enter the entries for the new table.

    a. At the top of the Attributes page, click **Configuration**. The Configuration page appears.

    b. Click **Tables**. The Tables page appears. The new table appears in the list of tables on the left.

    c. To add entries to the new table, follow the procedure for "Adding a table entry" on page 11. For example, when you include entries such as "Golf" or "Tennis" for an Interests table, you can target appeals or events such as an annual golf tournament for your constituents according to their interests.

    d. Once you enter data into the table, click **Configuration**. The Configuration page appears.

    e. Click **Attributes**. You return to the Attributes page. In the grid, the **Data Type** and **Table Name** columns in the row of the attribute with the new table are locked. You cannot edit these columns.

13. To associate the attribute with a record:

    a. In *Records*, open the record to associate with the attribute. For example, for an attribute for a constituent, open a constituent record.

    b. Select the Attributes tab.

    c. In the **Category** column, the descriptions entered in *Configuration* for active attributes appear as selections. Select the description of the attribute to associate with the record.

    d. In the **Description** or **Short Desc**. column, the entries entered in *Configuration* for the attribute appear as selections. Select the entry for the attribute to associated with the record. For example, if you select a data type of "Table" for the attribute, select the entry from the list defined in the **Tables** link of *Configuration*.

e. In the **Date** column, enter the date you associate the attribute with the record.

f. In the **Comments** column, enter any additional useful information about the attribute.

g. Click **Save and Close**. You return to *Records*.

Attribute Data Types

On the Attributes page, in the **Data Type** column, you select the data type of each attribute. The data type you select determines the data entry format accepted for the attribute.

- Text - To enter free-form text, select Text. This is the least restrictive data entry format. However, since the Text format does not allow you to maintain consistency in your database, we recommend you select this format only when no other data types are applicable.

- Number - To enter only positive integers, select Number. For example, you can enter "4", but not "four". You cannot enter decimals or negative numbers.

- Date - To enter only dates that include a day, month, and year, select Date.

- Currency - To enter a monetary value, select Currency.

- Yes/No - To enter only a value of either Yes or No, select Yes/No.

To link a constituent record as an attribute on another constituent record, in the **Data Type** column, select "Constituent Name".

- Constituent Name - To search for and select a constituent from your database, select Constituent Name. When you select this format, the Open screen for constituents appears so you can find a constituent to store as an entry.

- Fuzzy Date - To enter incomplete dates, such as a year only, select Fuzzy Date. For more information about how to enter partial dates, see the "Program Basics" chapter of the *Program Basics Guide*.

Manage Attributes

You can define new attributes using a variety of data types. You can edit existing attributes and determine the order in which they appear in the grid on the Attributes screen. If your organization no longer uses an attribute on any records, you can delete it from the program.

➢ **Determine the order of attributes in the grid**

You can determine the order in which attributes appear in the Attributes grid.

The order you set here determines the order of the attributes when you click the down arrow in the **Category** column on a record. You can place your most popular entries at the top to save time scrolling through your less used entries during data entry.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click **Attributes**. The Attributes page appears.

3. From the list, select the type of attribute to sort.

4. In the grid, select the row of the attribute to move in the order.

5. On the action bar, click **Up** or **Down** to the move the selected attribute up or down one line in the grid.

➢ **Delete an attribute**

You can delete only those attributes which are not in use on any records.

A worker at your organization decides to delete a constituent attribute of "Committees" to list the committees on which a constituent serves. The attribute is currently used on several constituent records.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click **Attributes**. The Attributes page appears.

3. From the list, select the type of attribute to delete, such as **Constituent**.

4. In grid, place the cursor in the **Description** column of the attribute to delete.

5. Click the box on the far left of the row. The entire row is selected.

   To select multiple rows simultaneously, select a single row, hold the left mouse button down, and move the mouse up or down to select the rows.

6. Press **DELETE** on your keyboard. A message appears to verify the deletion of the selected rows.

7. To delete the attribute, click **Yes**.

   If the attribute is not in use on any records, the program deletes it. You return to the Attributes page.

   If the attribute appears on a record, you cannot delete it. A message appears to inform you that the attribute is in use. Click **OK**. You return to the Attributes page. To delete the attribute, you must first run a query to find all records that include the attribute and remove the attribute from each record.

➢ **Print attributes**

You can print simple lists for each type of attribute or a detailed report of all attributes to keep for your files.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click **Attributes**. The Attributes page appears.

3. From the list, select the type of attribute to print, right-click, and select **Print**. A submenu appears.

   • To print a list of attributes as they appear in the grid, select **Grid only**. The program sends a list of attributes of the selected type to the printer.

   • To print detailed information for each attribute in the grid, such as the data type and whether the **Allow only one** and **Required** checkboxes are marked, select **Attributes Report**. The program sends information for each attribute of the selected type to the printer.

If an attribute your organization no longer uses appears on records, you can make the attribute inactive rather than delete it. Inactive attributes no longer appear as selections when you assign attributes to records. To make an attribute inactive, unmark its checkbox in the **Active** column on the Attributes page.

When you delete an attribute with a data type of "Table," you must first delete the attribute and then delete the table in the **Tables** link.

Financial Institutions

You can create bank records by storing information such as account names and numbers, user numbers, locations of bank branches, transit/routing numbers, and customized notes.

This option is usually used in conjunction with the optional module *RE:EFT* to facilitate your electronic funds transfers; however it can be used to track information even if you do not have *RE:EFT*. For more information on how to build an electronic funds transfer file, see the *Electronic Gifts (EFT) Guide*.

Adding Financial Institutions

You can add a financial institution and include information such as the name and address of a bank, and whether it is a branch where you transfer funds electronically.

➢ **Adding a financial institution in Configuration**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Financial Institutions** link. The Financial Institutions page appears.

3. On the action bar, click **New Financial Institution**. The New Bank/Branch screen appears.

4. If you are adding a branch for the bank, click the down arrow in the **Bank** field and select the bank for which you are adding the new branch. Enter the new **Branch**.

   To add a new bank, you must have security rights to add it as a table entry in the **Bank** field.

5. In the **Address lines** field, enter address information for the institution. Enter the **City**, **State**, **Zip**, and **Region** for the new branch. In the **Phones/Email/Links** grid, enter the phone **Type** and **Number** for the branch. To specify a phone number as "Do Not Call", click in the **DNC** column.

6. If you process direct debit transactions using *Electronic Funds Transfer* and this is a branch where you transfer funds electronically, mark **Sponsoring Bank** and enter the **Account name**, **Account number**, and **User number**. If you do not have *Electronic Funds Transfer*, you can only track information in this frame. You cannot use it to create a transfer file.

7. In the **Electronic Transfer Information** frame, enter the **Transit/Routing no.** the bank uses to direct electronic transfers. Your financial institution assigns your account and user numbers.

8. For **Immediate origin**, select whether the bank should **Use Transit/Routing no.** or some **Other** number to track the origin of electronic files. If you select **Other**, enter the number in the provided field. If you do not have *RE:EFT*, this information is for tracking purposes only.

9. Enter any additional information about the institution in the **Notes** box. For example, you can include the name of the branch manager or any other person your organization contacts frequently.

If you use *Electronic Funds Transfer* but process your direct debit transactions through IATS/Ticketmaster rather than your financial institution, you do not need to establish your sponsoring bank.

10. To save your entry, click **Save and Close** on the toolbar. You return to the Financial Institutions page.

➢ **Adding a financial institution through the Relationships tab of the constituent record**

You can add a bank to Configuration through the Relationships tab of a constituent record.

1. Open a constituent record to which you want to add a new financial institution. For more information about opening a constituent record, see the "Constituent Records" chapter of the *Constituent Data Entry Guide*.

2. Select the Relationships tab.

If you do not have security rights to add financial institutions in *Configuration*, you cannot add them through the Relationships tab on the constituent record.
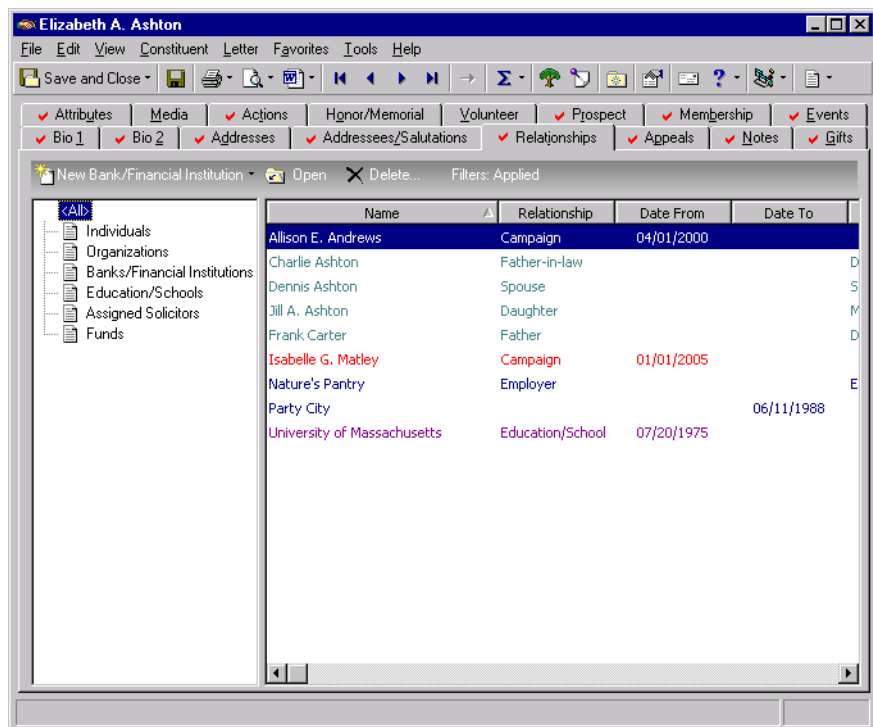
3. From the tree view on the left, select **Banks/Financial Institutions**.

4. On the action bar, select **New Bank/Financial Institution**. The New Bank/Financial Institution screen appears.

5. Enter the information for the new financial institution. For a detailed explanation of the fields on this screen, see "Adding a financial institution in Configuration" on page 58.

6. Click **Save and Close**. If the institution has not already been added to your database, a message appears.
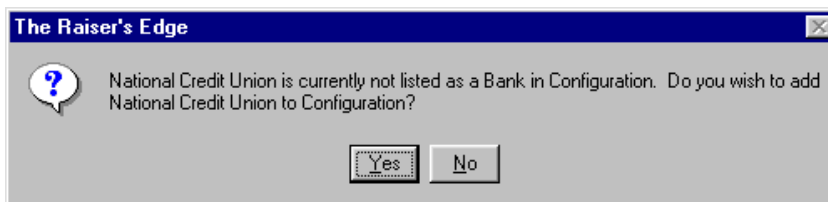
7. To add the financial institution to *Configuration*, click **Yes**. After you add the financial institution, or if it is already present in *Configuration*, but the branch is new, another message appears.
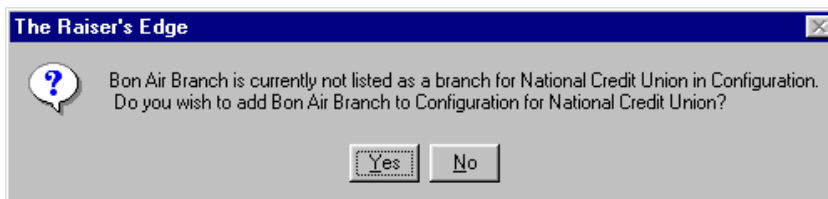
8. To add the branch to the grid on the Financial Institutions page of *Configuration*, click **Yes**.

Cleaning Up Financial Institutions

The Financial Institution Cleanup utility enables you to replace duplicate financial institution records in your database. You select one or more financial institution records to be replaced, then specify a single financial institution to replace them with. As part of the cleanup, any constituent and other records associated with the duplicate financial institution are changed to show association with the replacement financial institution. However, it is important to note that account numbers are not changed on any financial institution records, or on any associated constituent, gift, or other records.

For example, in your database you may notice that "Lexington State Bank" has also been entered as "Lexington Bank," and the bank appears on constituent and gift records both ways. You can use the cleanup utility to delete the incorrect duplicate, Lexington Bank, and replace it with Lexington State Bank. Lexington State Bank will then appear correctly on all associated gift and constituent records. You can also specify to update all phone numbers, email addresses, and other links on associated records to show the information from the corrected financial institution record. Again, the Financial Institution Cleanup utility does not change any account numbers.

Additionally, you can specify to automatically delete any institutions that are being replaced from your database.

> **Cleaning up financial institutions**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Financial Institutions** link. The Financial Institutions page appears.

The Financial Institution Cleanup utility is excellent for combining banks, as well. For example, if the Bank of Washington merges with Capitol Bank to form the new Constitution Bank, you can replace both Bank of Washington and Capitol Bank with the newly formed Constitution Bank on all your constituent and gift records.
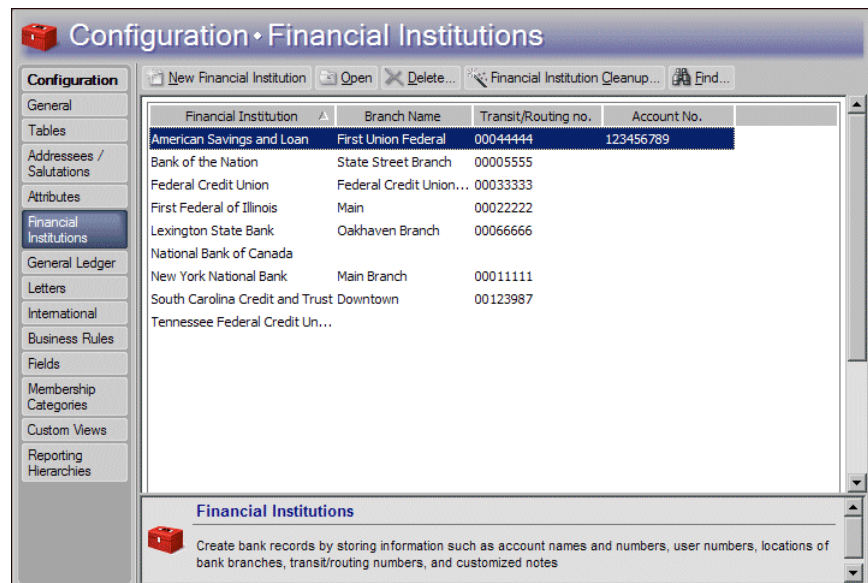
3. On the action bar, select **Financial Institution Cleanup**. The Financial Institution Cleanup screen appears.

4. In the **Replace these Financial Institution Records** grid, select the financial institution records to be replaced.

5. In the **Replace with** field, select the financial institution record to replace the records selected in the **Replace these Financial Institution Records** grid.

6. To remove the duplicate financial institution records from your database, mark **Delete financial institutions being replaced**.

7. To change the financial institution information on associated constituent and other records to show the information of the replacement financial institution instead of the duplicate, mark **Add Phone/Email/Links from the financial institution record in the 'Replace with' field to the financial institution relationship records for all associated constituents**.

   For example, if you are replacing "Lexington Bank" with "Lexington State Bank" and any phone numbers, email addresses, or other links are entered differently for the two, the information on the Lexington State Bank record replaces that from the Lexington Bank on all associated constituent and other records.

8. To clean up the selected financial institutions and associated records, click **Replace Now**.

9. When the cleanup is complete, a message appears. Click **OK**.

10. To exit the utility, click the 'x' in the upper right of the Financial Institution Cleanup screen. You return to the Financial Institutions page.

The Financial Institution Cleanup utility does not alter account numbers on any records.

Managing Financial Institutions

You can add financial institutions in *Configuration* and on the Relationships tab of a constituent record.

You can add new financial institution records, and edit and delete existing records. If you add a financial institution as a relationship on a constituent record, *The Raiser's Edge* asks if you want to add the new bank to *Configuration*. You cannot delete a financial institution record that is linked to constituent records. You must remove it from all records before you can delete it from your database.
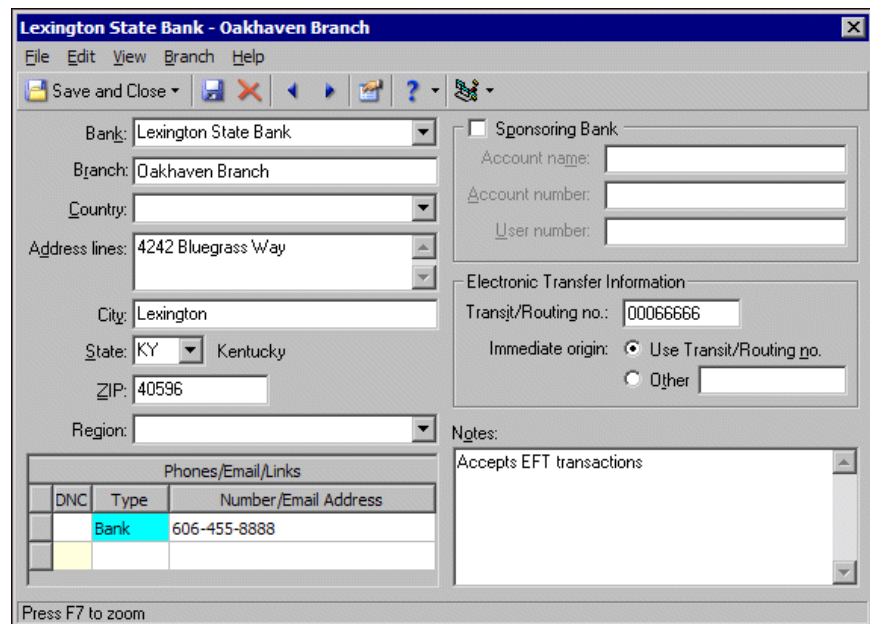
➢ **Editing a financial institution**

Occasionally, you may need to change the information for a bank. For example, address information may need updating, electronic transfer information can change, or a bank may merge with another financial institution.

The Oakhaven branch of the Lexington State Bank has moved to a new building. You need to update your address information for the institution.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Financial Institutions** link. The Financial Institutions page appears.

3. Select Lexington State Bank.

4. Click **Open**. The Lexington State Bank - Oakhaven Branch screen appears.

To make data entry easier, press **F7** while the cursor is in the **Address lines** field to zoom in and change the view.

5. In the **Address lines** field, enter the new address information. If necessary, you can also change the information in the other address and phone fields.

6. To save changes, click **Save and Close** on the toolbar. You return to the Financial Institutions page**.**

➢ **Deleting a financial institution**

You can remove a bank record from the Financial Institutions grid. Only banks that are not present on constituent or gift records can be deleted.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Financial Institutions** link. The Financial Institutions page appears.

3. Select the institution to delete.

4. On the action bar, click **Delete**. A verification message appears.
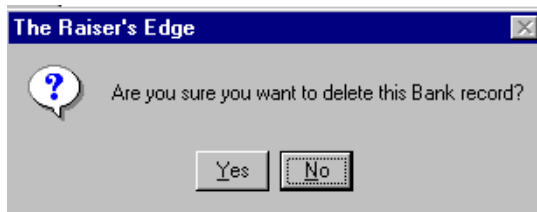
5. Click **Yes**. If the financial institution is not present on any constituent or gift records, it is deleted and you return to the Financial Institutions page. If the financial institution is present on any records, a message appears.
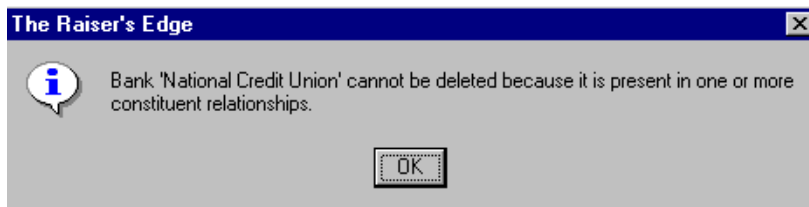
6. Click **OK**. You return to the Financial Institutions page. You must remove the bank from any records before you can delete it.

➢ **Printing financial Institutions**

You can print a list of all your financial institutions and banks or a detailed profile of each institution to keep for your records.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Financial Institutions** link. The Financial Institutions page appears.

3. Select the institution for which you want to print information.

4. Right-click anywhere in the Financial Institutions grid. A shortcut menu appears.

5. Select **Print**. A submenu appears.

6. To print a list of all the institutions in the grid, select **Grid only**. Your printer produces a list of the institutions in the grid.

7. To print a detailed report for an institution, including address, phone, and electronic fund transfer information, select the institution in the grid. Right-click and select **Print** from the shortcut menu. From the submenu, select **Bank Profile**. Your printer produces the information for the selected institution.

General Ledger

You can establish program settings for the interface between *The Raiser's Edge* and Blackbaud's *General Ledger* accounting software. These settings enable the two programs to work together so you can save time by entering gifts once for both programs. If you have *General Ledger*, you must specify the location of its database and whether it is a single or multi-user version. You can specify that *General Ledger* automatically check the validity of account and project information entered into *The Raiser's Edge*. You can also define Journal Reference Fields to use in the **Post to General Ledger** link of *Administration* for posting detailed gift transactions.

When you have the latest version of Blackbaud's *General Ledger* in *The Financial Edge*, you can enter *General Ledger* information used in *The Raiser's Edge* Accountability Summary. Additionally, if you have *The Financial Edge* optional module *Project, Grant and Endowment Management*, you can specify that a *Financial Edge* transaction code be placed on all appeal and (if you have the optional module *Event Management*) event records you add in *The Raiser's Edge*. That way, you can associate *Financial Edge* expenses with your *Raiser's Edge* appeals and events.

You can also enter GL Distribution information that defaults into each new fund you create to save data entry time. The information is only a default, and you can change it in individual funds if necessary. Credit and debit account information for gift types and subtypes is accessed directly from the *General Ledger* database, so when you add a fund to gifts in *The Raiser's Edge*, the accounts you specified are automatically debited and credited in *General Ledger*. If you have the *Financial Edge* optional module *Project, Grant and Endowment Management*, you can also specify default gift distributions among multiple projects.

If you do not have Blackbaud's *General Ledger*, you can still use this link to send transaction details to your accounting software and print a report of posted transactions.

> ➢ **Establishing General settings for the interface between The Raiser's Edge and General Ledger**

All options for setting the interface between *General Ledger* and *The Raiser's Edge* are located on the General Ledger page. The information you enter on this screen is used in gift and fund records, queries, exports, and the **Post to General Ledger** option in *Administration*.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

In order to run the Accountability Summary or use transaction codes on appeals, *The Financial Edge* must be installed on the same workstation as *The Raiser's Edge*, and you must have logged into *The Financial Edge* at least once.

2. Click the **General Ledger** link. The General Ledger page appears. Select **General** on the left of the page.

3. If you have Blackbaud's *General Ledger*, mark **Blackbaud General Ledger present**.

4. In the **Database type** field, select the type of database your version of *General Ledger* uses.

   • If you use *General Ledger* 6.x or a version of *The Financial Edge* prior to 7.2, select "Sybase ASA" and go to 5.

   • If you use *The Financial Edge* 7.2, select "SQL Server" and go to step 7.

5. Specify whether your database is accessed by many computers through a network or by only your computer.

   • If you have a multi-user version of *General Ledger*, select **Network**.

Enter the **Server name** for your *General Ledger* database engine. This name is required because it allows *The Raiser's Edge* to establish a link with the *General Ledger* Sybase ASA database.

If you use an alias for your *General Ledger* database, enter it in the **Alias** field. All computers on your network use this name to locate the database linking *The Raiser's Edge* and *General Ledger*.
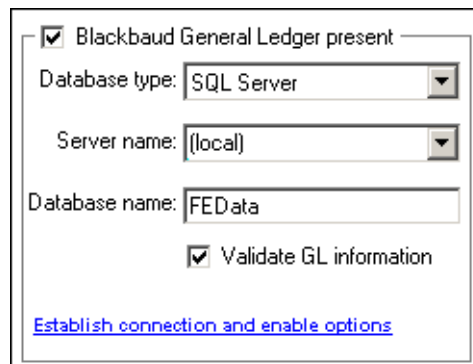
• If you have a single user version of *General Ledger*, select **Local**.

The **Database path** to *General Ledger* is required. Enter the path to the Blackbaud database file folder in *General Ledger*. If necessary, click the **Browse** button to find the path to the folder.

To test the connection to *The Financial Edge* database, click the **Establish connection and enable options** link. If the connection is successful, a message appears informing you of this and the **Accountability Options** frame is enabled.

6. Go to step 11.

7. When you select "SQL Server" as the **Database type** to establish a link with *The Financial Edge* 7.2, several fields appear.

In the **Server name** field, select the server on which your *Financial Edge* SQL Server database resides.

8. In the **Database name** field, enter the name of the database to which you are connecting.

If you previously linked to a Sybase ASA database with another version of *General Ledger*, and the database to which you linked is still available, you must log out of *The Raiser's Edge* and log back in before you can connect to your SQL Server database.

If you previously linked to a Sybase ASA database with another version of *General Ledger*, and the database to which you linked is still available, you must log out of *The Raiser's Edge* and log back in before you will be connected to your SQL Server database.

9. If you mark **Validate GL information**, *The Raiser's Edge* searches the *General Ledger* database to determine if the account numbers and project IDs you enter on fund records and other areas of *The Raiser's Edge* exist in *General Ledger*. Marking this checkbox can help eliminate errors caused by incorrectly entered account numbers.

10. To test the connection to *The Financial Edge* database, click the **Establish connection and enable options** link. If the connection is successful, a message appears informing you of this and the **Accountability Options** and **Expense Tracking and Appeal Posting** frames are enabled.

11. To run the Accountability Summary, you must enter information in the **Accountability Options** frame. If you intend to run the summary, you must specify information from *The Financial Edge* to use in the Accountability Summary.

In the **Account Attribute** field, select the attribute you established in *The Financial Edge* to group accounts together. This must be a "table" type attribute. An attribute must be added to at least one *Financial Edge* expense account before it appears in the **Account Attribute** dropdown.

The table entry values will appear in the Accountability Summary.

12. To view budget distribution information on the Accountability Summary, mark **Show Budgeted Distribution**. When you mark this checkbox, you must select an entry in the **Budget Scenario** field. Budget scenarios are established in *The Financial Edge* and used in the Accountability Summary to show how a gift will be spent based on how a given project is budgeted.

A budget scenario is a single version of an organization's budget for a given fiscal year. If you have *The Financial Edge* optional module *Budget Management*, you can create multiple budget scenarios. For example, you can create a scenario of your original budget and also create scenarios for various revisions of that budget.

13. If you want *The Raiser's Edge* to look at transactions in *Financial Edge* transfer and loss accounts when it determines how money donated to a fund is spent, mark **Include Loss Accounts** and **Include Transfer Accounts**. You can mark one, both, or neither of these checkboxes.

14. If you specified a SQL Server database in the **Database type** field, the **Expense Tracking and Appeal Posting** frame appears. To include *Financial Edge* transaction codes on new appeals and, if you have the optional module *Event Management*, new event records, you must enter information in the **Expense Tracking Options** frame. By including transaction codes on these records, you can use the codes to track *Financial Edge* expenses for the records.

In *The Financial Edge*, a transaction code helps categorize information for reporting and closing fiscal years. Transaction codes are available with *The Financial Edge* optional module *Projects and Grants*.

In the **Transaction Code** dropdown list, all transaction codes established in *The Financial Edge* appear. We recommend you create a transaction code in *The Financial Edge* especially for your *Raiser's Edge* appeal and event records.

To post gifts for a given appeal with the transaction code you selected in the **Transaction Code** field, mark **Apply Transaction Code associated with gift appeal when posting**.

When you select a transaction code and mark **Appeals** and **Events**, a **Financial Edge Transaction Code** field and **View GL Expenses** button appear on the appeal record Attributes/Expenses tab and event record Expenses tab. When you save a new appeal or event, a table entry is created in *The Financial Edge* for the selected transaction code. The table entry equals the name of the appeal or event. The table entry also appears on the appeal or event record in the **Financial Edge Transaction Code** field.

In *The Financial Edge*, you can associate *General Ledger* expenses with individual transaction code table entries. You can view any *Financial Edge* expenses you associate with a transaction code table entry for an event or appeal by clicking the **View GL Expenses** button on the appeal or event record. For more information, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits Guide*.

15. In the Journal References frame, you can select reference fields. *The Raiser's Edge* sends these fields to *General Ledger* as a description when you post detailed transactions.

    To define additional Journal Reference fields, or to insert spaces between fields, click **Fields** to access the Journal Reference Fields screen. When you finish defining fields, click **OK** to return to the General Ledger page.

> You can create a field name of up to twenty characters. The total length of the journal reference can be up to fifty characters.
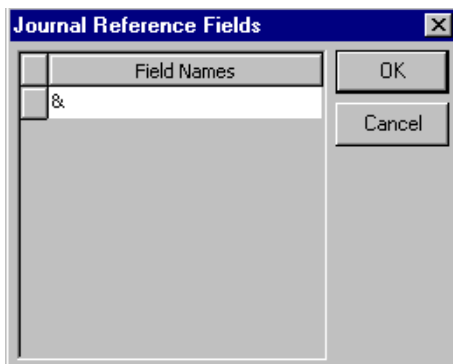
16. The **Sample** display shows how the fields you select for the journal will format. If you want to re-establish program settings, click **Reset to System Defaults**.

17. When you leave the General Ledger page, the program saves your settings automatically.

➢ **Establishing default GL Distribution settings**

You can create a default GL distribution. The distribution settings you enter here default into each new fund you create to save data entry time; however, the information is only a default, and you can change it in individual funds if necessary.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

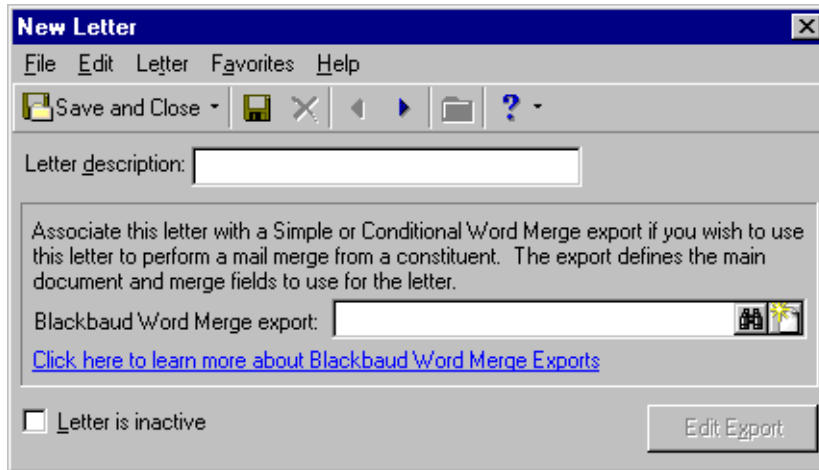2. Click the **General Ledger** link. The General Ledger page appears.

3. On the left of the page, select **GL Distributions**. The **GL distributions** grid appears.

If your fund has more than one project distribution, we recommend you select one project for each fund on the GL Distributions tab on the fund record. If you do not select one project per fund, it is important to note that the project assigned to the gift type of Cash is applied to the fund record when posting to **The Financial Edge***.*

4. If you have funds with more than one project distribution, such as a separate project distribution for each gift type for one fund, the **Remove Project column from fund GL Distributions grid** checkbox appears.

   This checkbox enables you to define a project once instead of on each line of the grid on a fund record. When you mark the checkbox, a **Project** field appears instead of a grid column on the GL Distributions tab of a fund record. You can enter a project or project distribution once in the field instead of in each row of the **Project** column.

   To clean up your project distributions by designating one project per fund, mark this checkbox. Then, on the GL Distributions tab of a fund record, you can select one project for the fund.

   If you do not have more than one project distribution for each fund, the **Remove Project column from fund GL Distributions grid** checkbox does not appear.

5. In the **GL distributions** grid, you can establish default settings for the GL Distributions tab on a new fund record. You can set up these defaults for each gift type in the columns of **Debit Account Number**, **Debit Account Desc**, **Credit Account Number**, **Credit Account Desc**, and **Interfund**.

   When you add a new fund record, any information you enter in the **GL distributions** grid automatically appears on the GL Distributions tab on the new fund record. You can change the GL Distribution information on the record.

6. When you leave the General Ledger page, the program automatically saves your settings.

➢ **Establishing settings when General Ledger is not present**

If you do not have *General Ledger*, you can configure *The Raiser's Edge* to work with other accounting software.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **General Ledger** link. The General Ledger page appears.

Do not mark **Blackbaud General Ledger present**. The **Database path** field and the **Validate General Ledger information** checkbox are disabled.

3. In the **Journal References** frame, select fields to send as transaction descriptions to other accounting software. The number you enter in the **Length** column is the number of characters to allow for the corresponding entry in the **Reference Field Name**.

   The number of characters in the **Length** column is always included for a particular name, even if the name itself consists of less characters than the number specified. For example, if you select a length of "10" for a reference field name of "Constituent ID", and the ID consists of only six characters, the ID is followed by four spaces in the post. For more information on how to use this information, see the "Posting to General Ledger" chapter of the *Gift Record Guide*.

4. To re-establish program settings, click **Reset to System Defaults**.

5. To save your settings, exit the General Ledger page.

Letters

On the Letters page, add letters and give them corresponding descriptions in *The Raiser's Edge*. Choose from letter types of Gift, Action, Constituent, Membership (if you have the optional module *Membership Management*), Event (if you have the optional module *Event Management*), or Appeal.

> You can create a field name of up to twenty characters. The total length of the journal reference can be up to fifty characters.

> On the File Locations tab in User Options, you can specify a directory where you store files created in *The Raiser's Edge* in a word processing format.

If you have *Microsoft Word 2000* or higher, you can use the *Office* integration features of **The Raiser's Edge** to create *Word* documents containing the merge fields from your export for your mailings. When you create an action, gift, and constituent letter, you can associate the letter with a simple or conditional *Word* merge export so you can use the letter to perform mail merges from constituent, action, or gift records. The export defines the main document and **Raiser's Edge** merge fields to use for the letter.

You can store letter information in the grid on the Letters page. The Letters grid lists letters by a **Letter Description** and **File Location** of the document.

Adding Letters

You can create documents in *Microsoft Word* containing **Raiser's Edge** merge fields for use in mailings.

➢ **Adding a letter**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Letters** link. The Letters page appears.
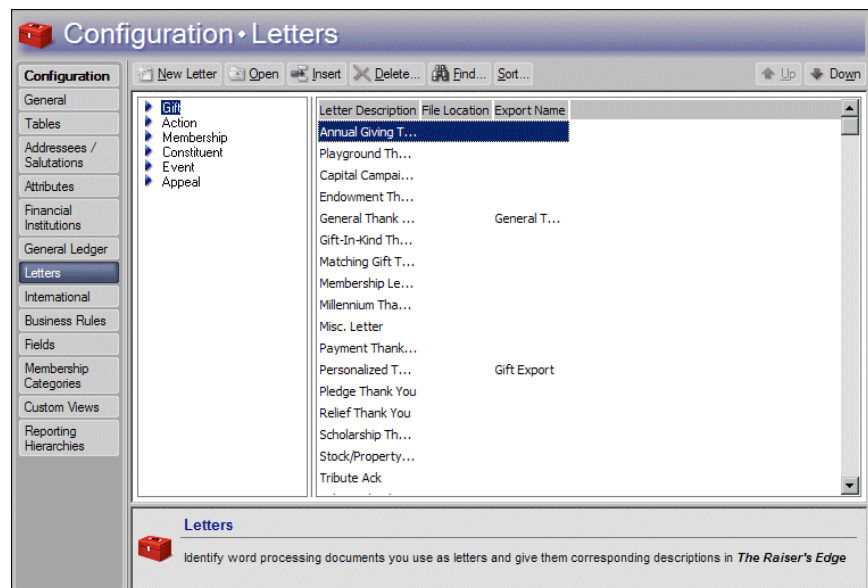
The letter types list on the left in the Letter Types box. When you select a type, you can view all letters you defined for that category in the Letters grid on the right.

The letter types are: **Gift**, **Action**, **Membership** (if you have the optional module *Membership Management*), **Constituent**, **Event** (if you have the optional module *Event Management*), and **Appeal**.

3. In the Letter Types box, select the type of letter to add.

4. On the action bar, click **New Letter**. The New Letter screen appears.

5. Enter a **Letter description**. The description appears in the Letters grid on the right side of the main Letters page and in the list of entries for the **Letters** table. The **Letters** table contains all letter descriptions you can assign to an action, gift, event, or membership.

6. When you create constituent, action, or gift letters, the **Blackbaud Word Merge export** field is available. Use this field to associate the letter with a simple or conditional *Word* merge export if you want to use this letter to perform mail merges from constituent, action, or gift records. To access the Open screen for exports, click the binoculars.

The **Blackbaud Word Merge export** field is not available for all letter types.

7. From the Open screen, you can search for an export file you already created and saved for a mail merge, or you can create a new export file for a mail merge. To create a new export file for this letter, click **Add New**. The New Export screen for the type of letter you are creating. For example, if you are creating a constituent letter, the New Constituent Export screen appears.
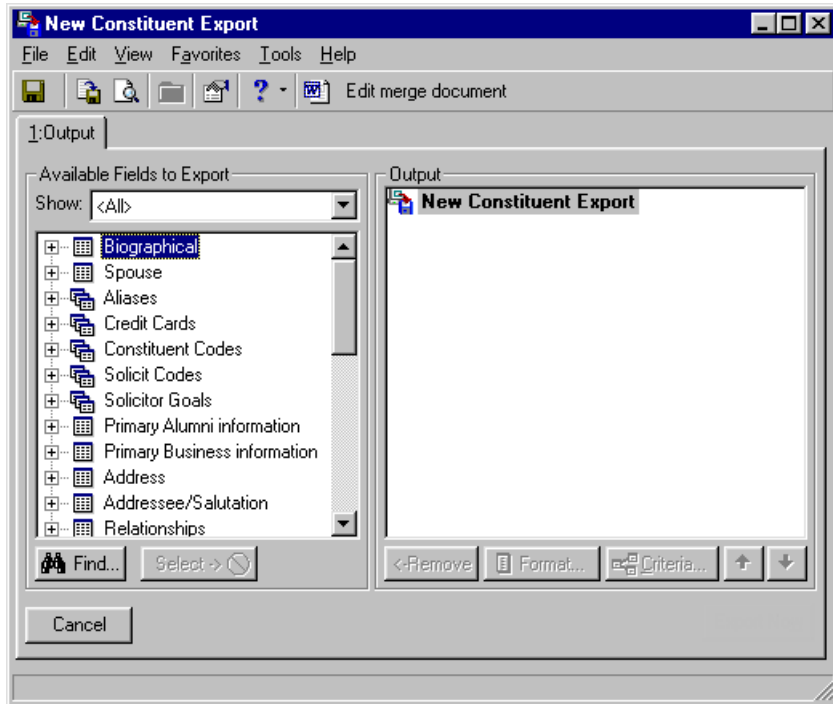
On the Output tab, select the merge fields to use in your letter.

8. In the **Available Fields to Export** box on the left, click the plus sign on the left of a category to view the fields in that category. To move a field into the **Output** box, double-click the field or highlight it and click **Select**. For example, when creating a constituent letter you may want to include **Last Name**, **Name**, and **Title 1**, under the Biographical category, and **Address line 1**, **Address line 2**, **City**, **State**, and **ZIP** under the Address, Preferred Address category.
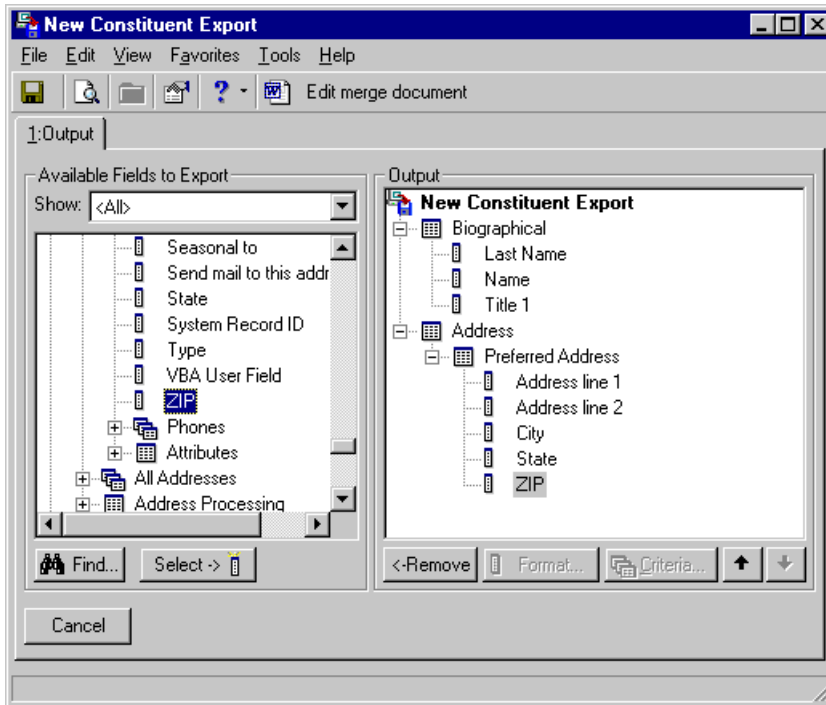
9. After you move all the fields you want to use in the letter into the **Output** box, click **Edit merge document** in the toolbar. Microsoft *Word* opens and a blank Merge document appears.
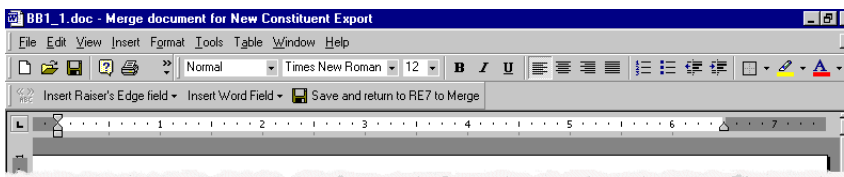
10. As you compose your merge document, you are going to insert merge fields into the letter. When you print the letter, the correct information is exported out of *The Raiser's Edge* and appears in the designated areas (placeholders) of your letter.

You will likely want to first enter merge fields for the constituent's name and address block of the letter. Leaving your cursor flashing in the left corner of the work space of your letter, click **Insert RE7 field** on the toolbar. Then select a field category and a specific field. For example, if you want to begin with the constituent's title, select **Biographical**, **Title 1**.
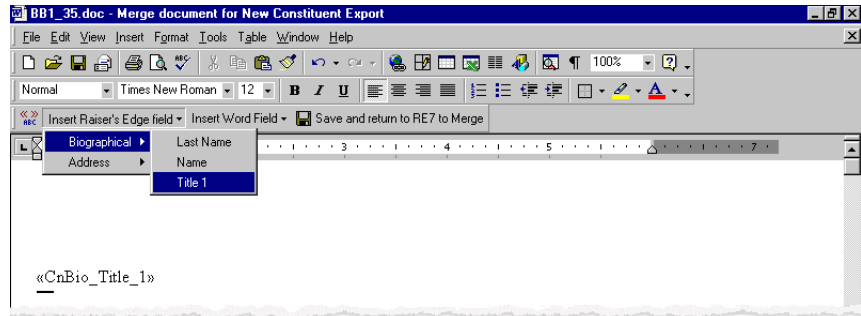
Then if you want to include the address information underneath the title, use the same steps to add the address fields you included in the export.

11. You can now enter merge fields for the salutation of the letter. Move down and type the greeting of your letter, for example "Dear". Press the space bar on your keyboard. On the toolbar, click **Insert RE7 field**. Select **Biographical**, **Title 1**. Press the space bar on your keyboard. Click **Insert RE7 field** and select **Biographical**, **Last Name**. Type a colon. Move down, and compose the body and closing of your letter.
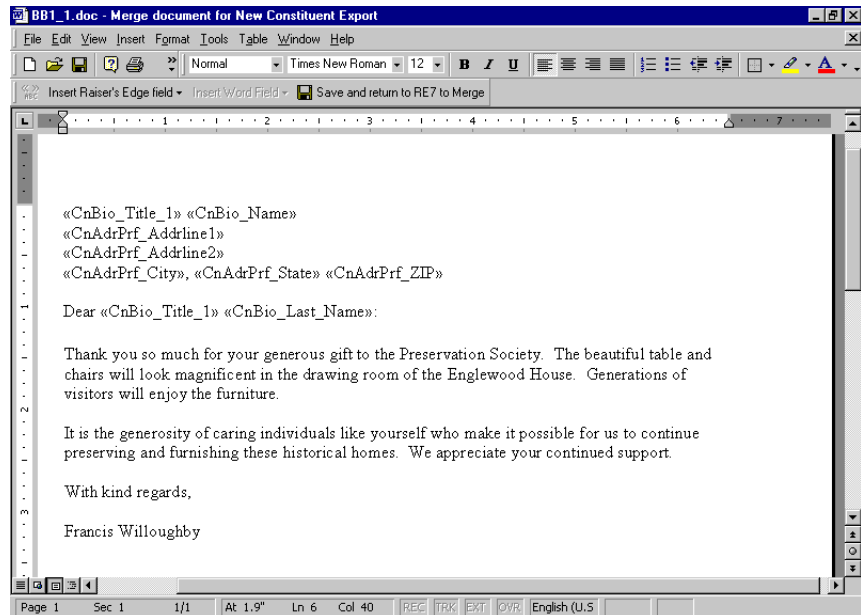
12. On the toolbar, click **Save and return to RE7 to Merge**.

13. You return to the New Constituent Export screen, from the menu bar, select **File**, **Save as**. The Export file name screen appears.

To save the Constituent Export to use with the new letter (or any other letter), click **Save** on the toolbar. The Save Export As screen appears, so you can name and describe the export you are saving.

To close the New Constituent Export screen, click the "X" in the top right corner. You return to the New Letter screen.
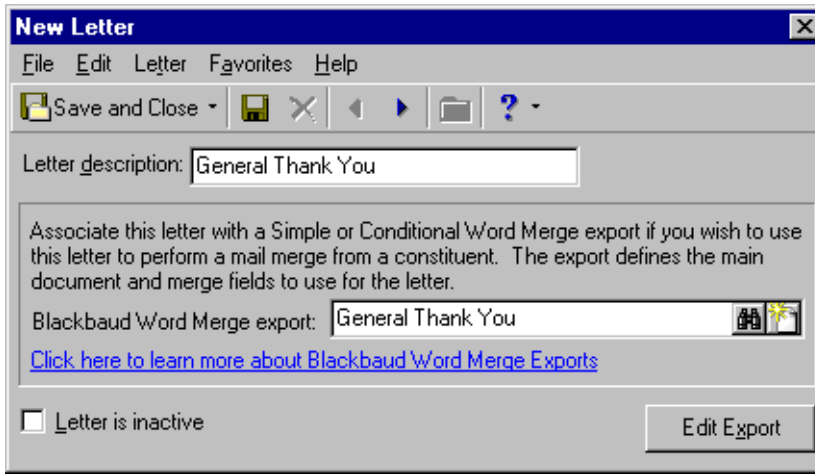
14. On the New Letter screen, the name of the export you created now appears. You can open the export for editing by clicking **Edit export**. To return to the Letters page of *Configuration*, click **Save and Close**.

The new letter now appears on the Letters page.

➤ **Adding a letter using classic view**

If you do not want to take advantage of *The Raiser's Edge* integration with Microsoft *Word*, you can add letters and manually configure merge fields using "classic view."

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Letters** link. The Letters page appears.
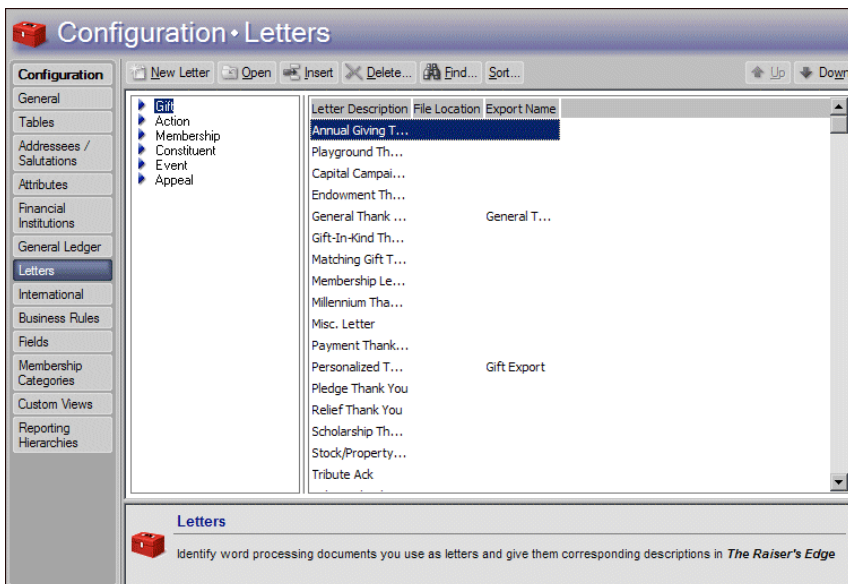
The letter types list on the left in the Letter Types box. When you select a type, you can view all letters you defined for that category in the Letters grid on the right.

The letter types are: **Gift**, **Action**, **Membership** (if you have the optional module *Membership Management*), **Constituent**, and **Event** (if you have the optional module *Event Management*).

3. In the Letter Types box, select the type of letter to add.

4. On the action bar, click **New Letter**. The New Letter screen appears.

5. From the menu bar, select **Letter**, **Classic View**. The New Letter screen appears in classic view.
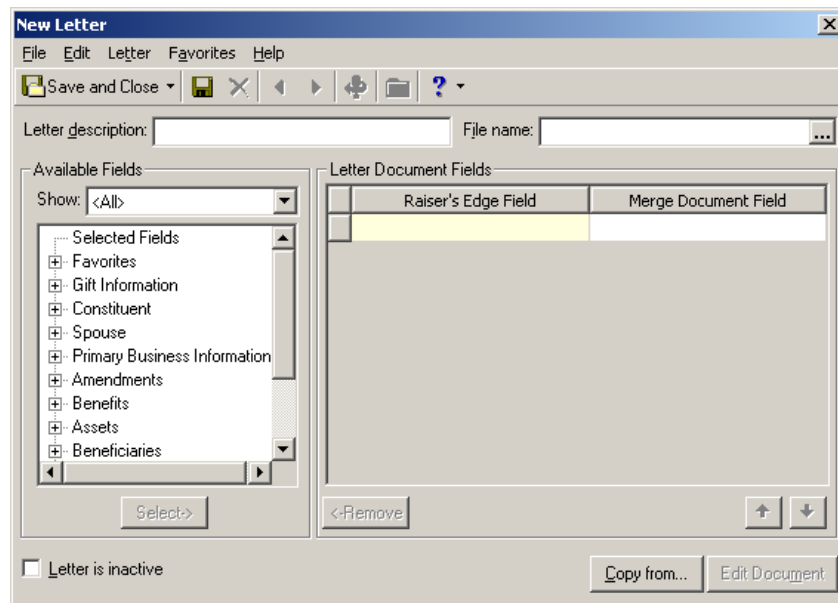
6. Enter a **Letter description** of up to fifty characters. The description appears in the Letters grid on the right side of the main Letters page and in the list of entries for the **Letters** table. The **Letters** table contains all letter descriptions you can assign to an action, gift, event, or membership.

7. Enter the **File name** including the subdirectory and extension. To avoid entering the path incorrectly, or if you do not know where the letter is located, you can click the button beside the **File name** field to find the letter file. When you click this button, the File Location screen appears so you can navigate through your directories to find the document.

8. In the **Available Fields** frame, you can enter a category in the **Show** field. The available fields for the selected category list in the tree view under the **Show** field. Highlight a field and click **Select** to move it into the **Raiser's Edge Field** column of the **Letter Documents Field** grid.

9. In the **Merge Document Field** column, list each merge field defined in the letter beside its corresponding **Raiser's Edge Field**. When you actually merge the letter, *The Raiser's Edge* fields replace the merge fields in the letter.

If you have *Microsoft Word*, when you enter a **File name** and path, *The Raiser's Edge* validates the data path and loads all the merge fields in the document into the **Merge Document Field** column. A message appears informing you that either the document was not found; the document was found, but no merge fields were found; or the number of merge fields that were successfully loaded from the document.

If you use another word processing program, you must enter the fields manually.

10. To remove a field from the **Raiser's Edge Field** column, select it and click **Remove**.

11. When you mark **Letter is inactive**, you can ensure that a letter is not used in any further mailings. It remains in your database for historic purposes. If you mark the checkbox, the letter does not appear in the **Letters** table.

12. When you click **Copy from**, the Copy From Existing Letter screen appears. You can select a letter and copy the information from it into the currently open letter. If the new letter has many of the same fields as an existing one, this can save time and promote consistency.

13. When you click **Edit Document**, the document path is validated and the program attempts to open the document using your word processor. This button is available only if you have *Microsoft Word* and enter a **File name**.

14. To save your entry, click **Save and Close** on the toolbar. You return to the Letters page.

Managing Letters

On the Letters page of *Configuration*, you can edit existing letters, insert and sort letters in the grid, delete letters, find existing letters, and print a list of all your defined letters.

➢ **Inserting a letter**

Inserting a letter places the new letter above an entry in the list you highlight. If you are going to use the new letter frequently, you can place it on or near the top of the grid to speed your data entry. You can also sort and move existing letters in the grid. For more information, see "Sorting and moving letters in the grid" on page 83.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Letters** link. The Letters page appears.

3. In the Letter Types box on the left, select the type of letter to insert.

4. In the list of letters on the right, select the letter above which to place a new letter.

5. Click **Insert**. The New Letter screen appears. Follow the instructions for "Adding a letter" on page 74. The new letter appears in the Letters page grid above the entry you selected in step four of this procedure.

You can enter a letter with no merge fields, such as a handwritten letter or form letter, so you can track the recipients of the letter.

In the **File name** field, if you enter a document name with no file extension, the extension defaults to ".doc."

If you use *Microsoft Word*, you can format the text for a merge field in the *Word* merge document.

You can define how a constituent name appears on envelopes or letters through the **Addressee/Salutations** link of *Configuration*.

When you create a letter using **New Entry**, the new letter appears at the bottom of the list.

➢ **Deleting a letter**

You can delete only letters that are not in use on any records in the program.

You want to make changes to your General Thank You letter for gifts. Instead of editing the existing letter, you decide to delete it and replace it with a new one.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Letters** link. The Letters page appears.

3. In the Letter Types box on the left, select **Gifts**.

4. In the **Letter Description** column, select **General Thank You**.

5. Click **Delete**. A verification message appears.
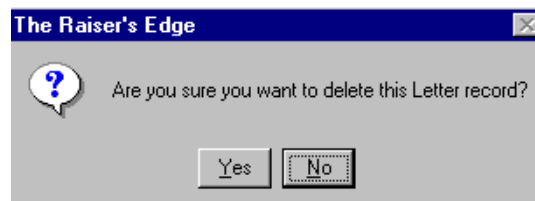
6. To delete the letter, click **Yes**. If the letter appears on a record, you cannot delete it. In this case, the General Thank You letter for gifts currently appears on many gift records. The following message appears.
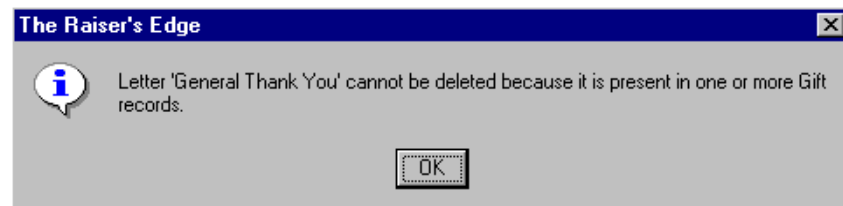
7. To return to the letter, click **OK**. You can either edit the current General Thank You letter, or remove it from all records and then delete it.

➢ **Printing a list of your letters**

You can print a list of your letters. You may want to keep a paper copy of all your letters as a record for your files.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Letters** link. The Letters page appears.

3. In the Letter Types box on the left, select a type of letter.

4. On the right side of the Letters page, right-click anywhere in the Letters grid. From the shortcut menu, select **Print Letters Grid**. Your printer produces a list containing the **Letter Description** and **File Location** of every defined letter for the selected type.

➢ **Finding a letter**

You can quickly and easily find a letter without scrolling through all your entries. This is especially useful if you have defined many different letters. Perhaps you need to find a particular letter for editing. Use the **Find** command to locate it quickly and easily.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Letters** link. The Letters page appears.

3. Click **Find** on the action bar. The Find screen appears.
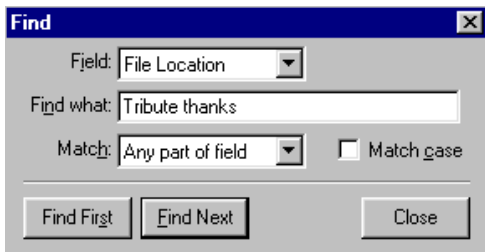
4. In the **Field** field, select whether to base your search on the Letter Description or File Location.

5. In the **Find what** field, enter the name of the letter to find.

6. In the **Match** field, select whether you want your entry in the **Find what** field to match: Any part of field, Whole field, or Start of field.

7. If you want your search to match any capitalization in the letter name, mark **Match case**.

8. To find the first match that meets your search criteria (in the order in which they list, not the first alphabetically), click **Find First**. When found, the letter is selected in the letters list on the Letters page.

9. To find any additional entries that meet the search criteria, click **Find Next**.

You can use wildcard characters such as "?" and "*" in your searches as a substitute for part or all of your entry in the **Find what** field.

➢ **Sorting and moving letters in the grid**

You can control the order your letters list in the grid. You can place your most frequently used letters at the top to speed data entry.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Letters** link. The Letters page appears.

3. In the box on the left, select the type of letter to sort.

4. On the action bar, click **Sort**. The Sort Letters screen appears.

5. In the **Sort Order** frame, specify the order in which to view the table.

   • To view the table to be in alphabetical order from A-Z, mark **Ascending**.

   • To view the table to be in reverse alphabetical order from Z-A, mark **Descending**.

6. In the **Sort By** frame, specify whether to sort the table by **Description** or **File Location**.

You can use this procedure to place the most popular entries at the top of the Letters grid. This speeds data entry by saving time you spend scrolling through your less popular entries.

7. To move a selected entry up or down one line in the Letters grid, use the up and down arrows.

International

Using the **International** link, you can track information such as the different types of currency you accept and the standard address formats for different countries. By defining different countries, you can enter donations from, and define address formats for, constituents who live in countries other than your own.

Define currency exchange rates so when you enter gifts, *The Raiser's Edge* calculates an amount in your country's default currency. When you print mailing addresses, constituent information formatting is determined by the settings you establish on this screen.

Establishing International Settings

You can add new countries to the program and include currency and address block formatting information. You can edit information for countries already entered in the program to update exchange rates and change other information. You can delete a country from your records or print the information for a country to keep as a record for your files.

➢ **Adding a country**

You can add a country and define currency and address formatting information for it.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **International** link. The International page appears.
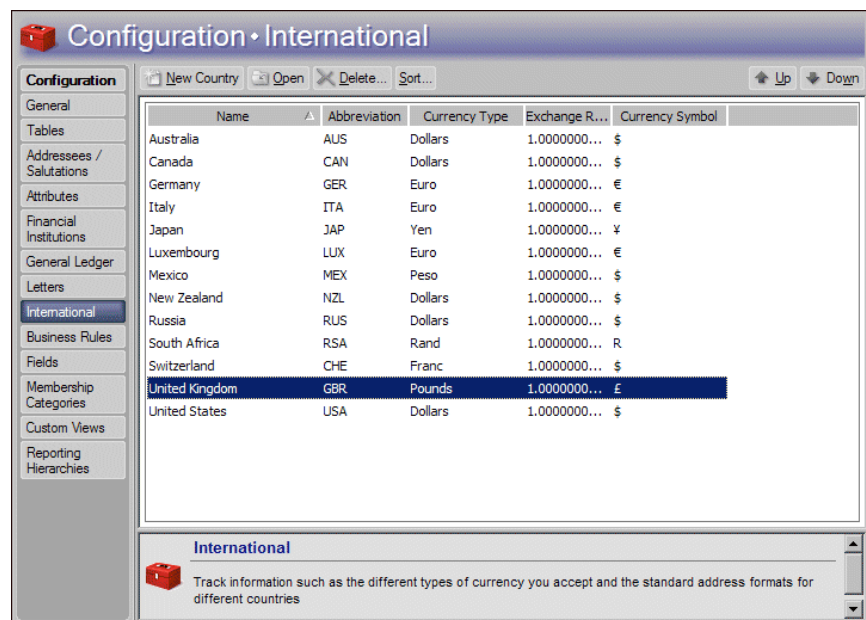
The International grid displays information for countries already entered in the program.

3. On the action bar, click **New Country**. The New Country screen appears.

4. Enter the **Name** of the new country. When you click the down arrow, a dropdown list of countries appears. The dropdown list includes all the countries for which you can establish Regional Settings in your *Windows* Control Panel. You can also type the name of the new country directly into the field.

5. Enter an **Abbreviation** for the country. You can use your entry here in the address block for mailing purposes. For example, you can use USA in place of United States of America.

6. Enter the **Currency** type used in this country.

7. Enter the **Exchange rate** for this currency with US dollars.

8. Enter the appropriate **Symbol** for the currency type you selected. Click the down arrow to view the table entries for the **Placement** field. Your selection determines where the currency symbol is placed.

9. In the **1000 separator** field, determine which character is placed between the 1 and first 0 in 1000 (it will also separate any other number in the thousands). In the **Decimal separator** field enter the character you want to use as a decimal.

10. In the **Decimal digits** field, enter how many digits to appear after the decimal point in a number. For example, to format ten dollars as $10.00, enter 2.

11. For **Leading zero**, specify whether to place a zero before the decimal on numbers less than one. For example, your selection determines whether 50 cents prints as $0.50 or $.50.

When you select a country, the symbol and placement automatically default to the settings you establish in the International option of the *Windows* Control Panel.

If you need to add a currency symbol that is not available on your keyboard, click **Start** on the *Windows* taskbar. Select **Programs**, **Accessories**. Select **Character Map**. Highlight the symbol you need and click **Copy**. On the New Country screen, place the cursor in the **Symbol** field and press **CTRL** + **V** to enter the symbol.

12. If you use *AddressAccelerator*, the **Addresses with this country are eligible for AddressAccelerator** checkbox appears. By default, this checkbox is marked for the United States and not marked for other countries. When you mark this checkbox, the addresses for the country are available for validation through *AddressAccelerator*. To validate addresses in a country, you must first obtain the *AddressAccelerator* version for the country. You can only have one set of *AddressAccelerator* data files at a time.

    If, in Configuration, you set a business rule to automatically validate any address you edit, *AddressAccelerator* validates only addresses in countries with this checkbox marked. For more information about this business rule, see "Defining general rules" on page 88.

13. In the **Display available fields for this country** field, select the country with the address block style most similar to the country you are adding.

14. Use the left and right arrows to move fields to or from the **Address block** box. You selections in this box determine how the address for the new country is formatted. You can select any field from the **Available fields** box for the address format of the new country.

15. Use the buttons at the bottom of the New Country screen to add punctuation, line breaks, or spaces to the address formatting in the **Address block** box.

16. To save the new country, click **Save and Close** on the toolbar. You return to the International page.

Managing International Settings

You can edit and delete countries. You can print information for countries to keep as a reference.

➢ **Editing a country**

You can edit the information for a country you have already entered in the program.

> You need to update the exchange rate for the United Kingdom. You currently have the rate entered at 1.00 and you want to enter a more accurate figure.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **International** link. The International page appears.

3. In the International grid, select United Kingdom and click **Open**. The United Kingdom screen appears.

4. In the **Exchange rate** field, enter the updated exchange information.

5. To save the changes, click **Save and Close** on the toolbar. You return to the International page.

➢ **Deleting a country**

Occasionally, you may need to remove a country from the program. For example, if you end appeal mailings to a country in which no constituents live, you can remove it from your database.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **International** link. The International page appears.

3. In the International grid, select the country to delete.

4. On the action bar, click **Delete**. A verification message appears.

5. To delete the country, click **Yes**.

➢ **Printing international information**

You can print a list of all defined countries or a detailed profile of each country to keep for your records.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **International** link. The International page appears.

3. Right-click anywhere in the International grid. A shortcut menu appears.

4. Select **Print**. A submenu appears.

5. To print a list of all the countries in the grid, select **Grid only**. Your printer produces a list of the countries in the grid.

6. To print a detailed profile for a country, including address formatting and currency exchange information, select the country in the grid. Right-click and select **Print** from the shortcut menu. From the submenu, select **Country Profile**. Your printer produces the information for the selected country.

Business Rules

Business rules help speed your data entry and help to verify that the data is correct. You can perform common tasks in two categories: those with predefined rules and those with rules that you define. Predefined rules are for the most part set up by marking a series of checkboxes and options. They govern a wide variety of functions such as rules for adding gifts and what constitutes duplicate criteria during searches.

You can create customized rules for three events: opening constituents, adding gifts, and adding actions. By specifying a query and defining a message to appear, when you execute one of the three events and the record falls within the query, the message you defined for that rule appears. For example, you can run a query to include all your board members. You can then use the query to create a rule specifying that a message appear advising extreme care any time one of your users opens a board member's constituent record.

Business rules take effect as soon as you set them. Once you mark an option or checkbox or save a user-defined rule, the rule is in effect.

Business rules affect virtually all areas of the program including **Batch**, **Import**, and **Global Change**. However, you can override business rules for individual imports. For more information, see the *Import Guide*. Business rules also affect inactive constituents.

General Rules

General rules control how the program treats invalid credit card numbers and determine functions from which deceased constituents are excluded. If you have *AddressAccelerator*, you can also specify that the service attempt to validate addresses whenever you edit them, and select additional address formatting options.

➢ **Defining general rules**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.
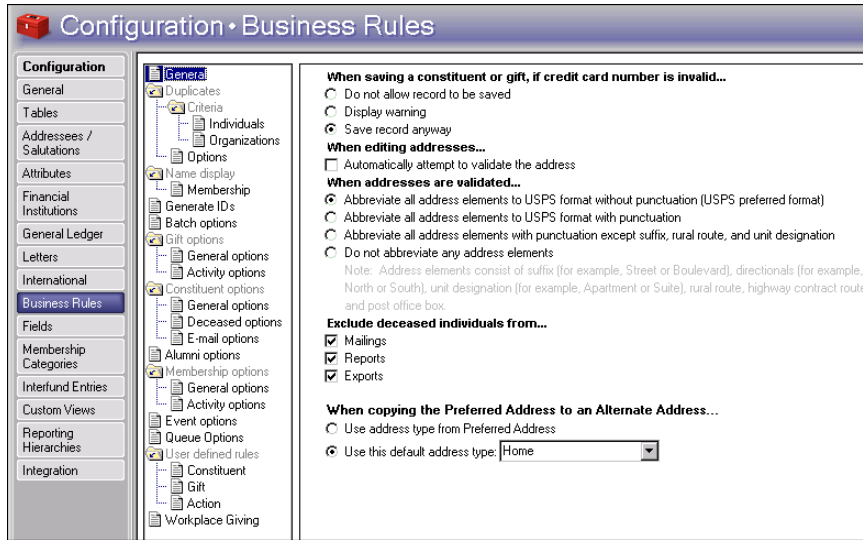
The tree view on the left lists all business rule options. When you select an option, the rule choices for that option appear on the right. If you select a folder, the rule choices for the first option under that folder display on the right. The default opening option in the tree view is **General**.

3. Select a default option for what to do if the credit card number is not valid when saving a constituent or gift record. *The Raiser's Edge* does not check the availability of credit in an account. The program uses a formula to check the validity of the credit card number based on several factors, including the prefix (first several digits) and number of digits in the account number. If no credit card type is specified on the record, *The Raiser's Edge* tries to determine the type based on the prefix and number of digits, and processes the number as the assumed credit type.

When you mark **Do not allow record to be saved**, invalid numbers cannot be saved. If you attempt to do so, a warning displays.
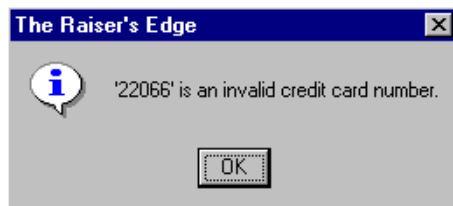
When you mark **Display warning**, the program displays a warning, but allows the number to be saved anyway.
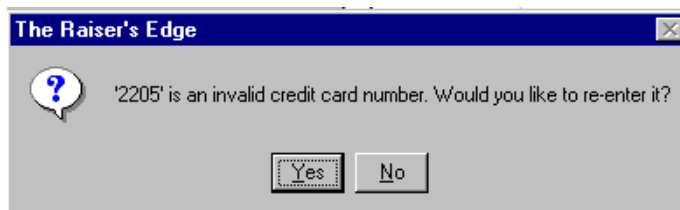
Availability of credit is not checked here. The program validates an account number based on a formula which includes the prefix and number of digits in the account number.

Remember, business rules affect all users of the program. For settings that affect individual users, see the "User Options" chapter of the *Program Basics Guide*.

When you mark **Save record anyway**, the program saves the invalid number without issuing a warning.

4. If you use the *AddressAccelerator* mailing service, the **Automatically attempt to validate the address** checkbox appears. To see if an address meets *AddressAccelerator* standards whenever you edit an address, mark this checkbox.

   Only addresses in countries for which you have marked the **Addresses with this country are available for address validation** checkbox are included. For more information about this checkbox, see "Adding a country" on page 84.

5. If you use the *AddressAccelerator* mailing service, the **When addresses are validated** options appear. By default, all addresses are abbreviated to the preferred format of the USPS. You can select options to specify other types of formatting here.

   If you select any option other than the USPS preferred format (the first option), you can still get the USPS preferred format when using the optional module *PostalSaver* by marking **Cass certify addresses (this option will not update addresses in the database)** on the PostalSaver tab of a mailing. For mailings that meet postal discount requirements, this option converts the addresses to the USPS preferred format for that mailing only — it does not update the addresses in the database.

6. To increase accuracy and efficiency and avoid potentially uncomfortable situations, you can **Exclude deceased individuals from** a variety of functions. These settings are only defaults. You can change them in the specific area of the program.

   Mark checkboxes to exclude records marked as "Deceased" from **Mailings**, **Reports**, and **Exports**.

7. Select the type of address to use when **Copying the Preferred Address to an Alternate Address** using the **Copy Preferred to Alternate** menu item on a constituent record**.** When you use this menu item on the Bio or Org 1 tab of a constituent record, the preferred address is copied as an alternate address so you can select, or create, another address to use as the preferred address. All records linked to the old preferred address (now an alternate), are updated to the new preferred address. This business rule determines the type of address the alternate is saved as.

   • When you select **Use address type from Preferred address**, the alternate address uses the same address type it had when it was the preferred address.

   • When you select **Use this default address type**, the alternate address uses the type you specify in the accompanying field. The default entry is "Home".

   When you leave this page, your changes are automatically saved.

> If you have NCOA processing, we recommend you run the addresses updated via NCOA through the address validation process to put the NCOA addresses in your preferred format.

Duplicate Rules

Duplicate searches in *Records* are used to determine if a new or edited entry already has a record. On this screen, you can specify how the program conducts these searches.

You can define the criteria the program uses to find duplicate records during a duplicate search. Select your own search criteria or use the defaults. For example, if you use the default settings, during a duplicate search for individual constituents, the program searches the first five characters in the **First Name** and ten characters in the **Last Name** fields of individual constituent records and compares them to a new or edited record to determine if it is a duplicate.

You can change or add **Field Name** criteria and change the **Length** (number of characters) the program searches for duplicates. No specific fields are required as criteria, but you must define at least one criteria field to begin a search.

Criteria

You can define the criteria the program uses to determine if a record already exists when you perform a search. You can define criteria by fields and by the length of entries in those fields.

➢ **Defining duplicate criteria for individual searches**

In addition to searches for duplicate individual records, the program uses this criteria in Duplicate Constituent Reports, and when you import records.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Duplicates**, **Criteria**, select **Individuals**. The Individual Duplicate Criteria grid appears on the right.

4. In the grid, define a **Field Name** (the defaults are **First Name** and **Last Name**) and **Length** (the default is 50 characters). You can replace the default field names or add more fields to the existing criteria. To view all possible field entries, click in a cell and then click the down arrow.

During a duplicate search, the program checks all address components against the constituent's primary address.

When you enter a **Field Name**, a number defaults into the **Length** column. The number varies according to the **Field Name** you select and is only a default. You can overwrite it.

If you select a code table, date field, or yes/no checkbox field in the **Field Name** column, the length is not applicable. N/A appears in the **Length** column.

5. To include any aliases in the search for duplicates, mark **Check aliases**. Aliases are other names a constituent is known by. For example, an individual alias can be a stage name.

   If you want to reestablish program default criteria settings, click **Reset to System Defaults**.

   When you leave this page, your changes are automatically saved.

➢ **Defining duplicate criteria for organization searches**

You can define the criteria the program uses to determine if a record already exists when you perform an organization constituent search.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Duplicates**, **Criteria**, select **Organizations**. The Organization Duplicate Criteria grid appears on the right.

4. In the grid, you can define a **Field Name** (defaults is **Org Name**) and **Length** (the default for **Org Name** is 60 characters). You can replace the default field names or add more fields to the existing criteria. To view all possible field entries, click in a cell and then click the down arrow.

When you enter a **Field Name**, a number defaults into the **Length** column. The number varies according to the **Field Name** you select and is only a default. You can overwrite it.

5. To include any aliases in the search for duplicates, mark **Check aliases**. Aliases are other names an organization is known by. For example, a company may be known by an acronym. If you enter an alias of JSC for the John Smith Company, both would list in duplicate search results.

If you want to reestablish program default criteria settings, click **Reset to System Defaults**.

When you leave this page, your changes are automatically saved.

*If you select a code table, date field, or yes/no checkbox field in the **Field Name** column, the length is not applicable. N/A appears locked in the **Length** column.*

Options

Use duplicate options to determine when the program performs duplicate searches and how search results display.

➢ **Defining general options for duplicate searches**

You can define general rules to determine which constituents display as results for duplicate searches.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Duplicates**, select **Options**. The options for duplicates appear on the right.

*For **Duplicates** business rules, set **Criteria** rules to specify the fields and number of characters used in duplicate searches, and set **Options** to specify when searches take place and how results display.*

If you have lots of records, running a duplicate search every time you create or edit a record may take too long to suit your purposes. Instead, you may want to run a Duplicate Constituent Report in *Administration* at set intervals rather than use these business rules.

Security rights can limit the constituents who appear in a duplicate search.

4. To run a duplicate search whenever you save a new constituent record, mark **Constituent**. The constituent record is only searched when you first add it, not if you subsequently open it for editing. Only fields specified as criteria are used in duplicate searches. When the program finds duplicates, it displays them in a list.

5. To search for other records with the same name when you edit a constituent name; spouse name; relation's first, middle, or last name; or parent company organization name on an existing constituent record, mark the applicable checkboxes. Marking these checkboxes ensures you do not create a duplicate record when you edit and save current records. This rule applies only when you save current records after editing, not when you create new ones. If duplicates are found, they appear in a list. You can save the record as it is or return to the record without saving it.

6. Specify which constituents to display in duplicate search results.

   • To show all constituents who meet the search criteria, select **Display all constituents that meet the criteria**.

   • To limit the results that appear based on the user's security view rights, select **Display only constituents that the user has rights to view**. When you select this option, if the user does not have security view rights to a constituent that appears in search results, the message "User is not authorized to access this constituent" appears. For information on how to assign user view rights for constituents, see the "Security" chapter of this book.

   When you leave this page, your changes are automatically saved.

Duplicate Constituents Report

After you define duplicate criteria in *Configuration*, you can run a duplicate constituents report in *Administration*. To keep your database from filling up with duplicate records, *The Raiser's Edge* can compare records in your database — individual and organization — and find all duplicates. Other *Administration* links, such as **Merge Constituents** and **Global Delete**, can then help you rid the database of any duplicate records discovered. The **Duplicate Constituents** link determines duplicates based on the criteria you established under **Business Rules** in *Configuration*.

➢ **Searching for duplicate constituents**

   1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. Click **Duplicate Constituents**. The Duplicate Constituent Report screen appears.

3. In the **Show** field, select the criteria to use: **Individual criteria** or **Organization criteria**. These options are for viewing purposes only. The program automatically checks for both individual and organization duplicate records.

4. In the **Duplicate criteria** grid, the criteria you established in **Business Rules** in *Configuration* displays. You cannot edit the criteria information on this screen. To change the duplicate criteria before running the duplicate criteria report, you must go to **Business Rules** in *Configuration*.

5. Once you confirm the duplicate criteria, you can mark **Create output query of duplicate records**.

6. To generate the report, click **Run Report Now**. If you marked **Create output query of duplicate records**, the Save Static Query screen appears.

7. Enter a **Query name** and **Description**. The **Query format** defaults to Static and cannot be changed. You can also specify whether to allow others to execute and/or modify your query.

8. Click **Save**. The duplicate search begins. A screen appears tracking the process.

When the process is complete, if the program finds no duplicates, a message appears telling you "No records meet specified criteria". If the program discovered any duplicate records, the Duplicate Constituent Report appears and displays information about the duplicate records.

9. To print the report, click the print icon on the toolbar.

10. To close the report, click the X in the upper right corner. You return to the Duplicate Constituent Report screen.

11. To return to the Administration screen, click **Admin** on the Raiser's Edge bar.

Name Display Rules

If you have the optional module *Membership Management*, Name display rules appear. These rules determine defaults for how names display for memberships.

➢ **Defining default membership name display rules**

Select the default for how a name appears in the **Name on card** field on a membership record.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Name display**, select **Membership**. The membership name display rule options appear on the right.
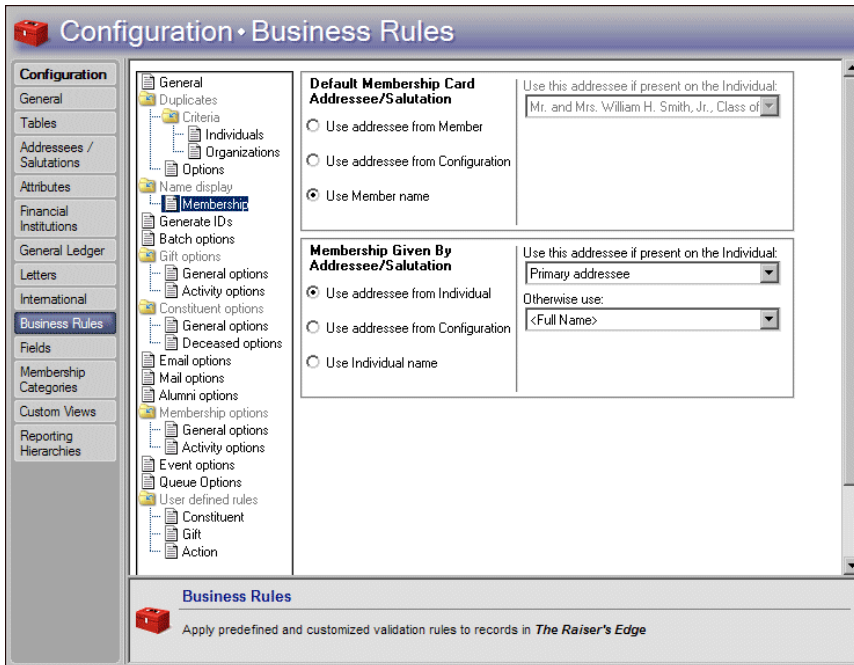
4. In the **Default Membership Card Addressee/Salutation** frame, select a display option for the default addressee/salutation of the member. Your selection determines how the name of the member appears on the membership card.

- To select an addressee/salutation from the individual record, select **Use addressee from Member** and specify your entry in the **Use this addressee if present on the Individual** field. In the **Otherwise use** field (which contains the additional choices of Name and Constituent ID), specify an entry for the program to use as a backup if it cannot find the first addressee/salutation format you specify. If the program finds no addressee/salutation, it uses the Key name (First name, Middle name, and Last name).

- To select any defined addressee/salutation plus any embedded addressee/salutations in the program, select **Use addressee from Configuration**. If you select an embedded addressee/salutation (Const Addr/Sal), specify entries in the **Use this address if present on the Individual** and **Otherwise use** fields. To learn more about embedded addressee/salutations, see "Adding an addressee/salutation" on page 43.

- To use the name from the membership record, select **Use Member name**. The **Use this address if present on the Individual** and **Otherwise use** fields are disabled.

If the program finds no selected addressee/salutation, it uses Key name (First name, Middle name, and Last name).

An embedded addressee/salutation lets you define the addressee/salutation each time you use it.

5. In the **Membership Given by Addressee/Salutation** frame, select a display option for the default addressee/salutation for the individual who gives the gift of membership. Your selection determines how the name of the person giving the membership appears on the membership record. The options are the same as those for membership cards.

When you leave this page, your changes are automatically saved.

Generate IDs Rules
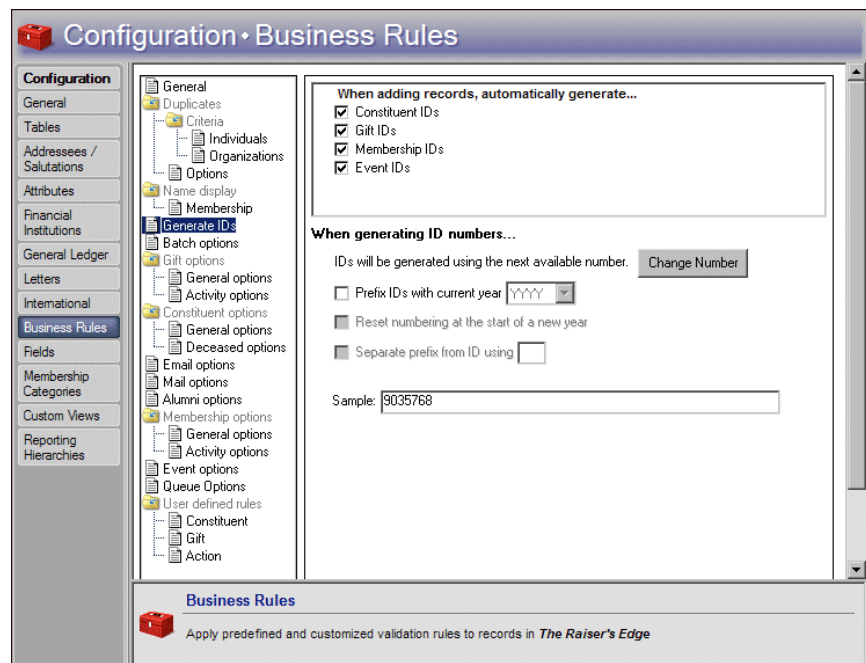
Automatic IDs are sequential and unique. They can be generated in numeric form only.

You can specify rules for generating automatic ID numbers for several record types. Automatic IDs for record types are assigned in the order the records are added. Auto IDs are sequential and unique. They can be generated in numeric form only. You can use these IDs to streamline your data retrieval in queries and searches.

➢ **Defining defaults rules for generating IDs**

You can set defaults to establish the record types for which you generate IDs, and how the IDs are numbered.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, select **Generate IDs**. The rule options for generating IDs appear on the right.

4. In the **When adding records, automatically generate** frame, specify the IDs to automatically generate when you add a record. To generate an ID, mark its checkbox. You can automatically generate **Constituent IDs**, **Gift IDs**, **Membership IDs**, (if you have the optional module *Membership Management*), and **Event IDs** (if you have the optional module *Event Management*).

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5. To generate ID numbers, the program searches for the lowest available number that occurs after the ID number listed in the **When generating ID numbers** frame. To find and change the reference number the program uses to find a unique ID number, do as follows:

   a. Click **Change Number**. The Change Next Available ID Number screen appears.

   b. In the **Next Available ID** column, the program displays the number last used to generate an ID, plus one. If you want the program to start with another number when it searches for the next unused ID number when you add a **Record Type**, enter it here.

   When you place the cursor in the **Next Available ID** field for a record type, a button in the field is enabled. When you click the button, the program starts at zero and searches for the next unused ID number available for that record type. You can use this button to ensure you have no gaps in your ID numbering.

   c. Click **OK**. You return to the rule options for generating IDs.

6. When you mark a record type, the **Prefix IDs with current year** checkbox is enabled. To display the year before the ID number, mark this checkbox and enter whether you want the year to appear as two or four characters. Placing the year before the ID number lets you identify at a glance the year the record was added. When you mark this checkbox, you affect all record types.

7. When you mark **Prefix IDs with current year**, the **Reset numbering at the start of a new year** and **Separate prefix from ID using** checkboxes are enabled.

   • To begin with number 1 when creating IDs in a new year, mark **Reset numbering at the start of a new year**.

   • To separate the year from the ID number, mark **Separate prefix from ID using** and enter the symbol you want to use in the corresponding field. For example, if you enter a forward slash in this field and select the year to display as four characters, the program formats the constituent ID as "2001/762."

   In the **Sample** field, an example of the ID options you select appears.

   When you leave this page, your changes are automatically saved.

If you mark **Prefix with current year**, you can reset your IDs to begin renumbering at the start of a new year.

Be careful when using prefix numbers with a year. If you decide not to use the prefix during the year and change the option, when the program searches for the next available number, it does not take into account numbers already entered with the prefix. For example, if you entered IDs prefixed with 2000 and then change the option to include no prefix, the program will show the next available ID number as "1".

Batch Rules

You can establish rules to control how the program generates batch numbers and warnings to display when gifts are added to batches.

➢ **Defining batch rules**

You can set rules for the generation of batch ID numbers and select a warning to appear when you add gifts to a batch from constituents with outstanding balances.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the **Business Rules** tree view, select **Batch options**. The batch rule options appear on the right.
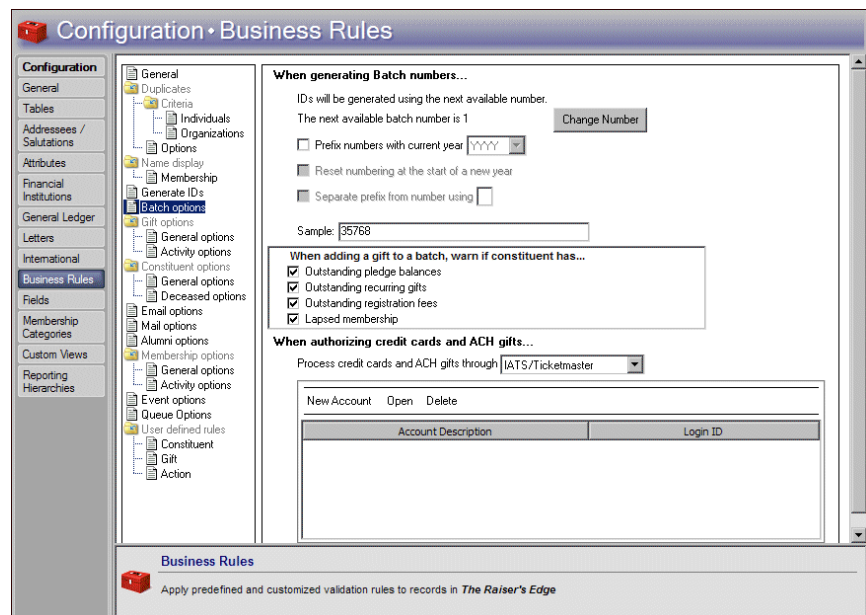
When you begin to create batches, the program does not update the next available batch number listed in the **When generating batch numbers** frame. The program uses this number as a reference point to begin a search for the next unused batch number.

4. To generate batch numbers, the program searches for the lowest available number that occurs after the batch number listed in the **When generating Batch numbers** frame. To find and change the reference number the program uses to find a unique batch number, do as follows:

   a. Click **Change Number**. The Change Next Available Batch Number screen appears.
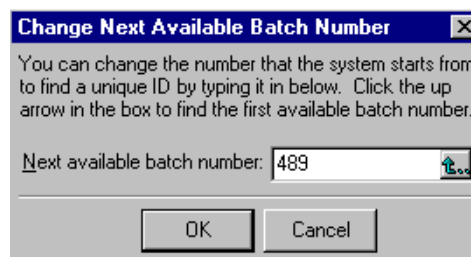
b. In the **Next available batch number** field, enter the number you want the program to use when it begins a search for the next unique batch number. If you click the button in the **Next available batch number** field, the program searches for the next unique batch number available.

c. Click **OK**. You return to the Batch Business Rules page.

5. To display the year the batch was created before the batch number, mark **Prefix numbers with current year** and select whether to display the year in two or four characters in the corresponding field. When you add a year prefix to your ID numbers, you can identify at a glance the year a batch was created.

6. When you mark **Prefix numbers with current year**, the **Reset numbering at the start of a new year** checkbox is enabled. If you mark **Reset numbering at the start of a new year**, *The Raiser's Edge* resets the next available batch number to "1" for the first batch created in a new calendar year.

7. When you mark **Prefix numbers with current year**, the **Separate prefix from ID using** checkbox is enabled. When you mark **Separate prefix from ID using**, enter the symbol to use to separate the sections of a batch number. For example, if you enter a hyphen in this field, the program formats the batch number as "2000-489."

In the **Sample** field, an example of the batch number with the format options you select appears.

8. In the **When adding a gift to a batch, warn if constituent has** frame, specify when to display a warning when you add gifts to a batch. You can mark checkboxes to warn if a constituent has **Outstanding pledge balances**, **Outstanding recurring gifts**, **Outstanding registration fees** (*Event Management* only), or a **Lapsed membership** (*Membership Management* only).

For example, if you mark **Outstanding pledge balances** and you add a gift with an outstanding pledge to a batch, the following warning message appears.
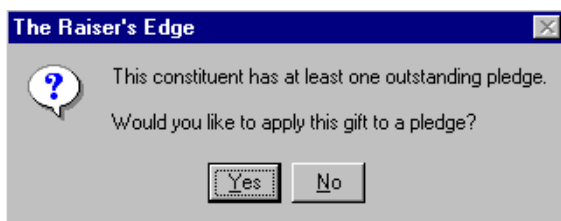
If more than one of the conditions is present, multiple messages display.

9. In the **Process credit cards and ACH gifts through** field, specify the service you use to process credit card transactions. You can select "ICVerify" or "IATS/Ticketmaster".

- If you select "ICVerify", go to User Options, select the File Locations tab, and enter an **ICVerify Data Path**.

Batch ID numbers must be unique, so before you can **Reset numbering at the start of a new year**, you must mark the **Prefix numbers with current year** checkbox.

- If you select "IATS/Ticketmaster", the account grid and its action bar are enabled. In the grid, you can set up account descriptions, login IDs, and passwords for each IATS/Ticketmaster account to which transactions are directed when you create transmission files.

10. If, in the **Process credit cards and ACH gifts through** field, you select "IATS/Ticketmaster", enter information for at least one IATS account.

   a. On the action bar of the grid, click **New Account**. The Add Account screen appears.

   b. Designate an account description for the IATS account and enter the login ID and password provided by IATS/TicketMaster for the account.

   c. Click **OK**. You return to the Business Rules page and the account description and login ID appear in the grid. When you create transmission files, *The Raiser's Edge* uses this information to integrate with IATS. For detailed information and procedures about how to create and send transmission files, see the Creating Transmission Files section of the *Electronic Gifts (EFT) Guide*.

   When you leave this page, your changes are automatically saved.

Gift Rules

You can set rules to control many aspects of gift entry including who soft credits default to and defaults for saving gifts. Your selections affect how gifts display on reports and in mailings.

Gift General Options

Define rules to determine who is credited for matching gifts, who is soft credited on reports and in mailings, queries, and exports, and how to display the word gift.
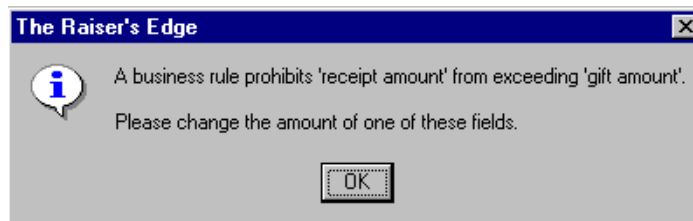
➢ **Defining general defaults for gifts**

   1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

   2. Click **Business Rules**. The Business Rules page appears.

3. From the Business Rules tree view, under **Gift options**, select **General options**. The general gift rule options appear on the right.
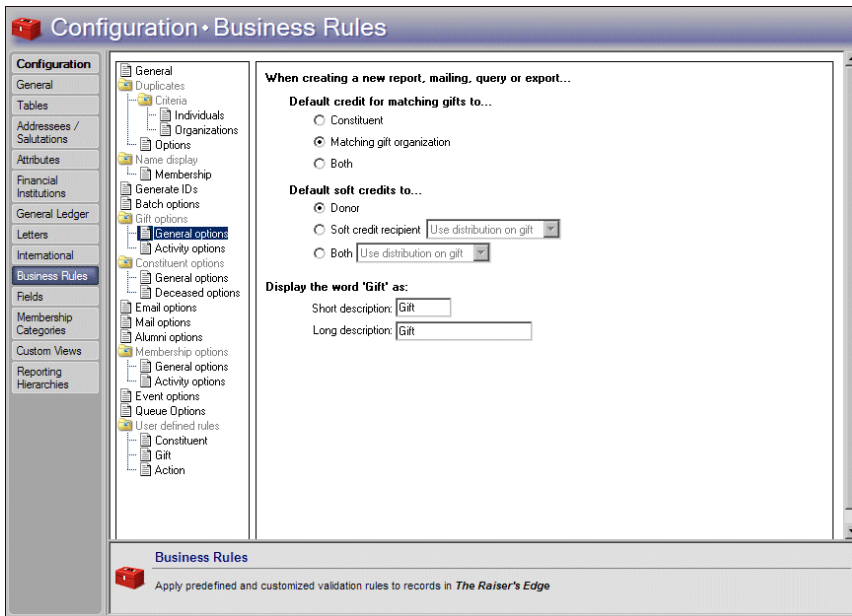
4. Select who to **Default credit for matching gifts to** for reports, mailings, queries and exports. Your selection is only a default. You can change it on individual reports, mailings, queries, and exports.

- To default the matching gift credit to the giver of the primary gift, select **Constituent**.

- To default the matching gift credit to the matching gift company defined on the constituent record, select **Matching gift organization**.

- To default the matching gift credit to the giver of the primary gift and the matching gift company defined on the constituent record, select **Both**.

5. Select who to **Default soft credits to** on reports, mailings, queries, and exports. You can select to default soft credits to the **Donor**, **Soft credit recipient**, or **Both**. Your selections for soft credits are only defaults. You can change these defaults on individual reports, mailings, queries, and exports.

If you select **Soft credit recipient** or **Both**, select how to distribute the soft credit among the recipients.

- On the Soft Credit tab of the gift record you can distribute a gift among multiple recipients. For example, you can credit one recipient with thirty percent of a gift and another with fifty percent (the distribution does not have to equal 100 percent). To follow this distribution for soft credits on reports and mailings, select "Use distribution on gift".

- To distribute the gift evenly between recipients, select "Split evenly". For example, a $600 gift split among three recipients would credit each with $200.

- To credit all recipients with the full amount, select "Full amount to all".

For more information about matching gifts and soft credits, see the *Gift Records Guide*.

When you rename the word "gift," the change affects many areas of the program. To ensure consistency and accuracy, be careful to not duplicate terms already used in *The Raiser's Edge*.

6. Enter the short and long description of how you want to **Display the word 'Gift' as**. If your organization does not use the term "gift," you can customize it to reflect your business needs. The maximum character length for the short description is four. The maximum character length for the long description is 25. Neither the short or long description can contain periods [.] or ampersands [&]. For example, if your organization uses the word transaction, you would enter "trns" in the **Short description** field and "transaction" in the **Long description** field.

    The name you enter will appear most places in the program where the term "gift" currently appears.
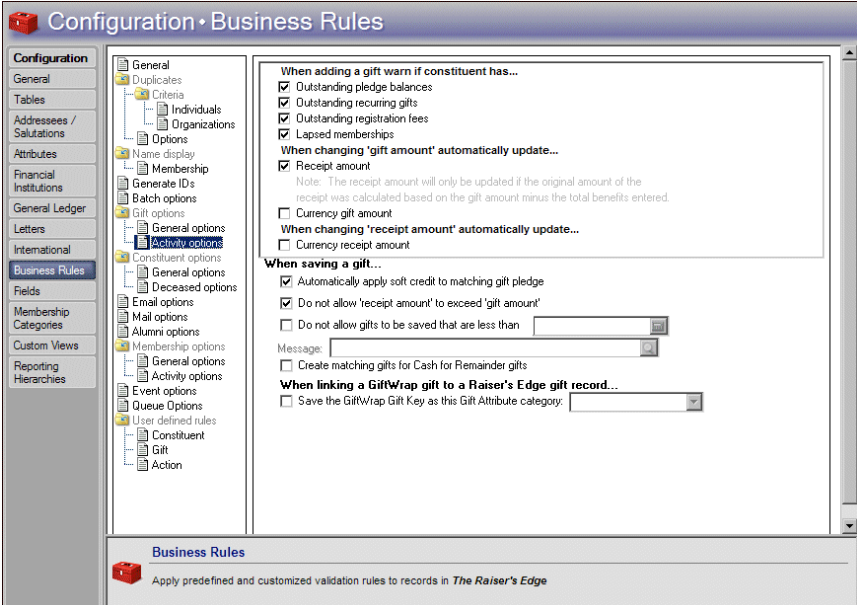
    When you leave this page, your changes are automatically saved.

Gift Activity Options

You can establish rules for warnings to appear when users add new gifts and change gift and receipt amounts. You can also establish rules for soft crediting matching gift pledges, linking matching gifts to proposals, matching gift and receipt amounts, and minimum gift amounts you allow to be saved.

➢ **Defining rules for adding and updating gifts**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Gift options**, select **Activity options**. The gift activity rule options appear on the right.

4. Under **When adding a gift warn if constituent has**, specify when to display a warning when entering gifts. You can mark checkboxes to warn if a constituent has **Outstanding pledge balances**, **Outstanding recurring gifts**, **Outstanding registration fees** (*Event Management* only), or **Lapsed memberships** (*Membership Management* only).

If any of these situations exists, a warning message appears to ask whether to apply the new gift toward the outstanding pledge balance, recurring gift, registration fee, or membership renewal. If more than one of these situations is present, separate message boxes appear for each.

5. Under **When changing 'gift amount' automatically update**, specify whether to update the receipt amount. When you mark **Receipt amount**, the receipt amount is updated only if, before the change, it equals the gift amount minus the value of all benefits. For example, if a gift of $20.00 was given and a $10.00 t-shirt was a benefit, the receipt is for $10.00. If you change the gift amount to $50.00, the receipt amount changes to $40.00. Or, if a gift of $100 has no benefits and a receipt value of $100 (the receipt amount still equals the gift amount minus the benefit value), and you change the gift amount to $150, the receipt amount automatically updates to $150.

   However, if a receipt amount is different from the gift amount minus the value of all benefits, the receipt amount does not automatically update if you later change the gift amount. For example, if you have a gift of $100 with no benefits that you assign a receipt value of $75, and you change the gift amount to $150, the receipt amount remains $75.

6. To update the currency gift amount to reflect the new gift amount, mark **Currency gift amount**. To determine the currency gift amount, the program multiplies the gift amount by the currency exchange factor as entered for a country in the **International** link of *Configuration*. When you mark these checkboxes, figures already in the **Receipt amount** and **Currency gift amount** fields automatically update when you change the gift amount.

7. Under **When changing 'receipt amount' automatically update**, specify whether to update the currency receipt amount. When you mark **Currency receipt amount**, you ensure the relationship between the receipt amount and currency receipt amount remains the same. The value in the **Currency receipt amount** field is the receipt amount times the currency exchange factor. The currency receipt amount updates as soon as you leave the **Receipt amount** field. When you mark **Currency receipt amount**, figures already in the **Currency receipt amount** field automatically update when you change the receipt amount.

   When you leave this page, your changes are automatically saved.

➢ **Defining rules for saving gifts**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

If you do not set this rule, when the gift amount is originally entered, the receipt amount defaults to the same amount as the gift.

3. From the Business Rules tree view, under **Gift options**, select **Activity options**. The gift activity rule options appear on the right.
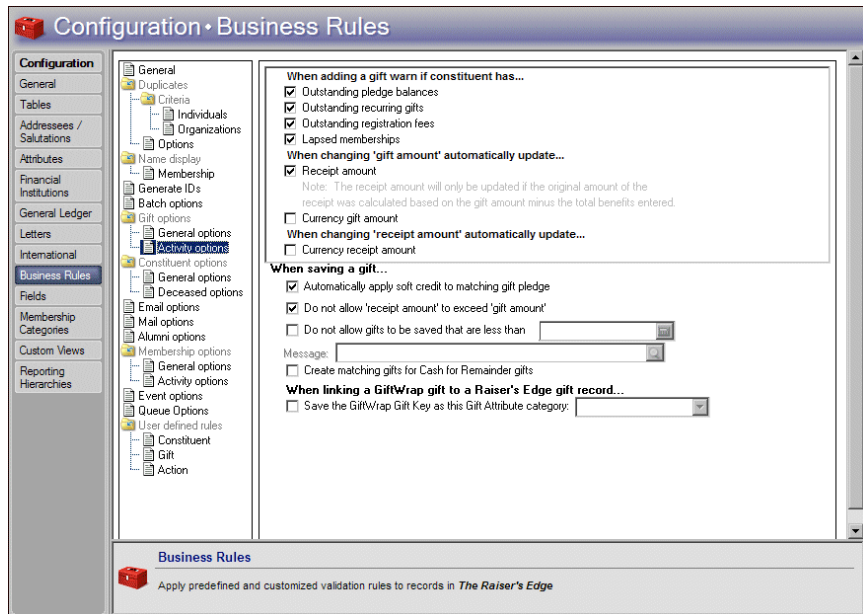
4. To default the soft credit recipients from the original gift into the Soft Credit grid on the matching gift pledge when you save a gift, mark **Automatically apply soft credit to matching gift pledge**. Each soft credit recipient is automatically credited for the same percentage of the matching gift as they received for the initial gift.

5. To ensure that no receipt can exceed the amount of the gift for which it is issued, mark **Do not allow 'receipt amount' to exceed 'gift amount'**. If a user attempts to enter a receipt amount greater than the gift amount, a message appears.

6. To define the minimum gift amount allowed to be saved, mark **Do not allow gifts to be saved that are less than** and enter the minimum gift amount in the corresponding field.

When you mark **Do not allow gifts to be saved that are less than**, the **Message** field is enabled. In this field, enter the message to appear when a user attempts to save a gift that is less than the specified amount. A message is required.

Not allowing gifts less than certain amounts to be saved can be helpful in preventing data entry errors. For example, you can specify that no gift less than $1.00 can be saved. This prevents a gift of $50.00 from inadvertently being entered as $.50.

a. For more room to view your text, click the magnifying glass. The Define Message screen appears.
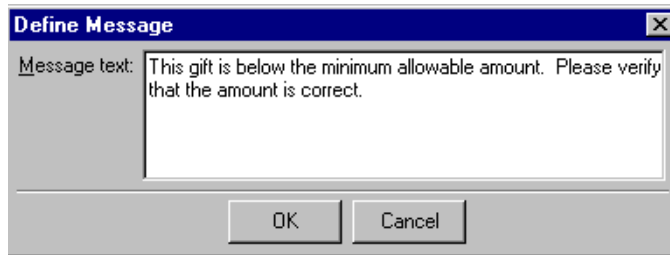
b. In the **Message text** field, enter the message to appear when a user attempts to save a gift that is less than the specified amount.

c. To save the message and close the Define Message screen, click **OK**. To close the zoom window without saving the message, click **Cancel**. You return to the Business Rules gift options activity options page.

When you leave this page, your changes are automatically saved.

➢ **Defining rules for integration with GiftWrap**

When you install and activate *Planned Giving Tracker*, this rule appears. Before you import any gift records from *GiftWrap*, you must specify the *Raiser's Edge* gift attribute category used to store the gift key from the corresponding gift record in *GiftWrap*.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Gift options**, select **Activity options**. The gift activity rule options appear on the right.
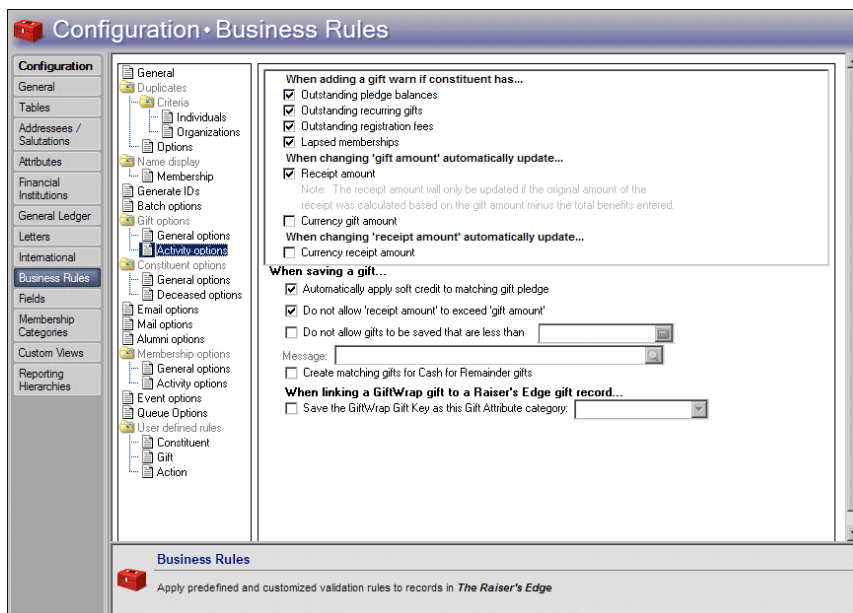
4. Under **When linking a GiftWrap gift to a Raiser's Edge gift record**, mark the **Save the GiftWrap Gift Key as this Gift Attribute category** checkbox and select the category where the *GiftWrap* gift key will be stored on each corresponding *Raiser's Edge* gift record.

    When you leave this page, your changes are automatically saved.

Constituent Rules

You can set rules for general rules for such things as changing constituent names and adding names to the list of aliases. You can also set rules for when you mark a person as deceased and rules when the deceased constituent has a spouse.

Constituent General Rules

You can set rules for changing constituent names and adding names to the list of aliases. You can also set rules for constituents who give to an appeal that does not appear on the Appeal tab of their constituent record and rules for specifying an action type for actions created for letters.

➢ **Defining the rule for changing constituent last names**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Constituent options**, select **General options**. The constituent rule options appear on the right.
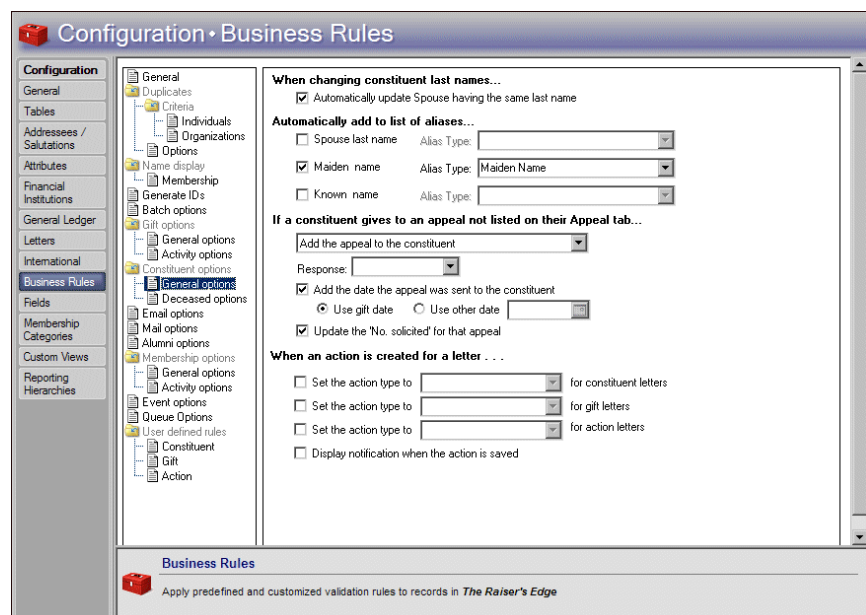
4. Under **When changing constituent last names**, if you mark **Automatically update spouse having the same last name**, when you leave the **Name** field, the last name of the spouse automatically changes to the new last name of the constituent, as long as the entry in the **Spouse name** field is the same as the constituent's last name.

If the spouse's last name is different from the constituent's last name before the change, this rule does not occur. This rule affects spouses even if they are not constituents. If you manually change the entry in the **Spouse name** field, the rule does not change the active constituent.

When you leave this page, your changes are automatically saved.

➢ **Defining rules for aliases**

You can mark checkboxes to automatically add selected names to the alias grid.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Constituent options**, select **General options**. The constituent rule options appear on the right.

4. Under **Automatically add to list of aliases**, specify the whether to automatically add the spouse last name, maiden name, and known name to the Alias grid on the constituent record. If the entry already exists in the Alias grid, the program does not add it again. If you mark any of these checkboxes, the value for the alias does not change if the **Maiden name** on the constituent record, **Known name** on the education record, or **Last name** on the spouse record changes.

   • To include the spouse last name in the Alias grid, mark **Spouse last name**. In the **Alias type** field, select the alias type to save the spouse last name as in the Alias grid.

   • To include the maiden name in the Alias grid, mark **Maiden name**. In the **Alias type** field, select the alias type to save the maiden name as in the Alias grid.

   • To include the known name in the Alias grid, mark **Known name**. In the **Alias type** field, select the alias type to save the known name as in the Alias grid.

Aliases are other names a constituent is known by. Aliases can include a stage name for an individual or an acronym for an organization.

If you mark any of the checkboxes under **Automatically add to list of aliases**, the value for the alias does not change if the **Maiden name**, **Known name**, or **Last name** changes.

When you leave this page, your changes are automatically saved.

➢ **Defining rules for a constituent who gives to an appeal not listed on the Appeals tab of the constituent record**

You can set defaults for the appeal record when a constituent gives to an appeal which has not yet been added to the constituent record.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Constituent options**, select **General options**. The constituent rule options appear on the right.

4. In the **If a constituent gives to an appeal not listed on their Appeal tab** field, select how to manage appeals when the constituent gives to one not on their Appeal tab.

   • To place the appeal on the Appeals tab of the constituent record, select "Add the appeal to the constituent".

   • To display a message asking whether to add the appeal to the constituent record, select "Ask before adding the appeal to the constituent".

   • To not add the appeal to the Appeals tab of the constituent record, select "Do not add the appeal". The fields and options in the remaining steps are disabled.

5. If, in the **If a constituent gives to an appeal not listed on their Appeal tab** field, you select "Add the appeal to the constituent" or "Ask before adding the appeal to the constituent", the **Response** field is enabled. In this field, select the default response to appear for the appeal. To view all entries for the **Response** table on the Appeal tab of the constituent record, click the down arrow. Your selection here is only a default and can be changed on the Appeals tab.

6. If, in the **If a constituent gives to an appeal not listed on their Appeal tab** field, you select "Add the appeal to the constituent" or "Ask before adding the appeal to the constituent", the **Add the date the appeal was sent to the constituent** checkbox is enabled. To automatically place a date into the **Date** column on the Appeal tab, mark this checkbox and select the date to use.

   • To use the date on which the gift given in response to the appeal is added, select **Use gift date**.

   • To use another date, select **Use other date** and enter a date in the corresponding field.

7. If, in the **If a constituent gives to an appeal not listed on their Appeal tab** field, you select "Add the appeal to the constituent" or "Ask before adding the appeal to the constituent", the **Update the 'No. Solicited' for that appeal** checkbox is enabled. To increase the number in the **No. solicited** field on the appeal record by one, mark this checkbox.

   When you leave this page, your changes are automatically saved.

➢ **Defining rules for automatically creating an action when sending letters**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Constituent options**, select **General options**. The constituent rule options appear on the right.

4. Under **When an action is created for a letter**, specify the action types to default when constituent letters, gift letters, or action letters are created through Microsoft *Word* mail merges. When you mark a **Set the action type to** checkbox, you can select a default type for actions created for the applicable letters.

When a new action record is created from a letter, the **Action type** is set to the type you select in this field. When an existing action record is updated because of a letter, the **Action type** is set according to your entry here only if you have not already selected a type for that action record. If an existing action record already has an **Action type** defined, it is not overwritten.

If you do not select an entry in the **Set the action type to** field, new action records created from letters contain no entry in the **Action type** field, and existing records are not updated.

5. To display a message to notify you that the action was saved each time you send a letter, mark **Display notification when the action is saved**.

When you leave this page, your changes are automatically saved.

Deceased Constituent Rules

> Business rules are not retroactive. When you set any deceased business rules, they do not apply to records that are already marked deceased. A rule applies only to records you mark deceased after setting the rule.

You can set rules for when you mark a person as deceased and rules when the deceased constituent has a spouse.

➢ **Defining rules for marking a person deceased**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Constituent options**, select **Deceased options**. The deceased rule options appear on the right.

4. Under **When marking a person deceased**, to default the current date as the deceased date, mark **Enter the current date as the deceased date**.

5. To unmark the **Send mail to this address** checkbox on each address in the deceased constituent's record, mark **Uncheck the "Send mail?" checkbox for all of the deceased's addresses**. Mail will not be sent to any of the deceased's addresses in future mailings.

6. If you have the optional module *Honor/Memorial Tracking*, specify whether to make the deceased constituent an honor/memorial. An honor/memorial is a constituent who is being honored or memorialized by gifts donated to your organization. When you mark **Make the deceased constituent an Honor/Memorial**, the **Constituent is an honor/memorial** checkbox on the Honor/Memorial tab of the deceased's constituent record is automatically marked.

When you designate a constituent as an honor/memorial, the constituent is an honoree in your database. You can refer to the constituent as an honor/memorial or as the honoree receiving gifts.

7. When you mark **Make the deceased constituent an Honor/Memorial**, the **Create a tribute for the deceased** checkbox is enabled. To create a tribute for the deceased constituent, mark this checkbox and select an entry in the **Tribute type** field. A tribute explains the reason why you honor or memorialize a constituent.

8. To enter the deceased date as the ending date for all active constituent codes assigned to the constituent (only those that have no entry in the **Date to** field), mark the **Enter the current date as the "Date to" for all the deceased's active constituent codes** checkbox.

9. Your changes are automatically saved when you leave this page.

➢ **Defining rules for when a deceased constituent has a spouse**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under Constituent options, select **Deceased options**. The deceased rule options appear on the right.

> Business rules are not retroactive. So when you set any deceased business rules, they do not apply to records that are already marked deceased. A rule applies only to records you mark deceased after setting the rule.

4. Under **If the deceased has a spouse**, specify whether to convert the non-constituent spouse of the deceased constituent into a constituent. When you mark **Make the spouse a constituent**, if the deceased constituent has a spouse who is not a constituent, the spouse becomes a constituent.

5. To soft credit the spouse with the amount of each gift previously received from the deceased constituent, mark **Soft credit the spouse for all past gifts given by the deceased**. If the deceased constituent has a spouse who is a constituent or is becoming a constituent through the **Make the spouse a constituent** checkbox, the spouse receives a soft credit for the full amount for each gift previously given by the deceased constituent. If the spouse already received soft credit for a gift, he or she does not receive soft credit for the same gift again.

   When you mark **Soft credit the spouse for all past gifts given by the deceased**, you can review the complete giving history of the deceased constituent from the spouse record.

6. To prevent the deceased constituent from receiving soft credit for gifts you receive from the spouse, mark **No longer soft credit the deceased for gifts given by the spouse**. If the deceased constituent has a spouse who is a constituent or is becoming a constituent through the **Make the spouse a constituent** checkbox, the **Automatically soft credit this individual for gifts** is automatically unmarked on the spouse record.

   For example, Robert Hernandez is a deceased constituent and his wife Wendy Hernandez is also a constituent. When you mark **No longer soft credit the deceased for gifts given by the spouse** and mark Robert Hernandez as deceased, the **Automatically soft credit this individual for gifts** checkbox is unmarked on the relationship to Robert Hernandez accessed from Wendy Hernandez's constituent record. This indicates that you should no longer soft credit Robert for gifts you receive from Wendy.

7. To change the marital status of the spouse, mark **Change the marital status of the spouse** and select an entry in the **Change Marital status to { } if spouse is male** and **if spouse is female** fields. If the deceased constituent has a spouse who is a constituent or is becoming a constituent through the **Make the spouse a constituent** checkbox, the spouse's marital status changes to the specified status when you mark the constituent as deceased. If **Gender** is not defined in the spouse relationship record, the marital status does not change.

8. When you mark both **Make the deceased constituent an Honor/Memorial** and **Create a tribute for the deceased** under **When marking a person as deceased**, the **Make the spouse an acknowledgee on the tribute for the deceased** checkbox is enabled. To create a tribute with the spouse as an acknowledgee, regardless of whether the spouse is a constituent, mark this checkbox.

   Since acknowledgees who are not constituents must have an address, if the spouse is not a constituent and does not have an address, the spouse is not added as an acknowledgee on the tribute.

If **Gender** is not defined on the spouse relationship record, the marital status does not change for a spouse even if you mark **Change the marital status of the spouse**.

9. To receive a reminder to update addressee/salutations for the constituent, mark **Prompt to update the spouse addressee/salutations**. When you mark a constituent deceased, after any other deceased options you have set are completed and the constituent record is saved, the Update Spouse Addressee/Salutations screen appears so you can edit the addressee/salutations for the deceased constituent.

    When you leave this page, your changes are automatically saved.

Email Rules

You can specify that an action automatically be created when an email is sent to a constituent. When you integrate *The Raiser's Edge* with Microsoft *Outlook*, you can also indicate settings for actions saved for incoming emails and appointments.

➢ **Defining rules for creating actions from emails**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, select **Email options**. The email rule options appear on the right.
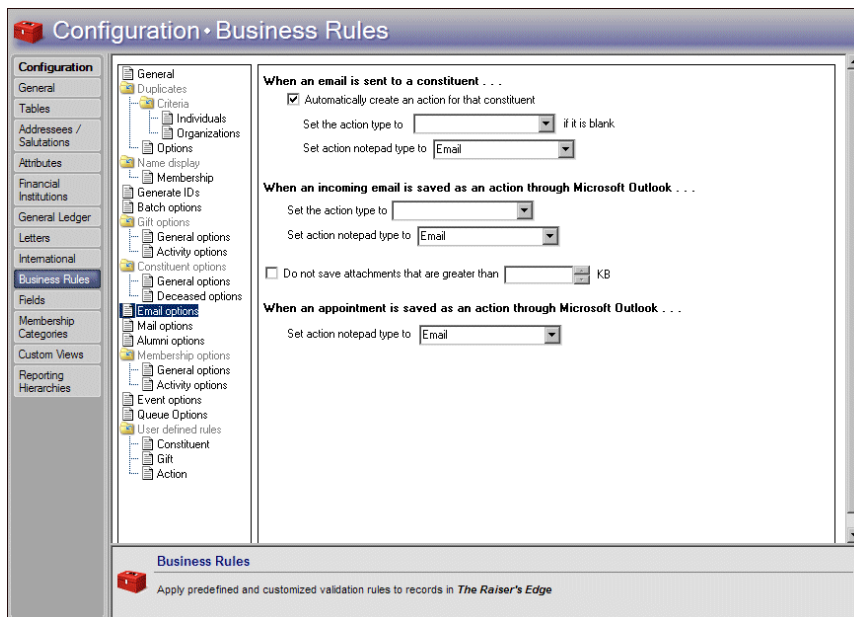
4. Under **When an email is sent to a constituent**, the **Automatically create an action for that constituent** checkbox defaults to marked. When this checkbox is marked, when you send an email message from the Constituent record by clicking the email address on the Bio 1 tab or selecting **Constituent**, **Send email** from the menu bar, your default email program opens.

If an email is sent from a relationship record, the action is created for the constituent from which the relationship is being viewed. For example, if, from the Relationships tab of AAA Concrete's constituent record, you open the relationship to Martin Shultz and send an email to Martin Shultz, the action is created for AAA Concrete, not Martin Shultz. This is also true for non-constituent relationships. If you open a non-constituent relationship from a constituent record, the action is created for the constituent.

When you complete and send the email, an action is automatically created that includes the following information:

- **Action Date**: current date
- **Action Type**: See **Set the action type to** field in step 5
- **Action Notes**: subject line and notes
- **Completed**: checkbox is marked
- **Completed Date**: current date
- **Start Time**: current time
- **Email address**: address to which message was sent
- **Solicitor**: constituent name of user (as entered in security)
- **Campaign and Fund**: defaults from solicitor
- If you have *Outlook* 2000 or XP installed on your computer, any text entered in the **Subject** or **Body** fields is included in the **Notes** for the created action.

To not create an action for a constituent when you use *The Raiser's Edge* to send email to that constituent, unmark **Automatically create an action for that constituent**.

If you do not use *Office* XP or 2003, go to step 6.

5. If you use *Office* XP or 2003, please read the following information.

The latest versions of *Office* have a security feature to prevent viruses from accessing *Outlook's* address book and sending messages without your knowledge. When another application such as *The Raiser's Edge* attempts to connect with *Outlook*, a message appears to ask whether you want to allow it.

- To deny *The Raiser's Edge* access to *Outlook*, click **No**. An explanation appears, and no message is sent.

To avoid numerous appearances of the security message, allow *The Raiser's Edge* to access *Outlook* for one minute.

- To allow *The Raiser's Edge* one-time access to *Outlook*, click **Yes**. To send an email and create an action, *The Raiser's Edge* must access *Outlook* several times. Each access causes a separate warning message to appear.

- To allow *The Raiser's Edge* access to *Outlook* and avoid numerous warning messages, specify an amount of time (by default, one minute) that *The Raiser's Edge* can access *Outlook*. By default, you can allow *The Raiser's Edge* to access *Outlook* for 1 minute. The email is sent, and the action is created.

6. If you mark **Automatically create an action for that constituent**, select entries to **Set the action type to** and **Set the action notepad type to** if the fields are blank.

When a new action record is created when you send an email, the action and action notepad types are set to the type you select here. When an existing action record is updated when you send an email, the **Action type** is set according to your entry here only if you have not already selected a type for that action record. If an existing action record already has an **Action type** defined, it is not overwritten.

If you do not select an entry in the **Set the action type to** and **Set the action notepad type to** fields, new action records created from sending emails contain no entry in the **Action type** or **Action Notepad** fields, and existing records are not updated.

7. Under **When an incoming email is saved as an action through Microsoft Outlook**, specify how emails saved as actions through the integration with *Outlook* are handled. When you integrate *The Raiser's Edge* with *Outlook*, a **Create action** button appears on the toolbar in received emails. The settings you specify in these business rules affect actions created with this button.

a. Select entries to **Set the action type to** and **Set the action notepad type to** if the fields are blank. The notepad type is required and defaults to "Email." The body of the email is saved as a notepad in the action record created from the email.

b. To specify the maximum size of attachments to save in your database, mark **Do not save attachments that are greater than** and specify a size. Any attachments that exceed this size are not saved with the email in your database.

8. Under **When an appointment is saved as an action through Microsoft Outlook**, specify the default notepad type for actions created from *Outlook* appointments.

When you leave this page, your changes are automatically saved.

Mail Options

To work with eReceipts through the Receipts mail task in *Mail*, you must specify an SMTP mail server and port number to use when sending the eReceipts as email.

➢ **Defining rules for mail**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click **Business Rules**. The Business Rules page appears.

Integration is available only with *Outlook* version 2000 or higher. For more information about setting up the integration, see *The Raiser's Edge & Microsoft Office Integration Guide*.

3. From the tree view on the left, select **Mail options**. The mail option appears on the right.
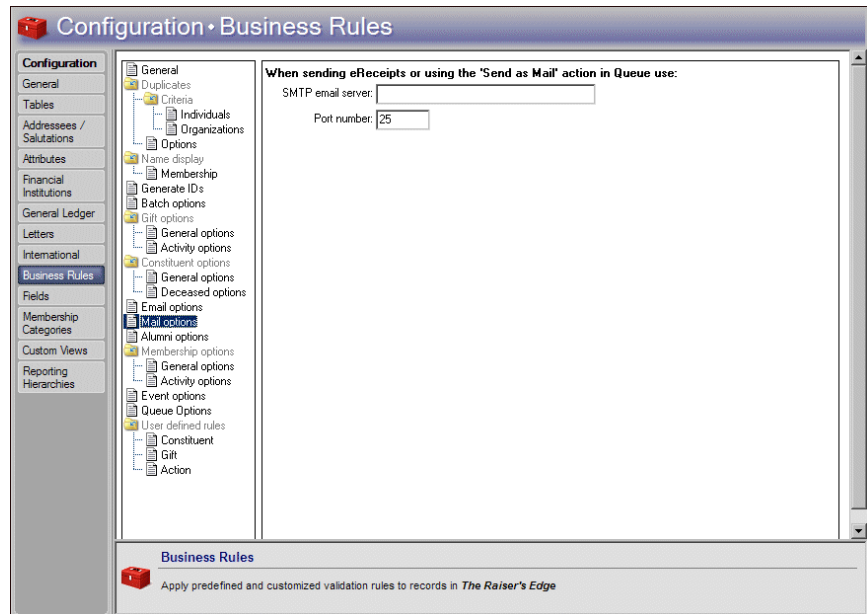
4. In the **SMTP email server** field, enter the name of the Simple Mail Transfer Protocol server to use to email eReceipts.

5. The **Port Number** field entry defaults to 25. This setting defines the TCP/IP port used by the server. Port 25 is the Internet standard for receiving SMTP mail. To use a different port, enter the number in this field.

   When you leave this page, your changes are automatically saved.

Alumni Rules

If you have *RE:Alum*, the **Alumni options** appear. To establish a format for "class of" year and define rules for adding alumni information to constituents, use these options. You can set rules to automatically enter a default school on the education record and to include a default constituent code on constituent records to which you add a primary education record.

➢ **Establishing a "class of" year format**

You can select to display the year a constituent graduated in either a two or four year format. This selection affects reports, mailings, and any addressee or salutation that includes "class of."

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, select **Alumni options**. The alumni rule options appear on the right.
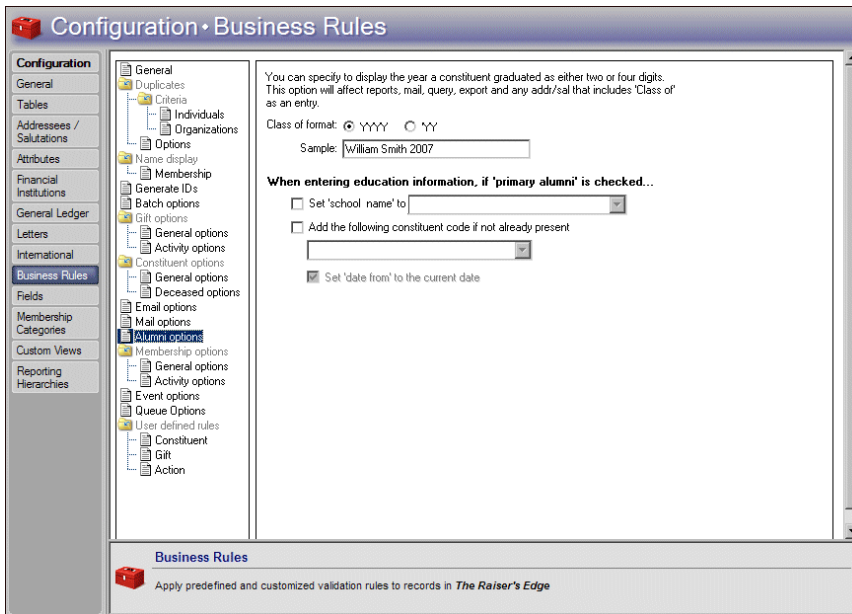
4. For **Class of format**, specify how to year a constituent graduated in. The "class of" date will always appear in the format you select here, regardless of your *Windows* Regional Date settings. To eliminate any chance of ambiguity in your records, we recommend you select the four year format.

• To display the year in a four-digit format, select **YYYY**.

• To display the year in a two-digit format, select **YY**.

The **Sample** frame displays an example of your format selection.

When you leave this page, your changes are automatically saved.

➢ **Defining rules for adding education information when the primary alumni checkbox is marked**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, select **Alumni options**. The alumni rule options appear on the right.
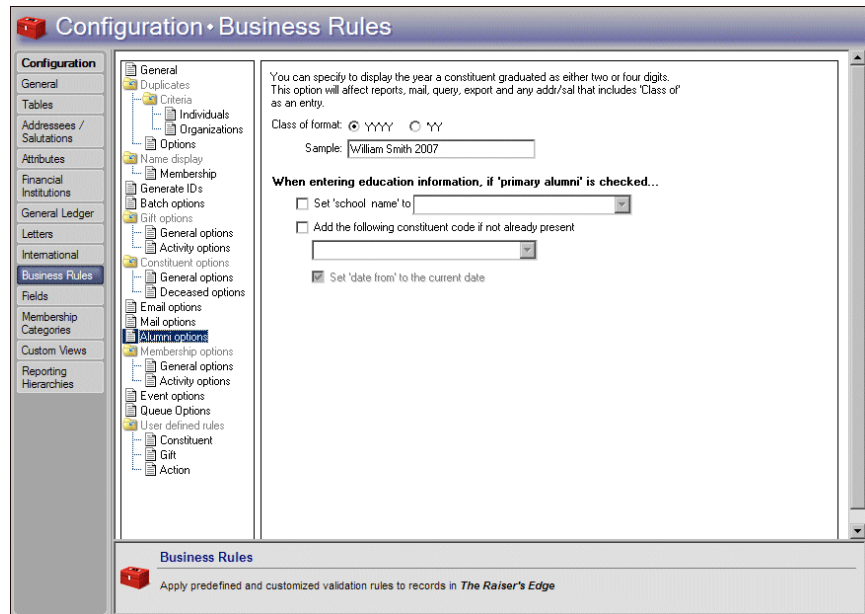
*When you mark **Add the following constituent code if not already present** and place an entry in the corresponding field, all active constituent records to which you add a primary education record contain at least one constituent code. Constituent codes explain why constituents are present in your database.*

4. To automatically populate the **School name** field on education records that have the **Primary alumni** checkbox marked, mark **Set 'school name' to** and enter a default school name.

5. To specify a constituent code to include when you add a primary education record to a constituent record, mark **Add the following constituent code if not already present** and enter the constituent code to include. To access a list of established codes, click the drop-down arrow.

When you mark **Add the following constituent code if not already present**, the **Set 'date from' to the current date** checkbox is enabled. To automatically enter the current date in the **Date from** field for the specified constituent code, mark this checkbox.

When you leave this page, your changes are automatically saved.

Membership Rules

If you have *Membership Management*, the **Membership options** appear. You can establish General and Activity rules for memberships.

Membership General Options

You do not have to activate any of the General Membership Rules.

You can define rules for membership categories with gift defaults that are already established, membership transactions that are linked to a pledge, and other general defaults for memberships.

Define rules for start dates for new or renewed memberships, rules for linking gifts to memberships, rules for applying pledge payments to memberships, rules for program/categories for dues, and rules for the maximum number of members for a membership. Using these rules to set defaults lets *The Raiser's Edge* enter information when you create new memberships, saving you the time of entering it manually.

➢ **Defining general rules for memberships**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Memberships**, select **General options**. The general rule options for memberships appear on the right.
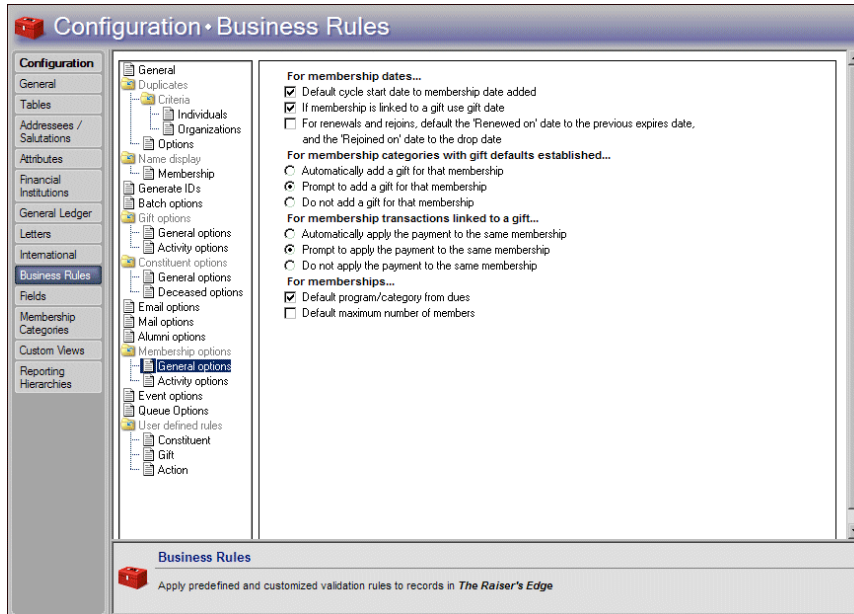

4. Under **For membership dates**, to default the **Joined on** and **Renewed on** dates to the date the membership is added, mark **Default cycle start date to membership date added**. Typically, this is the current date.

5. When you mark **Default cycle start date to membership date added**, the **If membership is linked to a gift use gift date** checkbox is enabled. To default the **Joined on** and **Renewed on** dates to the gift date for memberships that are linked to gifts, mark this checkbox. This rule applies only to memberships created from a gift record. Linking a membership to a gift from the membership record does not change the gift date. If the membership is not linked to a gift, the date defaults to the date the membership is added. For more information about Memberships given as gifts and how they are linked, see the *Membership Data Entry Guide*.

6. When you mark **Default cycle start date to membership date added**, the **For renewals and rejoins, default 'Renewed on'/'Rejoined on' date to previous 'Expires' date** checkbox is enabled. To change the **Expires date** of the previous membership transaction to the **Renewed on** or **Rejoined on** date for the renewal or rejoin being entered, mark this checkbox. You can use this checkbox to avoid overlapping memberships if a member renews before the current membership expires.

If you globally add a membership record through *Administration*, the **Joined on** date defaults to the current program date, no matter what setting you select in **Business Rules**.

A membership transaction includes all individual membership activities on the membership record, such as renewals, rejoins, drops, upgrades, and downgrades.

7. Under **For membership categories with gift defaults established**, if you set up gift defaults for a membership category, select how to manage membership categories that have gift defaults established. For information about establishing gift defaults for a membership category see "Defining general information for a membership category" on page 139.

   • To automatically add a gift for the membership dues and link it to the membership, select **Automatically add a gift for that membership**.

   • To display a message to ask whether to add the gift and link it to the membership, select **Prompt to add a gift for that membership**.

   • To not add a gift for the membership, select **Do not add a gift for that membership**. You can still manually add the gift and link it to the membership.

8. Under **For membership transactions linked to a gift**, select how to apply the payment to the membership.

   • To apply the payment to the same membership as the pledge but not add a membership transaction, select **Automatically apply the payment to the same membership**. Typically, if you select this option, you do not renew, rejoin, upgrade, or downgrade the membership with pledge payments.

   • To display a message to ask whether to apply the pledge payment to the membership, select **Prompt to apply the payment to the same membership**.

   • To not automatically apply the payment to the membership, select **Do not apply the payment to the same membership**. When you select this option, the program assumes you manually link pledge payments to memberships.

9. Under **For memberships**, to default the program and category for a membership once the dues are entered, mark **Default program/category from dues**. For example, you may specify a program and category for minimum dues of $1,000 and maximum dues of $2,000. When you mark this checkbox and create a new membership, if you enter a dues amount between the above amounts, the program and category automatically default into the membership record. You can overwrite these defaults.

10. To default the maximum number of members from **Membership Categories** to the **Total number of members on this membership** field on the Other Members and Card Information screen of the membership record, mark **Default maximum number of members**.

    When you leave this page, your changes are automatically saved.

Membership Activity Options

You can set rules for adding new memberships, saving gifts of membership, and renewing memberships. Decide whether or not to allow multiple concurrent memberships for constituents and who gets credit for gifts of membership. You can set a rule to determine the maximum period of time you allow a lapsed membership to be renewed.

➢ **Defining activity defaults for memberships**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **Membership**, select **Activity options**. The activity rule options for memberships appear on the right.
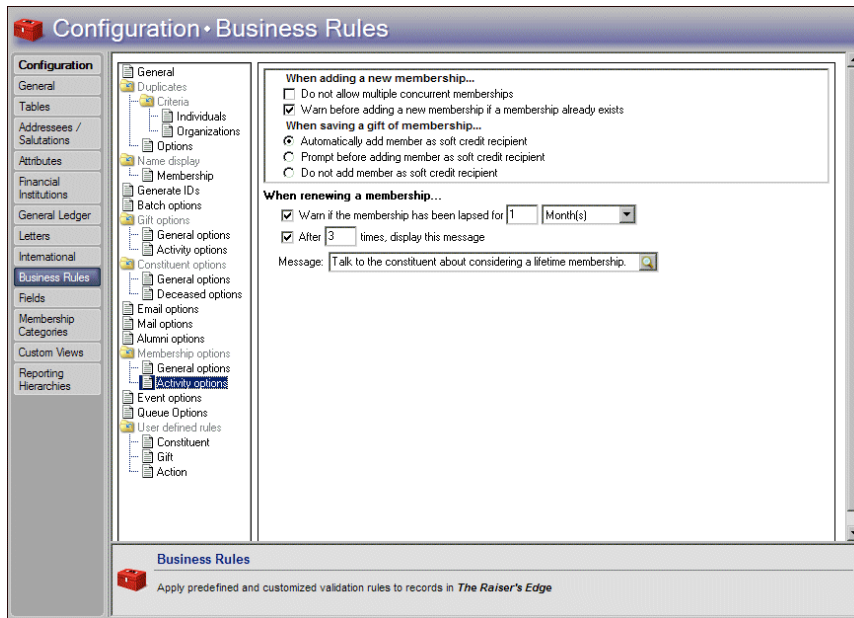
4. Under **When adding a new membership**, specify whether to enable multiple memberships for one constituent.

   • If you do not allow constituents to have multiple memberships at the same time, mark **Do not allow multiple concurrent memberships**. If a user attempts to add multiple memberships to a constituent, a message appears.
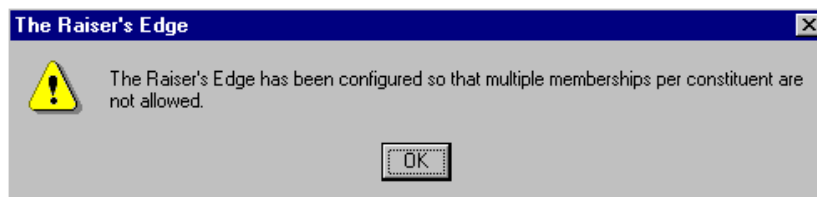
When you mark **Do not allow multiple concurrent memberships**, the **Warn before adding a new membership if a membership already exists** checkbox is disabled.

- To allow constituents to have more than one membership at the same time, mark **Warn before adding a new membership if a membership already exists**. When you mark this checkbox, if a user tries to add a new membership to a constituent who already has a membership, a message appears.
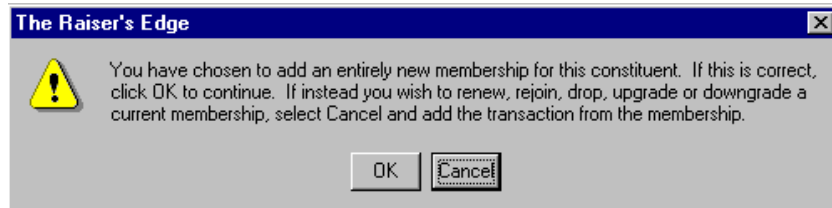
5. Under **When saving a gift of membership**, select whether and how to add members as soft credit recipients when you save a gift of membership.

    - To add members who receive gifts of membership linked to the gift record of the individual who gave the gift as soft credit recipients, select **Automatically add member as soft credit recipient**. This applies only to the primary member, not joint members.

    - To display a message to ask whether to add each member as a soft credit recipient, select **Prompt before adding member as soft credit recipient**. You may want to select this option if, for example, a husband has a constituent record in the database and gives a gift of membership to his wife who is also a constituent. Because the husband pays the dues, you can link the membership to a gift on his record. To also display the gift on the wife's gift history and soft credit her record, you can select **Automatically add member as soft credit recipient**, or you can select the option and click **Yes** on the message screen.
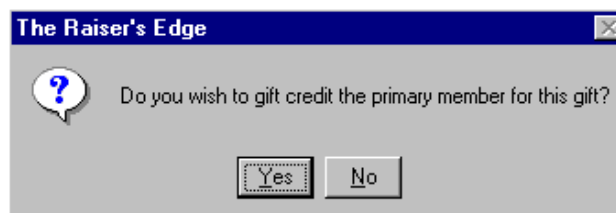
    - To not add a soft credit to the record of the primary member, select **Do not add member as soft credit recipient**.

6. Under **When renewing a membership**, to set a time period for which a membership has been lapsed before the program triggers a warning, mark **Warn if the membership has been lapsed for**. For example, if your organization does not renew memberships lapsed for over a month, set a warning to appear when a membership has been lapsed for this amount of time.

You may want to set warnings for membership expirations if you do not allow renewals for memberships that have been lapsed for a certain period of time, or if you track memberships by dropping and rejoining them.

7. To define a warning message to appear after a membership has been renewed a certain number of times, mark **After [ ] times, display this message** and specify the number of membership renewals allowed before you display the warning. In the **Message** field, enter the text that appears in the warning. For example, you can create a message to warn a user to ensure the address and phone information on the member's constituent record is up to date after a yearly membership has been renewed two times.

To more easily view the text you enter, click the magnifying glass in the **Message** field. The Define Message screen appears.

When you leave this page, your changes are automatically saved.

An entry in the **Message** field is required. There is no default message.

Event Rules

These rules are available only if you have the optional module *Event Management*. You can select rules to warn when event capacity is reached, whether or not you allow a constituent to register more than once for an event, and whether or not you treat registration fees as constituent gifts.

➢ **Defining rules for adding participants to an event**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, select **Event options**. The rules options for events appear on the right.
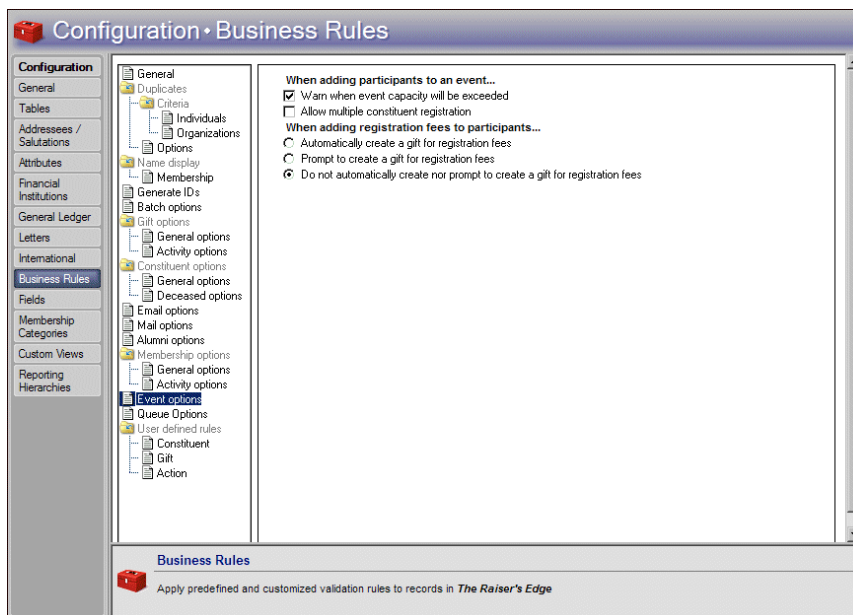
You can set a rule for a warning to appear when an event has reached the capacity you specified in the optional module *Event Management*. However, you can override the event capacity and continue to add participants. For example, you may discover that you can fit an additional table into your banquet hall so the event can now exceed its original capacity.

4. Under **When adding participants to an event**, to display a warning when the user adds a participant who makes the total participants exceed the number set as the event capacity, mark **Warn when event capacity will be exceeded**. For example, you mark this checkbox and set the capacity at 150. When a user attempts to add a participant who will result in a total of 151 participants, a message appears to inform the user of this.

On this message, if the user marks **Do not show this message again**, a warning does not appear when users add more participants to this event. The **Do not show this message again** checkbox applies only to the currently open event, not all events. If you do not specify an event capacity, the message does not appear for that event.

5. To enable a constituent to register for an event more than once, mark **Allow multiple constituent registration**.

If you do not mark the checkbox, you do not allow multiple registrations for constituents. When you add a participant who is a constituent to an event, the program checks to see if the constituent is already linked to the event. If the constituent is already linked, a message appears.
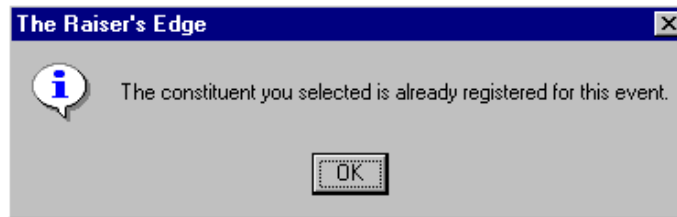
6. Under **When adding registration fees to participants**, select whether and how to create a gift record for registration fees you receive.

- To automatically add the registration fees to the gift record of the participant, select **Automatically create a gift for registration fees**. For this to occur, the participant must be a constituent in your database, the gift cannot already be linked to the participant, and you must have added a row to the registration fees grid and specified a fund for gift defaults on the event record.

   The program creates a gift for the participant record only. Any applicable benefits that have not been waived default into the participant record.

- To display a message to ask whether to add registration fees to the gift record of the participant, select **Prompt to create a gift for registration fees**.

- To not add registration fees to the participant's gift record, select **Do not automatically create nor prompt to create a gift for registration fees**. To create a gift, you can still select **Link to Gift** on the Registration Fees/Donations tab of the event record.

When you leave this page, your changes are automatically saved.

Queue Rules

You can specify rules for adding recurring queues to the schedule and removing them after they process.

➢ **Defining rules for recurring queues**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, select **Queue options**. The rules options for queues appear on the right.
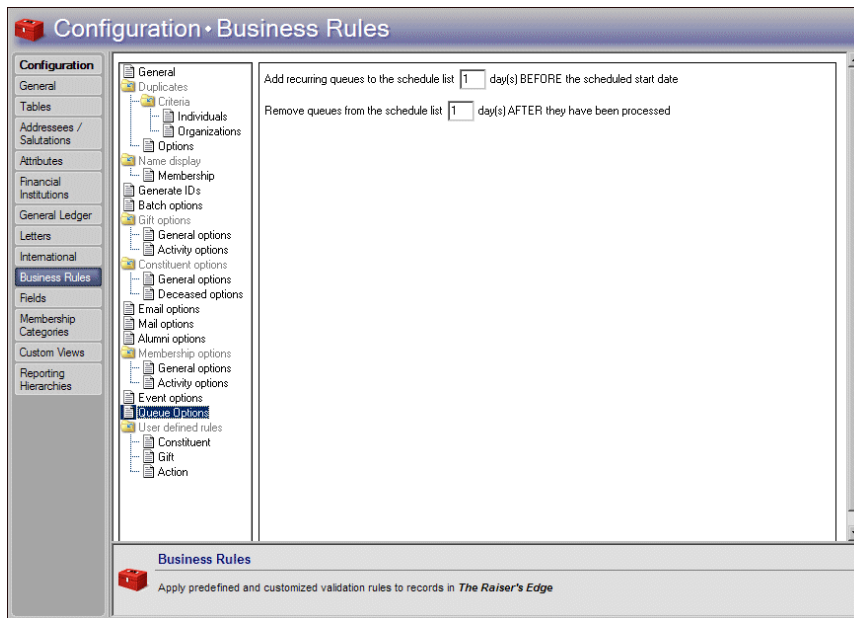
4. To add recurring queues to the Queue Schedule screen a specific number of days before the queue runs, enter a number in the **Add recurring queues to the schedule list [ ] day(s) BEFORE the scheduled start date** field. For example, to add recurring queues to the Queue Schedule screen two days before a queue is scheduled to run, enter "2".

   When you change the number of days entered for this business rule, the Queue Schedule screen is not automatically updated. For existing recurring queues to update on the Queue Schedule screen, either run or resave existing queues you created before you changed this business rule. For example, you created and scheduled a membership queue. The membership queue is on the Queue Schedule screen, waiting to run. When you change the number of days you initially entered for this business rule, the membership queue is not affected on the Queue Schedule screen. To update the queue, you must either run or resave the queue for the business rule.

5. To remove recurring queues from the Queue Schedule screen a specific number of days after the queue is processed, enter a number in the **Remove queues from the schedule list [ ] day(s) AFTER they have been processed** field. For example, to remove recurring queues from the Queue Schedule screen one day after a queue processes, enter "1".

When you leave this page, your changes are automatically saved.

User Defined Rules

Opening constituents, adding gifts, and adding actions can all cause user defined business rules to activate.

Rules you create display a message if the constituent being opened, or the gift or action being added, meets the criteria of a constituent query which you have specified. For constituent rules, you can also specify the rule execute when gifts or actions for a constituent are accessed directly without first opening the constituent record.

If you open a record that meets the query criteria for multiple rules, multiple messages display.

For example, you can create a query to include all constituent records with the constituent code Board Member. Then, you can base a rule on the query specifying that a message appears advising extreme care any time a board member's constituent record is opened. For gifts, you can specify that any time a gift is added for a constituent who normally gives anonymously, a message appears asking whether the current gift is also anonymous. For actions, you can specify that a warning appear if an action is being added for a constituent who does not want to receive phone calls.

➢ **Creating an opening constituents rule**

You can create rules to display messages when a user opens selected constituent records. Users can also activate rules when they open a gift or action for certain constituents directly through **Actions** or **Gifts** rather than through the constituent record.

You need to add a new Business Rule warning your users to take special care when opening the constituent record of one of your board members.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **User defined rules**, select **Constituent**. The Opening Constituent Rules grid appears on the right.
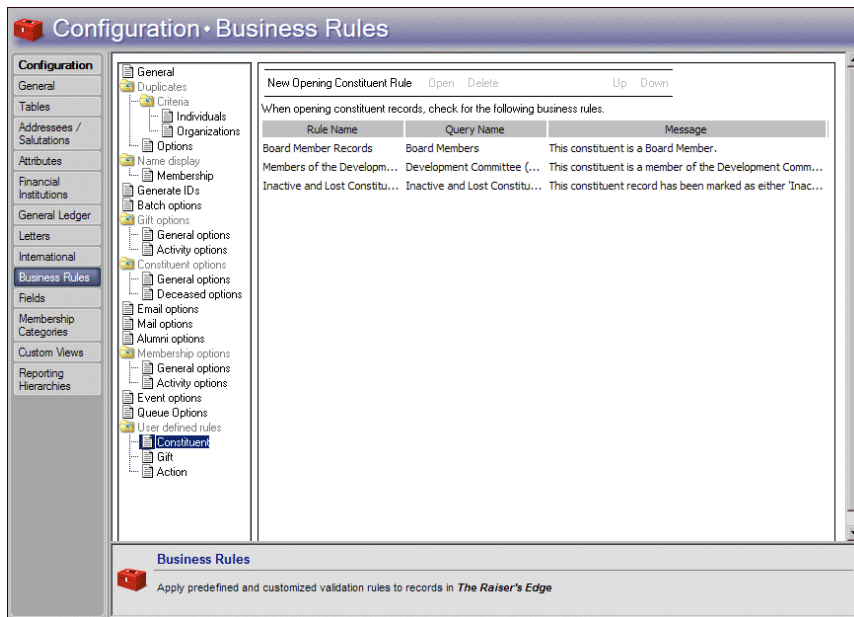
In the grid, any rules you defined appear. **Rule Name** displays the name assigned the rule, **Query Name** shows the query on which the rule is based, and **Message** displays the text that appears when the a user activates the rule.

4. On the action bar, click **New Opening Constituent Rule**. The New Rule for Opening Constituents screen appears.
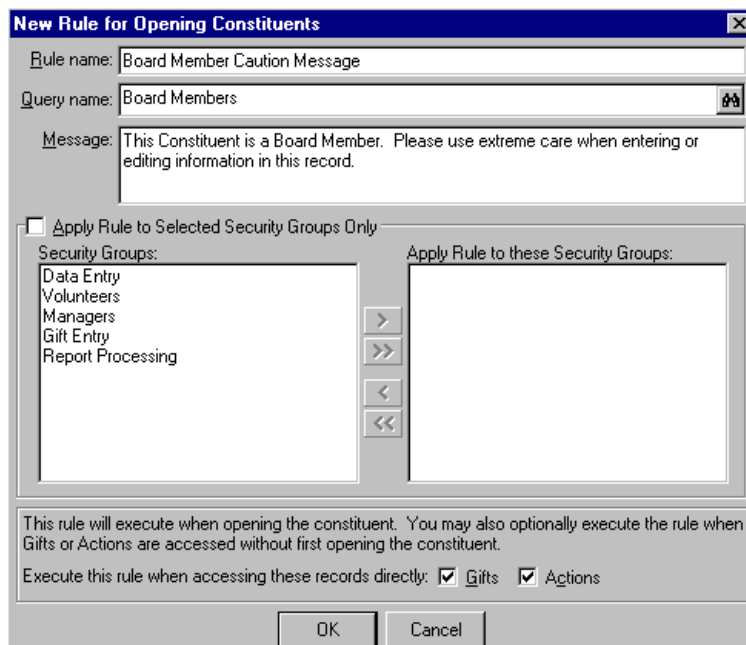
We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include records you add after you create the query. When you base your rule on a dynamic query, you ensure any record meeting the criteria activates the rule, regardless of when the record is added. Rules based on static queries may not activate for all records meeting the criteria you establish.

If you want to make a line break in the **Message** field, press **CTRL** + **ENTER** on your keyboard. When you press **ENTER** by itself, the program attempts to save and close the rule.

If a user is in more than one security group, and at least one group is affected by a rule, the rule activates for that user.

5. In the **Rule name** field, enter "Board Member Caution Message" to identify the new rule in the grid on the Business Rules page.

6. Enter a **Query name** or click the binoculars to find a query. You can select any saved dynamic or static constituent query or create a new one. Queries filter and extract information from the program.

   We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include any new records you add that meet the query criteria. For more information on how to create a query, see the "Query" section of the *Query & Export Guide*. For this rule, select a dynamic constituent query that includes only those constituent records with the constituent code "Board Member."

7. In the **Message** box, enter the text to appear when the new rule executes. For this rule, the text reads "This constituent is a Board Member. Please use extreme care when entering or editing information in this record."

8. To apply the rule to only selected security groups, mark **Apply Rule to Selected Security Groups Only**. The selection box is enabled. For more information about security groups, see the "Security" chapter of this book. To move selected groups from the **Security Groups** box into the **Apply Rule to these Security Groups** box, use the arrows. The business rule affects only those groups you move into this box.

   To apply the rule to all users, leave the **Apply Rule to Selected Security Groups Only** checkbox unmarked.

9. To activate the rule when the user adds a gift for a constituent coded as a board member directly from the **Gifts** link of *Records* rather than from the constituent record, mark **Gifts**. When a gift is added to a board member's constituent record, the message appears.

10. To activate the rule when the user adds an action for a constituent coded as a board member directly from the **Actions** link of *Records* rather than from the constituent record, mark **Actions**. When an action is added to a board member's constituent record, the message appears.

11. To save the new rule, click **OK**. You return to the Business Rules page. In the grid, the new rule now appears.

➢ **Creating an adding gifts rule**

You can create rules to activate when your users add selected gift records.

You need to add a new Business Rule to display a message whenever one of your users enters a gift for a constituent who normally gives gifts anonymously. You want to verify whether or not the new gift should also be entered as an anonymous gift.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **User defined rules**, select **Gift**. The Adding Gift Rules grid appears on the right.
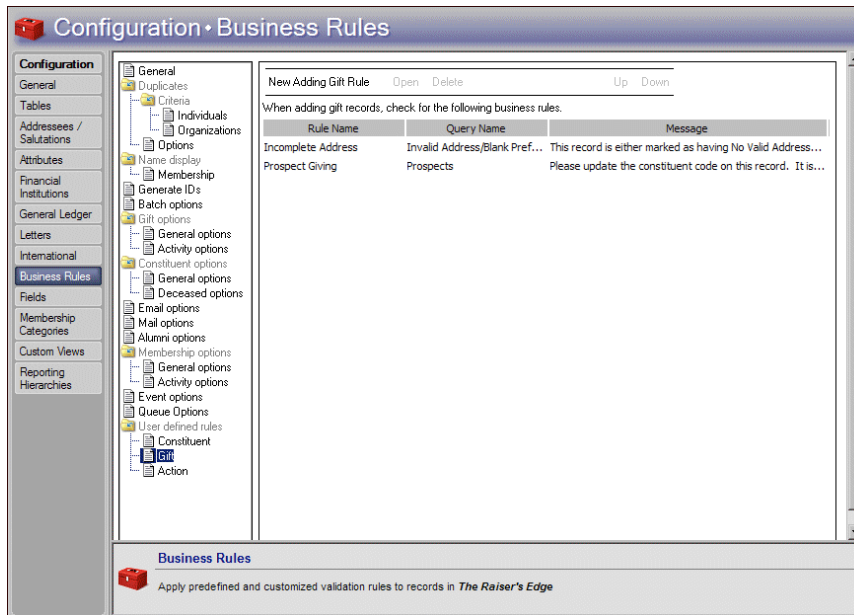
In the grid, any rules you defined appear. **Rule Name** displays the name assigned the rule, **Query Name** shows the query on which the rule is based, and **Message** displays the text that appears when the rule is activated.

4. On the action bar, click **New Adding Gift Rule**. The New Rule for Adding Gifts screen appears.
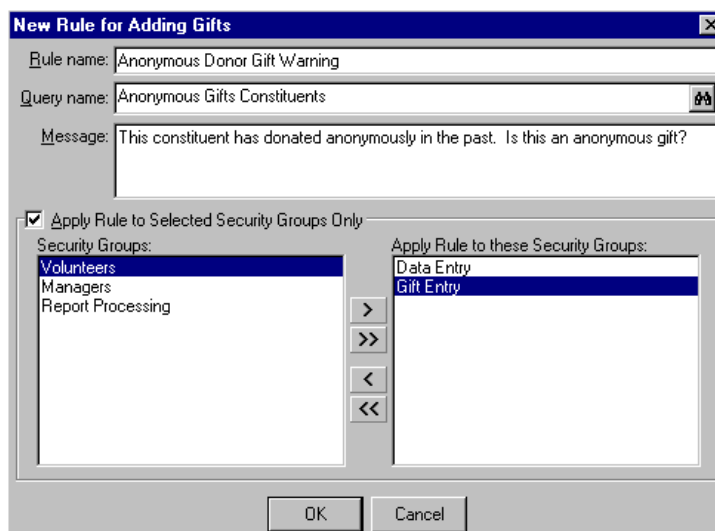
5. In the **Rule name** field, enter "Anonymous Gift Donor Warning" to identify the new rule in the grid on the Business Rules page.

All user defined business rules are based on constituent queries. Constituent queries contain all the available criteria fields available in other types of queries.

We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include records added after you create the query. When you base your rule on a dynamic query, you ensure that any record meeting the criteria activates the rule, regardless of when the record is added. Rules based on static queries may not activate for all records meeting the criteria you establish.

If a user is in more than one security group, and at least one group is affected by a rule, the rule activates for that user.

6. Enter a **Query name** or click the binoculars to find a query. You can select any saved dynamic or static constituent query or create a new one. Queries filter and extract information from the program.

   We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include any new records you add that meet the query criteria. For more information on how to create a query, see the "Query" section of the *Query & Export Guide*. For this rule, select a dynamic constituent query that includes only those constituent records with the **Constituent normally gives gifts anonymously** checkbox marked.

7. In the **Message** box, enter the text to appear when the new rule executes. For this rule, the text reads "This constituent has donated anonymously in the past, is this an anonymous gift?"

8. To apply the rule to only selected security groups, mark **Apply Rule to Selected Security Groups Only**. The selection box is enabled. For more information about security groups, see the "Security" chapter of this book. To move selected groups from the **Security Groups** box into the **Apply Rule to these Security Groups** box, use the arrows. The business rule affects only those groups you move into this box.

9. To save the new rule, click **OK**. You return to the Business Rules page. The new rule now lists in the grid.

➢ **Creating an adding actions rule**

   You can create rules to activate when your users add selected action records.

   You need to create a business rule specifying that a warning appear if an action is being added to a constituent who does not want to receive phone calls.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **User defined rules**, select **Action**. The Adding Action Rules grid appears on the right.
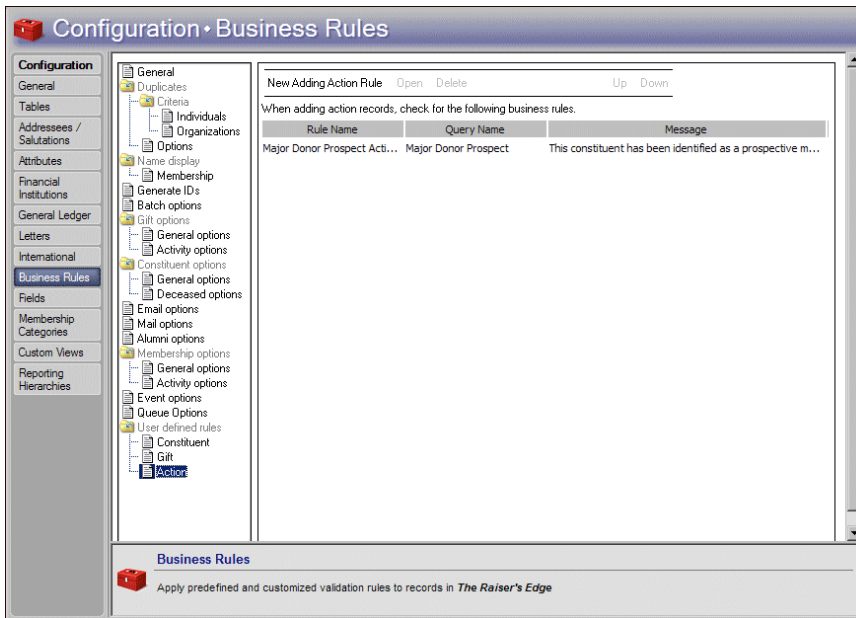
In the grid, any rules you defined appear. **Rule Name** displays the name assigned the rule, **Query Name** shows the query on which the rule is based, and **Message** displays the text that appears when the rule is activated.

4. On the action bar, click **New Adding Action Rule**. The New Rule for Adding Actions screen appears.
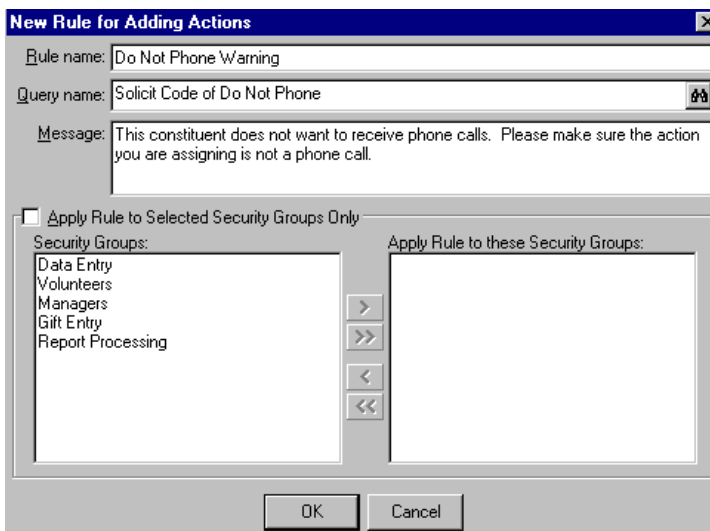
5. In the **Rule name**, Enter "Do Not Phone Warning" to identify the new rule in the grid on the Business Rules page.

All user defined business rules are based on constituent queries. Constituent queries contain all the available criteria fields available in other types of queries.

We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include records you add after you create the query. When you base your rule on a dynamic query, you ensure that any record meeting the criteria triggers the rule, regardless of when the record was added. Rules based on static queries may not activate for all records that meet the criteria you establish.

If a user is in more than one security group, and at least one group is affected by a rule, the rule executes for that user.

6. Enter a **Query name** or click the binoculars to find a query. You can select any saved dynamic or static constituent query, or create a new one. Queries are ways of filtering and extracting information from the program.

    We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include any new records you add that meet the query criteria. For more information about how to create a query, see the "Query" section of the *Query & Export Guide*. For this rule, select a dynamic constituent query that includes only those constituent records with the solicit code "Do not phone".

7. In the **Message** box, enter the text to appear when the new rule executes. For this rule, the text reads "This constituent does not want to receive phone calls. Please make sure the action you are assigning is not a phone call."

8. To apply the rule to only selected security groups, mark **Apply Rule to Selected Security Groups Only**. The selection box is enabled. For more information about security groups, see the "Security" chapter of this book. To move selected groups from the **Security Groups** box into the **Apply Rule to these Security Groups** box, use the arrows. The business rule affects only those groups you move into this box.

    Because you want this rule to apply to all users, leave the **Apply Rule to Selected Security Groups Only** checkbox unmarked.

9. To save the new rule, click **OK**. You return to the Business Rules page. The new rule now lists in the grid.

➢ **Editing a user defined rule**

You can edit a rule you already created. For example, you can change the name of the rule or the query on which the rule is based. This procedure demonstrates how to change an action rule that specifies a warning appear when an action is added to a constituent who does not want to receive phone calls.

You decide to include constituents who do not want to receive mailings in your "Phone Call Warning" rule for actions.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **User defined rules**, select **Action**. All action rules you defined list in the grid.

4. In the grid, select **Phone Call Warning** in the **Rule Name** column.

5. On the action bar, click **Open**. The Do Not Phone Warning screen appears.

6. Change the **Rule name** to "Do Not Phone or Mail Warning."

7. In the **Query name** field, use the binoculars to select or create a dynamic constituent query that includes only constituents with the solicit code "Do not phone" and/or "Do not mail".

8. In the **Message** field, change the text to read "This constituent does not want to receive phone calls or mailings. Please make sure the action you are assigning is not a phone call or mailing."

9. To automatically save your changes, click **OK**. You return to the Business Rules page.

➢ **Deleting a user defined rule**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Business Rules** link. The Business Rules page appears.

3. From the Business Rules tree view, under **User defined rules**, select the type of user defined rule you want to delete.

4. In the grid, select the rule to delete.

5. On the action bar, click **Delete**. A verification message appears.

6. To delete the rule, click **Yes**. You return to the grid, where the rule no longer appears.

To make a line break in the **Message** field, press **CTRL** + **ENTER** on your keyboard. When you press **ENTER** by itself, the program attempts to save and close the rule.
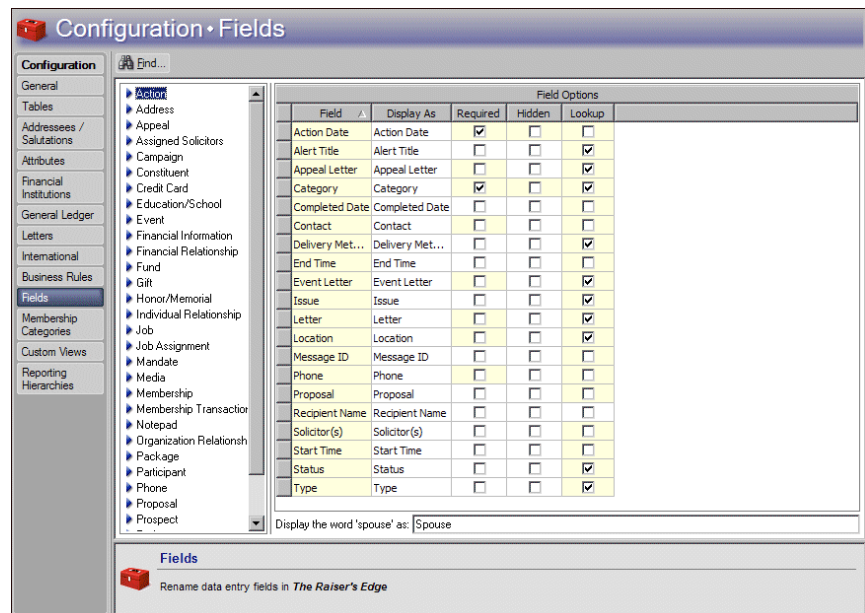
Fields

Fields are areas in which you enter information in *The Raiser's Edge*. You can rename fields. For example, if you do not want to track **Ethnicity**, you can change the name of the field to **Status** and use it to track other information. You can also change the way the word "Spouse" displays throughout the program. For example, you may want to substitute "Life Partner".

You can change field status from optional to required, so that a field must have an entry before you can save a record. You can hide fields you do not use so they are not visible to your users. You can also change fields from standard to lookup. Lookup fields are similar to tables. You can define entries for a lookup and when you place the cursor in the field, you can press **F7** on your keyboard to view a list of entries. Making a field a lookup can help standardize your entries and increase the consistency and speed of your data entry.

➢ **Defining field characteristics**

You can rename fields, and make them required, hidden, or lookups. You can change the way the word "spouse" displays throughout the program.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Fields** option. The Fields page appears.

3. From the Categories box on the left, select a field category. The **Field Options** for that category appear in a grid on the right.

4. In the **Field Options** grid, the **Field** names list in the first column. To change the display name of a field, enter a new name in the **Display As** column on the same row.

5. To make a field **Required**, mark the checkbox. Before a record can be saved, a required field must contain information.

If you make a field required, the program verifies the new required field does not prevent a security group from adding a record. For example, a group may not have view rights to a tab on which the field is located. If this is the case, a message appears to ask whether to make the field required.

6. To make a field **Hidden**, mark the checkbox. A hidden field may contain information, but it does not appear on a record. You can use this checkbox to hide fields your organization no longer uses.

7. To make a field a **Lookup**, mark the checkbox. You can add, edit, and delete entries for a lookup field. When you place the cursor in a lookup field, you can press **F7** on your keyboard to access a screen where you can add, edit, and delete entries.
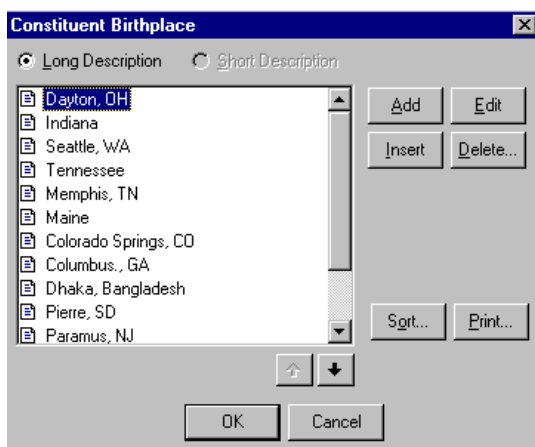
Lookups are virtually identical to tables. The only difference between the two is lookup fields do not have the down arrow in them as do fields with tables. When you make a field a lookup, you can view, add, edit, and delete entries for the field. Define standard entries to make your data entry more consistent. The field then appears in the list of tables in the **Tables** link of *Configuration* and in *Administration* in the **Code Tables** section of **Security**. Security rights to add, edit, and delete entries for the new lookup are automatically granted to all users.

8. At the bottom of the Fields page, in the **Display the word 'spouse' as** field, substitute another word (or words) for "spouse" throughout the program, if necessary.

➢ **Finding a field**

Instead of scrolling through the list of fields, you can use this procedure to quickly locate any existing field in the program for editing or viewing.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

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*If you make **Membership ID** a required field, no memberships can be globally added. Because the ID must be unique, the field is disabled in the **Globally Add Records** link of *Administration*.*

A field you make into a lookup functions like a table. You can define entries for a lookup field to make data entry quick and consistent.
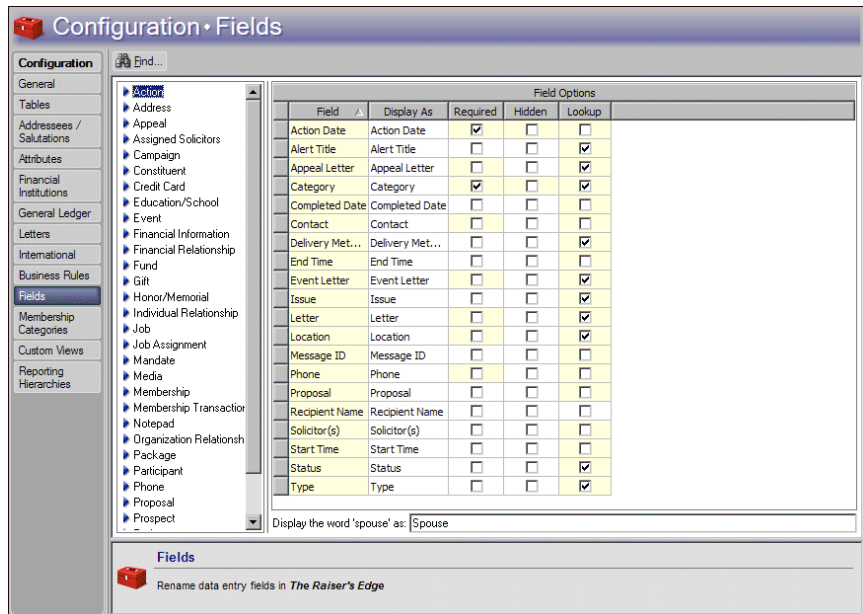
2. Click the **Fields** option. The Fields page appears.

3. On the action bar, click **Find**. The Find screen appears.
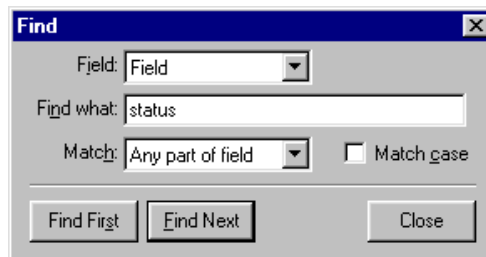
4. In the **Field** field, select whether to base your search on either the Field or Display as.

5. In the **Find what** field, enter the name of the field to find.

6. In the **Match** field, select whether you want your entry in the **Find what** field to match "Any part of field", "Whole field", or "Start of field".

7. If you want the search to match any capitalization in the field, mark **Match case**.

8. To find the first match that meets your search criteria, click **Find First**. in The **Field Options** grid on the Fields page, the match is highlighted.

9. To find additional entries, click **Find Next** on the Find screen.

Membership Categories

If you have the optional module *Membership Management*, the **Membership Categories** button appears. A membership category defines the level of giving required for a constituent to gain membership in one of your categories or clubs. For example, you can establish categories for Lifetime Member, Corporate Member, and Individual Member. You can define membership categories based on program titles, minimum and maximum dues amounts, and number of members.

Membership Category Record

The membership category record consists of several tabs:

General Information tab. On the General Information tab, enter information such as the category name and establish membership dues required to qualify for this category.

Default Benefits tab. On the Default Benefits tab, enter the benefits, such as discounts, member newsletters, or t-shirts, that you give constituents who qualify for membership in the category.

Default Settings tab. On the Default Settings tab, enter defaults for expiration dates, memberships linked to gifts, and receipt amounts.

Renewal Information tab. On the Renewal Information tab, establish a wide variety of default information for membership renewals such as when to drop lapsed memberships and when to print renewal notices.

Managing Membership Categories

You can add new membership categories, edit and delete existing ones, and save time by copying information from categories you already established into new ones. You can easily find membership categories if you have so many that they all cannot be viewed in the grid at the same time. You can determine the order categories list in the grid and save time by placing your most frequently used categories at the top of the list.

➢ **Defining general information for a membership category**

You can name a category and specify a program for it. Specify how many members are allowed per membership. You can include subcategories with the category. Determine a default dues level and minimum and maximum dues for the new category.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

Membership categories and Donor categories are not the same. Membership categories are available only if you have the optional module *Membership Management* and define levels of giving necessary to gain membership in one of your categories or clubs. Donor categories define cumulative giving clubs or levels.

2. Click **Membership Categories**. The Membership Categories page appears.
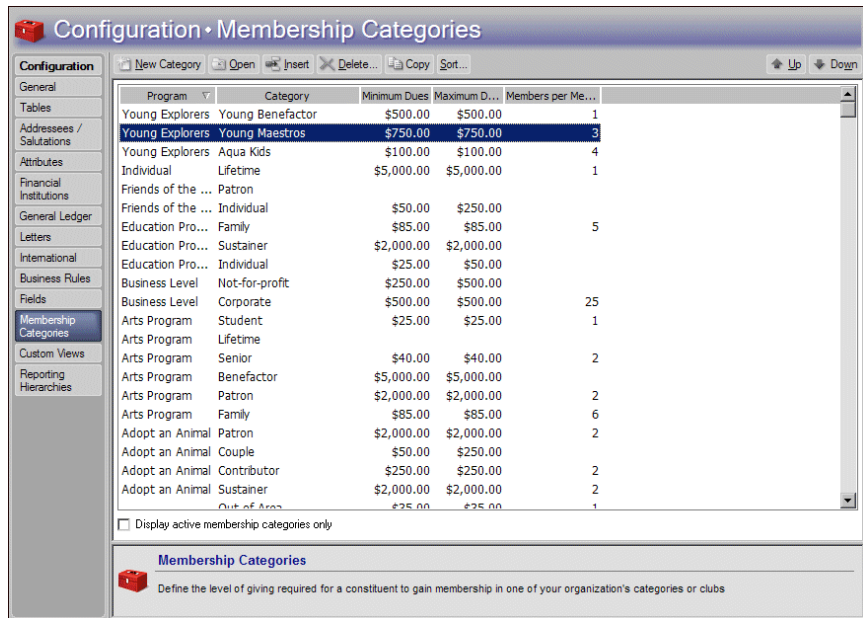
When you create and save a new membership category, it appears at the bottom of the grid on the Membership Categories screen. To place a new category on a specific line, select an existing category and click **Insert**. Follow the same steps to create the category as when you use **New Category**. When you save the new category, it appears in the grid above the selected category.

3. On the action bar, click **New Category**. The New Membership Category screen appears.
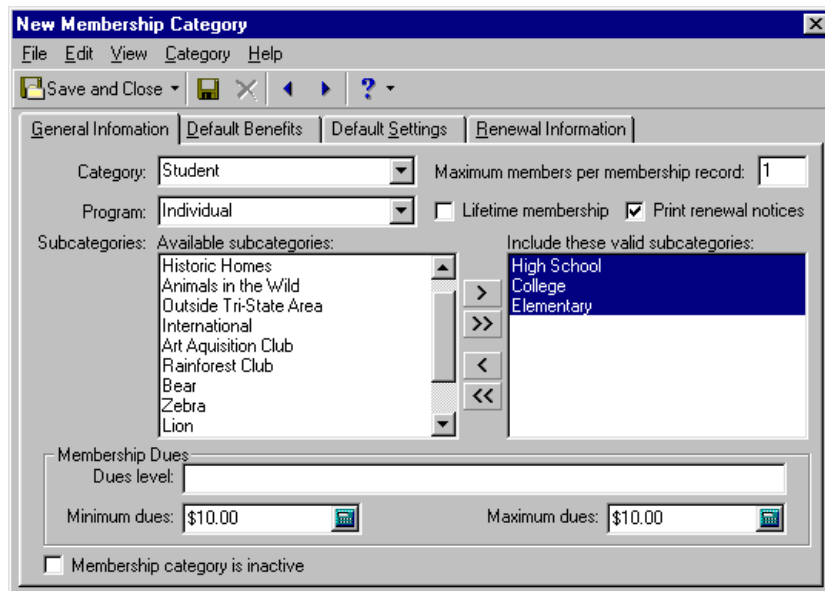
4. Select the General Information tab.

5. In the **Category** field, name the category you are entering. For example, you can create categories for "Benefactor", "Student", and "Friend".

6. To automatically default the **Print renewal notices** checkbox on a membership record to unmarked when you enter this membership category and program on a membership transaction, mark **Lifetime membership**.

7. In the **Program** field, enter the program the specified category belongs in. For example, an animal assistance league can have categories of "Benefactor" and "Gold Club Member" in both the "Adopt an Animal" and "Feed the Animals" programs. Click the down arrow to list the available programs as defined on the Tables page or press **F7** on your keyboard to add a new entry if you have security rights to do so. This field is not required and does not have to be unique, but the combination of this and your entry in the **Category** field must be unique.

8. To determine the maximum number of members a membership can have for this category and program, mark **Max. members per membership record** and enter the number in the corresponding field. For example, you can specify that a "Lifetime Member" receives as many as four memberships for use by family members.

   The maximum number of members you enter here is only a default and can be exceeded. Using the "Lifetime Member" example above, if you enter a fifth joint member on a membership in this category, a warning appears, but you can add the member anyway.

9. You can create **Subcategories** through the **Tables** link or directly from this screen. Click the word **Subcategories**. The Membership Subcategories screen appears so you can add, edit, and delete entries. Examples of subcategories could include "College" and "High School" under the category "Student".

10. On the New Membership Category screen, the **Available Subcategories** box lists all defined subcategories. Use the arrows to move the subcategories you want to add to the new membership category into the **Include These Valid Subcategories** box. Only subcategories in this box appear for the Category/Program combination when you add a transaction for the membership to a constituent record.

11. The **Membership Dues** frame contains information used in determining defaults when a membership transaction is entered on a constituent record. In the **Dues level** field, you can enter any alphanumeric amount. Information in this field is for informational purposes only. It does not affect reports or defaults when adding a membership transaction.

12. In the **Minimum dues** field, enter the minimum currency amount to qualify for the membership category.

13. In the **Maximum dues** field, enter the maximum currency amount to qualify for the membership category.

14. To indicate a category is not currently used by your organization, mark **Membership category is inactive**. If you mark both this checkbox and **Display active membership categories only** on the Membership Categories screen, you can ensure that a category is not used further on any records without deleting it from your database.

15. Click **Save** on the toolbar and proceed to the next tab on the record or, to save the record and return to the Membership Categories page, click **Save and Close**.
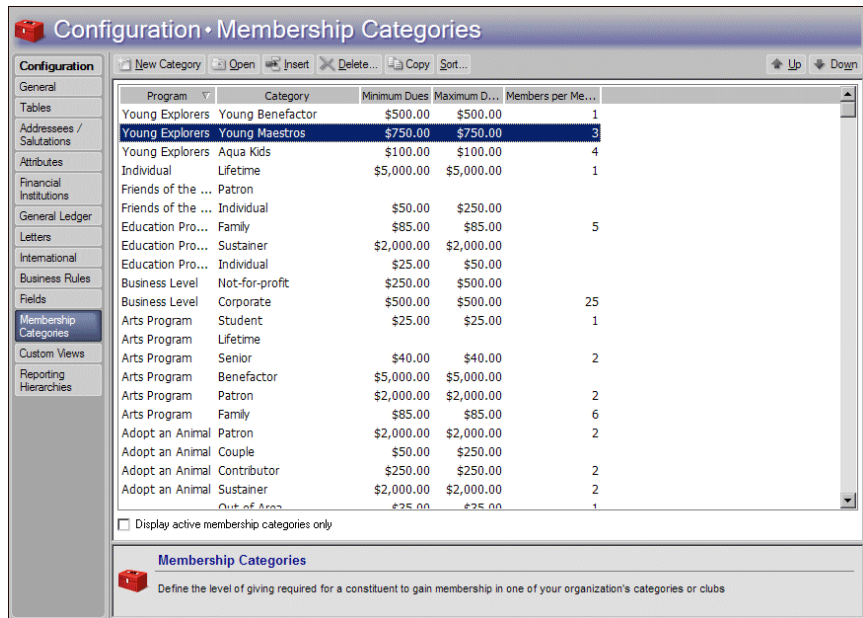
➢ **Establishing default benefits for a membership category**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

Program is like an umbrella for **Categories**. For example, a zoo can have categories of Little Friend, Best Buddy, and Junior Keeper, all under the Kid's Club program.

2. Click the **Membership Categories** link. The Membership Categories page appears.

3. On the action bar, click **New Category**. The New Membership Category screen appears.

4. Select the Default Benefits tab.
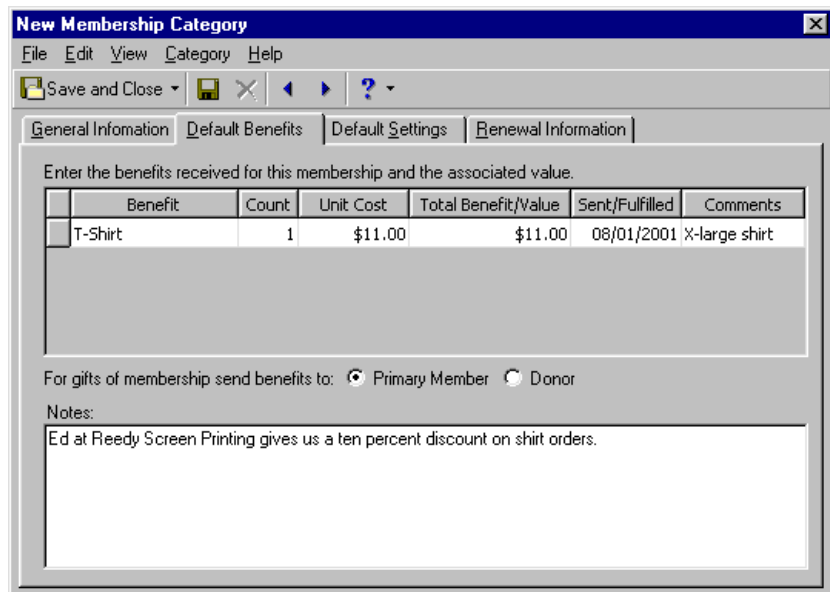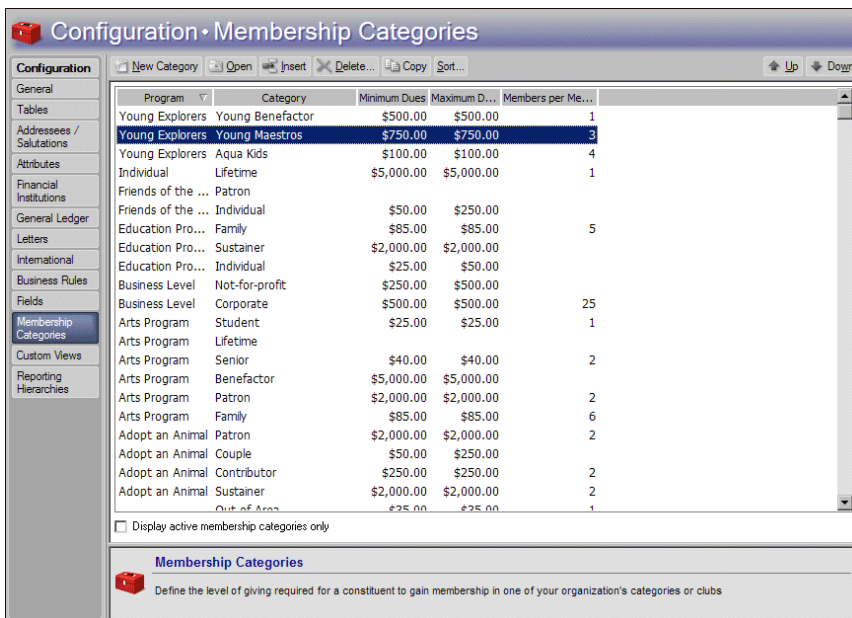
5. In the grid, you can set defaults for benefits received for membership in the new category and establish the associated value of these benefits. In the **Benefit** column, select an entry or add your own. Examples of benefits include coffee mugs, tote bags, and t-shirts.

6. In the **Count** column, enter the number of times the corresponding benefit is received. For example, if the category entitles a member to two t-shirts, enter "2".

7. In the **Unit Cost** column, enter the currency value of the benefit. This field defaults to a value based on the table entry in the **Benefit** column (as established in the **Tables** link), but you can overwrite the default value.

   In the **Total Benefit Value** column, the program automatically multiplies the number of units by the benefit cost and displays the total value.

8. In the **Sent/Fulfilled** column, enter the date the benefit was given to the member.

9. In the **Comments** column, you can enter an additional text note about each benefit.

10. To indicate which constituent should get the benefit for gifts of membership, mark **Primary Member** or **Donor**.

11. In the **Notes** box, you can include additional information about benefit(s) for the membership category. For example, you can mention the name of the shop that screen printed your t-shirts or how many tote bags you purchased to give as benefits.

12. Click **Save** on the toolbar and proceed to the next tab on the record or, to save the record and return to the Membership Categories page, click **Save and Close**.

> **Establishing default settings for a membership category**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Membership Categories** link. The Membership Categories page appears.

3. On the action bar, click **New Category**. The New Membership Category screen appears.

When you edit a **Benefits** table entry, any default benefit that you already assigned to a membership category is not affected. For example, if you enter a default benefit with a unit cost of $5 for an appeal, when you enter gifts on that appeal, the benefit defaults on the gift with a unit cost of $5. If the cost of the benefit rises to $6 and you update the **Benefits** table, the unit cost does not change on gifts that already have the benefit, only on new gifts added to the category.

4. Select the Default Settings tab.

5. In the **Card/Renewal Defaults** frame, in the **Default renewal card status to** field, select a default card status for when you renew a membership. The choices are: "Not Printed", "Do Not Print", "Lost", and "Printed".

6. In the **Default no. of cards to print** field, enter the number of memberships to which a category member is entitled.

7. In the **Expiration Defaults** frame, select an entry in the **Default 'Expires' to** field to indicate the default expiration date for the membership.

    • To enter each expiration date individually, select "No default".

    • To default the expiration to the first of the next month for a membership that expires on any day other than the first in a month, select "Beginning of Month". For example, if a membership starts on 2-15-2007 and is supposed to last twelve months, it normally expires on 1-15-2008. If you select this option, the expiration defaults to 2-1-2008.

    • To default the expiration to the last day of the current membership month for a membership that expires on any day other than the last in a month, select "End of Month". For example, select this option if your organization only drops memberships or sends out expiration notices at the end of the month. For example, if the membership starts on 1/15/2007, the expiration defaults to 1/31/2008 if Category is set at twelve months and "End of Month" is selected as the default expiration date.

    • To have every membership expire at the end of the annual (not fiscal) quarter in which it began, select "End of Quarter".

    • To have every membership expire on the same month and day as it began (the 'Joined on,' 'Renewed on,' or in some cases 'Rejoined on' date), select "Same Month/Day as Cycle Start Date".

To enter an expiration date on each membership card individually, select "No default" as your entry in the **Default 'Expires' to field**.

- To have every membership expire on the same month, day, and year, select "Specific Date" and enter the date in the provided field. For example, you can make all memberships expire at the end of the year, so even if a member joined, renewed, or rejoined in June or July, the expiration date is always 12/31. If you select this option, you must change the year in the corresponding field entry at the beginning of each new membership year, whether it be calendar or fiscal.

8. Select a default for the amount of time that **New memberships expire after**. You must make an entry here before the new category can be saved, but you can override the default when entering membership transactions. If you select "Specific Date" in the **Default 'Expires' to** field, this field is disabled.

9. Select a default for the amount of time that **Renewed memberships expire after**. This is required to save a category and can be overwritten. If you select "Specific Date" in the **Default 'Expires' to** field, this field is disabled.

10. Select a default for the amount of time **Rejoined memberships expire after**. This can also be overwritten but is not required because your organization may not ever drop memberships. If you select "Specific Date" in the **Default 'Expires' to** field, this field is disabled.

   New and renewed memberships are separated because, for example, you may want to give new members a thirteen month membership as a bonus for joining, but renewed memberships last the standard twelve months.

11. In the **Default Information For Memberships Linked to Gifts** frame, you can specify the gift field default set. To select an existing default set or create a new one, click **Gift Defaults**. To select a default set, you can entering the name directly into the field. When you leave the field, the program searches for a match. If a match is found, the link is made. If a match is not found, you are asked if you want to create a new default set. If you have specified a valid default set, the magnifying glass is available to view details of it.

12. In the **Default Receipt Amount Options** frame, specify whether to default the receipt amount of memberships linked to gifts based on the gift amount and benefits received or another amount.

   - To default the receipt amount of a membership linked to a gift based on the membership benefits loaded into the gift record Benefits grid, select **Gift Amount - Benefits**.

   - If you do not want a default receipt amount, select **Do not default receipt amount** option. This affects only gifts linked through membership.

   - To default another amount as the receipt amount of a membership linked to a gift, select **Other Amount** and enter an amount. If this field is already populated in the gift record, it is not overwritten by the default values you set here.

13. Click **Save** on the toolbar and proceed to the next tab on the record or, to save the record and return to the Membership Categories page, click **Save and Close**.

You must make an entry in the **New memberships expire after** and **Renewed memberships expire after** fields before you can save a membership category; however, the entries can be overwritten on individual records.

Default sets can contain default entries for almost every field on a record. When you load a default set into a record, the values you entered for the set can automatically default into the record. This saves you time during data entry. For more information about default sets, see the "Program Basics" chapter of the *Program Basics Guide*.

➢ **Assigning renewal information for a membership category**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Membership Categories** link. The Membership Categories page appears.
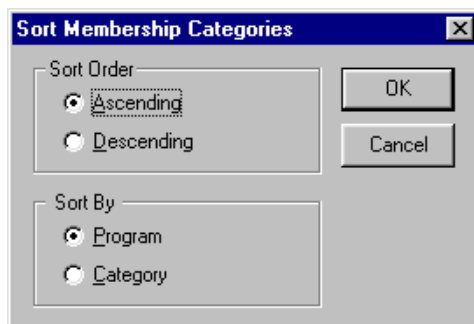

3. On the action bar, click **New Category**. The New Membership Category screen appears.

4. Select the Renewal Information tab.

5. In the **Drop this membership after being lapsed for** field, you can specify a grace period (the amount of time a membership can be lapsed before it is dropped). Enter a number up to 99 followed by a selection of Day(s), Week(s), Month(s), or Year(s) from the table.

6. The **Regular Renewal Notice Information** grid contains the following columns:

- **Letters** - indicates which letter to send for the renewal notice.

- **Comments** - you can enter additional comments to include with this renewal.

- **No.** - number of days, weeks, months, or years before or after expiration that a renewal notice should be sent.

- **Frequency** - functions with the **No.** column to determine days, weeks, months, or years before or after expiration that a renewal notice should be sent.

- **Before/After** - indicates if the renewal notice should be sent before or after expiration of membership.

7. The **Renewal Notice Information When There Are Gifts of Membership** grid is the same except it also contains the **Send to** column to indicate whether the member, the giver of the gift of membership, or both should receive renewal notices.

8. To save the record and return to the Membership Categories page, click **Save and Close** on the toolbar.

➢ **Editing a membership category**
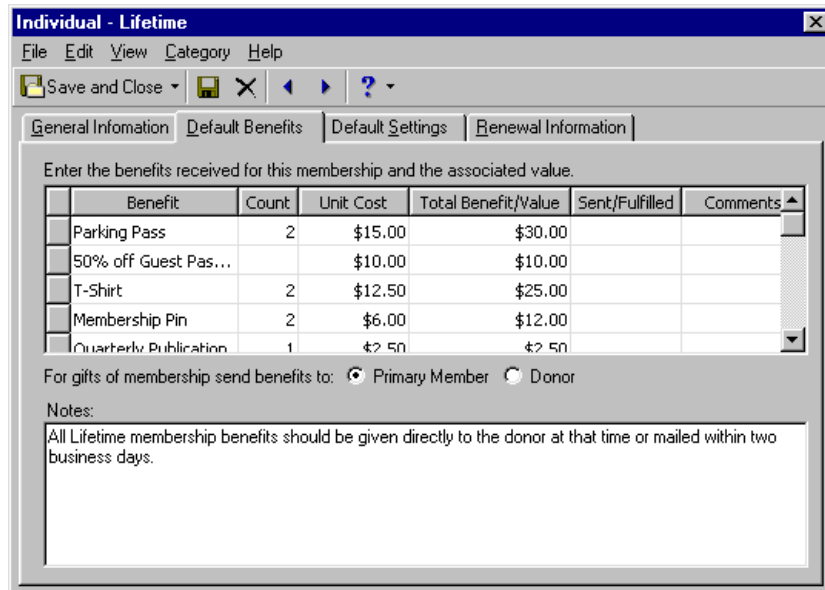
You can make changes to a membership category you have already established. For example, you may want to change the renewal information or default benefits for a membership category.

Your museum wants to assign a new benefit to the Lifetime category, Individual program. You want to give four free admission passes as a benefit for this category.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Membership Categories** link. The Membership Categories page appears.

3. In the Membership Categories grid, select the Individual program, Lifetime category.

4. On the action bar, click **Open**. The Individual - Lifetime screen appears.

5. Select the Default Benefits tab.

6. By default, a blank row appears at the bottom of the grid. Scroll to the bottom of the grid and in the blank row, enter "Free Admission" as the **Benefit**.

7. In the **Count** column, enter 4.

8. In the **Unit Cost** column, enter the amount $8. The **Total Benefit/Value** column entry defaults to $32.

9. Because you have not yet given out the passes, leave the **Sent/Fulfilled** column blank.

10. Enter any important **Comments** about the benefit.

11. On the toolbar, click **Save and Close**. You return to the Membership Categories page.

➢ **Deleting a membership category**

You can remove a membership category from your database. You can delete only categories that are not currently in use on any records.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

You can ensure a category is not used further on any records without deleting it from your database. Mark the **Membership category is inactive** checkbox on the General Information tab and the **Display active membership categories only** checkbox on the Membership Categories screen.

2. Click the **Membership Categories** link. The Membership Categories page appears.
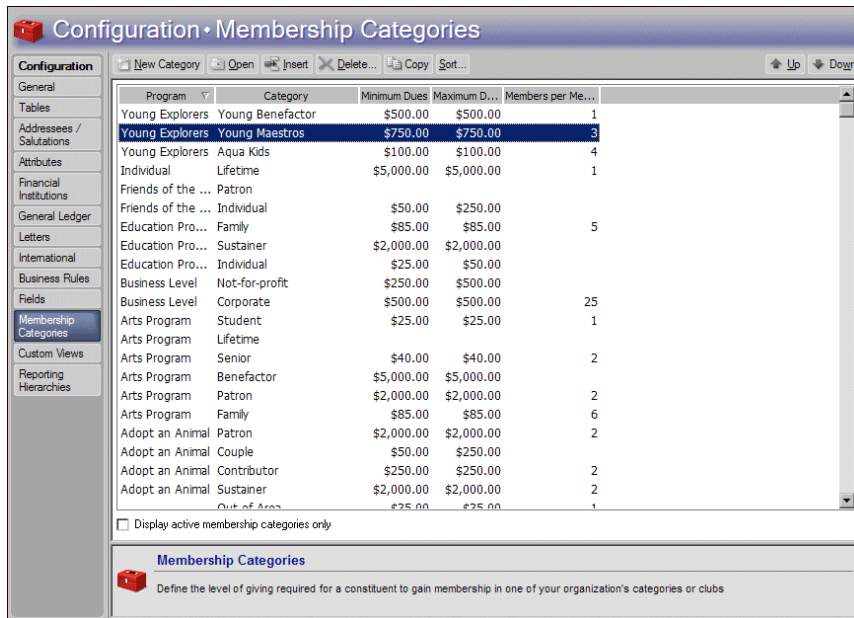
3. In the Membership Categories grid, select the category to delete.

4. On the action bar, click **Delete**. A verification message appears.
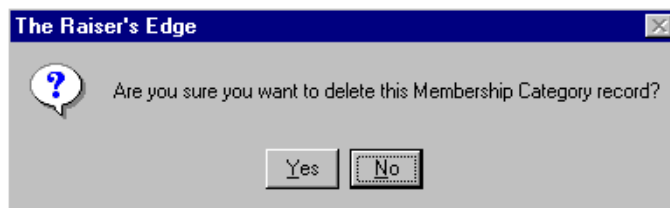
5. To delete the category, click **Yes**. You return to the Membership Categories page. In the grid, the deleted category no longer appears.

➢ **Copying information from a membership category into a new membership category**

You can use the information from an existing category to create a new membership category. If two of your categories are similar, this option can save time as you create your categories.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2.   Click the **Membership Categories** link. The Membership Categories page appears.

3.   Select the category from which you want to copy information.

4.   On the action bar, click **Copy**. The New Membership Category screen appears with information from the selected category automatically filled in.

5.   Before you can save the category, change either the **Program** or **Category** field to make the new category unique.

6.   On the toolbar, click **Save and Close**. You return to the Membership Categories page.

➢ **Finding a membership category**

You can find a membership category you already established. If you defined numerous categories, you may find it easier to locate a specific category this way instead of scrolling through all the entries in the grid.

1.   On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2.   Click the **Membership Categories** link. The Membership Categories page appears.

3.   On the action bar, click **Find**. The Find screen appears.
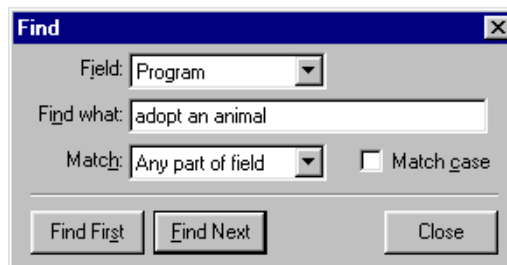
4. In the **Field** field, select to base your search on either the Program, Category, Minimum Dues, or Maximum Dues.

5. In the **Find what** field, enter the name or several letters of the membership category you want to find.

6. In the **Match** field, select whether you want your entry in the **Find what** field to match: Any part of field, Whole field, or Start of field.

7. If you want the search to match any capitalization in the table name, mark **Match case**.

8. To find the first match that meets your search criteria (as it appears in the grid, not alphabetically), click **Find First**. The entry appears highlighted in the grid.

9. To find any additional entries that match your **Find what** criteria, click **Find Next**.

➢ **Sorting and moving membership categories in the grid**

You can arrange the order categories list in the grid. You can place your most popular entries at the top of the grid to save time scrolling through the entries.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Membership Categories** link. The Membership Categories page appears.

3. In the action bar, click **Sort**. The Sort Membership Categories screen appears.

You can move your most frequently used entries to the top of the grid. This saves time scrolling through your less used entries during data entry.

4. In the **Sort Order** frame, specify the order in which to display the categories.

- To display the categories in alphabetical order from A-Z, select **Ascending**.

- To display the categories in reverse order from Z-A, select **Descending**.

5. In the **Sort By** frame, specify how to sort the entries.

- To sort the entries by program, select **Program**.

- To sort the entries by category, select **Category**.

6. To move a selected entry up or down one line in the Membership Categories grid, use the up and down arrows.

➢ **Printing membership categories**

You can print a list of all your membership categories or a detailed profile of each category to keep for your records.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Membership Categories** link. The Membership Categories page appears.

3. On the Membership Categories page, right-click your mouse anywhere in the Membership Categories grid. A shortcut menu appears.

4. Select **Print**. A submenu appears.

5. To print a list of the names of all the categories in the grid, select **Grid only**. Your printer produces a list of the categories in the grid.

6. To print a detailed report for a category, including default benefit and renewal information, select the category in the grid. Right-click and select **Print** from the shortcut menu. A submenu appears. From the submenu, select **Membership Category Profile**. Your printer produces the information for the selected category.

Interfund Entries

If you have Blackbaud's *General Ledger* and have established a link between it and *The Raiser's Edge* from the **General Ledger** link of *Configuration*, the **Interfund Entries** button appears. You can specify *General Ledger* transfer accounts and quickly access and enter them into the GL Distributions grid on fund records.

If the first two numbers of a *General Ledger* debit and credit account are different, they belong to different *General Ledger* funds. In this case, you must specify a transfer account. The interfund transfer ensures that posted debits and credits associated with a gift are balanced by *General Ledger* fund when the debit is to one fund and the credit to another. For example, if you post a debit to the *General Ledger* Playground Fund and a credit to the *General Ledger* Operating Fund both from the *The Raiser's Edge* General Fund, an interfund entry is needed to create an offsetting or balancing credit to the *General Ledger* Playground Fund and a balancing debit to the *General Ledger* General Operating Fund.

To access account numbers directly from the *General Ledger* database, click the binoculars or press **F7** on your keyboard. The accounts you define here appear in the list of entries when you click the down arrow in the **Interfund** column of GL Distribution grids.

➢ **Adding an interfund entry**

You can specify a transfer account to link debit and credit accounts from different *General Ledger* funds.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Interfund Entries** link. The Interfund Entries page appears.
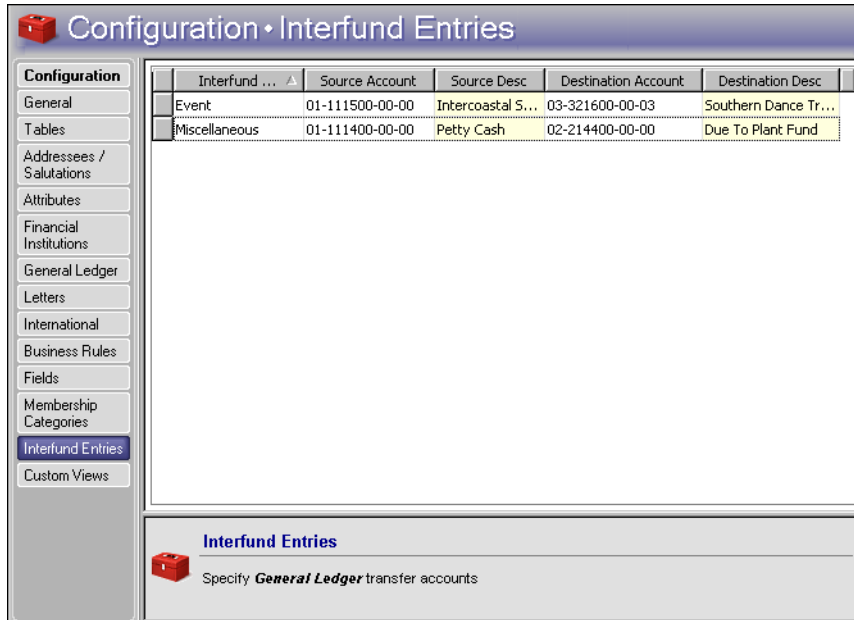
3. In the **Interfund Entry** column, enter a name of up to thirty characters. This name appears in the list of possible entries when you click the down arrow in the **Transfer** column of a GL Distributions grid on a fund record.

4. In the **Source Account** and **Destination Account** columns, click the binoculars to search the *General Ledger* database for account numbers. The account descriptions appear when you enter an account number. The descriptions are defined in *General Ledger* and cannot be edited in *The Raiser's Edge*. The source and destination account numbers must be different. If you select the same account numbers, a message appears.
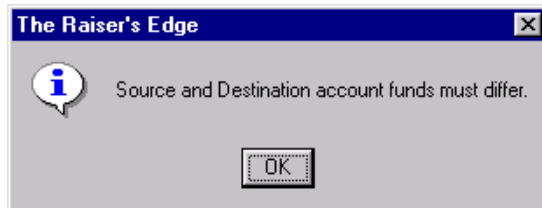
To return to the Interfund Entries page, click **OK**.

5. If you click the down arrow in the **Source** or **Destination Account** columns, a dropdown box appears. The contents of the box break down a *General Ledger* account number by **Segment**.

You can select which character to use as a placeholder for any missing digits in a *General Ledger* account number on the Records tab of User Options.

6. The **Segment** column breaks the account number into *General Ledger* fund (first two numbers), account number (next six numbers), expense category (the following two numbers), and Department/Cost (last two numbers). All the segments together make a complete account number. When you enter a **Value** for a particular segment, the **Description** column is locked with the description of that value entered in *General Ledger*.

When you leave the Interfund Entries page, the new interfund entry is automatically saved.

➤ Editing an interfund entry

You can change an interfund entry. For example, you may want to change the transfer account used between two *General Ledger* funds.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Interfund Entries** link. The Interfund Entries page appears.

3. Select the entry to change.

4. Enter a new **Source** or **Destination Account** number.

When you leave the Interfund Entries page, your changes are automatically saved.

➤ Deleting an interfund entry

You can delete interfund entries that are not in use in any GL Distributions. Deleting the information from *The Raiser's Edge* does not affect the information in *General Ledger*. If you attempt to delete an entry that is currently in use in a GL Distribution, a message informs you that it cannot be deleted.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click the **Interfund Entries** link. The Interfund Entries page appears.

3. In the grid, click the box on the far left of the entry to delete. The entire row highlights.

4. Press **DELETE** on your keyboard. A verification message appears.
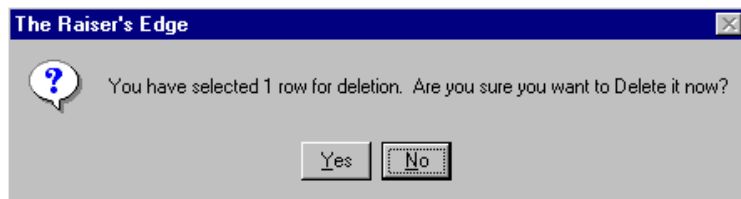
5. To delete the interfund entry, click **Yes**. You return to the Interfund Entries page. The selected entry no longer appears in the grid.

Security

Contents

Chapter 2

Procedures

Security settings define the level of access your users have to all areas of ***The Raiser's Edge***. These settings determine which tabs are visible to a user; whether or not the user can view, add, edit, or delete records; and whether or not the user can perform various functions throughout the program.

Security is centered around groups you create. You can customize the security settings for a group and then add members to the group based on the level of access you want to grant them. For example, you can create a group for your data entry personnel and give the group all necessary rights to view and change information and perform functions related to entering data.

Security is closely linked with *Configuration* in determining how information is managed by ***The Raiser's Edge***. We recommend you limit security access to *Configuration* to only those users with Supervisor rights. You can assign Supervisor rights to any of your users. Only the Supervisor and those users with Supervisor rights have full access to all areas of the program.

The Raiser's Edge is shipped with a user name of "Supervisor" and a password of "Admin". We recommend you change your Supervisor password immediately and make sure that at least one other person in your organization knows the new password. You can also grant rights to individual users allowing them to change their own passwords.

User names and passwords are not case sensitive when logging into *The Raiser's Edge*.

What is Security?

Security gives you the ability to ensure the consistency, integrity, and confidentiality of your data by limiting access to records and functions to only the users who need it. For example, by limiting view rights for your users, you can determine who sees such records as gift amounts from Board Members or sensitive notes and attributes assigned to constituents. By limiting rights to edit data and perform certain functions, you can control which of your users can change and delete important records for your organization.

Security in ***The Raiser's Edge*** is based on several ideas: object, system, and field level options; inclusion and exclusion criteria; and assigning rights by security groups. Although the term "object level security" sounds less widespread than "system level security," of the two, system level security is actually the smaller or more precise level of security. For example, if you deny rights to edit constituent records through object level security, the group cannot edit any constituent records; however, with system level security, you can deny edit rights to only constituent records with certain codes, while allowing rights to all others. A key difference between the two types of security is that object level security does not affect the user's ability to print restricted records in reports or mailings, but system level security does prevent restricted records from appearing in reports or mailings. Field level security can be used to deny access to specific fields on certain records. For example, if you deny rights to credit card information, all fields in the constituent record Credit Card grid are disabled and credit card information fields are left blank and disabled on gift records. Like object level security, field level security does not affect reports or mailings.

Encrypted Information in The Raiser's Edge

Credit card numbers, social security numbers, bank account numbers, and insurance policy numbers are encrypted in *The Raiser's Edge* database. Version 7.81 employs AES encryption. When you upgrade from version 7.80, your 3DES-encrypted data is decrypted during the upgrade and re-encrypted using AES encryption. If you are upgrading to 7.81 from a version prior to 7.80, the credit card, SSN, bank account, and insurance policy data was not previously encrypted and the data is AES encrypted during the upgrade. Fields that are encrypted can only be searched for with an exact match. Partial matches (such as "begins with," "contains," etc.) cannot be used for encrypted fields.

For user passwords, a "hash" is used. A hash encrypts a string (such as a password) in a way that it cannot be decrypted; when comparing an entered value to the password in the database, the entered value that is hashed, and that hash compared to the one in the database. This should be transparent to the user, as I've preserved the case-insensitivity of user passwords and their ability to appear as a masked string of the same length as the plaintext value.

Frequently Used Terms

If you come across an unfamiliar term when reading this or any other chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file. The following terms appear throughout this chapter.

Security Groups. You control security in *The Raiser's Edge* by creating groups with different rights and assigning your users to these groups based on how much access to records and functions you want them to have. In addition to creating new groups, you can edit the rights for existing ones.

Although each user has a unique password, you can use grouping to define the functions that users assigned to a group are allowed to perform and the records they can view, add, edit, and delete. For example, you can create a group for workers who add new constituent records, but who do not edit existing constituent records, by giving add rights and denying edit rights to constituent records.

Object Level Security. Object level security refers to access rights given to a user based on record type. Data entry security is based on object level security. For example, if a user does not have rights to edit campaign records, the user cannot edit campaigns from anywhere in the program. Object level security affects a user in all areas of the program, except *Reports* and *Mail* functions. If you deny a user access to records through object level security, those records do not appear in queries, exports, global changes, batches, or in search results. However, if a user has access to a report or mailing type, the user has access to all information in the report or mailing, including records restricted through object level security. To totally restrict access to certain records, you must use system level security.

Whenever a user attempts to access a record or function for which he does not have security rights, a message appears denying authorization.

System Level Security. System level security is created by giving or denying rights based on certain characteristics within a record type. System level security gives users rights to view and edit constituent records based on constituent code; gift records based on fund; and notepads based on type. For example, if a user does not have access to gifts given to a fund based on system level security, the user cannot view or edit gifts associated with this fund in data entry, queries, imports, reports, and mailing functions. Even if the user has full access to reports and mailings, restricted information does not appear on them. System level security for constituent codes is based on inclusion and exclusion criteria.

Field Level Security. Field level security is created by granting or denying access to information entered in a specific field. Fields available for this security level are limited to credit card information and other selected biographical fields on the constituent record. If you deny access to these fields, they are disabled and appear with no values on records. For example, if you deny access to credit card information, the Credit Card Grid is disabled on constituent records, and no credit card information can be viewed on gift records. Restricted fields cannot be used as filter, sort, or output fields when creating queries. Users also cannot run existing queries that contain the restricted field(s). With the exception of profiles, field level security does not affect information included in mailings and reports.

Inclusion and Exclusion. Inclusion and Exclusion security bases access to constituent records on whether or not the record contains one or more types of constituent code. Inclusion gives rights to a group for only those codes you specify; exclusion denies rights for those codes you specify. For example, using the constituent code of Alumni, if no exclusion criteria exists for a security group, the users in that group have access to all alumni, no matter what other constituent codes the record may have. If you then set an exclusion for Board Members, the users have access to all alumni except those whose records are also coded as Board Members. Using inclusion criteria, you can allow groups access to constituent records with only certain codes. If you specify the group has access to only constituents coded as Alumni, users can access only those records containing that constituent code. If the record contains other codes in addition to alumni, the user still has access unless you establish exclusion criteria. If both inclusion and exclusion criteria are set up for the same group, the exclusion criteria always takes precedence over the inclusion criteria. If you do not specify either inclusion or exclusion criteria, a user has access to all constituent codes.

Security Types Overview

System level security checkboxes default to unmarked because by default, all users have access to all constituents, gifts, and notepads. You mark these checkboxes only when you want to limit access to these records.

You can assign security rights to a group by marking a series of checkboxes. For some areas of the program such as *Records*, you can assign separate view, add, edit, and delete rights. For other areas such as *Query*, you can only grant or deny access to an entire module. All checkboxes default to marked (granting access) except the system security options: **Security by Constituency**, **Gift Security by Fund**, and **Notepad Security by Type**.

Records. You can assign view, add, edit, and delete rights for all record types. For example, you may want to give a group rights to view constituent records, but not to edit financial institution information, notes, or any other parts of the constituent record. You can assign field level security for several fields on the constituent record.

Reports. Rights to run reports are defined on two levels. You can assign rights by report type and more specifically by report name. For example, if you deny rights to analytical reports, a group cannot run any of them. However, you can grant rights to run analytical reports and deny rights to individual reports such as the Top Donors Report or LYBUNT Report. Records rights do not affect report rights. If a user has rights to a report, she has access to all records on that report. However, system level security by constituent code, notepad, or fund does affect the data that displays in reports.

Mail. You can define rights to run mailings by mailing types and more specifically by mailing functions. For example, if you deny rights to letters, the group cannot run any letters in the program. However, you can assign rights to run letters and still deny rights to individual letters such as Donor Acknowledgement letters and Follow Up letters. Records rights do not affect mailing options. If a user has rights to a mailing type, he has rights to all information included in that mailing. As with reports, system level security affects constituent and gift information in mailings.

Query. To define query security, you can mark or unmark a single checkbox that gives or denies all rights to *Query*. If you deny rights, users can still select queries in other areas of the program and run output and exception queries in reports. However, they cannot add new queries. System level security affects query results.

Export. To define export security, you can mark or unmark a single checkbox that gives or denies all rights to *Export*.

Batch. You can assign rights to create, edit, delete, and commit constituent and gift batches. For example, you may want to grant a group rights to create and edit batches, but not to delete them. Security by Constituency and Gift Security by Fund affect which constituents and gifts are included in batches. In Batch security, you can also assign rights to access *RE:EFT* for electronic fund transfers.

Mapping. To define security for the integration with Microsoft *MapPoint*, you can mark or unmark a single checkbox that gives or denies all rights to mapping.

Administration. To assign rights for each administrative function, including data importing, global adding, and global deleting, you can mark or unmark a checkbox that gives or denies rights. Because so many of these functions have wide ranging implications, we recommend you limit rights to only experienced users.

Configuration. To assign rights for each area of configuration, you can mark or unmark a checkbox that grants or denies rights. Rights to the **Fields** link of *Configuration* are automatically available only to users with Supervisor security rights. We recommend you limit rights to most functions to several key users.

Code Tables. Fields with a down arrow to the right, such as **Constituent code** and **School name**, are code tables. When you click the down arrow, you can select from a list of entries. Tables add consistency to your data entry. You can assign rights to add, edit, and delete entries for each table in *The Raiser's Edge*. To keep your table entries consistent and manageable, we recommend limiting rights to add or change code table entries to several key users.

Personal Information. You can specify whether credit card numbers, social security numbers, and bank account numbers are masked or visible to users.

Security by Constituency. You can define the constituent records to which a group has access by using inclusion and exclusion criteria. For example, you can use inclusion to grant a group rights to only those records that contain the code Friend and you can use exclusion to deny a group rights to any constituent record containing the code Trustee. If you restrict rights to a particular code, the user cannot assign the code to any record. If both inclusion and exclusion rights are set up for the same group, exclusion rights always take precedence over inclusion rights.

Gift Security by Fund. You can limit the ability of a group to access gifts given to particular funds. For example, if you deny access to gifts given to your Major Donor Annual fund, these gifts do not appear on reports, queries, or data entry records.

Notepad Security by Type. You can limit view and edit rights to selected notepad types. This can be useful if you keep sensitive information in a notepad. For example, you can grant view rights to a notepad type named "Director's Notes" to only the Director and Assistant Director.

Membership Scanning. To define security for *Membership Scanning*, you can mark or unmark a single checkbox that gives or denies rights to *Membership Scanning*.

Dashboard. To define *Dashboard* security, you can mark or unmark a single checkbox that gives or denies rights to *Dashboard*.

Install Samples. To define security for installing samples, you can mark or unmark a single checkbox that gives or denies rights to all samples. Sample queries, exports, custom reports, business rules, and more are available for installation when you select **Tools**, **Install Samples** from the shell menu bar.

NetSolutions. To assign rights for each area of *NetSolutions*, you can mark or unmark a checkbox that grants or denies rights to a specific area.

Proposal Security by Purpose. You can limit the ability of a group to access proposal records based on the purpose for which the proposals are targeted. For example, you may have a purpose of "Major Gift" for which you want to limit access. If you deny access to proposals with a purpose of Major Gift, these proposals do not appear on reports, queries, or data entry records for a security group.

Data Health Center. To define *Data Health Center* security, you can mark or unmark a single checkbox that gives or denies all rights to the *Data Health Center*.

AMPro Integration. You can specify which parts of the *AuctionMaestro Pro* integration are available to a group.

NetCommunity. When you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, you can specify which information from *Blackbaud NetCommunity* is available to a group.

Action Security by Type. You can limit view and edit rights to selected action types. This can be useful if you keep sensitive information in an action record. For example, you can grant view rights to a an action type named "Advocacy" to only the Advocacy Director and Assistant Director.

MatchFinder. You can specify which parts of the optional module *MatchFinder* are available to a group.

Navigating in Security

All security options are accessed from the **Security** link of *Administration*. From this link, you can create security groups and define the level of access they have in *The Raiser's Edge*. You can then add users to the groups based on the level of access they need to perform their job duties.

To access the Security page, on the Raiser's Edge bar, click **Admin**. The Administration page appears.
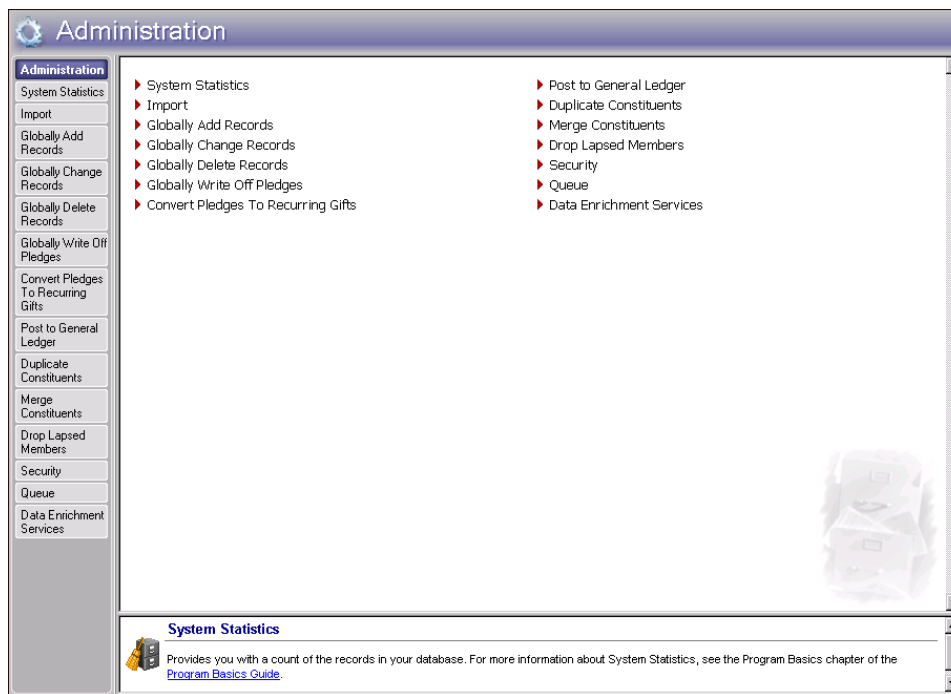
To return to the main Administration page, click the word "Administration" in the page title bar below the shell menu bar.

On the main Administration page, click **Security**. The Security page appears.

The tree view on the left lists all established **Security Groups** and all **Users** identified in **Security**. When you select a group from the tree view, all members of that group list in the box on the right. When you select a user in the tree view, all groups to which the user belongs list on the right.

Toolbars

Security user and group records contain several toolbar buttons to help you carry out commands quickly and easily without using the menu bar. You can mark the **Show Tooltips** checkbox on the General Tab of User Options so when you move the cursor across a button, a description of its function displays. Toolbar buttons with a down arrow contain additional options.
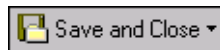
Save and close the current record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)

Save the record and keep the record open

Delete

Go to the previous record

▶

Go to the next record

? ▾

Access help contents

Managing Security

Your first step in establishing security for *The Raiser's Edge* is to create security groups. Give the groups descriptive names you can easily identify. Assign privileges to a group based on the areas of the program to which you want its members to have access. For example, a group containing experienced users may have access to *Administration* functions such as **Import** and **Globally Delete Records**. To avoid accidents in your database, any group with less experienced users should be denied access to these functions. Create as many different groups as you need. Then, as you add users to **Security**, make them members of whichever groups grant them the level of access they need to perform their job duties. When you add users, you must also decide whether or not they have the ability to change User Options and their own passwords.

You can assign Supervisor rights to users. Only users with Supervisor rights have full access to all areas of *The Raiser's Edge*. You can also change the Supervisor password. We recommend you do so frequently. At least two people in your organization should have Supervisor rights and know the Supervisor password.

Security Groups

You can add new security groups and edit the rights and members of groups you already established.

If you use Active Directory, you can also base your security groups on that structure. For more information, see "Windows Authentication Security Groups" on page 170.

➢ **Adding a security group**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Enter a **Group Name** and **Description** for the new group. The group name must be unique. It appears in the tree view on the main Security page.

5. In the **Group Members** frame, use the arrows to move individuals or the entire group between the **Members** and **Not Members** boxes. Use the single arrow to move one highlighted name or the double arrow to move all names from one box to the other. For new groups, all users that you define (including the Supervisor) are initially in the **Not Members** box.

6. The **Group Privileges** frame contains a box listing the different security types as checkboxes. Initially, the group is granted access to all areas of the program (except those available to only users with Supervisor rights). All security type checkboxes default to marked except the system security options: **Security by Constituency**, **Gift Security by Fund**, and **Notepad Security by Type**. The system security checkboxes default to unchecked because by default, the group has access to all constituents, gifts, and notepads; you mark these checkboxes only when you want to limit access to these records.

For a detailed explanation of how to assign group privileges for each type of security in *The Raiser's Edge*, see "Security Types" on page 183.

7. Click **Save and Close** on the toolbar to save the record. You return to the Security page.

➢ **Editing basic group information**

You can change the members and rights of a security group. For example, if a worker gets promoted, you may want to remove the employee from one group and add him to another. Or, you may want to change the rights granted to a particular group.

You decide to give all your users data entry rights. To do this, you will make them all members of your Data Entry security group.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. From the tree view, select the Data Entry group. The members you have already assigned to the group appear in the box on the right.

4. On the action bar, click **Open**. The Data Entry screen appears.
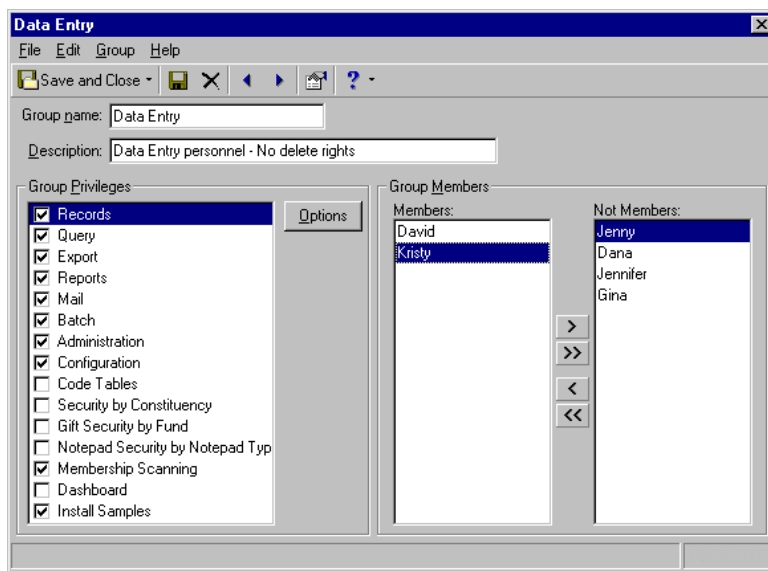
5. All users you added to security appear in the Group Members frame in either the **Members** or **Not Members** box. In the **Not Members** box, select any name. Click the double left arrow. All names in the **Not Members** box move to the **Members** box. All your users now have the rights you assigned to the Data Entry group. For information on the types of security rights you can assign to a group, see "Security Types" on page 183.

6. To save your changes, click **Save and Close** on the toolbar. You return to the Security page.

➢ **Deleting a group**

You can remove a group from **Security**. Before doing so, we recommend you print a security profile to back up your records. Deleting a group does not remove the users who are members of that group from security.

> You have a security group for volunteers who have limited rights to enter and view data for only constituents. You decided to eliminate this group and assign all its members to your Data Entry group. By doing so, your volunteers can also enter other information such as action records.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. In the tree view, highlight the Volunteers group.

4. On the action bar, click **Delete**. A verification message appears.
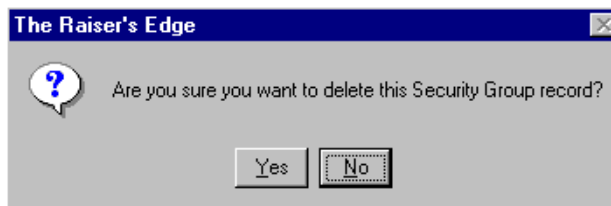
5. To delete the group, click **Yes**. The Security page appears.

6. From the Security page tree view, click **Users**. The members of the group still appear on the right. You can now assign them to the Data Entry group.

Windows Authentication Security Groups

If you have well organized and well established Active Directory user/group schemes you can leverage that infrastructure when creating your *Raiser's Edge* groups. You can manage your users from a single location without the need to duplicate your network directory in *The Raiser's Edge*.

You can assign multiple users to a group either by adding an Active Directory group or via an LDAP (Lightweight Directory Access Protocol) query. LDAP is an Internet protocol that programs use to look up information from a server.

➢ **Assign a Windows group to a security group**

1. In the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Windows Group**. The New Group screen appears.

4. Click **Synchronize**. The Select the source container screen appears.

5. You can select a group or specify users via an LDAP query.

6. To add an Active Directory group, mark the **Group** option and click **Browse**. The Windows Select Group screen appears.

    For more information about the items on this screen, click the question mark on the screen title bar and drag it over an item.

7. Mark the **Search for users in subcontainers** checkbox to include users in any groups within the group you specified. If you unmark the checkbox, the program returns only those users found explicitly within the specified group.

8. Select the group you want to add to the group and click **OK**.

9. To add users with an LDAP query, select **LDAP Query**.

10. Mark the **Search for users in subcontainers** checkbox to search for users in any groups found within your query. If you leave the checkbox unmarked, only those users found explicitly within the specified query are returned.

11. Enter a descriptive **Name** for the LDAP query you are creating.

The program does not allow duplicate Windows user names in different groups, so users added through Windows security groups cannot also be set to use Windows authentication as part of another group. If names in a Windows group match existing *Raiser's Edge* users, the program will not allow you to add the Windows group. So, it is important that you make sure to remove any users specified to use Windows authentication from other groups before including them in an Active Directory or LDAP group you want to add.

You can display a list of users in the selected group by clicking the **Preview** button

12. You can optionally specify where the program should begin searching by clicking the **Browse** button and selecting the desired location within your organization's Active Directory structure. When you select a location, it appears in the **Root** field.

    Setting this "starting point" can greatly improve the performance of your LDAP query.

13. In the **Query** field, you can manually type in a valid LDAP query. If you are not familiar with LDAP syntax you can use a wizard to build a simple query.

    a. Click **Define**. The LDAP query wizard appears.
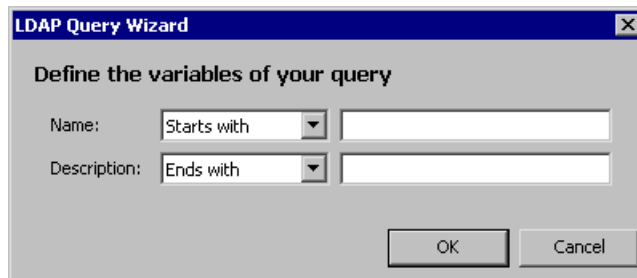
    b. Enter the information describing the users you are looking for.

    c. Click **OK** to save that information and return to the Select source container screen. The query you created with the wizard appears in the proper syntax in the **Query** field.

14. You can click **Preview** to view a list of users found by your query:

15. Click **OK** to return to the New Group screen.
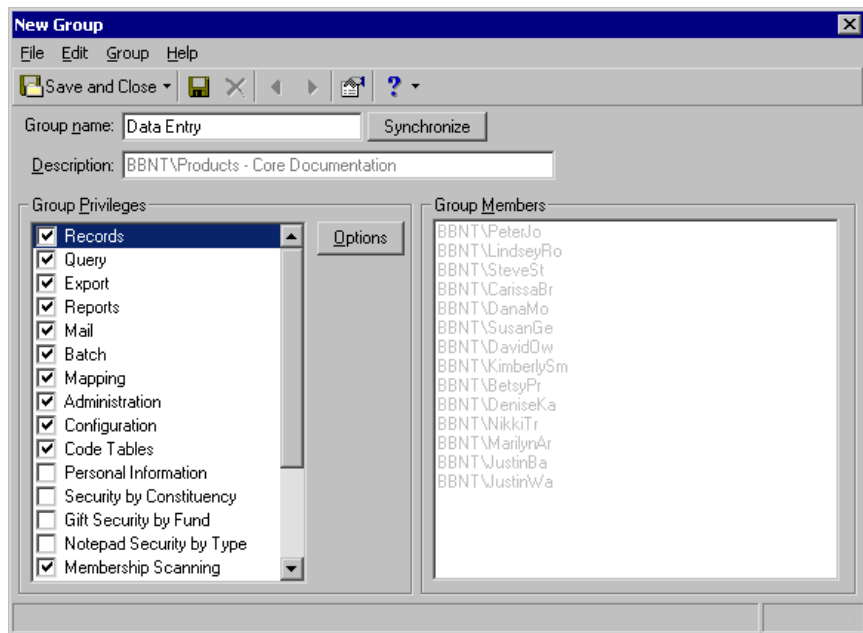
The users in your Windows group or LDAP Query appear in the **Group Members** box. You cannot add or remove group members from the box, membership in this security group is based solely on membership in the underlying Windows group or LDAP query.

Initially, the group is granted access to all areas of the program (except those available to only users with Supervisor rights). All security type checkboxes default to marked except the system security options: **Security by Constituency**, **Gift Security by Fund**, and **Notepad Security by Type**. The system security checkboxes default to unmarked because by default, the group has access to all constituents, gifts, and notepads; you mark these checkboxes only when you want to limit access to these records.

For a detailed explanation of how to assign group privileges for each type of security in *The Raiser's Edge*, see "Security Types" on page 183.

16. Click **Save and Close** to save the group.

Synchronizing Users in Windows and The Raiser's Edge

After you create and save a group, when you click **Synchronize** on the Groups tab, the program gathers a complete list of users in all specified groups and LDAP query results. The group is then updated by adding the users who are not currently assigned to the role, and removing users who were previously synchronized, but who are not currently in the query results.

This process can be automated using the Blackbaud.GroupSync.exe utility (located in "The Raiser's Edge 7" folder of your installation). This command line application can be accessed from all common administrative tools (batch files, wscript, at command, etc.). You can use the Windows Scheduled Task Wizard to schedule regular synchronizations via the GroupSync utility.

Security Users

You can add users to **Security** and define their level of access in *The Raiser's Edge* by assigning them to security groups. Although you can add users to more than one group, we recommend you do not. If a user belongs to multiple groups and one group has system level security rights to an area of the program that the other does not, the user does not have rights to that area. For example, if a user belongs to two groups, and one group has access to a certain notepad type or fund, but the other group does not have access to that notepad or fund, the user would not have access to the record. You can delete users from **Security** without removing them from your database.

➤ **Adding a user to Security**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

If a user belongs to multiple groups, the rights in the groups are combined. However, this does not apply to system level security (Gift Security by Fund, Notepad Security by Type, and Constituent Security by Constituency). If a user belongs to one group that has system level rights to records and another that does not, the user does not have rights to those records. We recommend you do not assign users to more than one security group.

3. On the action bar, click **New User**. The New User screen appears.

4. Enter a **User name** to appear in the Security tree view. The user enters this name, along with a password, to log into *The Raiser's Edge*. Certain words, such as "index," are reserved by the program and cannot be used as user names. If you enter one of these words or a duplicate name in the **User name** field, a message appears.
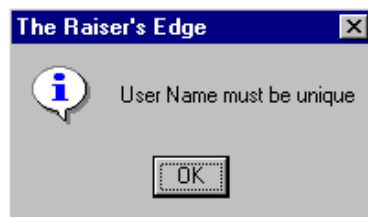
Click **OK** to return to the New User screen.

5. You can enter a **Description** if you want to further identify the new user, but this is not required. For example, you can enter a job title for each user or if you use only first names as user names, you can enter the full name here.

6. You can link the user to her constituent record using the binoculars in the **Constituent name** field. You should set up this link when you want to display action reminders to solicitors who are also users of *The Raiser's Edge*. When you click the binoculars, the Open screen appears for you to select the constituent record.

    For example, Kristy Graham is a solicitor for Mary Smith and an action is added to Mary's record specifying Kristy as the solicitor for the action. For Kristy to be reminded of this action, she must be a user in *The Raiser's Edge*. To enable automatically adding Kristy as a user to be notified, her constituent name must be associated with her user profile in security.

Default options enable solicitors on an action or solicitors for a constituent to be defaulted into the **Action Notification** grid of the action record if they are associated with a security user. If a solicitor is not associated with a security user, that solicitor cannot be added to the **Action Notification** grid.

7. The **Outlook user** field is visible only if you have Microsoft *Outlook*. When you enter a name from your *Outlook* address book in this field, meeting requests can be sent to that person's *Outlook* calendar when an action is entered in *The Raiser's Edge*. The person can then get reminders through *Outlook*, instead of, or in addition to the reminder from *The Raiser's Edge*. The name must be entered in this field exactly as it appears in *Outlook*.

   If you use an Oracle database, a **Database user** field appears instead of the **Outlook user** field. A **Database user password** field also appears. Both fields are required. The **Database user** field dropdown displays each Oracle database user who is given the BLACKBAUD_USER role. If you want to map the Oracle database user for the *Raiser's Edge* user you are adding, select that user in the dropdown and enter the database access password for that user. If you do not map to a specific database user, "REUSER" (which is a valid login) is the default user and password.

8. In the **Group Assignments** frame, mark **Supervisor rights** if you want to assign the user full access to the program.

9. If you want to limit access for the user, mark **Selected group rights**. The **Member of** and **Not a member of** boxes are enabled. Use the arrows to select group memberships for the user. Initially, all groups appear in the **Not a member of** box.

10. In the **Connection Options** box, you can specify whether a user can log in using *Raiser's Edge* or *Windows* authentication.

11. If you want the user to access *The Raiser's Edge* using a password unique to the program, mark the **RE7 Authentication** checkbox and specify a **Password**. Reenter the password in the **Confirm** field. Your entry in both fields must be identical when establishing a password.

If you want a user's log in information for *The Raiser's Edge* to be based on his or her *Windows* log in information, mark the **Windows Authentication** checkbox. When users logged into a workstation through their *Windows* authentication access *The Raiser's Edge*, the *Windows* information is used to automatically log the user into the program, so there is no need to remember a separate *Raiser's Edge* password. If a security user's *Windows* authentication information changes, the change is automatically recognized by *The Raiser's Edge*.

To associate a user's *Windows* authentication information with *The Raiser's Edge*, you use the **Login** field to locate that user's account on your network.

a. Click the binoculars in the **Login** field. The Select User Account screen appears.
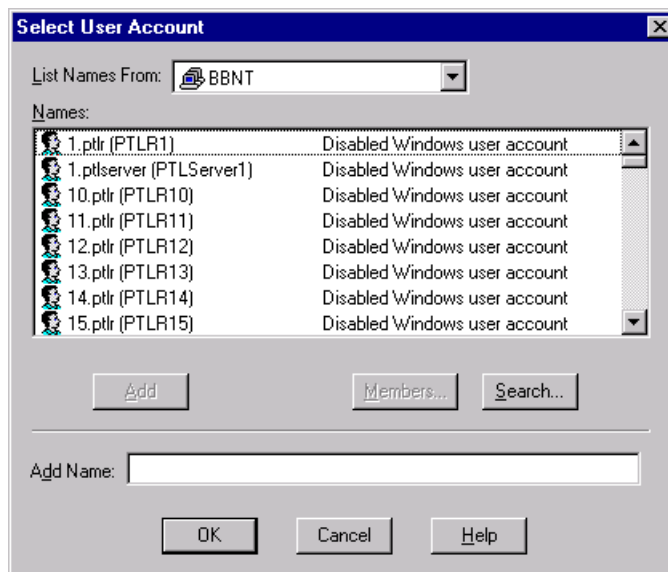
b. In the **List Names From** field, select the system to which the user you want to select belongs.

c. All members of the selected system appear in the **Names** box. Select the user you want to specify and click **Add**. The name appears in the **Add Name** field.

d. Click **OK**. You return to the Security User screen where the user now appears in the **Login** field.

12. You can mark both the **RE7** and **Windows authentication** checkboxes.

Marking both checkboxes enables you to store a password for a user even though the user typically is authenticated through *Windows*. This can be useful if, for example, you are running the standalone version of *The Raiser's Edge*, but your network goes down. Even if *Windows* authentication fails, the user can still log in to *The Raiser's Edge*.

Marking both checkboxes affects only whether or not a password is stored for the user. *The Raiser's Edge* always tries *Windows* authentication first, but if for some reason that fails, *The Raiser's Edge* User name/Password screen appears.

13. Mark the **User can change User Options** checkbox if you want to allow the user to change various displays, screen appearances, and defaults throughout the program. These options affect only that user. For more information, see the "User Options" chapter of the *Program Basics Guide*.

14. If you want to specify User Options other than the defaults for this user, click **Set This User's Options**. The Options screen appears so you can establish User Options that will affect only this user. You can also copy user option settings from another user. For more information, see "Copying user option settings from one user to another" on page 180. For information about the tabs on the Options screen, see the "User Options" chapter of the *Program Basics Guide*.

15. To save the new user, click **Save and Close** on the toolbar. You return to the Security page.

➤ **Deleting a user**

When you delete a user from security, if he has a constituent record in your database, it is not removed from the database. We recommend you back up your data by printing a security profile for the user before deleting the security record.

> Robert Thompson, a member of your Data Entry group, has left your organization to return to school. You entered him in your constituent database as a volunteer. You want to remove him from the Data Entry group, but keep his record in your database because he may work with you again next summer. If he returns, you will reassign him security rights based on his job responsibilities at that time. The Security treeview lists by **User name**. Robert Thompson's user name is Robert.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. From the Security tree view, select **Robert** and click **Delete** in the action bar. A verification message appears.
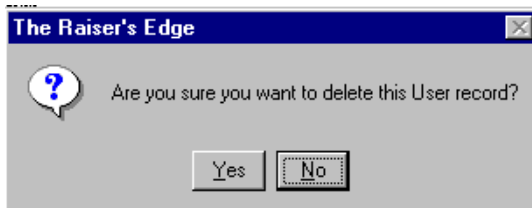
4. Click **Yes**. You return to the Security page. Robert Thompson is no longer listed in the tree view and his constituent record remains unchanged.

Before deleting a user from security, we recommend you back up your data by printing a security profile of the user. To print a profile, select **File**, **Print** from the menu bar while the user record is open.

A user cannot delete his own security record.

Passwords

The Supervisor can change passwords for users who do not have rights to change their own passwords. For example, the Supervisor may need to change a password for a user who has forgotten his current password. We recommend all passwords be changed frequently. Passwords can have up to 50 characters, but must have a minimum of 8 characters.

You can specify that users' *Windows* authentication information is used to log into the program instead of a ***Raiser's Edge*** user name and password. For more information, see "Adding a user to Security" on page 173.

➢ **Changing a user's password**

The Supervisor can change the password of any user. Other users, even those with Supervisor rights, cannot change other user's passwords.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. Select a user in the tree view and click **Open** in the action bar. The user's Security screen appears.
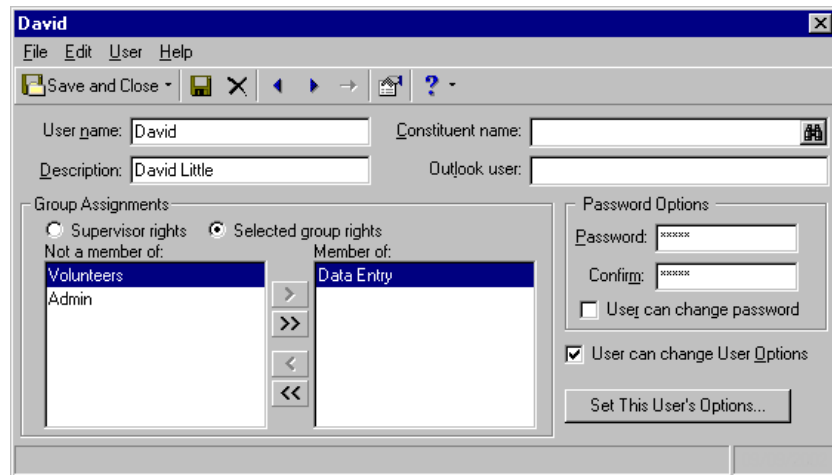
The actual password does not display in the **Password** and **Confirm** fields. For privacy, only asterisks appear in the fields.

4. The user's current password appears in asterisks in the **Password Options** frame. To change the user's password, enter the new **Password**. Reenter the password in the **Confirm** field.

If your entry in both fields is not identical, when you try to save the record a message appears.
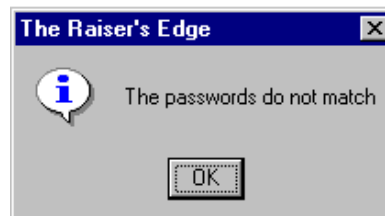
Click **OK** and reenter the new password in the **Password** and **Confirm** fields.
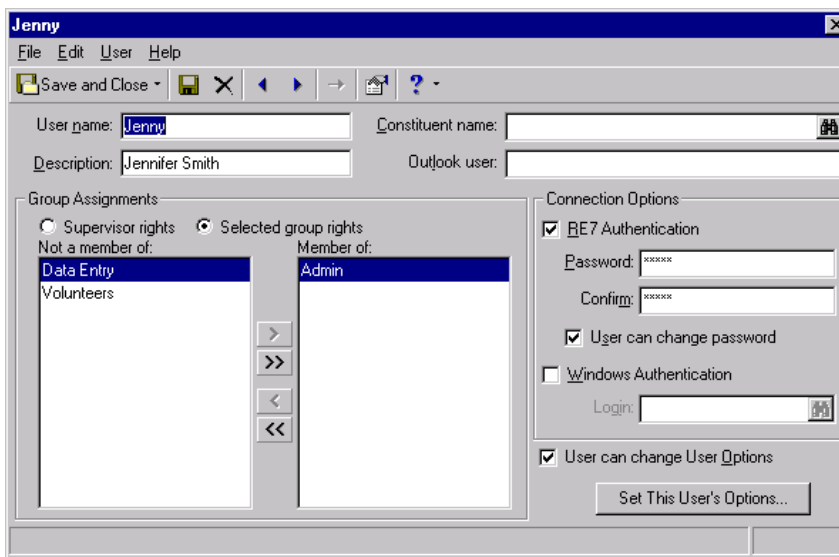
5. To save your changes, click **Save and Close** on the toolbar. You return to the Security page.

> ➤ **Giving a user rights to change his or her own password**

You can allow a user to change his own password. Users with rights can change their passwords from anywhere in the program by selecting **Edit**, **Password** on *The Raiser's Edge* menu bar.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. From the Security tree view, select a user and click **Open** on the action bar. The Security User screen appears.

4. In the **Password Options** frame, mark the **User can change password** checkbox.

5. To save your settings, click **Save and Close** on the toolbar. You return to the Security page.

User Options Security

The Supervisor can determine whether users have the ability to change User Options. User Options affect various display and data entry preferences throughout the program. You can copy user options established for one user to another user

> ➤ **Giving a user rights to change User Options**

You can give a user rights to change various display and data entry preferences throughout the program.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

Users with rights can change their passwords from anywhere in the program by selecting **Edit**, **Password** from *The Raiser's Edge* menu bar.

3. From the **Security** tree view, select a user and click **Open** in the action bar. The Security user screen appears.
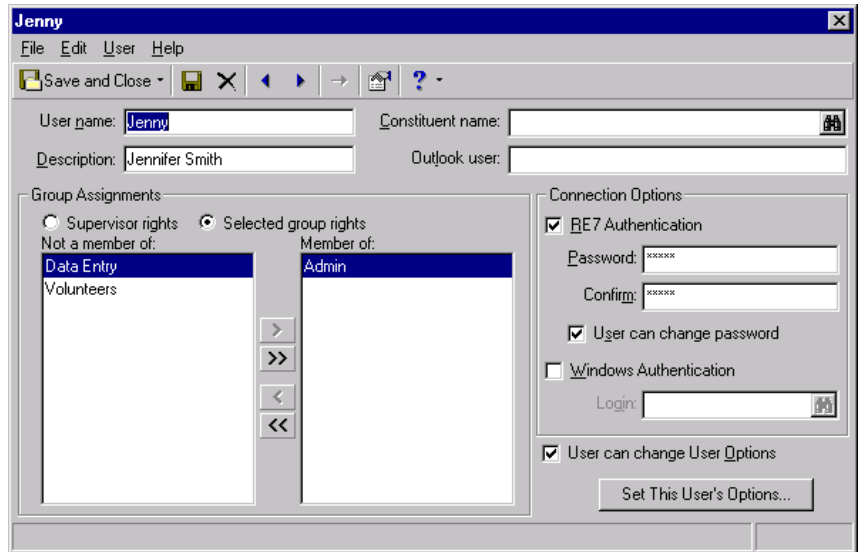
4. Mark the **User can change User Options** checkbox if you want to allow the user to change various displays, screen appearances, and data entry preferences throughout the program. These options affect only that user. For more information, see the "User Options" chapter of the *Program Basics Guide*.

5. Click **Save and Close** on the toolbar to save your settings. You return to the Security page.

➢ **Copying user option settings from one user to another**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. From the **Security** tree view, select a user and click **Open** in the action bar. The Security user screen appears.

4. Click **Set This User's Options**. The Options screen appears.

5. Click **Copy From**. The Copy User Options from Existing User screen appears.
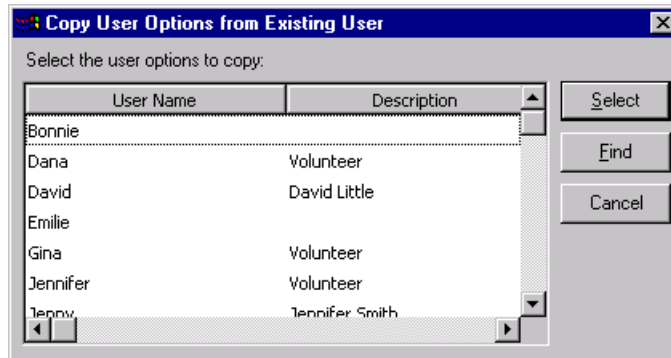
6. Select a user and click **Select**. You return to the Options screen where all the settings are copied from the selected user.

7. On the Options screen, click **OK** to save the user options and return to the Security User screen.

8. Click **Save and Close** to save the user options settings for the security user and return to the Security page.

Supervisor Security Procedures

The program is shipped with the Supervisor password of "admin". This password is not case sensitive. You should change the Supervisor password as soon as possible. You can assign Supervisor rights to any other users. We recommend that at least two members of your organization have full Supervisor rights and know the Supervisor password.

➢ **Changing the Supervisor password**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. From the Security page tree view, select **Supervisor** and click **Open** on the action bar. The Supervisor screen appears.

Any user with security rights to security itself can view the Supervisor record, but **File**, **Delete**, and all **Edit** menu options are disabled.
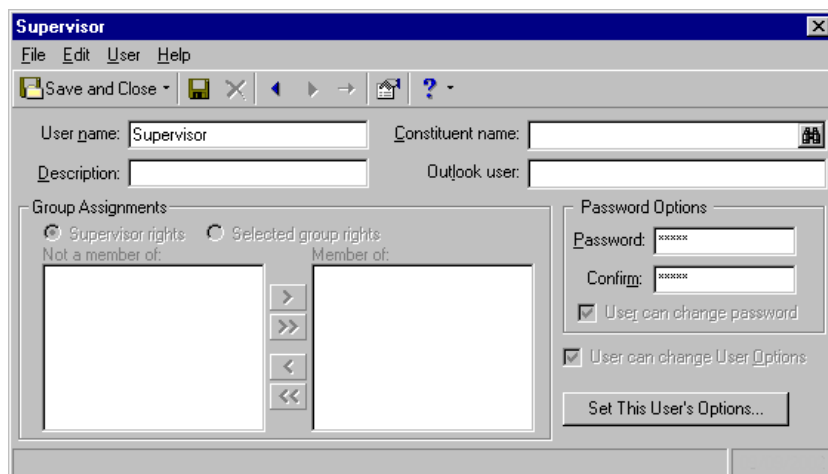
4. In the **Password Options** frame, enter the new Supervisor **Password**. Reenter the password in the **Confirm** field. Your entry in both fields must be identical when establishing a password. If you log in as Supervisor, you can change the password from anywhere in the program by selecting **Edit**, **Password** from *The Raiser's Edge* menu bar.

5. Click **Save and Close** on the toolbar to save the new password. You return to the Security page.

> ➢ **Assigning Supervisor rights**

You can assign Supervisor rights to any of your users. Only users with Supervisor rights have full access to all areas of *The Raiser's Edge*.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. From the Security page tree view, select the user you want to grant Supervisor rights to and click **Open** on the action bar. The Security User screen appears.

4. In the **Group Assignments** frame, mark the **Supervisor rights** option.

5. Click **Save and Close** on the toolbar to save your settings. You return to the Security page.

Security Types

Once you enter the basic information for a new security group, you can then define the security privileges for the group. Security privileges are defined by type. Some security types, such as records, have separate checkboxes allowing users to view, add, edit, or delete a record. Other types, such as Administration, contain checkboxes allowing access to each function contained in that area of the program. Finally, some types, such as Query, consist of a single checkbox which you mark or unmark to grant or deny access to that particular area or function of *The Raiser's Edge*. Use these options to specify the level of access for each of your groups.

The actual password does not display in the **Password** and **Confirm** fields. For privacy, only asterisks appear in the fields.

Only users with Supervisor rights have access to all areas of *The Raiser's Edge*.

Records Security

Even if you limit rights to records here, users can still globally delete records in *Administration* unless you deny security rights to that function. We strongly recommend you grant *Administration* rights only to key, experienced users. For more information, see "Administration Security" on page 211.

All record types default to marked, granting full access to the security group. If you unmark a checkbox, you deny all access to that record type, including the right to view the record. When the checkbox for a particular record type is marked, you can make security access even more specific by allowing a user rights to a record type while at the same time restricting rights to tabs within that record type. For example, you can specify that a group have view, add, edit, and delete rights to constituent records in general, but only view rights to the Attributes tab of the constituent record specifically. You can assign security for several specific fields on the constituent record.

The rights you assign here affect users' ability to access this data from the Records page and from anywhere in the program that a record can be opened. These rights affect the ability to access data from queries, global changes, and exports. Rights you assign here affect group add functionality and the ability to import information. If a user is restricted to certain records, he cannot update or import those record types. The rights you assign here do not affect the ability to print record information on reports, mail forms, or labels. To completely block record information from a user, you must set system level restrictions. For more information about system level security, see "Security by Constituency" on page 219, "Gift Security by Fund" on page 222, or "Notepad Security by Type" on page 224. To completely block access to records in an *Administration* function such as global delete, you should restrict access to that function. For more information, see "Administration Security" on page 211.

➢ **Assigning records security privileges**

Many record types contain specific and unique security options. This procedure examines security for records in general. Then, each record type is discussed in detail under a separate heading.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. The **Record Types** box on the left lists each record type as a checkbox. Each defaults to marked. However, campaigns, funds, and appeals have no checkboxes. Because they are associated with so many other records, view rights for campaign, fund, and appeal records are automatically given to users when you mark the **Records** checkbox on the New Group screen.

   The *Raiser's Edge* features you have determine the number of record types that appear. For example, if you have *Membership Management*, **Memberships** appears as a record type.

   Select a record type to view its corresponding options in the Privileges grid on the right. The actual name of the grid depends on your selection from the **Record Types** box. When you unmark a checkbox for a record type, the Privileges grid is disabled and view rights to that record type are denied for the group.

   Some **Record Types** have a **Miscellaneous Options** box below the Privileges grid where you can assign rights for additional functions.

7. Determine whether the group has rights to **View**, **Add**, **Edit**, and **Delete** record information.

   Even if you limit rights to records here, users can still globally change and globally delete records if they have rights to those *Administration* functions. We recommend you limit rights to Administration functions to only key, experienced users. For more information about assigning security rights in *Administration*, see "Administration Security" on page 211.

   • **View** - this checkbox defaults to marked.

     If you leave the checkbox marked, you allow a group to view a record type, but you can still restrict rights for the group to view tabs within the record type. Any tabs for which a user does not have view rights are hidden.

If you unmark the **Records** checkbox, you deny all rights to all records for the group.

Locked rows or columns in the grid appear in color and are not editable. You can select the color in which locked cells display on the Color tab of User Options.

If a user has only view rights to a record type, all fields for that record type are disabled so the user cannot enter or edit information.

The rights you assign here do not affect the ability of a user to print the information in reports, mailings, or labels.

If you unmark the checkbox, a group does not have rights to view a record type.

- **Add** - when you mark this checkbox, you allow a group to add information to a record.

- **Edit** - when you mark this checkbox, you allow a group to change the information in a record.

- **Delete** - when you mark this checkbox, you allow a group to remove a record from the database.

  If a function is unavailable for a record, N/A appears instead of a checkbox. For example, you add and delete attributes in *Configuration*, so N/A appears in the **Attributes** row in record security.

8. Click **OK** to save your settings and return to the New Group screen.

Constituents Security

Some tabs of the constituent record do not allow all four view, add, edit, and delete options. For example, on the Attributes tab you can assign only view and edit rights because add and delete rights for Attributes are set in the *Configuration* section of Security.

For other tabs, marking or unmarking the **View** checkbox gives or denies all rights to the entire tab.

All options default to marked, granting full access to the group.

➢ **Assigning security rights to constituent records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Constituents**. The **Constituents Privileges** grid and **Miscellaneous Constituent Options** box appear on the right.

7. When you mark the **Constituents** checkbox in the **Record Types** box, you give access rights for the record type itself. Because a user who has rights to a record type automatically has view rights to that type, the **View** column is locked as marked on the **CONSTITUENT** row of the **Constituents Privileges** grid.

All other rows represent tabs or other information within the record type. You can allow a user to view a record type while at the same time restricting view rights to tabs or information within that record type. If this is the case, the restricted tab or information does not appear on the record. For constituent records, you can assign rights to the following:

- **Biographical** - Only the **Edit** checkbox is available for this row. For a detailed explanation of what happens when you unmark this checkbox, see "Biographical Security Details" on page 190.

- **Alias** - Use this row to determine whether users can view or edit aliases. An alias is a secondary identification or acronym used to identify a constituent. For example, an alias for Business Information Systems may be BIS. Aliases can be used to search for and access a record. Aliases are accessed from the **Aliases** button on the Bio 1 tab of constituent records.

- **Address** - Use this row to determine how much access users have to constituent addresses. For a detailed explanation of what happens when you unmark the checkboxes in this row, see "Address Security Details" on page 191.

- **Phone** - On this row, the **View** and **Edit** checkboxes are available for you to determine user rights to constituent phone numbers in the **Phones/Email/Links** grid on the Bio 1 tab of constituent records.

If a user does not have access to **View** rights for a particular tab, the tab is invisible and the user cannot perform any actions on it. You can use the **View** column to quickly select which tabs appear on a record opened by a group.

The Gifts tab is not included as an option here because gifts security access is defined as a separate record type.

Even if a user does not have **Edit** rights for addressee/salutations, the user can still view the Label Truncation Report in *Mail*.

Any function for which a user does not have rights is disabled during the log in process. If you change user rights while the user is logged in, the changes do not take effect until the user closes and reopens that area of the program.

Attributes are added and deleted in *Configuration*.

Annotations are accessed when a constituent record is open by selecting **Edit**, **Annotate** from the menu bar.

- **Addressee/Salutation** - Only the **Edit** checkbox is available for this row. For a detailed explanation of what happens when you unmark this checkbox, see "Addressee/Salutation Security Details" on page 192.

- **Solicitor Details** - gives access to the information gained by clicking the solicitor **Details** button on the Bio 1 tab.

- **Relationships - Individuals** - if the user has rights to add the relationship, all information is accessible except for that on the Business and Education screens (based on rights to Relationships - Organizations and Education/Schools), and that which may be limited due to Biographical, Address, or Addressee/Salutation security settings.

- **Relationships - Organizations** - controls access to the information gained when you click the **Business** button on the Bio 1 tab.

- **Banks/Financial Institutions** - controls access to the information gained when you click the **Bank** button on the Bio 1 tab.

- **Education/Schools** - controls access to the information gained when you click the **Education** button on the Bio 1 tab.

- **Assigned Solicitors** - controls rights to view and change the solicitor hierarchy for the constituent.

- **Appeals** - controls rights to the Appeals tab on the constituent record.

- **Notes** - controls rights to view or change all notes your organization adds about constituents. You can restrict access to specific notepads, such as those containing sensitive subject matter, using Notepad Security by Type. For more information, see "Notepad Security by Type" on page 224.

- **Attributes** - controls view and edit rights to the Attributes tab of the constituent record.

- **Media** - controls rights to photos, clippings, etc. you attach to the constituent record as media objects.

- **Honor/Memorial** - controls view rights to the Honor/Memorial tab of the constituent record. Access to the **View Gifts** button is based on access to gifts.

- **Volunteer** - gives or denies rights to the entire tab. If you grant rights to this tab, you enable the **Qualifications**, **Availability/Interests**, **Job Assignments**, **Time Sheets**, and **Awards** rows so you can define volunteer security in more detail.

- **Prospect** - gives or denies rights to the entire tab. If you grant rights to this tab, you enable the **Financial**, **Proposals**, and **Ratings** rows so you can define prospect security in more detail.

- **Annotations** - even though this is a menu option, it is included here so you can assign view and edit rights.

Reports are unaffected by "object level" security settings such as these. For example, if you grant full rights on the **CONSTITUENT** row of the grid, but deny view rights by unmarking **View** in the **Appeals** and **Solicitor Details** rows, when the user opens a constituent record, the Appeals tab does not appear on the constituent record and the solicitor **Details** button on the Bio 1 tab is disabled. When the user runs a query, appeal and solicitor detail information does not appear in filter lists or on results, but the information does appear in reports.

8. In the **Miscellaneous Constituents Options** box, you can assign field level security for selected fields on the constituent record. If you mark a checkbox for a particular field, the group has total access to that information; if you unmark the checkbox, the group has no access.

   • **Credit Card**

   • **Target**

   • **Income**

   • **Religion**

   • **Ethnicity**

   • **Social Security Number**

     You can also assign view rights for:

   • **Solicitor Performance Summary** and **Gift Summary** - if you mark these checkboxes, the user can view these reports even if he is denied rights to run the reports through the **Reports** checkbox in the **Group Privileges** grid.

   If you deny rights to information using field level security, that information cannot be used as filter or sort criteria in new queries, and existing queries using the information as filter or sort criteria cannot be accessed. Credit card information does not appear in profiles, but all other reports are unaffected and do contain information from restricted fields. Mail functions are unaffected by field level security.

   A restricted field cannot be used for data entry in constituent or gift batches, and existing batches using restricted fields cannot be accessed. Users without access to any of these fields cannot import records containing values in the fields. If they try to do so, the records create exceptions. Restricted fields cannot be exported and existing exports containing restricted fields cannot be executed.

9. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Users must have rights to **Ethnicity**, **Religion**, and **Social Security Number** for the **Convert to Organization** menu item to be enabled on the Bio 1 tab of the constituent record. Data from these fields is moved to a notepad when an individual record is converted to an organization record, giving the user access to the data. This does not affect the **Convert to Individual** menu option on the Org 1 tab.

Biographical Security Details

Biographical security is intended to limit user access to information from some fields and items on the Bio 1, Bio 2, Org 1, and Org 2 tabs in records, without disabling access to the information in other areas of *The Raiser's Edge*. It is important to keep in mind that even though you may limit access to biographical information in records, users with the appropriate rights can still view or edit the information in *Query*, *Export*, *Reports*, *Mail*, or *Administration*. Additionally, these settings do not affect *RE:VBA* and *RE:API*.

This type of security can be useful in several ways. For example, you may want to give a group of users rights to add notes to constituent records, but not give them rights to edit any other information on the constituent record. However, if you want to completely eliminate access to certain constituent records in all areas of *The Raiser's Edge*, you can do so by eliminating access to records with specific constituent codes. For more information about this, see "Security by Constituency" on page 219.

When you unmark the **Edit** checkbox in the **Biographical** row, the following information on the Bio 1 or Org 1 tab cannot be edited:

Last name	Marital status
First name	Solicit code(s)
Middle name	Organization matches gifts
Titles	Factor
Suffixes	Fiscal year starts
Alias	Per gift Minimum
Alias Type	Per gift Maximum
Nickname	Annual per donor Minimum
Maiden name	Annual per donor Maximum
ID	Total per donor Minimum
Gender	Total per donor Maximum
SSN	Is inactive
Birth date	Gives anonymously
Deceased?	Requests no email
Deceased date	Is a solicitor

Because they are controlled by other security options (such as Address and Relationships), the following items are still available: **Spouse** field, constituent address fields, **Has no valid addresses** checkbox, **Bank** button, **Education** button, and **Business** button. To limit access to these items, unmark the appropriate individual relationship, organization relationship, or address rights.

The following information on the Bio 2 or Org 2 tab cannot be edited:

Target	No. subsidiaries
Income	Card Type
Receipt type	Credit Card No.
Birthplace	Expiration
Religion	Reference
Ethnicity	Description (Constituent Code)
Industry	Code
Parent corp.	Date From
No. employees	Date To

When you unmark the **Edit** checkbox, users can create new gift batches and open existing ones, but all fields in the constituent window are view only. The information that appears in record searches is unaffected. Participant (if you have *Event Management*) and tribute acknowledgee (if you have *Honor/Memorial Tracking*) information is also not affected.

If a user does not have full biographical (as well as Address and Addressee/Salutation rights), the **Convert to Organization** menu option on the constituent record is not available.

Address Security Details

Address security gives you increased flexibility for granting rights to address information on the constituent record. It can prove useful if, for example, you have a group of workers whose sole function is to update addresses. You may want them to have access to only the Addresses tab of the constituent record. With address security, it is important to note that even though you may limit access to address information in records, users with the appropriate rights can still view or edit the information in *Query*, *Export*, *Reports*, *Mail*, or *Administration*. Additionally, address security settings do not affect *RE:VBA* and *RE:API*.

View Rights

If you unmark the **View** checkbox on the **Address** row, the Addresses tab does not appear on constituent records. On the Bio 1 or Org 1 tab, no preferred address information appears and the **Has no valid addresses** checkbox is not enabled.

On relationship and participant (available in *Event Management*) records, information in the address frame is not visible.

Acknowledgees for tributes (*Honor/Memorial Tracking*) must be relationships on the Honor/Memorial's record, but they do not have to be constituents. If an acknowledgee is not a constituent, **Address lines** is a required field to save the relationship record. Users without **View** rights to addresses cannot access the **Address lines** field; therefore, users who do not have address **View** rights cannot add non-constituent acknowledgees.

In batches, the **Address Lookup** and **Address Correction** menu options are not available. The **New Gift Batch** and **Open** options are available on the action bar, but the constituent window is turned off.

On Open screens, no address information appears in search results. Also, because the default search query contains address information, users without **View** rights for addresses cannot use it for searches. When users without **View** rights attempt to use the default query, a message appears informing them that they are not authorized to view fields in the query and that they must select another.

Add Rights

When you unmark the **Add** checkbox, the **File**, **New** menu command and **New Address** in the action bar are disabled. Because existing addresses can still be edited, for consistency we recommend you always unmark the **Edit** checkbox if you unmark the **Add** checkbox.

Unmarking the **Add** checkbox affects only non-preferred addresses. When a new constituent record without a user defined address is saved, *The Raiser's Edge* creates a default preferred address (which may consist of no more than the default entry in the **Country** field). So a user without **Add** rights for addresses who creates a constituent record can still "add" a preferred address simply by saving the record.

The **Add** checkbox does not affect preferred addresses. Because batches, participants (*Event Management*), and tribute acknowledgees (*Honor/Memorial Tracking*) all use the preferred address, unmarking the **Add** checkbox does not affect them.

Edit Rights

When you unmark the **Edit** checkbox, **Preferred Address** and **Has no valid addresses** on the Bio 1 or Org 1 tab cannot be edited. Addresses, as well as any additional address or phone information, on the Addresses tab cannot be edited. In the action bar, **Open** is available; however, if the user attempts to save an edited address, a message appears informing him that he does not have security rights to edit the address.

Edit rights affect all addresses, including business addresses, contact addresses, relationship addresses, and participant addresses (if you have *Event Management*). With *Honor/Memorial Tracking*, addresses for existing acknowledgees on the Relationships tab are view only. If an acknowledgee is not a constituent, **Address lines** is a required field to save the relationship record. Because this field cannot be edited (no information added to it), acknowledgees who are not constituents cannot be added. For participants, the address is view only on existing records and is not required and cannot be changed on new participants.

In batches, the **Address Lookup** and **Address Correction** menu options are disabled. The **New Gift Batch** and **Open** options on the action bar are enabled, but all fields in the constituent window are view only.

Delete Rights

Because preferred addresses cannot be deleted, the **Delete** checkbox affects only non-preferred addresses. When you unmark this checkbox, **Delete** on the action bar, in the menu bar, and on the toolbar are all disabled so no addresses can be deleted.

Unmarking the **Delete** checkbox does not affect preferred addresses. Therefore, batches, participants (*Event Management*), and tribute acknowledgees (*Honor/Memorial Tracking*) are not affected because they all use the preferred address.

Addressee/Salutation Security Details

When you unmark the **Edit** checkbox, **Primary addressee**, **Primary salutation**, **Editable?**, and additional addressee/salutation information are view only. The **Test Label Truncation** button is still available, but the fields on the Test Label Truncation screen are view only.

In batches, the **New Gift Batch** and **Open** options are available on the action bar, and all fields in the constituent window are view only.

For tribute acknowledgees (available with *Honor/Memorial Tracking*), if the relationship is a constituent, the same fields present on the Addressee/Salutation tab of the constituent record appear on the relationship record. Therefore, the following fields on the General 2 tab are view only: **Primary addressee**, **Primary salutation**, **Editable?**, and additional addressee/salutation information. The **Test Label Truncation** button is enabled, but fields on the report are view only.

Gifts Security

You can assign security rights to gifts for a group by granting or denying view, add, edit, or delete rights for the entire record.

➢ **Assigning security rights to gift records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Gifts**. The **Gift Privileges** grid and **Miscellaneous Gifts Options** box appear on the right.

If a group is given rights to gifts through **Records**, but denied rights to gifts in a certain fund through Gift Security by Fund, the group is denied rights to the gifts in that fund.

7. For **Gifts**, you can only assign **View**, **Add**, **Edit**, or **Delete** rights for the entire record type. No specific tab category security is used. All rights default to marked. If the group has rights to gifts (if you mark **Gifts** in the **Record Types** box), then the group automatically has view rights, so the **View** column checkbox is marked and locked.

8. In the **Miscellaneous Gifts Options** box you can mark checkboxes to allow group members to **Adjust gifts**, **Write-off pledges**, **Sell stock/property**, **Select "Posted" for GL Post Status**, **Select "Do Not Post" for GL Post Status**, or **Amend recurring gifts**.

If you grant full rights to gifts through object level security, but limit rights through Fund system level security, gifts to the restricted fund are restricted in all areas of the program because system level security takes precedence over object level security.

If you use object level security to deny rights to gifts through **Gifts** in the **Record Types** box, you can still allow your users access to some gifts. For example, even if you deny **View** rights by unmarking **Gifts** in the **Record Types** box, you can still allow users to view gifts to campaigns (or funds and appeals). When you mark **Campaigns** in the **Record Types** box, you can mark a checkbox in the **Miscellaneous Campaigns Options** box that allows users to **View gifts** for a campaign.
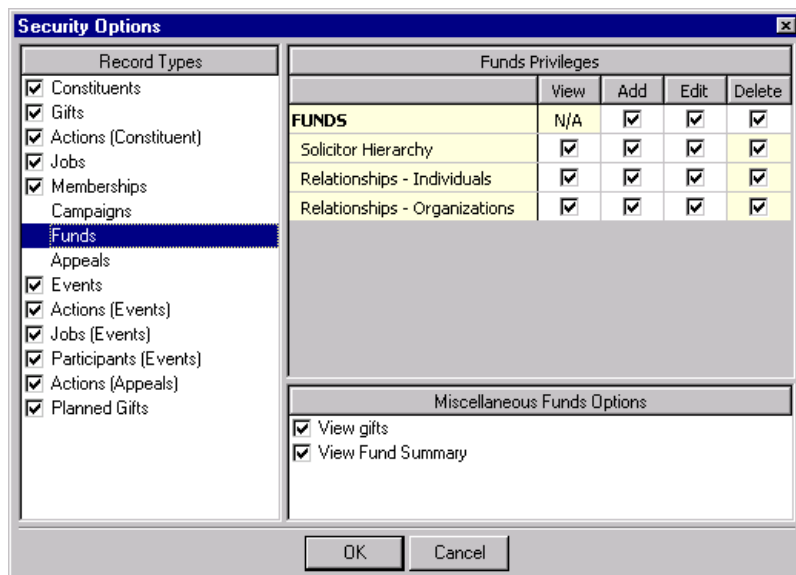
9. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Actions (Constituent) Security
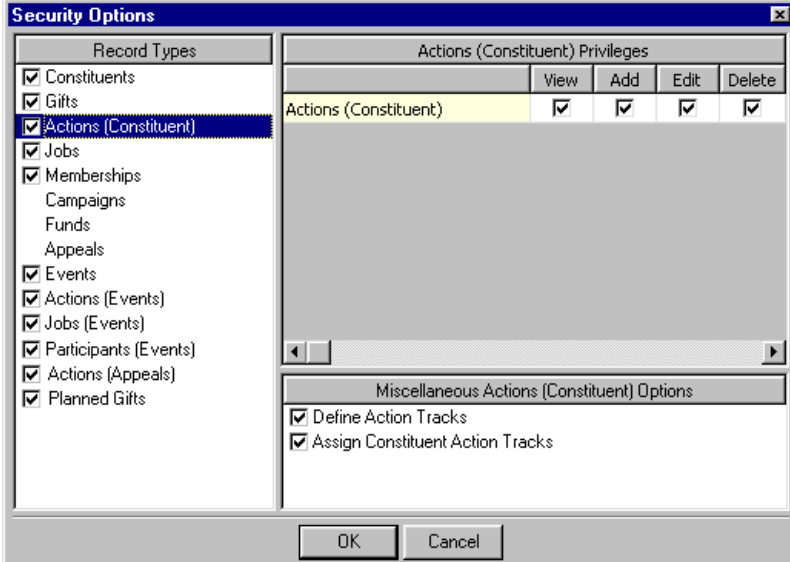
You can assign security for constituent actions by granting or denying view, add, edit, or delete rights for the entire record. You can also specify security for constituent action tracks.

Users with Microsoft *Outlook* 2000 or greater can synchronize *Raiser's Edge* action records with *Outlook* tasks and calendar appointments. To enable synchronizing these records, users must have full security rights to action records.

> To enable synchronizing actions with Microsoft *Outlook* 2000 or greater tasks and calendar appointments, users must have full security rights to action records.

➢ **Assigning security rights to actions (constituent)**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Actions (Constituent)**. The **Actions (Constituent) Privileges** grid and **Miscellaneous Actions (Constituent) Options** box appear on the right.

7. For **Actions (Constituent)** you can only assign **View**, **Add**, **Edit**, or **Delete** rights for the entire record type. No specific tab category security is used. All rights default to marked. If you gave the group rights to actions by marking **Actions (Constituents)** in the **Record Types** box, then the group automatically has view rights, so the **View** column checkbox is marked and locked.

8. In the **Miscellaneous Actions (Constituent) Options** box you can mark checkboxes to allow group members to **Define Constituent Action Tracks** and **Assign Constituent Action Tracks**. If the user does not have rights to add constituent actions, the **Assign Constituent Action Tracks** checkbox is locked as unmarked.

9. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Jobs Security

Job records are available if you have *Volunteer Management*. You can assign security for jobs only by granting or denying view, add, edit, or delete rights for the entire record.

➢ **Assigning security rights to job records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Jobs**. The **Jobs Privileges** grid appears on the right.
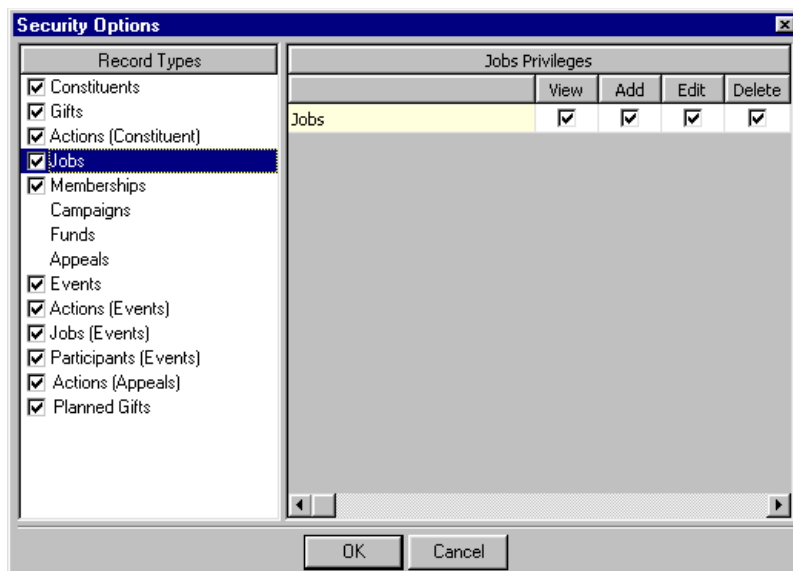
7. For **Jobs** you can only assign **View**, **Add**, **Edit**, or **Delete** rights for the entire record type. No specific tab category security is used. All rights default to marked. If you gave the group rights to jobs by marking **Jobs** in the **Record Types** box, then the group automatically has view rights, so the **View** column checkbox is marked and locked.

8. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Memberships Security

Membership records are available if you have *Membership Management*. You can assign security for memberships only by granting or denying view, add, edit, or delete rights for the entire record.

➢ **Assigning security rights to membership records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Memberships**. The **Memberships Privileges** grid appears on the right.
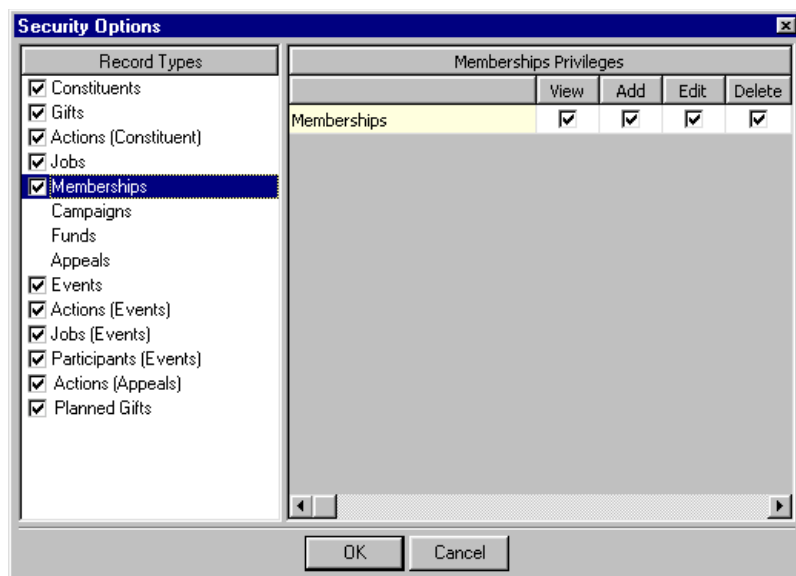
7. For **Memberships** you can only assign **View**, **Add**, **Edit**, or **Delete** rights for the entire record type. No specific tab category security is used. All rights default to marked. If you gave the group rights to memberships by marking **Memberships** in the **Record Types** box, then the group automatically has view rights, so the **View** column checkbox is marked and locked.

8. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Campaigns Security

You can assign rights to the solicitor hierarchy, gifts, and summaries for a campaign.

➢ **Assigning security rights for campaign records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Campaigns**. The **Campaigns Privileges** grid and **Miscellaneous Campaigns Options** box appear on the right.

7. When you select **Campaigns** in the **Record Types** box, view security options for campaigns. Because campaigns are associated with so many other records, when you mark **Records** on the New Group screen, users are automatically given view rights for campaign records. The **View** column is locked as N/A (not applicable) for the **CAMPAIGNS** row in the **Campaigns Privileges** grid. On this row, you can assign rights to add, edit, and delete campaigns.

8. In the **Solicitor Hierarchy** row, assign rights to view, add, edit, and delete entries on the tree view that lists solicitors for a campaign.

To give a group rights to campaigns, funds, or appeals, but not to other records, unmark all the checkboxes in the **Record Types** box on the Security Options screen.

If system level restrictions are set on gifts by funds, gifts for funds associated with the campaign cannot be viewed and do not appear on campaign summaries.

9. In the **Miscellaneous Campaigns Options** box, you can mark a checkbox to give the group security rights to **View gifts**. A user can view gifts to campaigns, even if view rights in **Gifts** are not granted.

   You can also mark a checkbox to give the group rights to **View Campaign Summary**. A user can view a Campaign Summary even if he is denied rights to run the report.

10. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Funds Security

You can assign rights to the solicitor hierarchy, gifts, and summaries for a fund.

➢ **Assigning security rights for fund records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Funds**. The **Funds Privileges** grid and **Miscellaneous Funds Options** box appear on the right.

To give a group rights to campaigns, funds, or appeals, but not to other records, unmark all the checkboxes in the **Record Types** box on the Security Options screen.

7. When you select **Funds** in the **Record Types** box, you can view security options for funds. Because funds are associated with so many other records, when you mark the **Records** checkbox on the New Group screen, users are automatically given view rights for fund records. The **View** column is locked as N/A (not applicable) for the **FUNDS** row in the **Funds Privileges** grid. On this row, you can assign rights to add, edit, and delete funds.

8. In the **Solicitor Hierarchy** row, assign rights to view, add, edit, and delete entries on the tree view that lists solicitors for a fund.

9. In the **Miscellaneous Funds Options** box, you can mark a checkbox to give the group security rights to **View gifts**. A user can view gifts to funds, even if view rights in **Gifts** are not granted.

You can also mark a checkbox to give the group security rights to **View Fund Summary**. A user can view a Fund Summary even if he is denied rights to run the report.

10. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Appeals Security

You can assign rights to the solicitor hierarchy, gifts, and summaries for an appeal.

➢ **Assign security rights for appeal records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Appeals**. The **Appeals Privileges** grid and **Miscellaneous Appeals Options** box appear on the right.

To give a group rights to campaigns, funds, or appeals, but not to other records, unmark all the checkboxes in the **Record Types** box on the Security Options screen.

7. In the **Appeals** row, assign **Add**, **Edit**, or **Delete** rights for the entire record type. No specific tab category security is used. All rights default to marked. Because appeals are associated with so many other records, when you mark **Records** on the New Group screen, users automatically receive view rights for appeal records. The **View** column is locked as N/A (not applicable) for the **Appeals** row.

8. In the **Solicitor Hierarchy** row, assign rights to view, add, edit, and delete entries on the tree view that lists solicitors for an appeal.

9. To give the group security rights to view gifts, in the **Miscellaneous Appeals Options** box, mark **View gifts**. With these rights, a user can view gifts to appeals, even if view rights in **Gifts** are not granted.

10. To give the group security rights to view appeal summaries, mark **View Appeal Summary**. With these rights, a user can view an Appeal Summary even if he is denied rights to run the report.

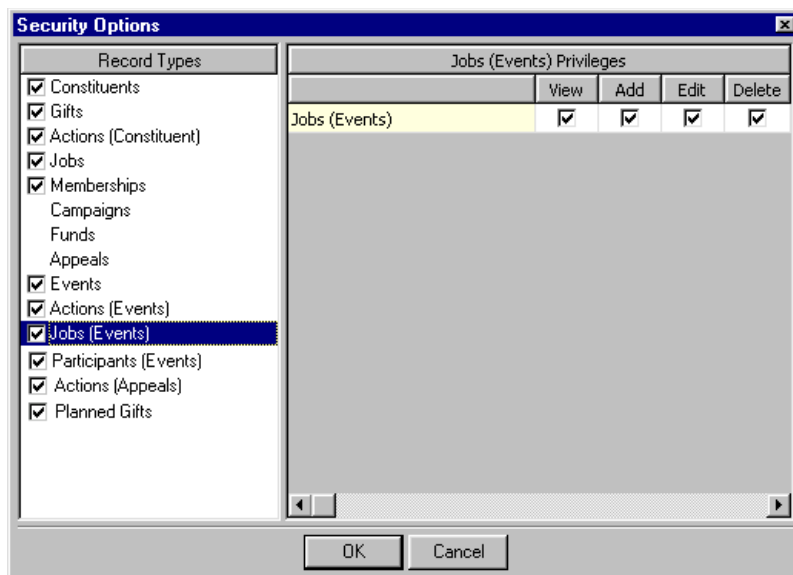11. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Events Security

These options are available only if you have *Event Management*. For event records, you can set tab level security privileges. You can also set view rights for event summaries.

➢ **Assigning security rights for event records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Events**. The **Events Privileges** grid and **Miscellaneous Events Options** box appear on the right.

7. When you mark the **Events** checkbox in the **Record Types** grid, you give access rights for the event record type itself. Because a user who has rights to a record type automatically has view rights to that type, the **View** column is locked as marked for the **EVENTS** row in the **Events Privileges** grid.

All other rows represent tabs within the record type. You can allow a user to view a record type while at the same time restricting access to tabs within that record type. If this is the case, restricted tabs do not appear on the event record. In the grid, if users do not have access to View rights to a tab, they cannot perform any actions on that tab. For event records, you can assign rights to view, add, edit, and delete the following:

- **Events** - you can assign rights to the Events tab, and the **Menu**, **Benefits**, and **Awards** options on the Events menu.

- **Prices**

- **Expenses**

- **Attributes**

- **Media**

- **Notes**

- **Annotations**

8. In the **Miscellaneous Events Options** box, you can mark checkboxes to **View Goal Summary**, **View Financial Summary**, **Calendar**, **Gift Defaults**, and **Update Participants**.

9. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Access to the Event Tickler Report is controlled by rights to view actions. Access to the Event Count Summary is based on rights to the Event Tally Report assigned through the **Reports** checkbox in the **Group Privileges** grid.

Access to the Actions and Jobs tabs from the event record is controlled by your settings for those record types. For example, if a user does not have rights to view event actions, the Actions tab does not display on the event record.

Actions (Events) Security

Actions for event records are available only if you have *Event Management*. You can assign security for actions for events only by granting or denying view, add, edit, or delete rights for the entire record. You can also specify security for event action tracks.

Users with Microsoft *Outlook* 2000 or higher can synchronize **Raiser's Edge** action records with *Outlook* tasks and calendar appointments. To enable synchronizing these records, users must have full security rights to action records.

To enable synchronizing actions with Microsoft *Outlook* 2000 or higher tasks and calendar appointments, users must have full security rights to action records.

➢ **Assigning security rights to actions (constituent)**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Actions (Events)**. The **Actions (Events) Privileges** grid and **Miscellaneous Actions (Events) Options** box appear on the right.
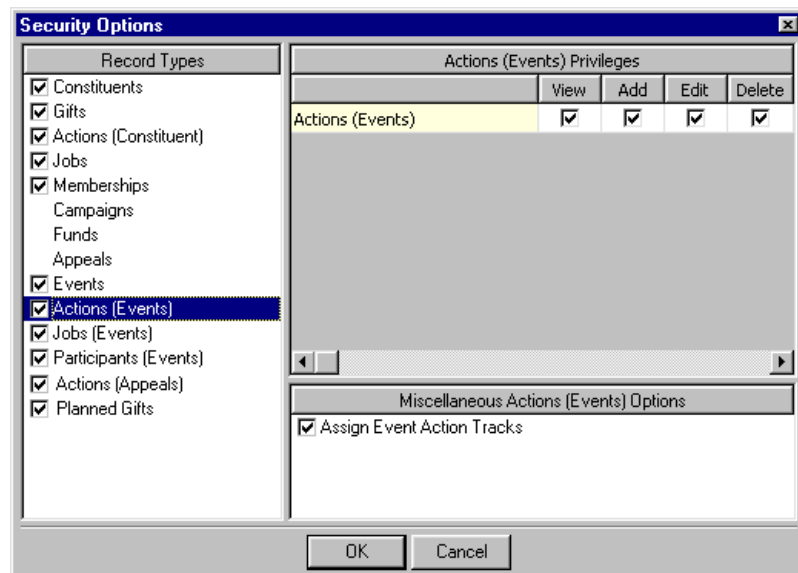
7. For **Actions (Events)** you can assign only **View**, **Add**, **Edit**, or **Delete** rights for the entire record type. No specific tab category security is used. All rights default to marked. If you gave the group rights to actions for events by marking **Actions (Events)** in the **Record Types** box, then the group automatically has view rights, so the **View** column checkbox is marked and locked.

8. In the **Miscellaneous Actions (Events) Options** box you can mark a checkbox to allow group members to **Assign Event Action Tracks** and **Define Event Action Tracks**. If the user does not have rights to add actions (event), these checkboxes are locked as unmarked.

9. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.
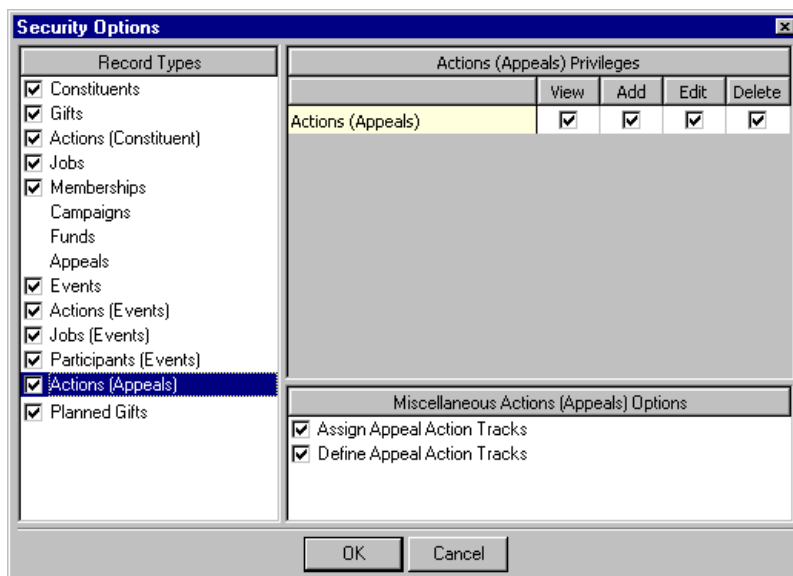
Jobs (Events) Security

Jobs for event records are available only if you have *Event Management* and *Volunteer Management*. You can assign security for jobs for events only by granting or denying view, add, edit, or delete rights for the entire record.

➢ **Assigning security rights to jobs (events) records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Jobs (Events)**. The **Jobs (Events) Privileges** grid appears on the right.

7. For **Jobs (Events)** you can only assign **View**, **Add**, **Edit**, or **Delete** rights for the entire record type. No specific tab category security is used. All rights default to marked. If you gave the group rights to jobs for events by marking **Jobs (Events)** in the **Record Types** box, then the group automatically has view rights, so the **View** column checkbox is marked and locked.

8. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Participants (Events) Security

Participant options are available only if you have *Event Management*. For participants in your events, you can set tab level security privileges.

➢ **Assigning security rights for participant records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Participants (Events)**. The **Participants (Events) Privileges** grid appears on the right.

7. When you mark the **Participants (Events)** checkbox in the **Record Types** grid, you give access rights for the participant record type itself. Because a user who has rights to a record type automatically has view rights to that type, the **View** column is locked as marked for the **PARTICIPANTS** row in the **Participants (Events) Privileges** grid.

    All other rows represent tabs within the record type. You can allow a user to view a record type while at the same time restricting access to tabs within that record type. If this is the case, restricted tabs do not appear on the participant record. In the grid, if users do not have access to View rights to a tab, they cannot perform any actions on that tab. For participant records, you can assign rights to view, add, edit, and delete the following:

    • **General 1**

    • **General 2**

    • **Participation**

    • **Registration Fees**

- **Donations**

- **Sponsoring Pledges**

- **Attributes**

- **Notes**

8. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Actions (Appeals) Security

You can assign security for actions for appeals only by granting or denying view, add, edit, or delete rights for the entire record. You can also specify security for event action tracks.

Users with Microsoft *Outlook* 2000 or greater can synchronize ***Raiser's Edge*** action records with *Outlook* tasks and calendar appointments. To enable synchronizing these records, users must have full security rights to action records.

➢ **Assigning security rights for actions (appeals) records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Actions (Appeals)**. The **Actions (Appeals) Privileges** grid and **Miscellaneous Actions (Appeals) Options** box appear on the right.

To enable synchronizing actions with Microsoft *Outlook* 2000 or greater tasks and calendar appointments, users must have full security rights to action records.

7. For **Actions (Appeals)** you can assign only **View**, **Add**, **Edit**, or **Delete** rights for the entire record type. No specific tab category security is used. All rights default to marked. If you gave the group rights to actions for events by marking **Actions (Appeals)** in the **Record Types** box, then the group automatically has view rights, so the **View** column checkbox is marked and locked.

8. In the **Miscellaneous Actions (Appeals) Options** box you can mark a checkbox to allow group members to **Assign Event Action Tracks** and **Define Event Action Tracks**. If the user does not have rights to add actions (event), these checkboxes are locked as unmarked.

9. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Planned Gifts Security

If a user who does not have security rights to planned gifts attempts to create a new gift using a default set that includes that gift type, a message displays giving the user the choice of creating the gift without that gift type, or not creating the gift at all.

Planned Gift security options are available only if you have *Planned Giving*. You can assign security for planned gifts only by granting or denying view, add, edit, or delete rights for this gift type. These privileges are designed to enable you to prevent unauthorized users from viewing or editing gifts with the gift type of "Planned Gift." The default setting is for users to have only view rights; if you change this to deny users view rights to these gifts, they are not included in queries, reports or dashboards for those users.

View rights for constituent relationship types (such as individual, organization, bank, or education) are bypassed when looking at the relationships/beneficiaries grid on a planned gift. For example, a user without view rights to a certain relationship type cannot access that type on the Relationships tab on the constituent record, but the user can still see them in the Relationship/Beneficiary grid on a planned gift.This is consistent with how security is handled in other areas (for example, a user without view rights for events can still see event data from the **Gift**, **Link to Event** menu item). We recommend that if you allow users rights to view planned gifts, that you also allow rights to view relationships.

➢ **Assigning security rights for Planned Gifts**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Planned Gifts**. The **Planned Gifts Privileges** grid appears on the right.
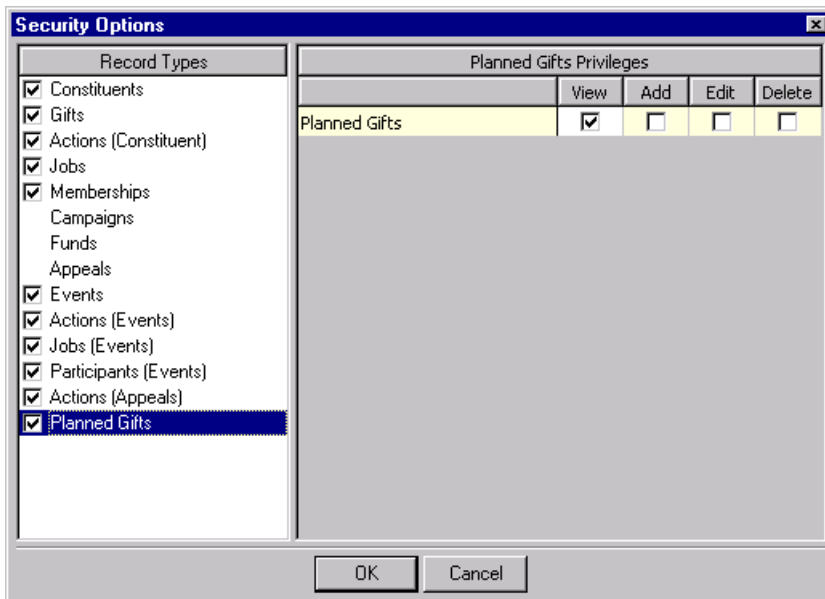
7. For **Planned Gifts** you can assign only **View**, **Add**, **Edit**, or **Delete** rights for the entire record type. All rights default to unmarked.

8. In the **Record Types** box, select the next record type for which you want to establish security, or click **OK** to save your settings and return to the New Group screen.

Reports Security

You can control the ability of a security group to run reports from anywhere in the program. Data entry and viewing rights do not affect the information appearing on reports. If a user has rights to run a report, the user has rights to all information on that report, including records restricted through object level security (such as Records). However, system level security restrictions (such as Gift Security by Fund for example) do limit the information appearing on reports.

➢ **Assigning reports security privileges**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. From the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Reports**. The checkbox defaults to marked and the **Options** button is enabled.

Security for reports controls the ability of a user to run them from anywhere in the program.

5. Click **Options**. The Security Options screen appears.
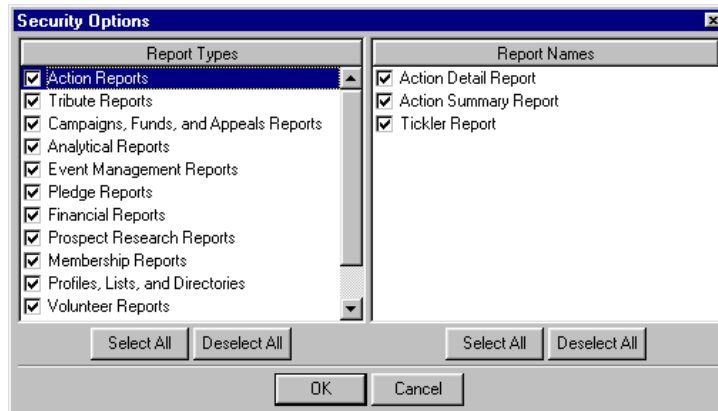
6. When you select an entry in the **Report Types** box on the left, the **Report Names** for that type list in the box on the right. All report names and types list as checkboxes and all default to marked. A user has access to any marked report. For more information the report types and individual reports within each type, see the *Reports Guide*.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Records restricted through object level security still appear in reports. Records restricted by system level security do not appear in reports. For example, if a user has rights to a report such as the First/Latest/Greatest Gift Report in **Analytical Reports**, but does not have view rights to gifts through records security, all gifts meeting the criteria for the report appear in the report anyway. However, if a user has system level restrictions through Gift Security by Fund or Security by Constituency, gifts associated with restricted funds and with constituents with restricted codes do not appear on the First/Latest/Greatest Gift Report. If the restricted code appears only on the gift record, not the constituent record, the gift appears in reports.

If you deny rights to certain reports, the user cannot run them from anywhere in the program. For example, if you select **Campaign, Fund, and Appeal Reports** and unmark the **Appeal Summary List**, the user cannot run the report. You can let users see (not run) appeal summaries by marking the **View Appeal Summary** checkbox on the Security Options screen for appeals.

Mail Security

You can assign security for all mailing functions in *The Raiser's Edge*. Data entry and viewing rights do not affect rights to information in mailing options. If a user has rights to perform a mailing function, the user has rights to all information included in that function, including records restricted through object level security. However, system level security restrictions do limit the information appearing in mailings.

➢ **Assigning mail security privileges**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

Records restricted through object level security still appear in reports; however, records restricted by system level security do not appear in reports.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Mail**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

If you unmark the **Mail** checkbox on the New Group screen, you deny all rights to all mailing functions for the group.
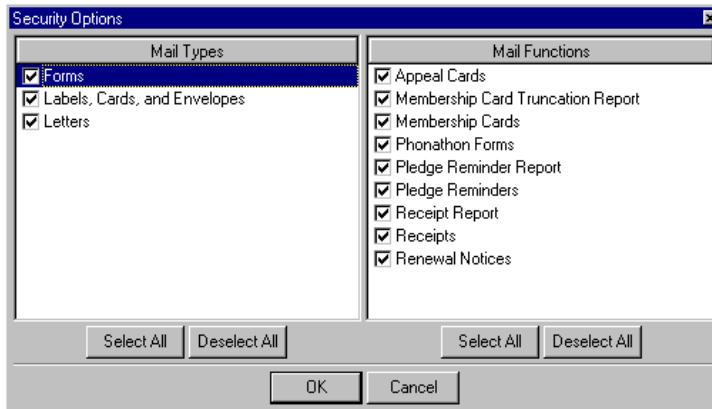
6. When you select an entry in the **Mail Types** box on the left, the **Mail Functions** for that type list in the box on the right. All mail types and functions list as checkboxes, and all default to marked. A user has access to any marked function. For more information about mailing functions in *The Raiser's Edge* and what each does, see the *Mail Guide*.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Query Security

Security for *Query* is defined on only one level. If you leave the **Query** checkbox marked in the **Group Privileges** box on the New Group screen, the members of the new group have access to *Query*.

Unmarking the checkbox does not affect the ability of group members to select queries in other areas of the program, but the users are not allowed to add a new query from the Open screen. Unmarking this checkbox does not affect the ability of the group members to create an output or exception query from reports and other processes.

Export Security

Security for *Export* is defined on only one level. If you leave the **Export** checkbox marked in the **Group Privileges** box on the New Group screen, the members of the new group have access to *Export*.

Batch Security

You can assign security rights for constituent and gift batches. If you have *Volunteer Management*, you can assign rights for time sheet batches. You can also assign rights to access *RE:EFT* for electronic fund transfers.

> ➤ **Assigning batch security privileges**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Batch**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

If you unmark the **Batch** checkbox, you deny rights to all batch functions for the group.

6. In the **Batch Types** box, select the **Constituent** checkbox. It defaults to marked. Unmarking the **Constituent** checkbox disables the **Batch Privileges** box for constituent batches.

7. In the **Batch Privileges** box for constituents, you can mark checkboxes to assign rights to **Create Batch**, **Edit Batch**, **Delete Batch**, or **Commit Batch**.

8. In the **Batch Types** box, select the **Gift** checkbox. The gift **Batch Privileges** appear.

The options in the **Batch Privileges** box are the same for both constituent and gift batches except you can **Change Batch Projections** only for gift batches.

9. The **Gift** checkbox defaults to marked. Unmarking the **Gift** checkbox disables the **Batch Privileges** box for Gift batches and for *RE:EFT.*

10. In the **Batch Privileges** box for gifts, you can mark checkboxes to assign rights to **Create Batch**, **Edit Batch**, **Delete Batch**, **Commit Batch**, or **Change Batch Projections**.

You can also mark checkboxes to give users rights to **Automatically Generate Transactions/Payments** and **Create EFT Transmission Files** using *RE:EFT*.

11. In the **Batch Types** box, select the Time Sheet checkbox (available if you have *Volunteer Management*). The time sheet **Batch Privileges** appear.
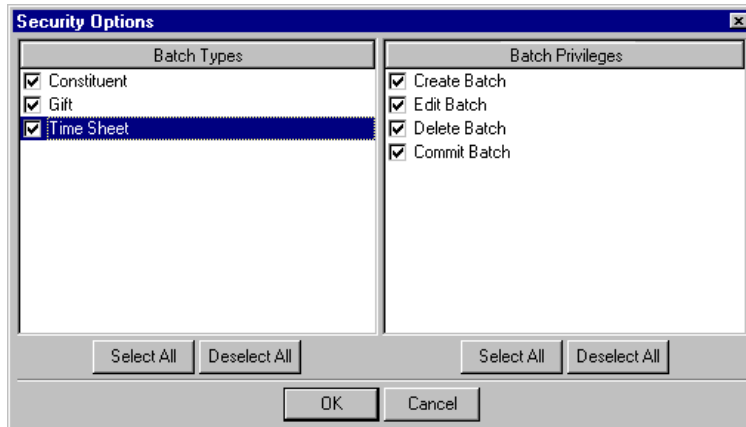
12. In the **Batch Privileges** box for time sheets, you can mark checkboxes to assign rights to **Create Batch**, **Edit Batch**, **Delete Batch**, or **Commit Batch**.

13. Click **OK** to automatically save your settings and return to the New Group screen.

Mapping Security

Security for the integration with Microsoft *MapPoint* is defined on only one level. If you leave the **Mapping** checkbox marked in the **Group Privileges** box on the New Group screen, the members of the new group have access to *Mapping*. If you unmark the checkbox, the **Mapping** link on the Raiser's Edge bar is not visible and users cannot access the Mapping page.

Administration Security

You can assign security rights for all administrative functions, including data importing, group adding, and global deleting.

➢ **Assigning administration security privileges**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Administration**. The checkbox defaults to marked and the **Options** button is enabled.

Because **Administration** functions have far reaching implications, we recommend that you give only experienced users access to this area of the program. If you give any of your users access to *Administration*, you should unmark the **Security** checkbox so they cannot enter Security and change their own rights.

5. Click **Options**. The Security Options screen appears.
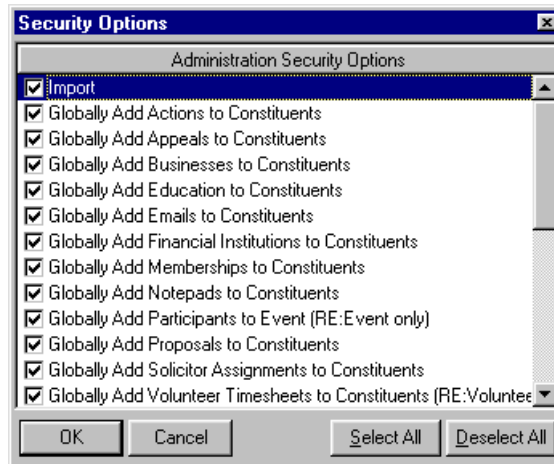
6. The **Administration Security Options** box lists each administration function as a checkbox. Each defaults to marked, giving access rights to the group. Unmark a checkbox beside a function to deny the group rights to that function. The checkboxes in the **Administration Security Options** box vary depending on the features you have. For example, if you have *RE:Queue*, it appears as a checkbox.

    Even if you grant access to Administration functions through the **Administration** checkbox in the **Group Privileges** grid, the effectiveness of the functions can be limited through system level security. For example, if you grant rights to **Globally Write Off Pledges**, but restrict access to constituents through inclusion or exclusion, or to gifts through Fund security, pledges associated with restricted constituents or funds cannot be written off. When the user tries to globally write off pledges, a warning message appears stating that system level security restricts them from accessing some records in *The Raiser's Edge* and that Globally Write Off Pledges will not affect records the user is restricted from accessing.

    If the user executes the **Globally Write Off Pledges** function anyway, a warning message appears at the bottom of exception reports stating that some information has not been written off due to security restrictions.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Configuration Security

You can assign the group rights to configuration options. Take special care to limit configuration access to only several key users.

Even if you mark the **Import** checkbox in the **Administration Security Options** box, the **Import** link will not appear on the Administration page if the user does not have rights to data based on object level, system level, or field level security.

If a user has rights to **Post to General Ledger**, but restricted rights to gifts, the user may still be able to view some restricted gift information. We recommend any users who are restricted from gift privileges in any way not have rights to Post to GL.

➢ **Assigning configuration security privileges**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Configuration**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
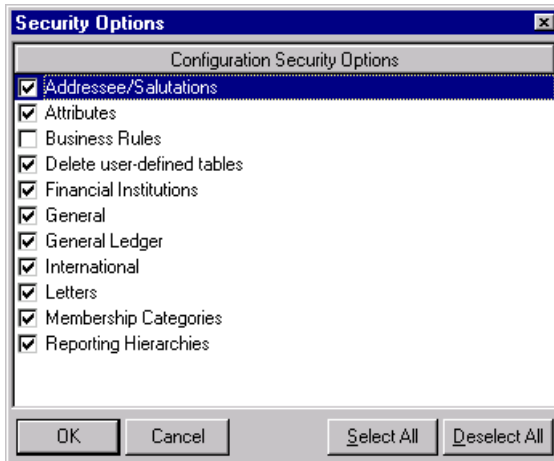
6. The **Configuration Security Options** box lists each configuration security option as a checkbox. Each defaults to marked, giving access rights to the group. Unmark a checkbox beside an option to deny the group rights to that function. For information on configuration options and what each does, see the "Configuration" chapter of this book.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Code Tables Security

You can grant or deny the ability to add and edit code table entries. Code tables are fields with a down arrow on the right. When you click the arrow, you can select from a list of entries to place in the field. Tables help speed and add consistency to your data entry by allowing you to place an entry in a field with a single click of the mouse instead of typing it in manually. If you grant rights to change tables, users can add and edit tables from anywhere in the program by pressing **F7** on your keyboard while the cursor is in a table field. To limit your table entries to a reasonable number and protect the consistency of your database, we recommend limiting access to changing tables among your users.

➢ **Assigning security privileges for code tables**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

Because the **Fields** link in *Configuration* is available to only those users with Supervisor rights, it does not appear as a checkbox in the **Configuration** box. When you unmark the **Configuration** checkbox on the New Group screen, you deny rights to all configuration functions for the group.

If you restrict rights to the **Financial Institutions** link of *Configuration*, members of the group cannot add banks in *Configuration* or on the Relationships tab during data entry.

If you unmark the **Code Tables** checkbox on the New Group screen, you deny the group rights to edit and add entries for all tables in *The Raiser's Edge*. The group can still enter information in the table field, but can only select from entries that have already been defined.

4. Select **Code Tables**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

You can make a field a lookup in the **Fields** option of *Configuration*. When a field is made into a lookup, you can define entries for it like a table. The lookup field also appears in the list of code tables in both *Configuration* and **Security**. The new lookup defaults to marked in **Security**, giving users rights to add, edit, and delete entries for it.
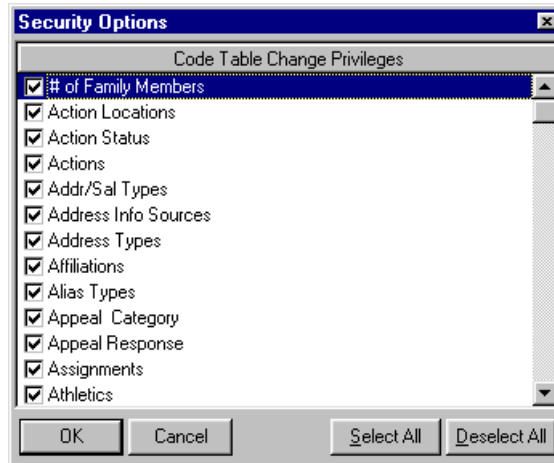
6. The **Code Table Change Privileges** box lists each code table in the program as a checkbox. Each defaults to marked, giving access rights to the group to change the table. Unmark a checkbox to deny the ability to change a table.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Code Table Example

If you unmark the checkbox for the **Actions** table, when a user enters an action such as Phone call or Lunch meeting, he can only select from the entries you already defined. The user can access the list by clicking the down arrow or by placing the cursor in the field and pressing the up or down arrow on his keyboard.

Personal Information Security

Use the personal information security options to determine the rights members of a group have to view and edit personal information such as social security numbers, credit card numbers, bank account, and insurance policy information. For detailed information about the areas affected by personal information security, see "Personal Information Security Details" on page 215.

We recommend you assign users as few right to personal information as possible to enable them to perform their job functions. For information about best practices when assigning rights to personal information, see "Personal Information Best Practices" on page 218.

➢ **Assigning personal information security**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Personal Information Security**. The checkbox defaults to checked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
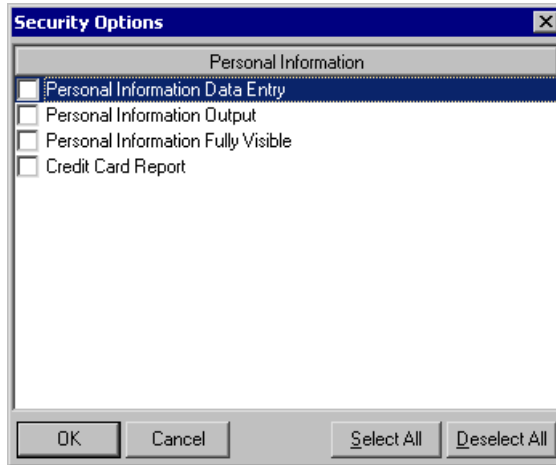
6. In the **Personal Information** box, you can mark four checkboxes to specify rights to personal information. For details about how each of these checkboxes affects the information users can view and edit, see the next section.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Personal Information Security Details

The following sections detail the areas affected by the four personal information security options.

Personal Information Data Entry Rights

When this checkbox is marked, a user can add, delete, or change personal information, but cannot view it after saving or output it (to a report or export for example).

Records

Users can:

- Add, delete, or change credit card information on a constituent or gift.

- Add, delete, or change social security numbers on constituents and relationships.

- Add, delete, or change bank account numbers on a financial institution on a constituent.

- Add, delete, or change insurance policy numbers on a life insurance planned gift record.

  In each of these fields, the number is visible while it is being entered, but once the record is saved, the field is masked.

Batch

Users can:

- Enter, delete, or change credit card numbers in a constituent batch or gift batch.
- Enter, delete, or change social security numbers in a constituent batch.
- Enter, delete, or change bank account numbers in a constituent batch.

  In each of these fields, the number is visible when entered in the batch. Once the batch is closed and reopened, the field is masked. Users without these rights can open the batch, but the fields are masked.

Admin

Users can:

- Globally change credit card fields.
- Globally change social security numbers.
- Enter bank account numbers when globally adding banks.

Import

Users can:

- Import gift credit card information.
- Import social security numbers.
- Import insurance policy numbers.
- Import bank account numbers (in Bank/Financial Institution Imports).

Configuration

Users can enter, delete, or change bank account numbers on financial institutions.

NetSolutions

Users can import *NetSolutions* donations.

Personal Information Output Rights

When this checkbox is marked, a user can output personal information, but cannot add, remove, change, or view it on records or in batch.

Records

Users can:

- Print Letters with an unmasked credit card number (from the **Letters** menu). The number is masked or unmasked based on the format option in export.
- Print Letters with an unmasked social security number (from the **Letters** menu). The number is masked or unmasked based on the format option in export.
- Print Letters with an unmasked bank account number (from the **Letters** menu). The number is masked or unmasked based on the format option in export.

  All other users can print letters with personal information, but the fields are always masked.

Export

Users can:

- Export a file with unmasked credit card numbers, unmasked social security numbers, unmasked insurance policy numbers, or unmasked bank account numbers.

- Each of these fields has a format option screen to indicate whether the field should be masked or unmasked. The format option screen displays only when a user has personal information output rights, and the numbers are masked or unmasked based on the selected option. For users without output rights, the information is masked (regardless of the option).

Custom View

Users can:

- See credit card numbers, social security numbers, insurance policy numbers, and bank account numbers on a custom view.

- For users with personal information output rights, the number is masked or unmasked based on the format option in export. For users without output rights, the information is masked.

Import

Users can:

- Run a constituent or gift import file with credit card information.

- Run a constituent import file with social security numbers.

- Run a bank import with account numbers.

- Run a gift import with insurance policy numbers.

- If a user does not have Personal Information Output rights, the personal information fields can be selected, but the personal information is not included in the file (the field is blank).

Personal Information Fully Visible Rights

When this checkbox is marked, the user can view personal information on records and in batch, but cannot add, remove, change, or output the information.

Records

Users can:

- View credit card numbers on a constituent or gift record.

- View social security numbers on a constituent or relationship record.

- View bank account numbers on a financial institution on a constituent record.

- View insurance policy numbers on a life insurance planned gift record.

Batch

Users can:

- View credit card numbers in a constituent or gift batch.

- View social security numbers in a constituent batch.

- View bank account numbers in a constituent batch.

Configuration

Users can view bank account numbers on a financial institution in *Configuration*.

Credit Card Reports Rights

When this checkbox is marked, credit card numbers on the credit card report are not masked.

Personal Information Best Practices

We recommend that credit card numbers, social security numbers, bank account numbers, and insurance policy numbers be masked at all times unless a user has a specific need to see this information to perform their job duties. This means all screens, reports, queries, and exports should mask the data unless a direct need is indicated. The cases listed below demonstrate when a user would need access to the information.

Data Entry

When editing masked values, the entire field must be replaced in order for the program to accept the changes to the field. If one of your users edits a field and leaves some of the masked values present, a message will appear and they will be unable to save the changed record.

Credit card number. A credit card number can be entered in a gift batch, constituent batch, constituent record, or gift record. A data entry user needs to be able to see a credit card number in a batch or record when entering the information, but does not need to see the number when editing a record. When adding or changing a credit card number on a gift or in batch, a drop down is available with credit card numbers if a constituent has more than one. The entire credit card number does not need to be seen here; the masked credit card number with the last four digits showing can be used to select the correct credit card number.

Data entry personnel may also want to validate data by printing a Batch Validation Report, or Gift Entry Validation Report. Printing the masked version of the credit card number is acceptable for this type of validation. It is not a best practice to print a report with the full credit card number.

Bank account number. Bank account numbers can be entered only on a Bank/Financial institution record or a constituent batch. The Bank/Financial institution record can be accessed via a constituent record, gift record, or gift batch. The Bank/Financial institution information for your organization is entered in *Configuration*. Your users need to be able to see a bank account number while entering the information in a batch, record, or *Configuration*, but they do not need to see the number when editing. When adding or changing a bank (not the bank account field but the bank itself) on a gift, a drop down is available with the bank name and the bank account number. The entire bank account number does not need to be seen here; the masked bank account number with the last four digits showing can be used to select the correct bank account.

Data entry personnel may also want to validate the data by printing the Batch Validation Report (for the constituent batch only, the gift batch validation report prints the bank name but not the bank account number). Printing the masked version of the bank account number is acceptable for this type of validation. It is not a best practice to print a report with the full bank account number.

Social security number. Social security numbers can be entered only on constituent or relationship records, or a constituent batch.

When entering social security numbers in a batch or record, a user needs to be able to see the number while entering the information, but not when editing the record.

Insurance policy number. Insurance policy numbers can be entered only on life insurance planned gift records.

When entering insurance policy numbers on a record, a user needs to be able to see the number while entering the information, but not when editing the record.

Credit Card/Direct Debit Processing

This includes EFT processes available in *The Raiser's Edge*, any reports (such as the Credit Card Report), and any custom export files used to transfer files.

Credit card number/Bank account number. When processing EFT transactions with *Raiser's Edge* EFT processes (auto-generate transactions and create EFT transmission files), a user does not really need to see credit card numbers. The main need for viewing credit card or bank account numbers is for exception processing. Users who need to handle exception processing should be given view/data validation rights. Since the two EFT processes (auto-generate transactions and create EFT transmission files) also have separate security access options of their own, another security option does not need to be created for this.

Print Credit Card Report. Export with credit card and/or bank account number for file formats that *The Raiser's Edge* does not support. While a user may need to export this information for EFT files, when printing letters or mail functions, they will still want the number to be masked.

Social security number. Social security numbers are not used in EFT processing.

Insurance policy number. Insurance policy numbers are not used in EFT processing.

View/Data Validation

Credit card number/bank account number/social security number/insurance policy number. A user who validates data entered does need access to full credit card, bank account, or insurance policy numbers. This may or may not be the person who actually enters the data.

However, users who process EFT exceptions will need to view full credit card and bank account numbers.

Security by Constituency

You can define which groups of constituents users can view or edit using Inclusion and Exclusion criteria. For example, if you do not want users in your data entry security group to have access to Trustee records, you can use exclusion criteria to deny access to any constituent record containing that code. If both inclusion and exclusion rights are set up for the same group, exclusion rights always take precedence over inclusion rights.

When entering a new constituent code, you can indicate whether the code should be included or excluded from existing security groups.

By default, all users have rights to view and edit all constituents.

> **Assigning security by constituency**

   1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

   2. On the Administration page, click **Security**. The Security page appears.

   3. On the action bar, click **New Group**. The New Group screen appears.

   4. Highlight **Security by Constituency**. When you mark the checkbox, the **Options** button is enabled.

   5. Click **Options**. The Security by Constituency screen appears.
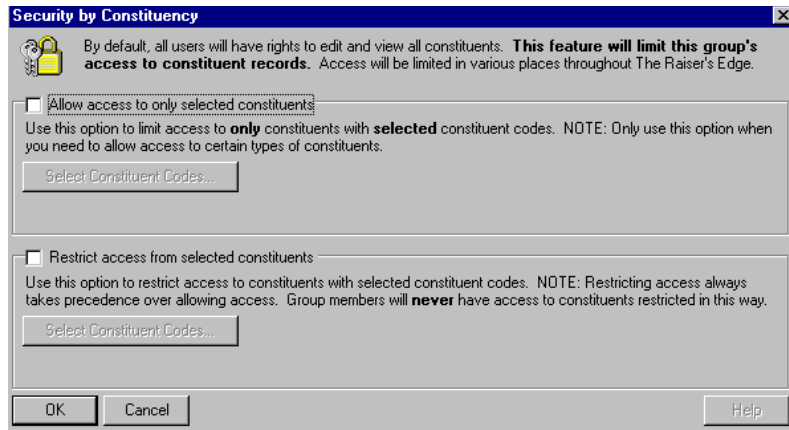
   6. In the **Allow Access to Only Selected Constituent Codes** frame, you can use inclusion criteria. Mark the **Allow access to only selected constituent codes** checkbox to limit access to only constituents with codes you select.

      Marking this checkbox also enables the **Select Constituent Codes** button. When you click this button, the Selected Constituent Codes screen appears.
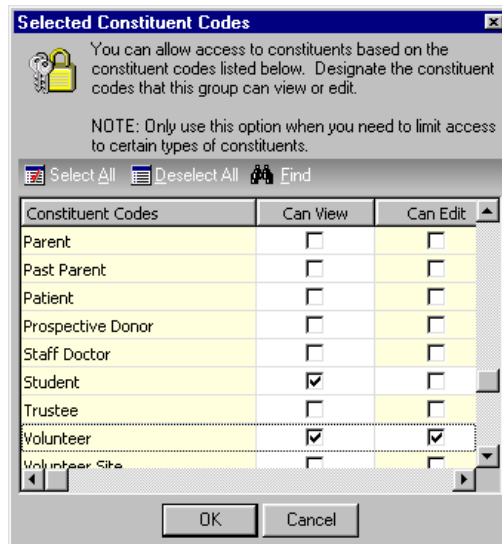
   7. The grid lists all constituent codes currently in the program.

You can mark checkboxes to allow **View** and **Edit** rights to certain constituent codes. In order for the group to access a constituent record, it must contain at least one of the codes you specify. You can click **Select All** to mark all the checkboxes or **Deselect All** to unmark them all. Click **Find** to access the Find screen so you can locate a particular constituent code.

The preceding screen shows a group that has view rights for only "Student" and "Volunteer" coded records and edit rights to only "Volunteer" records. If a record contains any of these codes, no matter what other codes it may contain, the group has access to that constituent record.

8. On the Security by Constituency screen, you can use the **Restrict Access From Selected Constituent Codes** frame to establish Exclusion criteria. Mark the **Restrict access from selected constituent codes** checkbox to restrict user access to constituents with certain codes.

9. Marking the **Restrict access from selected constituent codes** checkbox enables the **Select Constituent Codes** button. When you click this button, the Selected Constituent Codes screen appears.

Restricting access always takes precedence over allowing access. Group members do not have access to constituents restricted through the **Restrict Access From Selected Constituent Codes** frame.

10. The grid lists all constituent codes. You can mark checkboxes so that a group **Cannot View** and **Cannot Edit** certain codes. Click **Select All** to mark all the checkboxes or **Deselect All** to unmark them all. Click **Find** to access the Find screen so you can locate a particular constituent code.

The preceding screen shows a group that does not have rights to view or edit records with the constituent code "Major Donor Prospect".

11. Click **OK** to automatically save your changes and return to the New Group screen.

Security by Constituency Examples

Inclusion

If you mark the **Allow access to only selected constituents** checkbox and grant access to records with the code "Alumnus" using inclusion criteria, the user has access to only records containing that code. If a record has two or more codes, the user has access to it as long as one is "Alumnus." If a user has inclusion rights for "Alumnus" and opens a constituent record with "Alumnus", "Current Parent," and "Friend" in the **Constituent Codes** grid of the Bio 2 tab, in addition to being able to edit the "Alumnus" row, the user can also edit the rows containing the "Current Parent" and "Friend" codes, as long as they are not limited through exclusion criteria. All defined codes list when the user clicks the down arrow in the **Code** table of the **Constituent Codes** grid. However, the user cannot save a record unless it contains the code "Alumnus".

Inclusion criteria can be useful if you want to allow access to only those records with certain codes, but do not want to exclude access to records with multiple codes. For example, a large organization with chapters in different states can add state abbreviations to its entries in the **Constituent Code** table (for example, a "Friend" in South Carolina can be coded "FRSC"). The organization can then use inclusion criteria to specify that each chapter have access to only records from its own state. Some records may contain codes for multiple states (a constituent could be listed as a "Friend" in one state and a "Volunteer" in another). Both state chapters would have access to the record, but each chapter would have access to only those records from another state that also include the code for its own state. You must use exclusion criteria to keep a group from viewing and editing records with certain constituent codes.

Exclusion

If you limit view and edit rights to the constituent code "Trustee" for a group, users in the group cannot open or delete records that have the code "Trustee". A user cannot assign the code "Trustee" to a record. It does not display in the list of entries for the **Constituent Code** table when a user clicks the down arrow. Records with the code "Trustee" do not list in searches for the group. The user cannot manually add a solicitor, honor/memorial, matching gift company, or soft credit recipient with a code of "Trustee" to a gift record. However, any soft credit recipient or matching gift company designated to be automatically added will be added even if they have the code "Trustee".

The user cannot open or edit gift records to a restricted constituent. However, the user can open and edit gift records with the code "Trustee" as long as the code appears only on the gift record, not the constituent record. The user can also open and edit gifts with a Trustee solicitor in the Solicitor grid, a Trustee honor/memorial on the Honor/Memorials tab, a Trustee matching gift company on the Matching Gifts tab, and a Trustee soft credit recipient on the Soft Credit tab. Reports and queries do not include gifts to Trustee constituents.

Gift Security by Fund

You can limit the ability of a group to access gifts given to particular funds. Limiting access to gifts through this option affects reports, queries, and data entry. If a user belongs to two groups, and one group has access to a certain fund, but the other group does not have access to that fund, the user would not have access to the gift records for that fund.

➢ **Assigning gift security by fund**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Gift Security by Fund**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. You can mark checkboxes so users **Cannot View** and **Cannot Edit** certain funds. For example, the preceding screen shows a group that cannot view or edit gifts for the President's Development Fund, and can only view gifts for the Acquisition Fund. All funds, both active and inactive, display in the grid and all default to unmarked. If you mark **Cannot View** checkbox, the **Cannot Edit** checkbox is locked as marked since a group cannot edit gifts to a fund for which it does not have view rights.

7. Click **OK** to automatically save your changes and return to the New Group screen.

Gift Security by Fund Examples

You can limit access to gifts for users by limiting view and edit rights to funds. For example, your organization can have a Library Fund designed to target large gifts for which you do not want all your users to have access. If you mark the **Cannot View** checkbox beside the Library Fund on the Gift Security by Fund screen, users do not have access to any gift given to this fund. The user cannot open gifts to the Library Fund or assign the Library Fund to gifts. The Library Fund does not show in fund searches or as a possible entry when the user clicks the down arrow in the **Fund** table field of the gift record. For all show modes except **By Fund**, gifts to the Library Fund do not display on the Gifts tab of a constituent record. When a user selects **By Fund**, the unrestricted part of a gift lists for viewing only. Unrestricted parts can include matching gifts or soft credits to other funds. Any part of a split gift that is not restricted displays the true balance including the restricted amount.

When you add a new fund, all groups are automatically given view and edit rights for gifts to that fund.

Any constituent, campaign, fund, or appeal summary or gift list run by the user does not show gifts to the Library Fund. However, any part of a split gift that is not restricted appears in the report. Gifts associated with the Library fund, including split gifts, do not appear in search results.

Gift security by Fund takes precedence over any object level settings for records or reports, so if the group has full rights to gifts granted in records, they still cannot view gifts to the Library Fund. For campaigns and appeals with the Library Fund on the Funds tab, the Library Fund displays in the grid, but a user cannot add the Library Fund to the grid. If you have *Event Management* and the default fund for an event is the Library Fund, when a user adds a gift, the program processes the gift as if the **Default fund** field is blank. A "Required Field Missing" message appears, but the gift loads anyway.

Notepad Security by Type

You can define notepad types that cannot be viewed or edited by a group. This can be useful when sensitive information, which should not be available to everyone at your organization, is kept in a notepad. For example, you may want to make a notepad type named "Director's Notes" accessible to only the Director and Assistant Director, so you can create a security group with only those two users as members and grant the group rights to this notepad type and restrict all other groups from this notepad type.

➢ **Assigning notepad security by type**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Notepad Security by Notepad Type**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
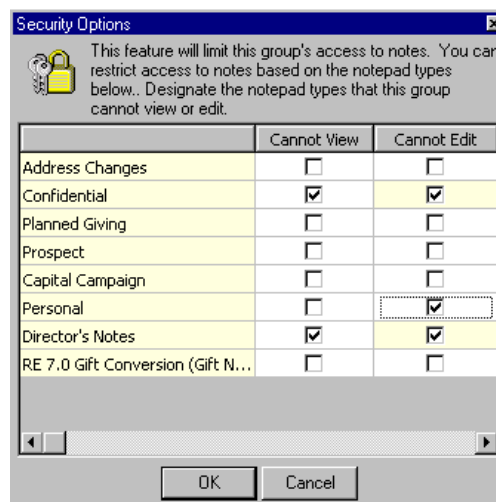
6. The grid lists all notepad types. You can limit a group's access to notepads by marking the **Cannot View** or **Cannot Edit** checkboxes. All default to unmarked, giving access to all notepad types to the group. All active and inactive notepad types display. The preceding screen shows a group that cannot view or edit Director's Notes and Confidential notes and can only view Personal information.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Notepad by Type Security Example

You can use Notepad security to limit access to sensitive information in your notes. You can set up a notepad type of Confidential and limit security to only a few key users. Any user who does not have access cannot open or delete Confidential notepads, including constituent and, if you have *Event Management*, event notepads. The user cannot assign the Confidential type to notepads. When the user clicks the down arrow in the **Type** field of the New Notepad screen, Confidential does not appear in the list of possible entries. When the user runs a query, Confidential does not appear in the filter list or on the query itself. The user cannot export the Confidential notepad type and it does not appear in reports.

Membership Scanning

Security for *Membership Scanning* is defined on only one level. If you mark the **Membership Scanning** checkbox in the **Group Privileges** box on the New Group screen, the members of the group have access to *Membership Scanning*.

Dashboard

You can assign security access to *Dashboard*. If you mark the **Dashboard** checkbox in the **Group Privileges** box on the New Group screen, the members of the group have access to *Dashboard*. When you assign security privileges for *Dashboard*, you can also specify whether to enable members to share dashboards. Other Security rights, such as record and system level settings affect which summaries are available and which records appear as results in *Dashboard* summaries.

➢ **Assigning security privileges for Dashboard**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Dashboard**. When you mark the checkbox, the **Options** button is enabled.

5. To enable members in the group to share dashboards, do the following:

If users are not allowed to view or edit a specific notepad type, they can still delete constituent records with the restricted notepad type through **Globally Delete Records** in *Administration* or through *Records*.

a. Click **Options**. The Security Options screen appears.
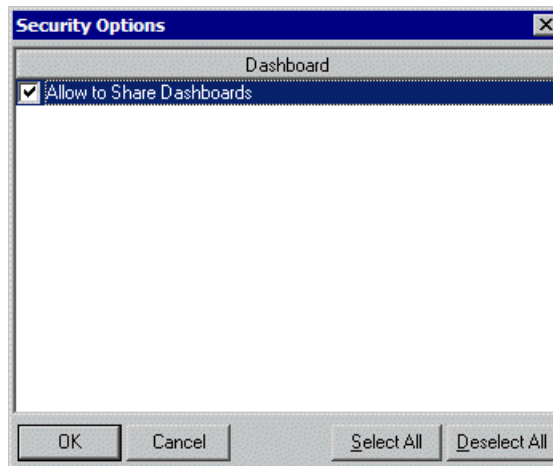
b. Mark **Allow to Share Dashboards**.

c. Click **OK**. The {Group Name} screen appears.

6. To save your settings, click **Save and Close**. You return to the main security page.

Install Samples

Security for installing samples that come with *The Raiser's Edge* is defined on only one level. If you mark the **Install Samples** checkbox in the **Group Privileges** box on the New Group screen, the members of the group have access to the samples. Other Security rights, such as record and system level settings affect which specific samples a user can view. For example, a user must have access to queries in order to view query samples. For more information about the types of samples that are included with *The Raiser's Edge* and how to install them, see the Program Basics chapter of the *Program Basics Guide*.

NetSolutions

You can assign security access to each area of *NetSolutions* so users may have access to some areas, but not others. For example, you may want a security group to have the ability to manage NetMail pages, but not to access Configure and Customize.

➢ **Assigning security privileges for NetSolutions**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **NetSolutions**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
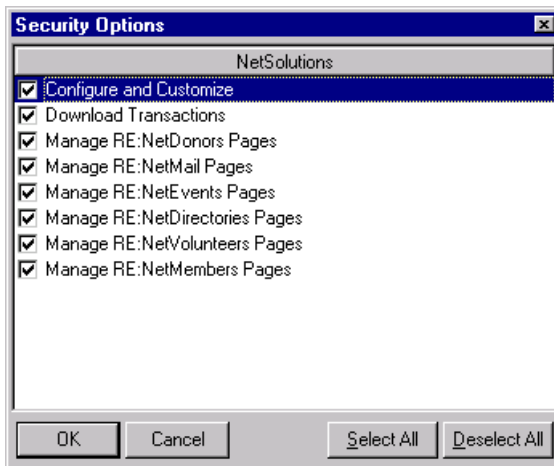
6. Mark the checkboxes by each area of *NetSolutions* to which you want the members of this group to have access.

7. When you finish selecting the areas of *NetSolutions* this group can access, click **OK**. You return to the {Group Name} screen.

8. Click **Save and Close** to save your settings and return to the main security page.

Proposal Security by Purpose

You can limit the ability of a group to access proposals with specific purposes. For example, if you have several fundraisers in your organization, you may want to limit their ability to look at proposals by other fundraisers so one fundraiser cannot see what another is asking for.

Limiting access to proposals through this option affects reports, queries, and data entry. If a user belongs to two groups, and one group has access to a certain proposal, but the other group does not have access to it, the user would not have access to that proposal.

➢ **Assigning proposal security by purpose**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Proposal Security by Purpose**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
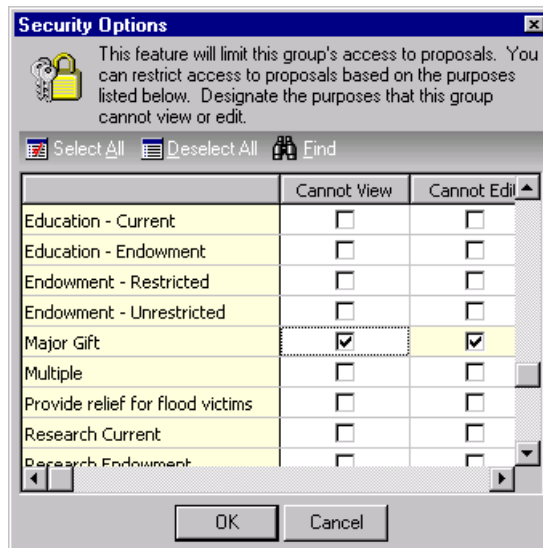
6. You can mark checkboxes so users **Cannot View** and **Cannot Edit** proposals with certain purposes. For example, the preceding screen shows a group that cannot view or edit proposal records with a purpose of "Major Gift". All purposes display in the grid and all default to unmarked. If you mark the **Cannot View** checkbox, the **Cannot Edit** checkbox is locked as marked since a group cannot edit gifts to a fund for which it does not have view rights.

7. Click **OK** to automatically save your changes and return to the New Group screen.

Proposal Security by Purpose Example

Your organization may have a proposal type of "Major Gift" for those efforts targeting large gifts. You may not want all your users to have access to these proposals. If you mark the **Cannot View** checkbox beside Major Gift on the Security Options screen for Proposal Security by Purpose, users do not have access to any proposals with this entry in the **Purpose** field. Users cannot open proposals with this purpose or assign this purpose to proposals. Major Gift proposals do not show in proposal searches.

Data Health Center

Security for the *Data Health Center* is defined on only one level. If you mark the **Data Health Center** checkbox in the **Group Privileges** box on the New Group screen, the members of the group have access to the *Data Health Center*.

AMPro Integration

You can assign security access to several areas of the *AuctionMaestro Pro* integration so users may have access to some areas, but not others. For example, you may want a security group to have the ability to download transactions, but not to configure the integration.

➢ **Assigning security privileges for AuctionMaestro Pro integration**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **AMPro Integration**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
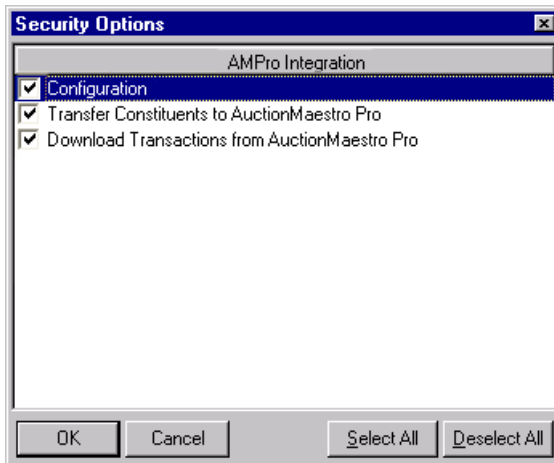
6. Mark the checkboxes by each area of the *AuctionMaestro Pro* integration to which you want the members of this group to have access.

7. When you finish, click **OK**. You return to the {Group Name} screen.

8. Click **Save and Close** to save your settings and return to the main security page.

NetCommunity

When you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, you can assign security access to specific areas of the integration so users may have access to some areas, but not others. For example, a security group may have access to the **NetCommunity** button on the Raiser's Edge bar but not to view user information from *Blackbaud NetCommunity* on constituent records. These security settings affect only your ability to access the *NetCommunity* integration functions. You also need the applicable rights in *The Raiser's Edge* for the functions you perform with information downloaded from *Blackbaud NetCommunity*. For example, to view information about your *Blackbaud NetCommunity* site users on constituent records in *The Raiser's Edge*, you must have security privileges in *Records*.

If, on the group screen, the **NetCommunity** checkbox is marked in the **Group Privileges** box, the members of the group have access to information downloaded from *Blackbaud NetCommunity*.

➢ **Assign security privileges for the Blackbaud NetCommunity integration**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. Click **Security**. The Security page appears.

3. Under groups in the **Security** tree view list on the left, select the security group to assign access to *NetCommunity Integration*. For example, to assign the data entry personnel access to *NetCommunity Integration*, select the Data Entry group.

4. On the action bar, click **Open**. The selected group screen appears.
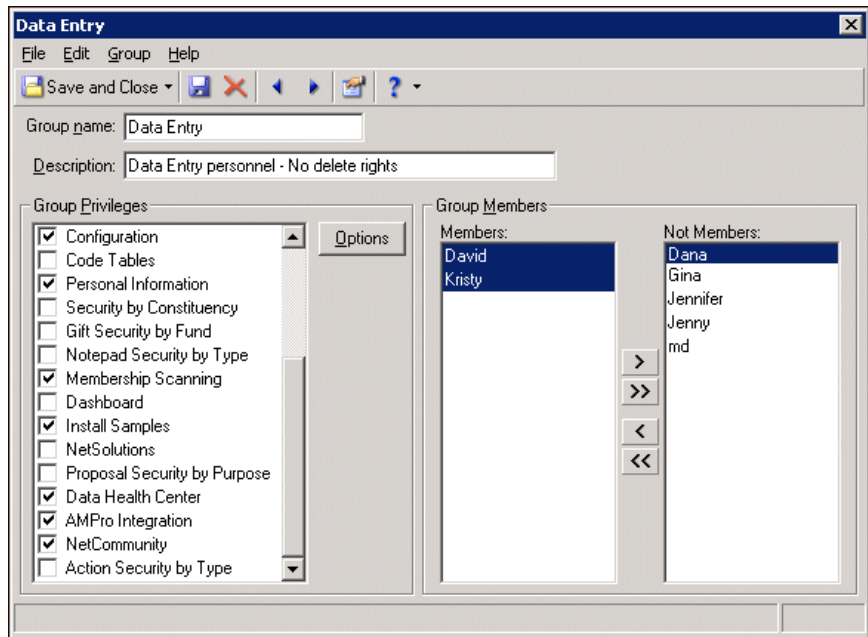
5. In the **Group Privileges** box, mark **NetCommunity**. When you mark this checkbox, the **Options** button is enabled.

6. Click **Options**. The Security Options screen appears.
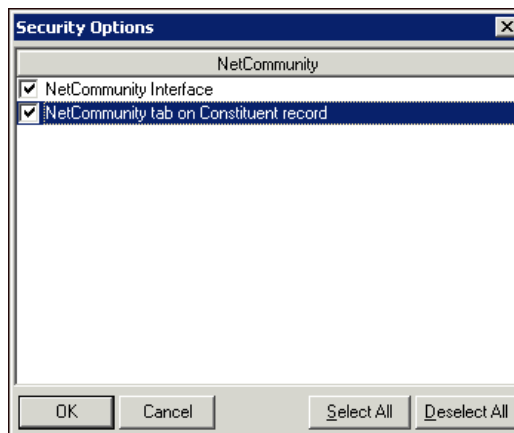
7. For each area of *NetCommunity Integration* you want the members of the security group to have access, mark the corresponding checkbox.

    • To enable members of the security group to use the **NetCommunity** button on the Raiser's Edge bar to access the NetCommunity page, mark **NetCommunity Interface**

- To enable members of the security group to access information about *Blackbaud NetCommunity* Web site users on the constituent records in *The Raiser's Edge*, mark **NetCommunity tab on Constituent record**.

To mark both checkboxes, click **Select All**. To unmark both checkboxes, click **Deselect All**.

8. Click **OK**. You return to the selected group screen.

9. Click **Save and Close**. You return to the Security page.

Action Security by Type

You can define action types that cannot be viewed or edited by a group. This can be useful when sensitive information, which should not be available to everyone at your organization, is recorded in an action. For example, you may want to make an action type named "Director's Actions" accessible to only the Director and Assistant Director, so you can create a security group with only those two users as members and grant the group rights to this action type and restrict all other groups from this action type.

➢ **Assigning action security by type**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. On the Administration page, click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Action Security by Type**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
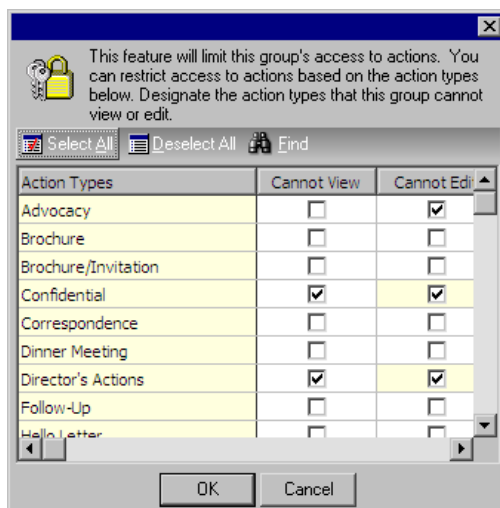
If users are not allowed to view or edit a specific action type, they can still delete constituent records with the restricted action type through **Globally Delete Records** in *Administration* or through *Records*.

6. The grid lists all action types. You can limit a group's access to actions by marking the **Cannot View** or **Cannot Edit** checkboxes. All default to unmarked, giving access to all action types to the group. All active and inactive action types display. The preceding screen shows a group that cannot view or edit Director's and Confidential actions and can only view Advocacy actions.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Action Type Security Example

You can use Action security to limit access to sensitive information in your actions. You can set up an action type of Confidential and limit security to only a few key users. Any user who does not have access cannot open or delete Confidential actions, including constituent and, if you use *Event Management*, event actions. The user cannot assign the Confidential type to actions. When the user clicks the down arrow in the **Action type** field on the New Action screen, Confidential does not appear in the list of possible entries. When the user runs a query, Confidential does not appear in the filter list or on the query itself. The user cannot export the Confidential action type and it does not appear in reports.

MatchFinder

You can assign security access to several areas of the *MatchFinder* database so users may have access to some areas, but not others. For example, a security group may have access to update the *MatchFinder* database but not to launch the Cross-Reference Tool. These security settings affect only your ability to access the *MatchFinder* functions. You also need the applicable rights in *The Raiser's Edge* for the functions you perform with the information from the *MatchFinder* database. For example, to link *MatchFinder* records to your records in *The Raiser's Edge*, you must have security privileges in *Records*.

If, on the group screen, the **MatchFinder** checkbox is marked in the **Group Privileges** box, the members of the group have access to *MatchFinder*.

➢ **Assigning security privileges for MatchFinder**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. Click **Security**. The Security page appears.

3. Under groups in the **Security** tree view list on the left, select the security group to assign access to *MatchFinder*. For example, to assign the data entry personnel access to *MatchFinder*, select the Data Entry group.

4. On the action bar, click **Open**. The selected group screen appears.
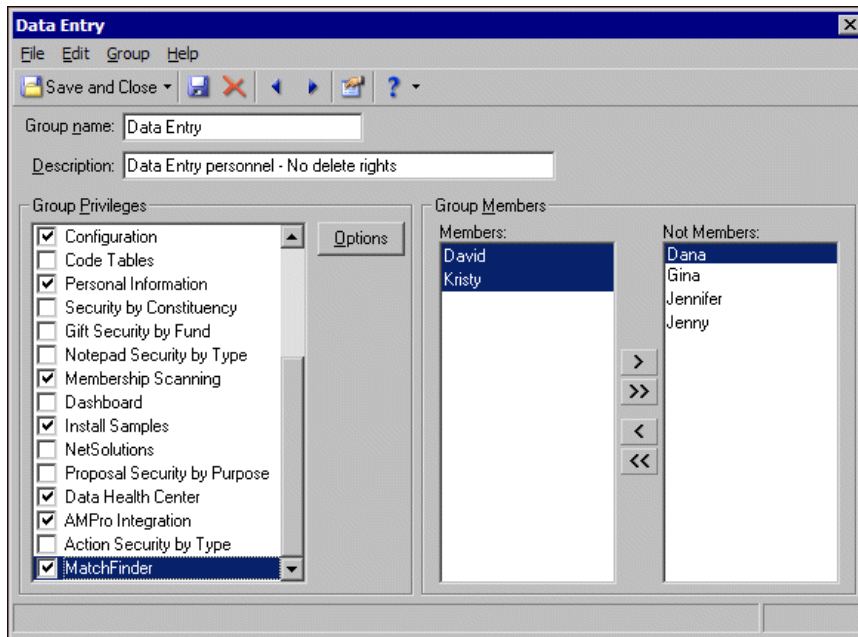
5. In the **Group Privileges** box, mark **MatchFinder**. When you mark this checkbox, the **Options** button is enabled.

6. Click **Options**. The Security Options screen appears.
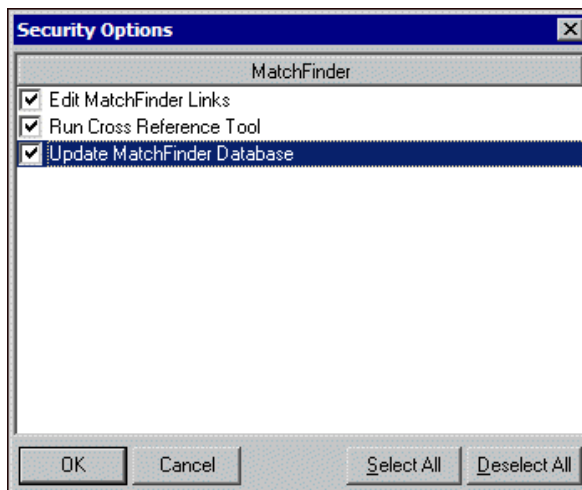
7. For each area of *MatchFinder* you want the members of the security group to have access, mark the corresponding checkbox.

   • To enable members of the security group to create and break links between records in the *MatchFinder* database and the database in *The Raisers' Edge*, mark **Edit MatchFinder Links**.

   • To enable members of the security group to use the cross-reference tool, mark **Run Cross-Reference Tool**. To run the cross-reference tool, the user must also have rights to **Edit MatchFinder Links**.

To run the cross-reference tool, the user must have rights to **Edit MatchFinder Links** and **Run Cross-Reference Tool**.

- To enable members of the security group to run the process to update the *MatchFinder* database, mark **Update MatchFinder Database**.

  To mark all three checkboxes, click **Select All**. To unmark all three checkboxes, click **Deselect All**.

8. Click **OK**. You return to the selected group screen.

9. Click **Save and Close**. You return to the Security page.

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