

TheRaiser'sEdge[®] Enterprise[™]

Mapping Guide

052909

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Mapping Guide

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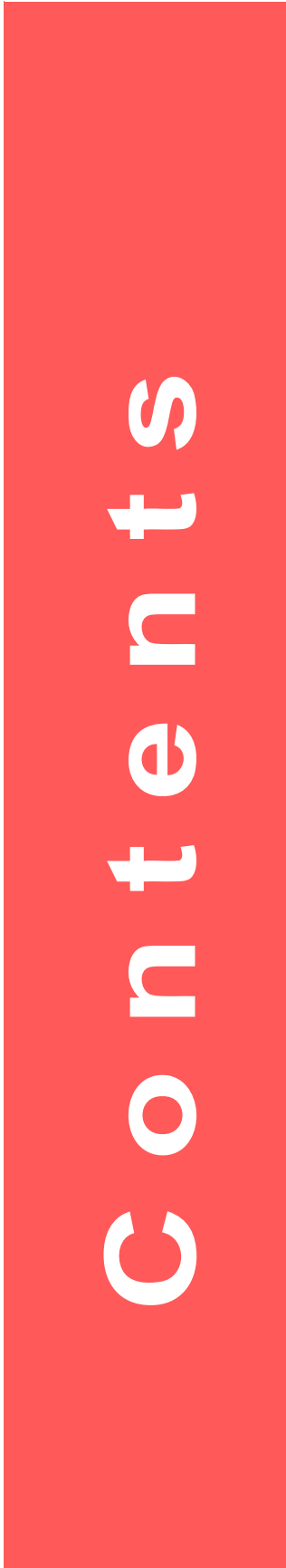
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What Is In This Guide?

In the *Mapping Guide*, you learn how to create maps, geographically locating constituent records in *The Raiser's Edge*. You can also learn about the following.

- “Mapping Page” on page 3
- “Mapping Parameters Wizard Screen” on page 4
- “MapPoint Screen - Raiser’s Edge Customization” on page 14



How Do I Use These Guides?

The Raiser's Edge Enterprise user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the *Raiser's Edge Enterprise* 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 7* 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.

W e l c o m e



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.

MapPoint and The Raiser's Edge

Chapter 1

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With *The Raiser's Edge*, you can easily find where your constituents are located geographically. To create maps with constituent address information entered in *The Raiser's Edge* database, click **Mapping** on the Raiser's Edge bar. To use **Mapping**, you must install Microsoft *MapPoint*.

In **Mapping**, you define the data to map, save your maps, and retrieve your maps. In addition, you can navigate to specific constituent records in *The Raiser's Edge* from mapped locations in *MapPoint*.

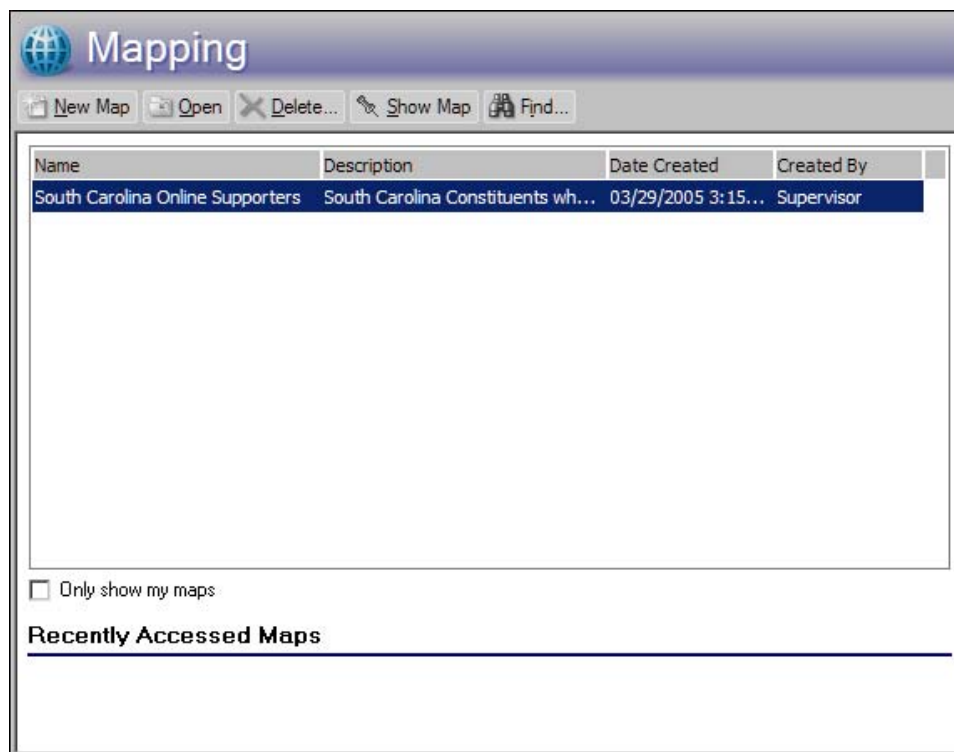
To help track mapped constituents, you can create static output queries for either the full set of mapped constituents or a subset of constituents. *The Raiser's Edge* saves these queries on the Query page, and you can use them with other functions in *The Raiser's Edge*, such as *Reports* or *Mail*, or to create additional maps.

This guide includes instructions and explanations about the mapping features in *The Raiser's Edge*, such as the Mapping page, the Map screen, how to create maps, and more. For detailed instructions about how to use *MapPoint*, visit Microsoft's website at <http://msdn.microsoft.com/library/default.asp>. The *MapPoint* documentation appears under **.NET Development**. Or, you can access the help file through *Windows Explorer* at `\Program Files\Microsoft MapPoint\MAPPOINT.chm`.

 The *Mapping* functionality in *The Raiser's Edge* is compatible with *MapPoint 2006* or later.

Mapping Page

When you click **Mapping** on the Raiser's Edge bar, the Mapping page appears.



In the grid, any previously saved mapping parameter files appear. From the grid, you can open or delete a parameter file, generate a map, or create a new map.

The grid displays the following information about your saved maps.

Name. This column displays the name assigned the saved parameter file.

Description. This column displays the description assigned the saved parameter file.

Created. This column displays the date on which the parameter file was created.

Created By. This column displays the ID of the user who created the parameter file.

Only show my maps. To view only the parameter files you create, mark this checkbox. The grid displays only the parameter files created by the current user.

Recently Accessed Maps. Under **Recently Accessed Maps**, the names of the last three parameter file accessed by the current user appear. To open the mapping wizard for the selected file, click the file name.

Buttons

The Mapping page includes a number of buttons to help you work in the program.

New Map. To open a blank mapping wizard so you can enter the address criteria to map, click this button.

Open. When you select a single map in the grid, this button is enabled. To open the mapping wizard for the selected map, click this button. You can then display the updated map or make changes to the existing map criteria.

Delete. When you select one or more maps in the grid, this button is enabled. To delete the selected maps, click this button. A delete confirmation message appears before the program deletes the maps.

Show Map. When you select a single map in the grid, this button is enabled. To open the selected map in *MapPoint* without the mapping wizard, click this button.

Find. To open the Find screen so you can enter a full or partial map name and search for the map listing, click this button.

Mapping Parameters Wizard Screen

With the Mapping Parameters wizard, you can enter or edit the criteria used to generate the list of addresses to map. For example, if you have a query of constituents to map, you can select the query and generate the map; to include only constituents living in a specific region in your map, you can select the region and generate the map.

The wizard includes three tabs: General, Ind. Address, and Org. Address. When you create a map, the program uses the criteria defined in the wizard to generate a list of constituent addresses from the database. *The Raiser's Edge* passes this list to *MapPoint*, which generates a map and marks each address.

After you create a map, you can save it and the criteria used for later use in *The Raiser's Edge*. All saved maps appear on the Mapping page.

Toolbar

To help you navigate, the Mapping Parameters wizard includes toolbar buttons.



The **Save** button saves parameter settings entered in the mapping wizard. If the parameter setting have not been previously saved, it opens the Save As screen.




The **Show Map** button creates a temporary export file (Names, Addresses, and Phone Numbers) based on the selected parameters and opens *MapPoint* in a separate window. The map that appears includes pushpins to mark the location of each address included in the export file.



The **Favorites** button adds the map to your Favorites page in *The Raiser's Edge*.



The **Help** button accesses the various help options available in the program: help file, user guides, customer support contact information, and online support options.

 *MapPoint* cannot map constituents with P.O. boxes as their address. If you include such addresses in the list passed to *MapPoint*, the Unmatched Address screen appears for each P.O. box address in the list. From this screen, you can select the appropriate action for each address. To avoid this situation, we recommend you include a condition in your mapping queries to exclude these addresses from the results.

General Tab

On the General tab of the Mapping Parameters wizard, you enter the general criteria used to generate the list of the addresses to map.

Include. To select the records to use to generate the list, click this button. This button provides a drop down menu with the following options:

- **All Records** – To apply the criteria entered in the Mapping Parameters wizard against the entire database to generate the list of addresses included on the map, select this option.
- **Selected Records** – To include a query of constituent, individual, or organization records, select this option. The Open Query screen appears so you can select or create a query to use to generate the list.
- **One Record** - To include only one constituent, individual, or organization record, select this option. The Open screen appears so you can search for the record to map.

Map only locations in. In this frame, enter specific locations to map.

- **City** - If all mapped addresses are to be in a single city, enter the name of the city.
- **State** - If all mapped addresses are to be in a single state, enter the name of the state.
- **County** - If all mapped addresses are to be in a single county, enter the name of the county.
- **Region** - If all mapped addresses are to be in a single region, enter the name of the region.

- **ZIP** - If all mapped addresses are to be in a single ZIP Code, enter the ZIP Code. If you enter a truncated ZIP Code, the address list used by *MapPoint* includes all matching addresses that begin with the ZIP Code information entered.
- **Country** - If all mapped addresses are to be in a single country, enter the name of the country.

Include inactive constituents. To include both active and inactive constituent records in the list of mapped addresses, mark this checkbox.

Create output query. To generate a static output query of records included in the map, mark this checkbox and select whether to create a Constituent, Individual, or Organization output query.

Display maps in. When you have both the North American and European versions of *MapPoint* installed, this frame appears. Select which version to use when you generate your map: **MapPoint Europe** or **MapPoint North America**.

Ind. Address Tab

On the Ind. Address tab, select the address information to include in your address list to determine the address processing applied to the mapped locations for individual constituents.

New Mapping Parameters

File Edit Favorites Help

1: General 2: Ind. Address 3: Org. Address

What would you like to see: Address Phone type: First telephone found

Step 1: Indicate if seasonal addresses should be considered. The first valid seasonal address will be used.

Consider addresses with seasonal dates as of Today

Step 2: Specify, in the order of importance, the addresses to consider if a valid seasonal address is not found.

Addresses to use: Preferred address

First address found
Primary business
Spouse primary business
Spouse preferred address

Step 3: You may check for special requirements by first considering addresses with the specified attribute(s).

Address Attributes... <No address attributes specified>

< Back Next > Cancel Show Map

What information would you like to see. Select whether to pass address and phone information or only address information to *MapPoint*. If you select Address & phone, in the **Phone type** field, select the type of phone number to include such as Home, Email, or Cell Phone.

Phone type. When you select Address & phone in the **What information would you like to see** field, this field is enabled. Select the type of phone number to include. If the selected phone type does not appear on a constituent record, no phone information appears on the map for that constituent.

Step 1. Select whether to include seasonal addresses in your map. If the program considers seasonal addresses, it selects the first valid seasonal address it finds. If it does not find a valid seasonal address, the program uses your selections in Step 2 to locate an address.

- **Consider addresses with seasonal dates as of** - To consider seasonal addresses when you generate your map, mark this checkbox and select the date as of when to accept seasonal addresses. For example, if you select Today, the program considers all seasonal addresses with valid dates as of the current date for your map. If you select <Specific date>, the **Date** field appears so you can enter the date to use. The map uses this date to determine whether a seasonal address is valid.

Step 2. Select the address types to consider if a valid seasonal address is not found in Step 1 or if you do not select to include seasonal addresses in the map.

To select an address type to include when the program generates your map, select the address type in the **Addresses** box and click the right arrow to move it to the **Addresses to use** box.

If you list multiple address types in the **Addresses to use** box, arrange them in order of preference. To arrange an address type in the **Addresses to use** box, select the address type and click the up or down arrow. For example, in the **Addresses to use** box you have Preferred address and Primary business. If a constituent has both addresses on his constituent record, you want to use the Primary business address first. Select Primary business and click the up arrow to move it to the top of the list.


Step 3. To further refine the address information included in your map, select the attributes of the addresses to include. For example, to avoid outdated or incorrect addresses, you can select to include only National Change of Address (NCOA) confirmed addresses.


To select address attributes to consider for your map, click **Address Attributes**. The Address Attributes to Consider screen appears.

Category	Description	Short Desc
NCOA Confirmed?	Yes	

Select the category and a description of the attribute of the addresses to include. For example, to include only National Change of Address (NCOA) confirmed addresses, select NCOA Confirmed? and Yes. Address attributes are entered on the Attributes tab of the constituent Address screen.

After you enter address attributes, click **OK**. You return to the Ind. Address tab. Next to the **Address Attributes** button, “Yes” appears.

 NCOA is an address correction service that works with Blackbaud's **NCOA On-Demand**. For information, see the Address Correction Services chapter in the *Data Enrichment Services Guide*.

 For information about the Attributes tab on the constituent Address screen, see the *Constituent Data Entry Guide*.

Org. Address Tab

On the Org. Address tab, select the address information to include in your address list to determine the address processing applied to the mapped locations for organization constituents.

What would you like to see. Select whether to pass address and phone information or only address information to *MapPoint*. If you select Address & phone, in the **Phone type** field, select the type of phone number to include such as Business, Email, or Cell Phone.

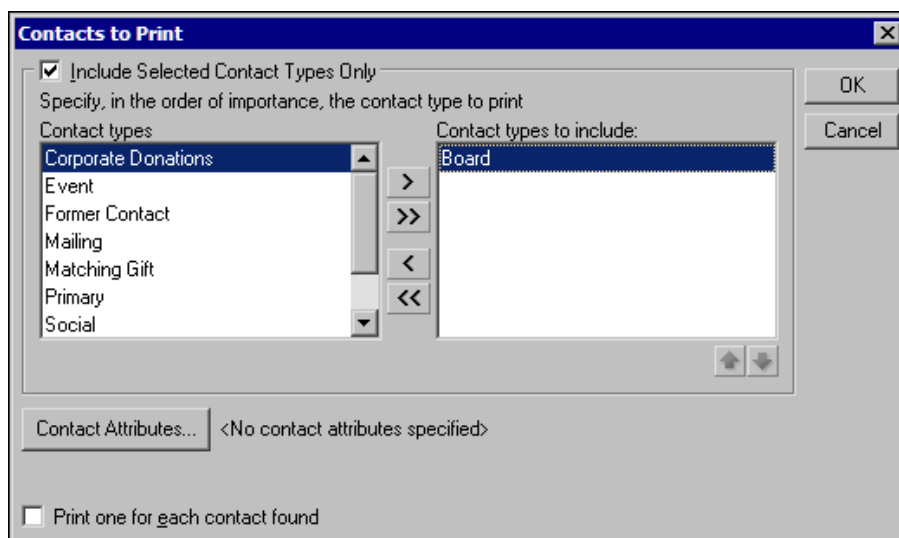
Phone type. When you select Address & phone in the **What information would you like to see** field, this field is enabled. Select the type of phone number to include. If the selected phone type does not appear on a constituent record, no phone information appears on the map for that constituent.

Step 1. Select whether to include contact address information or only the organization address information with your map.

- If you select **Show contacts**, the organization name does not appear with your map. The Org. Address tab displays buttons specific to contacts so you can define the contact information to include.
- If you select **Show only the organization**, the Org. Address tab displays buttons and fields in which you can define the organization address information to include.

Step 2 (Show contacts option). If, in Step 1, you select **Show contacts**, select the contact types, contact attributes, and address attributes to include in your map.


- To specify the contact types and attributes to include, click **Contact Information**. The Contacts to Print screen appears.



Select whether to include all contact types or selected contact types.

To include specific contact types, mark **Include Selected Contact Types Only**. In the **Contact types** box, select the contact type to include and click the single right arrow to move it to the **Contact types to include** box. If you list multiple contact types in the **Contact types to include** box, arrange them in order of preference. The program searches for the first type listed in the **Contact types to include** box. When it finds the first type listed, it includes that contact type with your map. For example, if you include Primary and Matching Gift contact types in the **Contact types to include** box, with Primary listed first, the program stops its search for contacts when it finds a primary contact on the constituent record. If you prefer the program uses Matching Gift contacts, but Primary contacts are acceptable if a Matching Gift contact does not exist on a constituent record, move Matching Gift to the top of the list. To arrange a contact type in the **Contact types to include** box, select the type and click the up or down arrow as necessary.

To include all contact types, do not mark **Include Selected Contact Types Only**. The program selects the first type on each record.

 On a screen with a selection box, you can use the single right and left arrows to move one entry back and forth between the two boxes. You can use the double left or right arrows to move all entries at once.

To further refine the contact information included in your map, select the attributes of the contacts to include or exclude. For example, to map only new contacts, select to include only contacts who became contacts as of a recent date. To select contact attributes to consider for your map, click **Contact Attributes**. The Contact Attributes to Consider screen appears.


Filter	Category	Description	Short Desc
Include	Contact As Of	04/04/2009	

Select the category and a description of the attribute of the contacts to include or exclude. For example, to include only new contacts, select “Include” in the **Filter** column and “Contact As Of” in the **Category** column. In the **Description** column, select the “as of” date of the contacts to include. Contact attributes are entered on the Attributes/Notes tab of the constituent’s Individual Relationship screen for the contact.

After you select all the contact types and attributes of the addresses to include on your map, click **OK**. You return to the Org. Address tab. Next to the **Contact Information** button, the selected contact types and attributes appear.

- To further refine the address information included in your map, select the attributes of the contact addresses to include. For example, to avoid outdated or incorrect addresses, you can select to include only National Change of Address (NCOA) confirmed addresses.

To select address attributes to consider for your map, click **Contact Address Attributes**. The Address Attributes to Consider screen appears.

 NCOA is an address correction service that works with Blackbaud’s **NCOA On-Demand**. For information, see the Address Correction Services chapter in the *Data Enrichment Services Guide*.

Category	Description	Short Desc
NCOA Confirmed?	Yes	

Select whether to include contacts with one of the selected address attributes, no address attributes, or different attribute categories or include only contacts with one of the selected address attributes. If you select **Only consider contacts with one of these address attributes**, to ensure the program includes contact information for all organizations regardless of the contact address attributes, mark **If an Organization does not have a valid Contact with one of these address attributes, consider Contacts with no address attributes or different address attribute categories**.

In the grid, select the category and a description of the attribute of the contact addresses to consider. For example, to include only National Change of Address (NCOA) confirmed addresses, select NCOA Confirmed? and Yes. Address attributes are entered on the Attributes tab of the constituent Address screen.

After you enter address attributes, click **OK**. You return to the Org. Address tab. Next to the **Address Attributes** button, "Yes" appears.

Step 2 (Show only the organization option). If, in Step 1, you select **Show only the organization**, select the address types to consider.


To select an address type to include when the program generates your map, select the address type in the **Addresses** box and click the right arrow to move it to the **Addresses to use** box.


If you list multiple address types in the **Addresses to use** box, arrange them in order of preference. To arrange an address type in the **Addresses to use** box, select the address type and click the up or down arrow. For example, in the **Addresses to use** box you have Preferred address and Business. If a constituent has both addresses on his constituent record, you want to use the Business address first. Select Business and click the up arrow to move it to the top of the list.


Step 3. If, in Step 1, you select **Show only the organization**, to further refine the address information included in your map, select the attributes of the addresses to include. For example, to avoid outdated or incorrect addresses, you can select to include only National Change of Address (NCOA) confirmed addresses.


To select address attributes to consider for your map, click **Address Attributes**. The Address Attributes to Consider screen appears.

Category	Description	Short Desc
NCOA Confirmed?	Yes	

 For information about the Attributes tab on the constituent Address screen, see the *Constituent Data Entry Guide*.

 NCOA is an address correction service that works with Blackbaud's **NCOA On-Demand**. For information, see the Address Correction Services chapter in the *Data Enrichment Services Guide*.

 For information about the Attributes tab on the constituent Address screen, see the *Constituent Data Entry Guide*.

 You can access the MAPPOINT.chm from the program files (Program\Microsoft MapPoint) or the **Help** menu on *MapPoint* proper menu bar.

Select the category and a description of the attribute of the addresses to include. For example, to include only National Change of Address (NCOA) confirmed addresses, select NCOA Confirmed? and Yes. Address attributes are entered on the Attributes tab of the constituent Address screen.

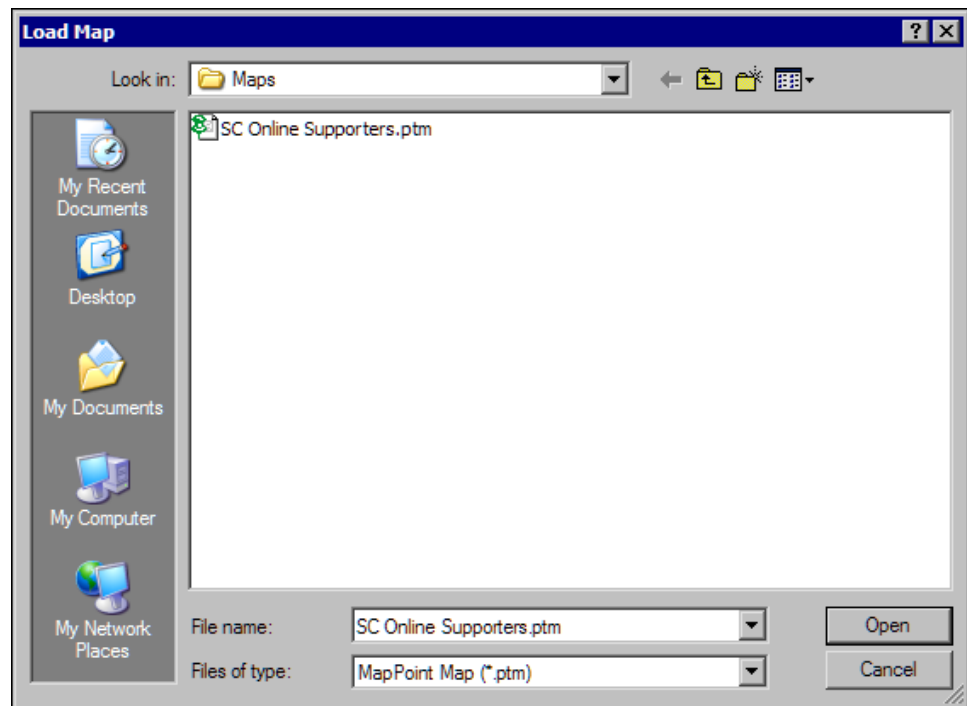
After you enter address attributes, click **OK**. You return to the Org. Address tab. Next to the **Address Attributes** button, “Yes” appears.

MapPoint Screen - Raiser's Edge Customization

When you access *MapPoint* through *The Raiser's Edge*, a number of the menu bar options available in *MapPoint* proper appear on the MapPoint screen. In addition, there are a few menu options customized for use specifically with *The Raiser's Edge*. This section explains only *The Raiser's Edge* customization. For information about the *MapPoint* proper menu options, see the *MapPoint* documentation, accessible from the MAPPOINT.chm.

Load Map From File

From the MapPoint screen, you can open any *MapPoint* map saved as a *.ptm file. From the menu bar, select **File, Load map from file**. The Load Map screen appears so you can browse to and select the map to open.

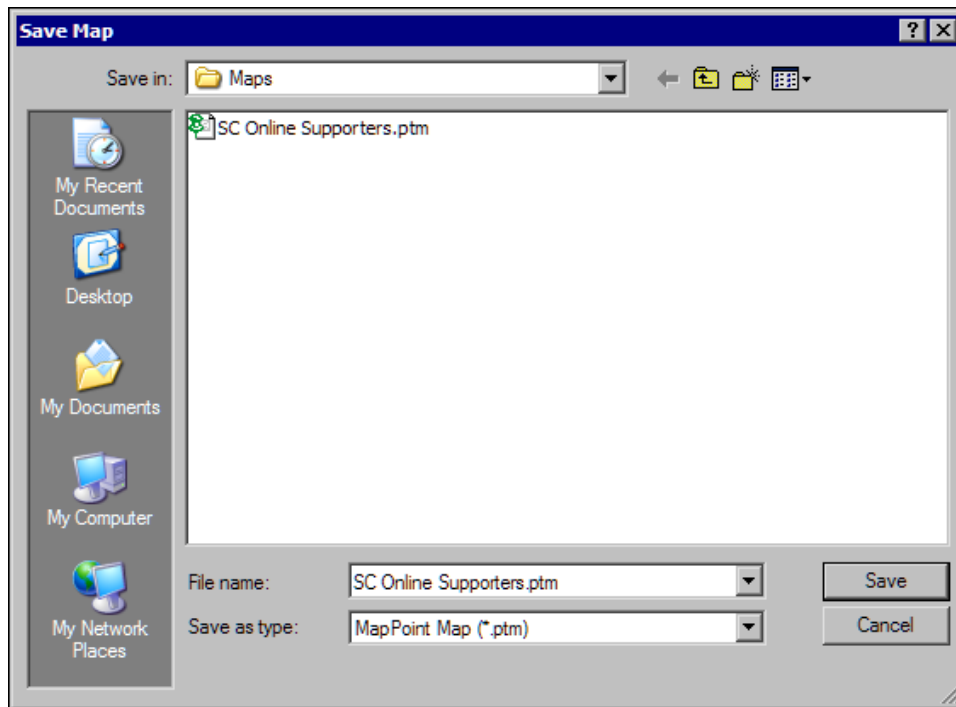


Maps opened from this screen can include saved driving directions, route maps, and peripheral locations such as hotels, restaurants, and banks generated by *MapPoint*, not *The Raiser's Edge* database.

You cannot access the Mapping Parameters wizard from maps opened from this screen, and you cannot refresh the displayed locations on these maps to reflect changes to addresses in *The Raiser's Edge*.

Save Map To File

From the MapPoint screen, you can save a map as it currently appears on the screen as a *.ptm file. From the menu bar, select **File, Save map to file**. The Save Map screen appears so you can name the map and browse to the location to save it.



Unlike maps generated by the Mapping Parameters wizard, maps saved from the MapPoint screen retain additional information from *MapPoint*, such as driving directions, route maps, and peripheral locations such as hotels, restaurants, and banks. When you load a saved map, you cannot refresh its displayed locations to reflect changes to addresses in *The Raiser's Edge*.

List

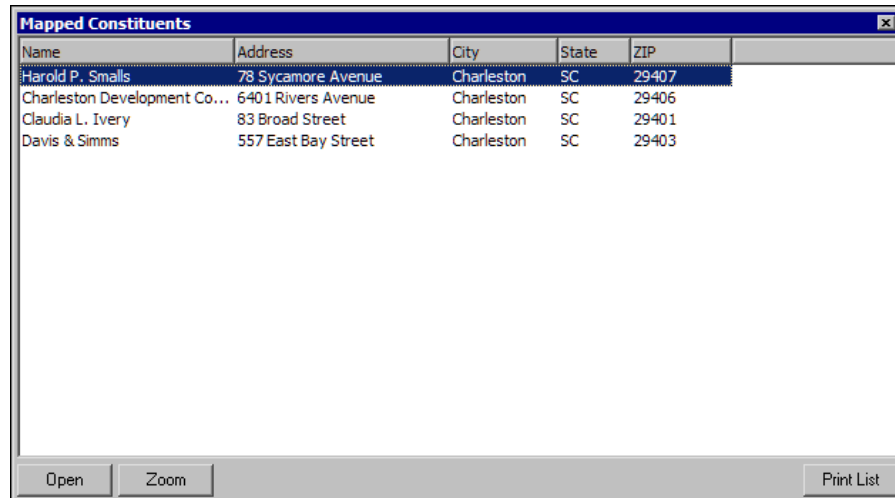
From the MapPoint screen, you can generate lists of all locations or selected areas on a map. From the menu bar, select **Tools, List**, and then **All Locations** or **Selected Areas Only**.

- If you select **All Locations**, the program lists all locations included on the map.
- If you select **Selected Areas Only**, only the specific area selected on the map is included in the list.

The **Selected Areas Only** option is enabled only when you select a subset area on the map. To select the subset area:

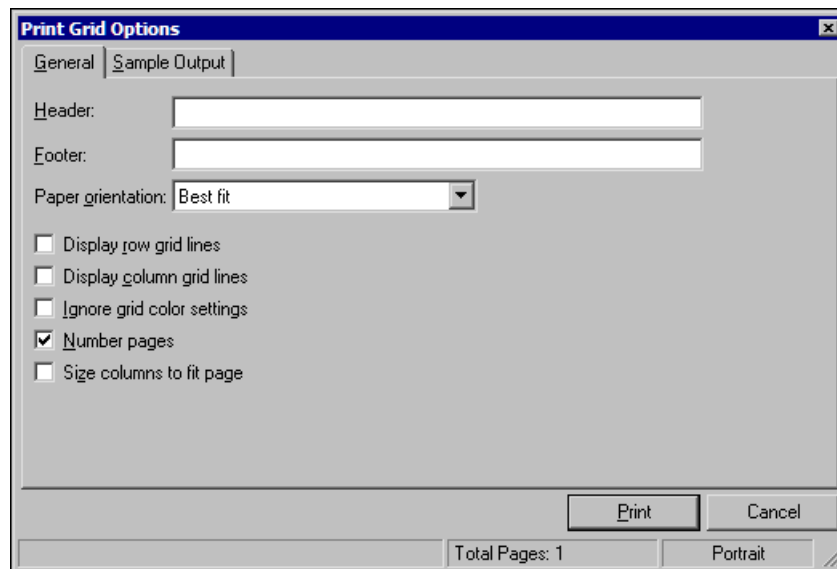
- Put the focus on the border of a drivetime zone before you select the **List** menu option. The program generates a list of the mapped locations inside the drivetime zone.
- Create a radius circle and put the focus on the circle before you select the **List** menu option. The program generates a list of the mapped locations inside the defined radius.

Either option opens the Mapped Constituents screen. This screen provides a list that includes the name, address, and phone information for each mapped location.



Name	Address	City	State	ZIP
Harold P. Smalls	78 Sycamore Avenue	Charleston	SC	29407
Charleston Development Co...	6401 Rivers Avenue	Charleston	SC	29406
Claudia L. Ivery	83 Broad Street	Charleston	SC	29401
Davis & Simms	557 East Bay Street	Charleston	SC	29403

From this list, you can select an address and click **Zoom** to zoom into its location on the map. You can also select an address and click **Open** to open the constituent record in *The Raiser's Edge*. To print the list, click **Print List**. The Print Grid Options screen appears and displays the General tab.



Print Grid Options

General | Sample Output

Header:

Footer:

Paper orientation: Best fit

Display row grid lines

Display column grid lines

Ignore grid color settings

Number pages

Size columns to fit page

Print Cancel

Total Pages: 1 Portrait

On the Print Grid Options screen, you can add a header and footer to your list and select the paper orientation. You can also select whether to display gridlines for rows or columns, ignore grid color settings, number pages, or size columns to fit the page.

To view how your selections appear before you print the list, select the Sample Output tab.

Create Output Query

From the MapPoint screen, you can generate output queries of records included in all locations or selected areas on a map. From the menu bar, select **Tools, Create Output Query**, and then **All Locations** or **Selected Areas Only**.


- If you select **All Locations**, the query includes all records in all locations included on the map.
- If you select **Selected Areas Only**, records from the specific area you select on the map are included in the query.


The **Selected Areas Only** option is enabled only when you select a subset area on the map. To select the subset area:

- Put the focus on the border of a drivetime zone before you select the **List** menu option. The program generates a list of the mapped locations inside the drivetime zone.
- Create a radius circle and put the focus on the circle before you select the **List** menu option. The program generates a list of the mapped locations inside the defined radius.

Either option opens the Save Static Query screen.

On this screen, you can enter a name and description to help identify the query. The query format defaults to “Static” and cannot be changed. You can select whether to allow other users to run or modify the query. You can also select the category in which to save the query. To save the query, click **Save**.

 If you use an individual or organization query to generate the map, the output query is of the same type. Otherwise, the output query is a constituent query.

 For information about *MapPoint* menu items, see the MAPPOINT.chm. You can access the MAPPOINT.chm from the program files (Program\Microsoft MapPoint) or the **Help** menu on *MapPoint* proper menu bar.

Omitted MapPoint Menu Items

Several menu items available in *MapPoint* proper are not available from the MapPoint screen accessed from *The Raiser's Edge*. However, you can access the functions associated with the omitted menu items elsewhere on the screen.

The following list identifies the omitted *MapPoint* function and how to access the function from the MapPoint screen.

- Page Setup – On the MapPoint screen, select **File, Print**. The **Page Setup** button displays at the bottom of the Print screen.
- Export to Excel – On the MapPoint screen, click **Legend and Overview**. The **Legend and Overview** frame opens on the left side of the map. Right-click on **The Raiser's Edge Addresses** (under **Pushpins**). The **Export to Excel** option appears.
- Map Type – On the MapPoint screen, click **Legend and Overview**. The **Legend and Overview** frame opens on the left side of the map. Right-click on **The Raiser's Edge Addresses** (under **Pushpins**). The **Map Type** option appears.
- Data Fields – On the MapPoint screen, click **Legend and Overview**. The **Legend and Overview** frame opens on the left side of the map. Right-click on **The Raiser's Edge Addresses** (under **Pushpins**). The **Data Fields** option appears.
- Format Legend – On the MapPoint screen, click **Legend and Overview**. The **Legend and Overview** frame opens on the left side of the map. Right-click on **The Raiser's Edge Addresses** (under **Pushpins**). The **Format Legend** option appears.
- Schedule Stop - On the MapPoint screen, click **Route Planner**. The **Route Planner** frame opens on the left side of the map. The option appears in this frame.
- More Options - On the MapPoint screen, click **Route Planner**. The **Route Planner** frame opens on the left side of the map. The option appears in this frame.

MapPoint Buttons

When you open *MapPoint* through *The Raiser's Edge*, the toolbar provides options from *The Raiser's Edge* along with several *MapPoint* options. This section provides an overview of the toolbar options. For a detail explanation about each option, see the MapPoint help file. You can access the help file through *Windows Explorer* at \Program Files\Microsoft MapPoint\MAPPOINT.chm.



The **New** button opens a new map in *MapPoint*.



The **Load map from file** button opens the Load Map screen. From this screen, you can select to open any saved map (*.ptm file).



The **Save** button saves the map as a *.ptm file. If the map has not been previously saved, the button opens the Save As screen.



The **Print** button prints a hardcopy of the map.



The **Undo** button reverses the most recent change made to the map.



The **Redo** button replaces changes recently reversed with the **Undo** button.



The **Legend and Overview** button displays a legend to help users understand the map.



The **Territories** button displays options to create territories on your map.



The **Find nearby places** button locates places such as hotels, restaurants, subway stations, near a selected location on your map.



The **Route Planner** button generates a driving route.




The **Directions** button generates a set of driving directions for selected points on your map.



The **Import Data Wizard** button takes you step-by-step through the process to import data from an outside source (i.e., Microsoft *Excel* spreadsheet) into *MapPoint*.



The **List** button generates two types of lists: **All Locations** or **Selected Areas Only**. If you select **All Locations**, the program lists all locations included on the map. If you select **Selected Areas Only**, the list includes only the specific area selected on the map.

 **The Raiser's Edge** integrates with Microsoft's *MapPoint 2006* or later. For instructions about the *MapPoint* options, see the *MapPoint* help file. You can access the help file through *Windows Explorer* at \Program Files\Microsoft MapPoint\MAPPOINT.chm.



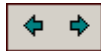
The **Create Output Query** button generates two types of output queries: **All Locations** or **Selected Areas Only**. If you select **All Locations**, the query includes all records included on the map. If you select **Selected Areas Only**, the query includes only records in the area selected on the map.



The **Show Information** button displays or hides information about a selected place or pushpin on the map.



The **Drawing Tool** button displays a toolbar at the bottom of the screen, which includes buttons to create and change tables and shapes on your map.



The **Back** and **Forward** buttons allow you to toggle between various versions of the map. To go to a previous version of the map, click **Back**; to return to the existing version, click **Forward**.



The **Find** button opens the Find screen. From this screen, you can search the map for a specific location.



The **Zoom Out** button zooms out the map, giving you a view of a larger area.



The **Zoom In** button, zooms in the map, giving you a more detailed view of a smaller area.



The **Select** button changes the pointer to a Select tool. You can then select an area of the map. Once an area is selected, you can click inside the area to zoom in.



The **Pan** button allows you to pan the map.

Procedures

With **Mapping**, you can create new maps with data from your database in *The Raiser's Edge*, edit existing map criteria, delete map criteria records, and view maps. These procedures take you step-by-step through the process to work in **Mapping**.

Create a New Map

To create a map from the Mapping page in *The Raiser's Edge*, click **New Map**. The New Mapping Parameters wizard screen appears. Use this wizard to enter the criteria to use to generate the list of addresses to map.

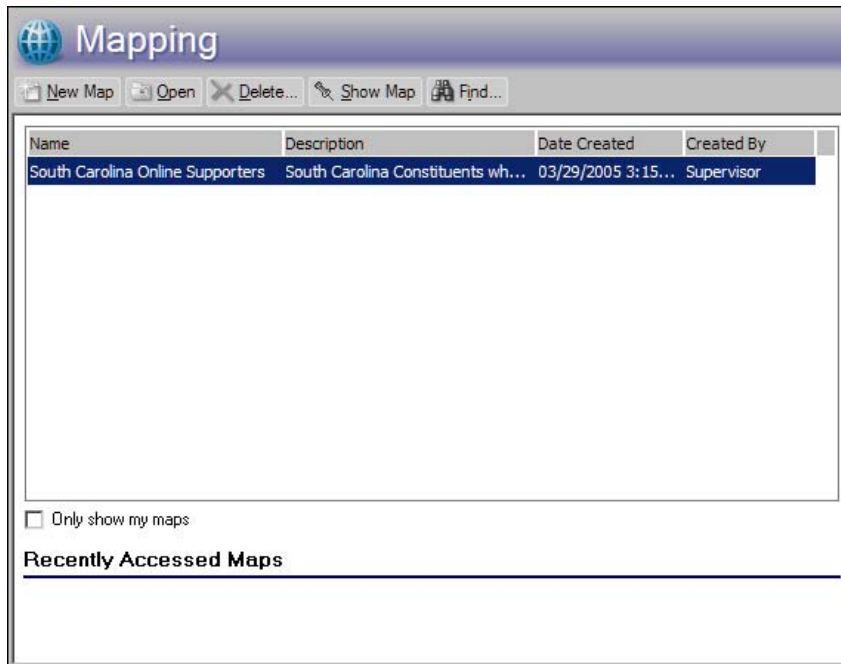
When you click **Show Map** in the Mapping Parameters wizard, *The Raiser's Edge* generates a list of addresses that match the criteria defined by the wizard. The program creates an export file that contains the constituent name and address information and passes this information to *MapPoint*. *MapPoint* then generates a map with markers for each address in the export file.


➤ Create a new map from The Raiser's Edge





A fundraiser for your organization is planning a New Year's Day event in South Carolina. Before he selects a specific location for the event, he wants to see where all of the South Carolina constituents are located so he can select the most central location.

1. From the Raiser's Edge bar, click **Mapping**. The Mapping page appears.

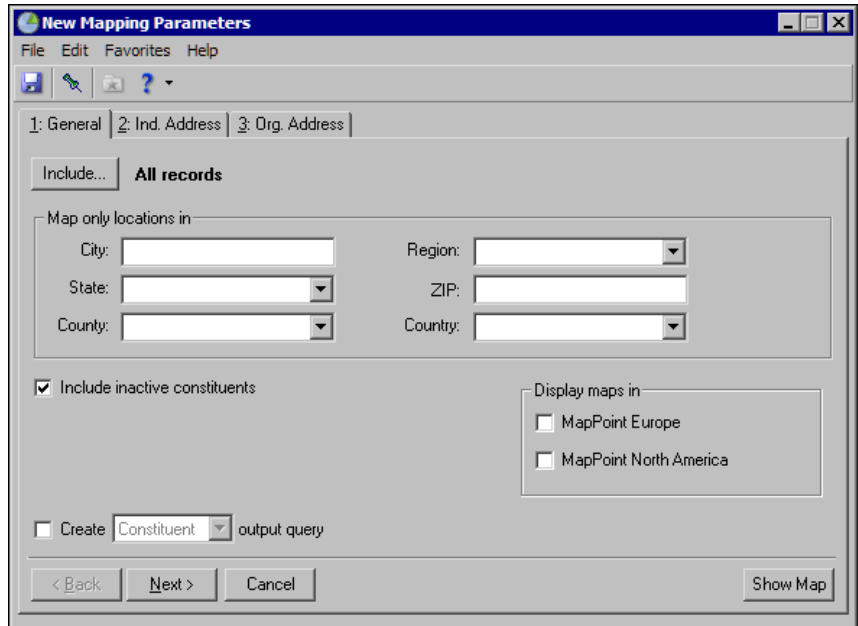


 **The Raiser's Edge** integrates with Microsoft *MapPoint 2006* or later. For instructions for the *MapPoint* options, see the *MapPoint* help file. You can access the help file through *Windows Explorer* at `\Program Files\Microsoft MapPoint\MAPPOINT.chm`.

 *MapPoint* cannot map constituents with P.O. boxes as their address. If such addresses are included in the list passed to *MapPoint*, the Unmatched Address screen appears for each P.O. box address in the list. From this screen, you can select the action for each address. To avoid this situation, we recommend you include a condition in your mapping queries to exclude these addresses from the results.

 For more information about the General tab, see “General Tab” on page 6.

- On the action bar, click **New Map**. The New MapPoint Parameters screen appears and displays the General tab.




- Enter the general criteria of the addresses to map. For this scenario, enter the following information.
 - To search all records in your database for constituents with a South Carolina address, click **Include** and select All Records.
 - Under **Map only locations in**, in the **State** field, select “SC”. Because you want only constituents with a South Carolina address, leave the other fields blank.
 - Because the fundraiser hopes the event will get inactive constituents involved in the organization again, mark **Include inactive constituents**.
 - If you have both the North American and European versions of *MapPoint* installed, the **Display maps in** frame appears. Select which version to use to generate your map. For this scenario, select **MapPoint North America**.
 - To generate a static output query of the constituent records included in the map so you can use the query later in *Mail*, mark **Create output query** and select Constituent.


4. Click **Next**. The Ind. Address tab opens.

5. Select the address information to include in your address list. This information determines the address processing applied to the mapped locations for individual constituents.

For this scenario, enter the following information.

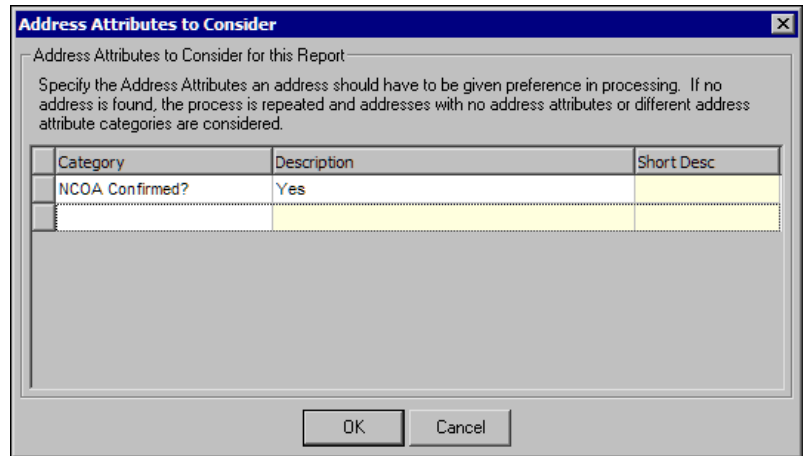
- a. Because the fundraiser may want to contact some constituents included on the map, include both address and phone number information with the map. In the **What would you like to see** field, select “Address & phone”.
- b. Because you selected “Address & phone” in the **What would you like to see** field, select a phone type in the **Phone type** field. For this scenario, to increase your chances of including a phone number for each constituent, select “First telephone found”.
- c. You know a number of your constituents have winter homes in South Carolina. In Step 1, to allow the program to consider seasonal addresses when it generates your map, mark **Consider addresses with seasonal dates as of** and select the as of date you are willing to accept seasonal addresses. For this scenario, you know January 1, 2010 is the date of the event, so select <Specific date>. In the **Date** field, enter “01/01/2010”. The map uses this date to determine whether the seasonal address is valid to include on your map.
- d. In Step 2, specify the address types to consider if a valid seasonal address is not found in Step 1, or if you did not select to include seasonal addresses in the map. For this scenario, consider a constituent’s preferred address first if no seasonal address is found. This address type defaults to the **Addresses to use** box, so there is no need to move it. If a preferred address is not located on the constituent record, you want the first address found used for your map. In the **Addresses** box, select “First address found” and click the single right arrow to move it to the **Addresses to use** box.

 For more information about the Ind. Address tab, see “Ind. Address Tab” on page 7.

 NCOA is an address correction service that works with Blackbaud's **NCOA On-Demand**. For information, see the Address Correction Services chapter in the *Data Enrichment Services Guide*.

- e. In Step 3, use attributes to further refine the address information in your map. For this scenario, to avoid outdated or incorrect addresses, include only National Change of Address (NCOA) confirmed addresses.

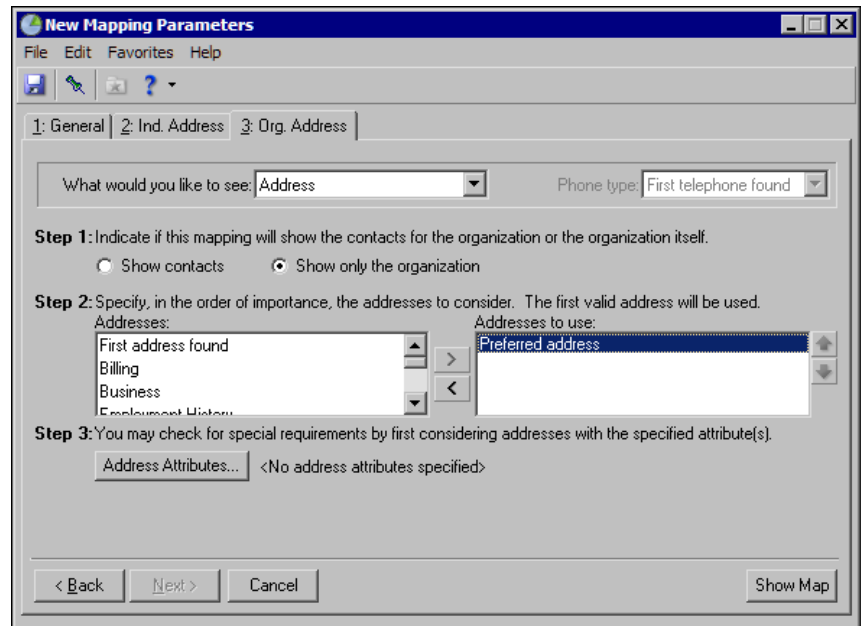
To select this address attribute, click **Address Attributes**. The Address Attributes to Consider screen appears.



Category	Description	Short Desc
NCOA Confirmed?	Yes	


Select “NCOA Confirmed?” in the attribute **Category** column and “Yes” in the **Description** column. This information appears on the Attributes tab of the constituent Address screen. After you enter address attributes, click **OK**. You return to the Ind. Address tab. “Yes” appears next to the **Address Attributes** button.

6. Click **Next**. The Org. Address tab opens.

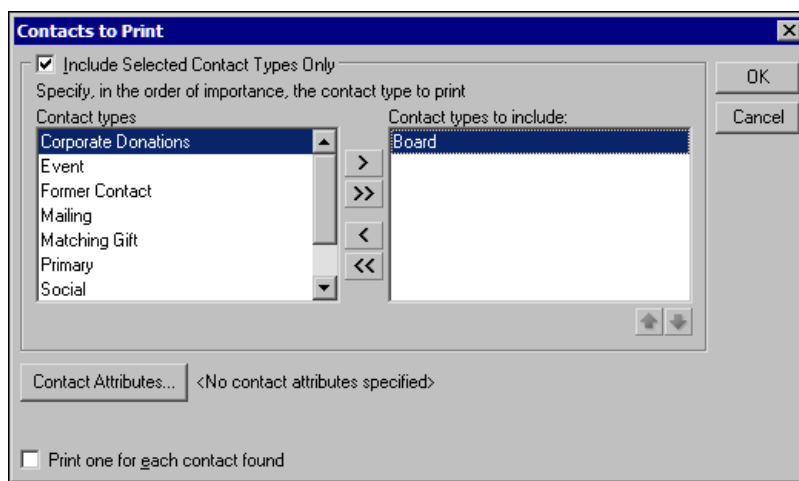


7. Select the address processing to apply to the mapped locations of organization constituents.

For this scenario, enter the following information.

 For more information about the Org. Address tab, see “Org. Address Tab” on page 10.

- a. Because the fundraiser may want to contact some constituents included on the map, include both address and phone number information with the map. In the **What would you like to see** field, select “Address & phone”.
- b. Because you selected “Address & phone” in the **What would you like to see** field, select a phone type in the **Phone type** field. For this scenario, to increase your chances of including a phone number for each constituent, select “First telephone found”.
- c. Select whether to include contact address information or only the organization address information with your map. For this scenario, the fundraiser wants contact information, so select **Show contacts**. The organization name does not appear with your map. The Org. Address tab displays buttons specific to contacts so you can define the contact information to include.
- d. Because you selected to show contacts in your map, in Step 2, identify the contact types to include. Click **Contact Information**. The Contacts to Print screen appears.



The fundraiser has requested you include primary contacts and social contacts only, so mark **Include Selected Contact Types Only**. In the **Contact types** box, select Primary and click the single right arrow to move it to the **Contact types to include** box. Repeat for Social.

After you select all the contact types whose addresses are acceptable for your map, click **OK**. You return to the Org. Address tab. The contact types selected appear next to the **Contact Types to Include** button.


Also, because you selected to show contacts in your map, use attributes to further refine the contact address information included your map. For this scenario, to avoid outdated or incorrect addresses, include only NCOA (National Change of Address) confirmed addresses.

To select address attributes, click **Contact Address Attributes**. The Contact Address Attributes to Consider screen appears.

Category	Description	Short Desc
NCOA Confirmed?	Yes	

Because you want only NCOA confirmed addresses included, select **Only consider Contacts with one of these address attributes** and select the attributes to considered. In the grid, select “NCOA Confirmed?” in the **Category** column and “Yes” in the **Description** column.

After you enter address attributes, click **OK**. You return to the Org. Address tab. “Yes” appears next to the **Address Attributes** button.

 NCOA is an address correction service that works with Blackbaud’s **NCOA On-Demand**. For information, see the Address Correction Services chapter in the *Data Enrichment Services Guide*.

8. To generate your map, click **Show Map**.

If you have not used *MapPoint* as a standalone application before you generate a map through *The Raiser’s Edge*, the Microsoft End User License Agreement screen appears. Click **I agree**. The Online Registration screen appears. Select whether to register now or later.

9. If *MapPoint* cannot find an exact match for an address, a screen appears to ask you to select a match or to skip the address.

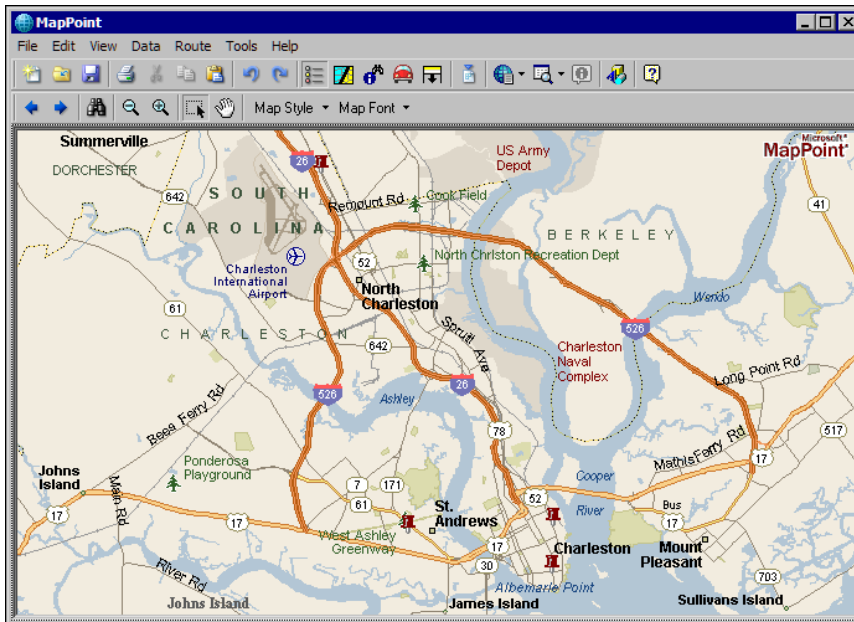
Your record:
Bebe D. Kemp, 1316 Racebrook Street, Charleston 29401, United States

Potential locations for this record:

- Railbrook Rd, Hopkins, SC 29061
- 29401, South Carolina, United States

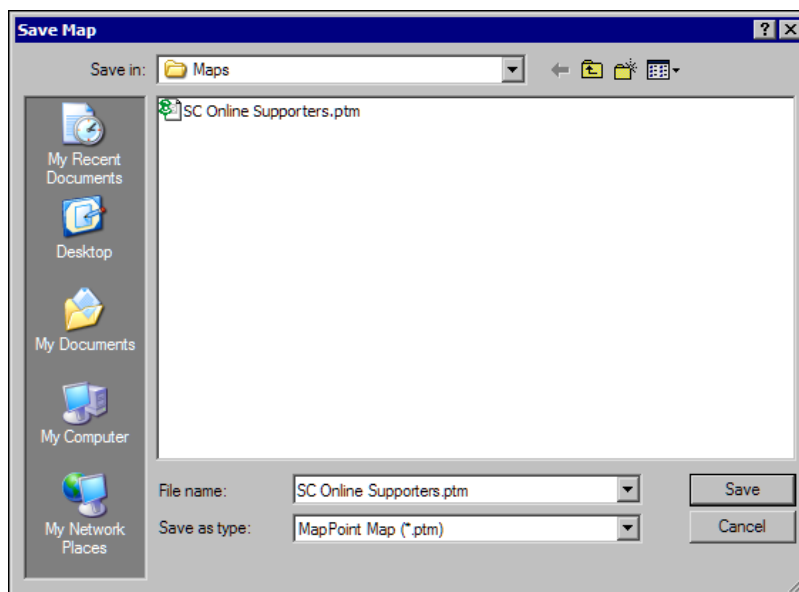
Under **Potential locations for this record**, select the address to use, and click **OK**. To not include the record on the map, click **Skip Record**. To not include any unmatched records on the map, click **Skip All Records**. To cancel the map and return to *The Raiser's Edge*, click **Cancel**.

10. When the program finishes processing the address information, the MapPoint screen appears. Pushpins represent the selected constituents' locations.



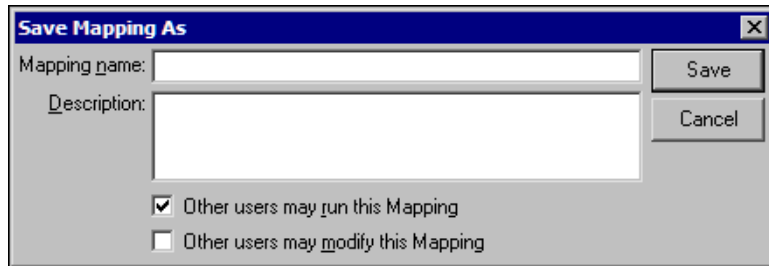
To save the map as a *.ptm file you can open later in *MapPoint* proper:

- a. On the toolbar, click **Save map to file**. The Save Map screen appears.



- b. Map to the location to save the map saved and enter a file name.

- c. Click **Save**. You return to the MapPoint screen.
11. To close the MapPoint screen, click the “X” in the upper right-hand corner. You return to the Mapping Parameters wizard.
12. To save the mapping parameters:
 - a. On the toolbar, click **Save**. The Save Mapping As screen appears.



- b. Enter a unique name and description to help identify the parameters.
- c. Select whether to allow other users to run or modify the mapping parameters.
- d. Click **Save**. You return to the Mapping Parameters wizard.
13. To close the Mapping Parameters wizard, select **File, Close** from the menu bar. You return to the Mapping page.


Edit an Existing Map

To edit a map from the Mapping page in *The Raiser's Edge*, select the map to change and click **Open**. The mapping wizard for the selected map appears so you can change the existing criteria as necessary.

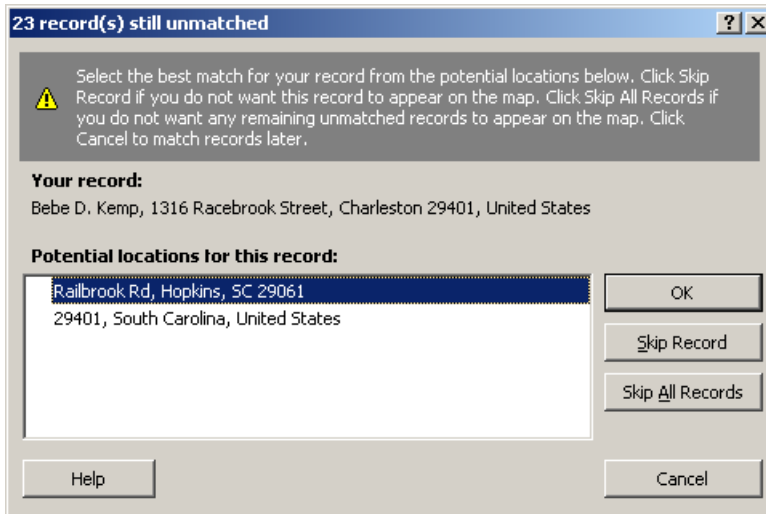
When you click **Show Map**, *The Raiser's Edge* generates an updated list of addresses that match the new defined criteria, updates the export file that contains the constituent names and address information, and passes the information to *MapPoint*. *MapPoint* then generates an updated map with markers for each address in the export file.

➤ Edit an existing map from The Raiser's Edge

1. From the Raiser's Edge bar, click **Mapping**. The Mapping page appears. All existing maps appear in the grid.
2. Select the map with the mapping criteria to edit.
3. On the action bar, click **Open**. The wizard for the selected map appears.
4. Make any necessary changes.
5. To generate your updated map, click **Show Map**.

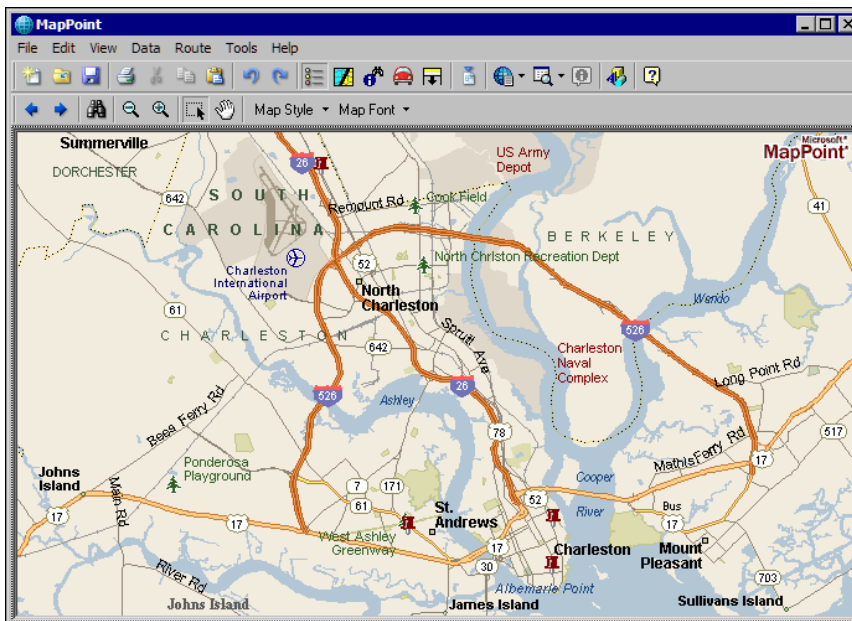
 **The Raiser's Edge** integrates with Microsoft's *MapPoint 2006* or later. For instructions for the *MapPoint* options, see the *MapPoint* help file. You can access the help file through *Windows Explorer* at \Program Files\Microsoft MapPoint\MAPPOINT.chm.

6. If *MapPoint* cannot find an exact match for an address, a screen appears to ask you to select a match or to skip the address.



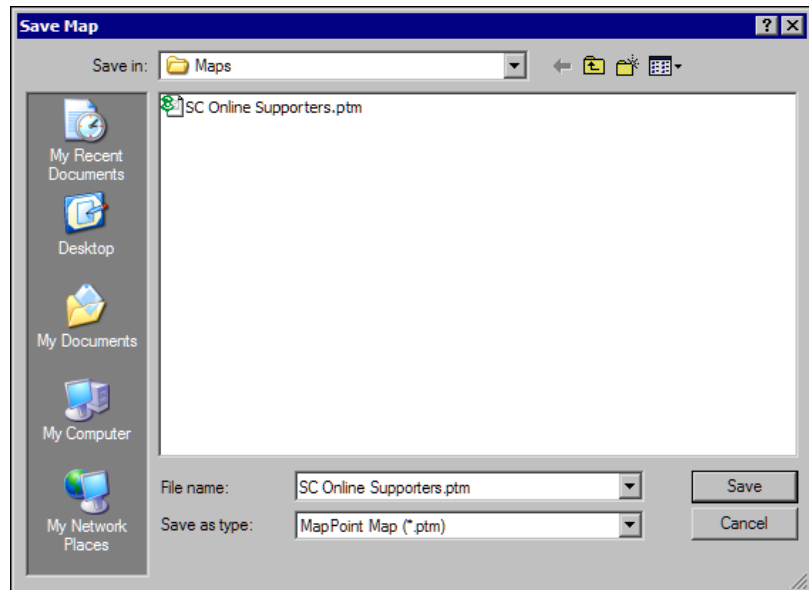
Under **Potential locations for this record**, select the address to use, and click **OK**. To not include the record on the map, click **Skip Record**. To not include any unmatched records on the map, click **Skip All Records**. To cancel the map and return to *The Raiser's Edge*, click **Cancel**.

7. When the program finishes processing the address information, the *MapPoint* screen appears. Pushpins represent the selected constituents' locations.



To save the map as a *.ptm file you can open later in *MapPoint* proper:

- a. On the toolbar, click **Save map to file**. The Save Map screen appears.



- b. Map to the location to save the map saved and enter a file name.
- c. Click **Save**. You return to the MapPoint screen.
8. To close the MapPoint screen, click the “X” in the upper right-hand corner. You return to the Mapping Parameters wizard.
9. To save the updated map criteria, click **Save** on the toolbar.
10. To close the Mapping Parameters wizard, select **File, Close** from the menu bar. You return to the Mapping page.

Delete an Existing Map


To delete a map you no longer need from the Mapping page in *The Raiser’s Edge*, select the map to delete and click **Delete**. *The Raiser’s Edge* removes the map.

➤ Delete an existing map from The Raiser’s Edge

1. From the Raiser’s Edge bar, click **Mapping**. The Mapping page appears. All existing maps appear in the grid.
2. Select the map to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the map.
4. Click **Yes**. You return to the Mapping page.

View an Existing Map

If you do not need to change the mapping wizard but want to view an updated version of a map, you can do so without the mapping wizard.


 **The Raiser’s Edge** integrates with Microsoft’s *MapPoint 2006* or later. For instructions for the *MapPoint* options, see the *MapPoint* help file. You can access the help file through *Windows Explorer* at \Program Files\Microsoft MapPoint\MAPPOINT.chm.

➤ **View an existing map from The Raiser's Edge**

1. From the Raiser's Edge bar, click **Mapping**. The Mapping page appears.
2. Select the map to view.
3. On the action bar, click **Show Map**. The program generates an up-to-date version of the selected map.

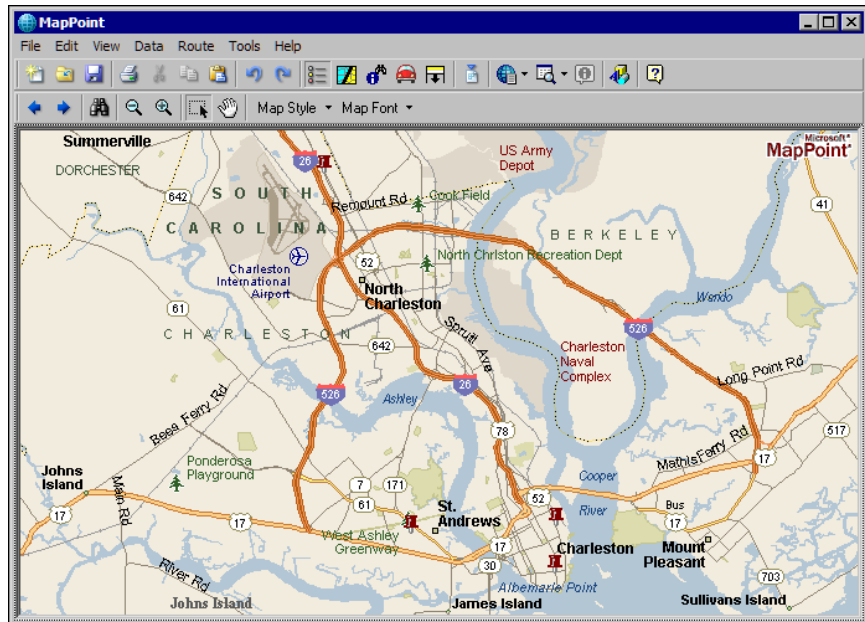
If, on the General tab of the selected map, you mark **Create static query**, the Save static query screen appears.

- a. Enter a unique name and description to help identify the query. The Query format defaults to "Static" and cannot be changed.
 - b. Select whether to allow other users to run or change the query.
 - c. Click **Save**.
4. If *MapPoint* cannot find an exact match for an address, a screen appears to ask you to select a match or to skip the address.

 **The Raiser's Edge** integrates with Microsoft's *MapPoint 2006* or later. For instructions for the *MapPoint* options, see the *MapPoint* help file. You can access the help file through *Windows Explorer* at `\Program Files\Microsoft MapPoint\MAPPOINT.chm`.

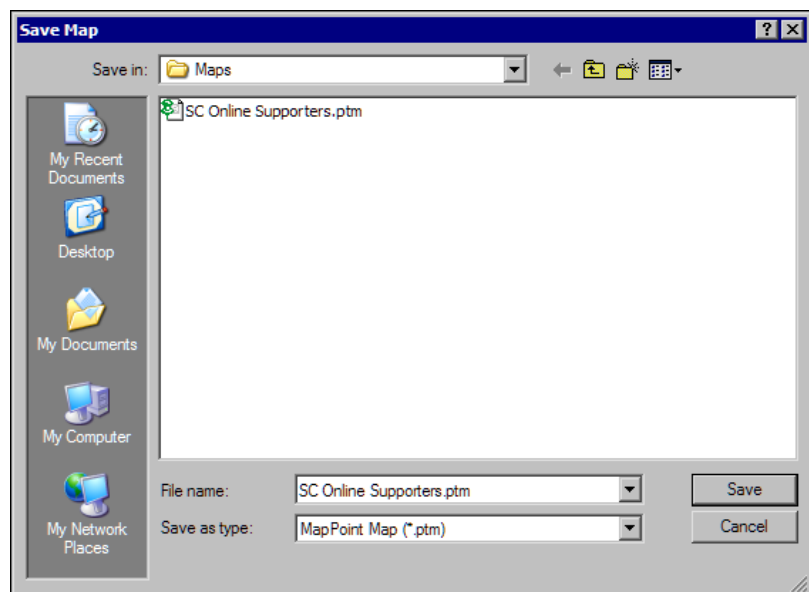
Under **Potential locations for this record**, select the address to use, and click **OK**. To not include the record on the map, click **Skip Record**. To not include any unmatched records on the map, click **Skip All Records**. To cancel the map and return to *The Raiser's Edge*, click **Cancel**.

5. When the program finishes processing the address information, the MapPoint screen appears. Pushpins represent the selected constituents' locations.



To save the map as a *.ptm file you can open later in *MapPoint* proper:

- a. On the toolbar, click **Save map to file**. The Save Map screen appears.



- b. Map to the location to save the map saved and enter a file name.

- c. Click **Save**. You return to the MapPoint screen.
6. To close the MapPoint screen, click the “X” in the upper right-hand corner. You return to the Mapping page.

Locate an Existing Map

If you have a number of saved map parameter files on your Mapping page in *The Raiser's Edge*, click **Find** to quickly locate a specific file.

➤ Locate an existing map in The Raiser's Edge

1. From the Raiser's Edge bar, click **Mapping**. The Mapping page appears.
2. On the action bar, click **Find**. The Find screen appears.




3. In the **Field** field, select whether to search for the map parameter file by its Name, Description, Date Created, or Created By.
4. In the **Find what** field, enter what you want to find. For example, if you select “Created By” in the **Field** field, enter the user name.
5. In the **Match** field, select the type of match to use to locate the file. “Any part of field” locates all files that contain any part of the information entered in the **Find what** field; “Whole field” locates the file that matches all the information entered in the **Find what** field; “Start of field” locates any file that starts with the information entered in the **Find what** field.
6. Click **Find First**. The program locates the first file matching your criteria.
7. If this is not the file you want, click **Find Next** to continue the search.
8. After you complete your search, click **Close**.

Export Mapping List

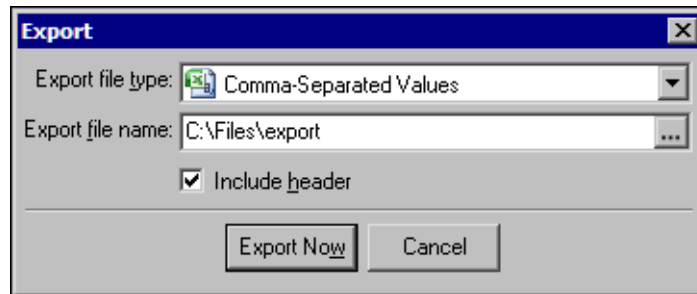
To use mapping information in another software application, you can export the map parameter file. For example, you may want to share your map information with someone who does not have *The Raiser's Edge*. With the export function, you can export your data into a shared application. When you export a map, you send the information to the database of another software application as a data file. To export data to Microsoft *Excel*, see “Export Mapping List to Excel” on page 34.

➤ Export data used in MapPoint

1. From the Raiser's Edge bar, click **Mapping**. The Mapping page appears.

 **The Raiser's Edge** integrates with Microsoft's *MapPoint 2006* or later. For instructions for the *MapPoint* options, see the *MapPoint* help file. You can access the help file through *Windows Explorer* at \Program Files\Microsoft MapPoint\MapPoint\MAPPOINT.chm.

- Right-click on the map to export and select **Export Mapping List Grid**. The Export screen appears.



- In the **Export file type** field, select an export format. For example, to use the data in Microsoft *Access*, select “Microsoft Access 2000 Database” to format the data for use in *Access*.
- In the **Export file name** field, browse to where to save the export file.
- Click **Export Now**. The program exports the parameter criteria to an file. You return to the Mapping page. The new export file is saved in the selected location.

You can now open the outside application and access the mapping data.

Export Mapping List to Excel

To use mapping information in Microsoft *Excel*, you can export the map parameter file directly to the outside application. The information included in the export depends on from where you run the export.

Export a Mapping List from The Raiser’s Edge

If you execute the export from the Mapping page in *The Raiser’s Edge*, the export option appears only if the map of the selected parameter file is focused on either a radius border or a drivetime zone border. In addition, information exported to *Excel* includes only the addresses within the area outlined by the radius or drivetime zone border.


On the Mapping page, right-click on the map to export and select **Export Mapping List Grid to Excel**. The program runs the export. When the export is complete, Microsoft *Excel* opens and displays the mapping parameter data.

Export a Mapping List from the MapPoint Screen

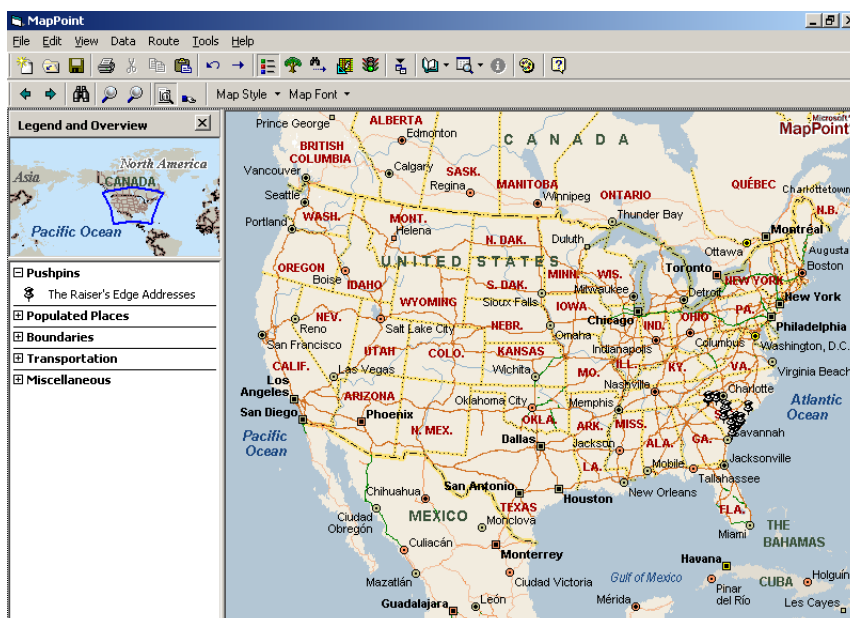
If you execute the export from the MapPoint screen generated from *The Raiser’s Edge*, and the map does not have a drivetime zone or radius border selected, the exported data includes all locations mapped. If you do have the focus on a drivetime zone or radius border, the export includes only the constituents included in the drivetime zone or radius border.

➤ Export MapPoint address data from the MapPoint screen to Microsoft Excel

- Generate your map in *The Raiser’s Edge*. The MapPoint screen appears.

 The export option appears only if the selected map is focused on either a radius border or a drivetime zone border. The set of addresses exported to *Excel* include only addresses within the area outlined by the applicable radius or drivetime zone border.


- On the toolbar, click **Legend and Overview**. The Legend and Overview pane appears on the left side of the screen.



- Under **Pushpins**, right-click on **The Raiser's Edge Addresses** and select **Export to Excel**. The program runs the export. When the export is complete, Microsoft *Excel* opens and displays the mapping parameter data.

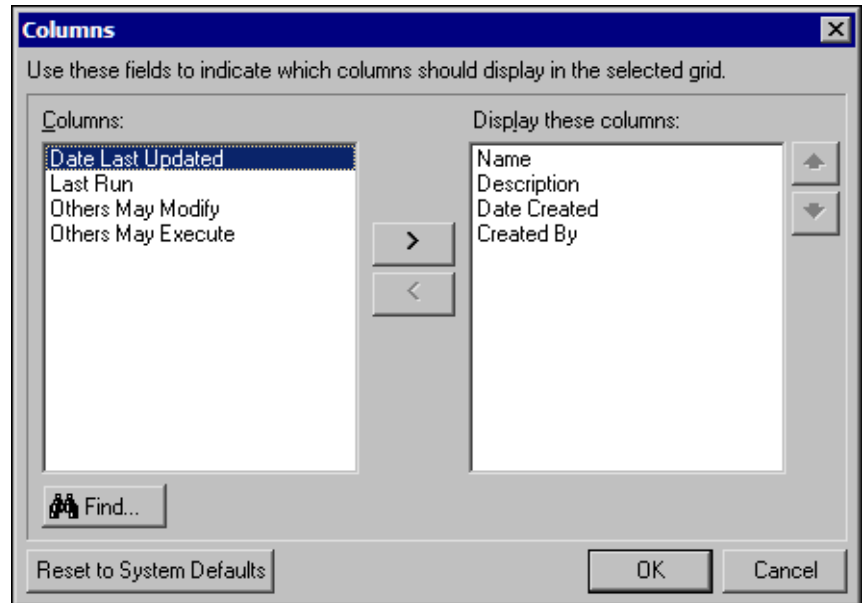
Columns Available in Mapping

You can edit and rearrange columns included in the Mapping page grid.

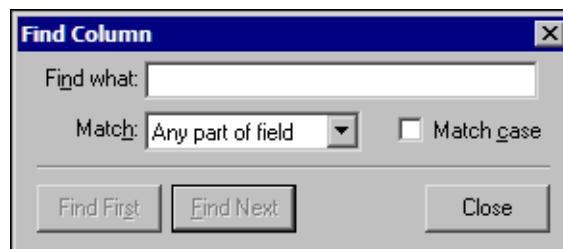
 For information about how to generate a map in *The Raiser's Edge*, see "Create a new map from The Raiser's Edge" on page 21.

➤ **Manage the columns on the Mapping page**

1. On the Mapping page, right-click in the grid and select **Columns**. The Columns screen appears.



2. In the **Columns** box, all available columns appear. In the **Display these columns** box, all columns that currently appear on the Mapping page appear. To move column names between the two boxes, click the arrow buttons.
3. To locate a specific column in the **Columns** box:
 - a. Click **Find**. The Find screen appears.

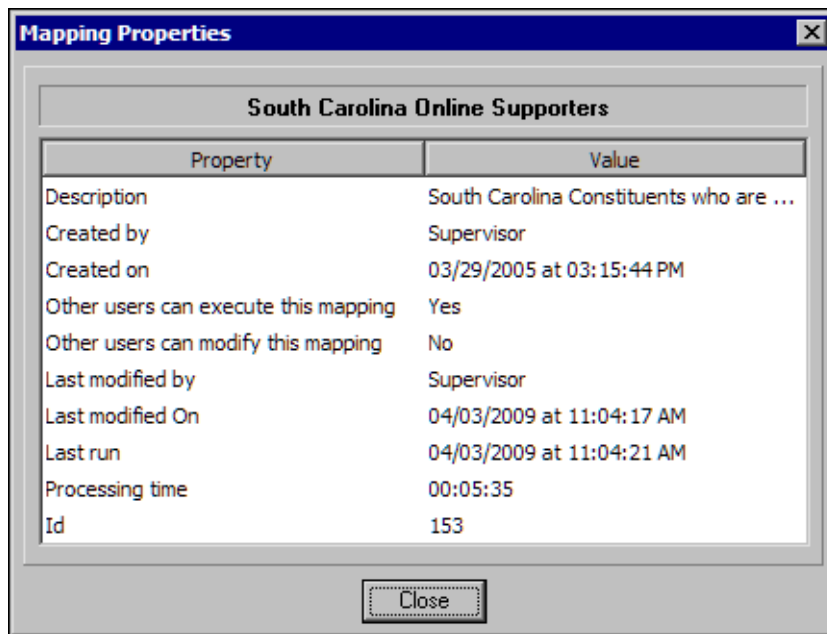


- b. In the **Find what** field, enter the column name to locate.
 - c. In the **Match** field, select whether to match any part of field, the whole field, or the start of the field.
 - d. Click **Find First**. If the program fails to locate the correct column, click **Find Next**.
 - e. To return to the Columns screen, click **Close**.
4. To arrange the column names in the **Display these columns** box, click the up and down arrows. The columns appear on the Mapping page based on the arrangement in the **Display these columns** box. For example, if “Name” is the first column in the **Display these columns** box, **Name** is the first column on the Mapping page.

5. After you arrange the columns, click **OK**. Your new column arrangement displays.

Map Properties

You can view property information about a selected map without the mapping wizard. On the Mapping page, right-click on the map with property information to view and select **Properties**. The Report Properties screen appears.



To close this screen and return to the Mapping page, click **Close**.



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