# Using the Raiser's Edge Export Wizard

Before you begin you will need to download and install the Raiser's Edge Export Wizard. The link below will bring you to the most up-to-date version and will provide instructions on how to install. If you have not logged into Blackbaud.com before please click on the "Can't access your account?" link and follow the prompts to create a new account. **If you have installed the Export Wizard previously please choose File then "Check for updates" to ensure you have the most up to date version.**

https://kb.blackbaud.com/articles/Article/59627

Once the Raiser's Edge Export Wizard has been installed please follow the instructions below.

• Right click on the RE7 Export Wizard shortcut icon and then choose 'Run as administrator'.
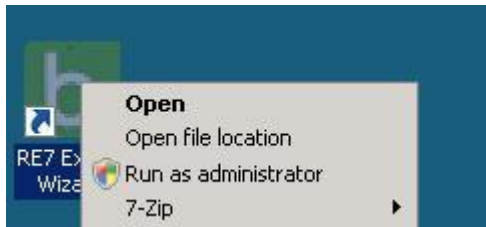

• Once the program has started:
  o Choose the 'donorCentrics' radial button under *Select a Service*.
  o Select your RE7 database from the dropdown menu under *Select a Database to Export*.
  o Ensure 'Use Last Configuration' is checked and 'Include All Records' is selected under *Select a Group*.
 o Click Next to continue.
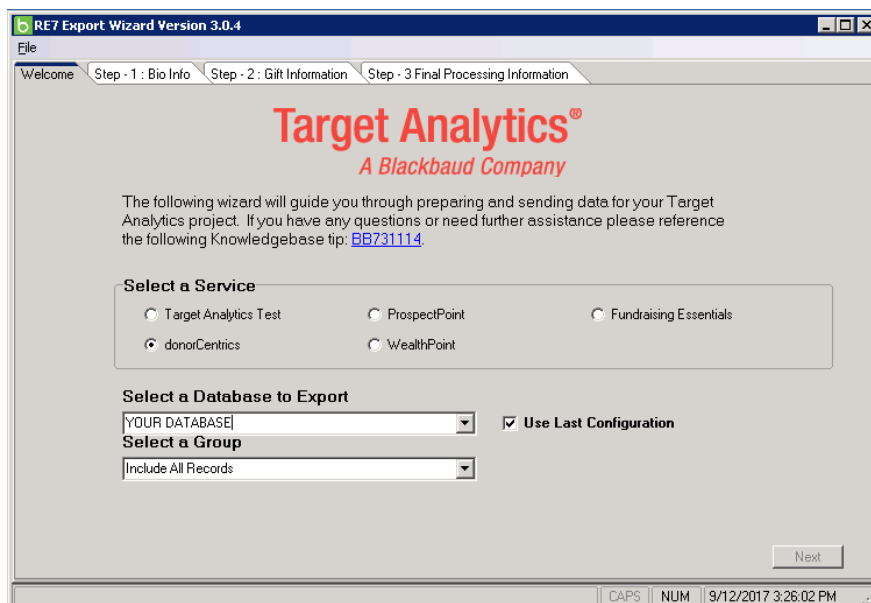
- At this point you will see numerous tabs that will help create your Biographical Information file.
  - For the first three tabs, you will need to ensure that any pertinent information for Home Address, Home Phone and Email Address is moved from the left-hand side (*List of Available Addresses*) to the right-hand side (*Hierarchy of Addresses*) by either dragging and dropping or double clicking. You will need to order the field value types based on relevance/accuracy (the most relevant/accurate field values should be at the top of the Hierarchy). The RE Export Wizard will export the field values based on this Hierarchy.
  - In the example below the client uses the Home field built into RE7 but also uses *Summer Home*, *Additional Home*, *Mailing Address, etc.* to store address information. The same rules apply to the 'Home Phone' and 'Email Address' tabs. The RE Export Wizard will first look for a *Home* address value for export; if none exists for a specific Biographical record, it will then look for a *Summer Home* address value for export. It will repeat this process until it has checked all field value types listed in the Hierarchy.
  - To move between tabs, you can either click on the tab or click on Next at the bottom of the screen.
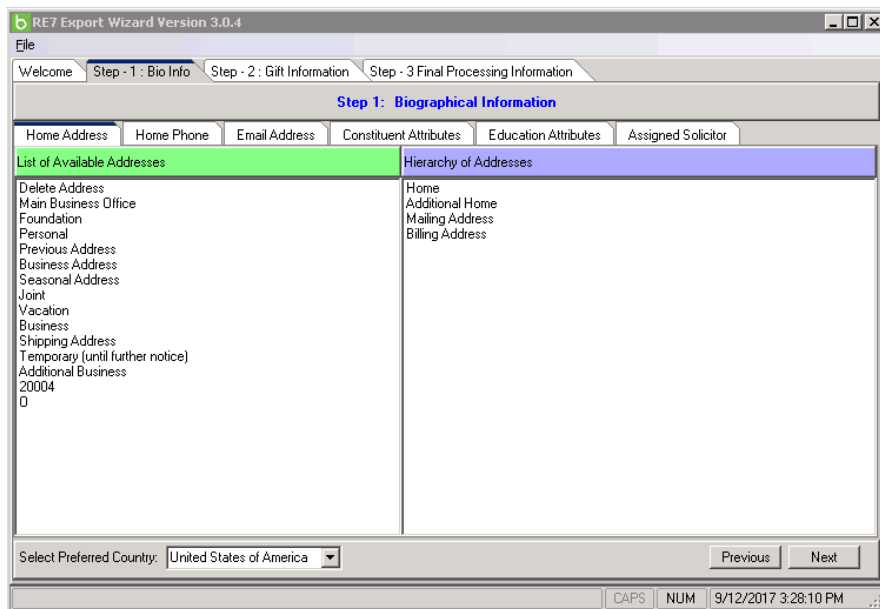

- The 'Constituent Attributes' tab has numerous fields that Target Analytics does not necessarily need. As you can see in the example on Page 3, there are data points like *Board Committee*, *Data Entry Method*, and *Foundation Type*. We are generally only looking for the following items from this tab.
  - **Solicitation Restrictions** – If you use the solicitation fields built into RE7 then you will not see these types fields under the Constituent Attributes. If you have custom built solicitation fields then you will find them here. Please ensure they are checked so that they are extracted.
  - **Deceased Information** – If you use the deceased field built into RE7 then you will not see this field under Constituent Attributes. If you have a custom built deceased field then you will find it here. Please ensure this field is checked so that they are extracted.
  - **Inactive Information** – If you use the inactive field built into RE7 then you will not see this field under Constituent Attributes. If you have a custom built inactive field then you will find it here. Please ensure this field is checked so that they are extracted.
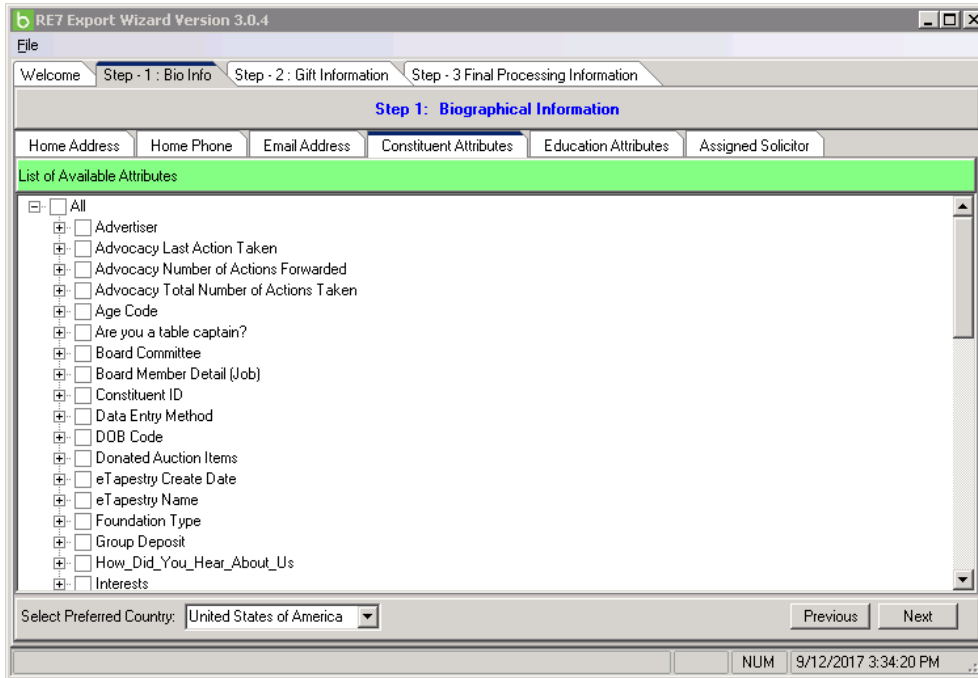
- If you are Higher Ed client please choose *All* under the 'Education Attributes' tab and move to the 'Assigned Solicitor' tab. If you are not a Higher Ed client please leave this blank and click the 'Next' button.
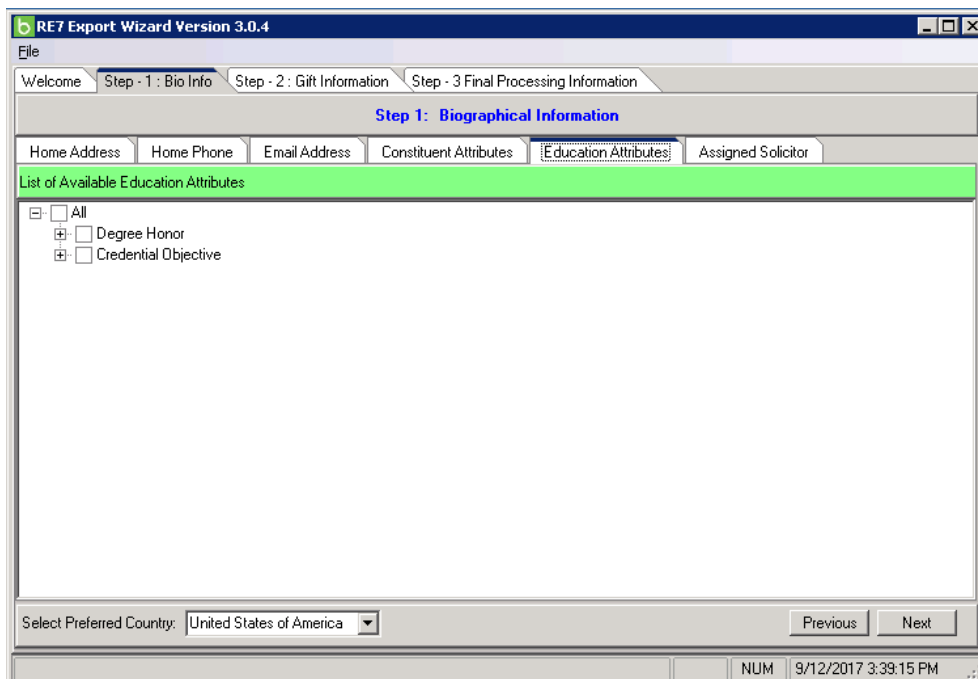
- You will not see any fields chosen under the *Hierarchy for Solicitor Field* on the 'Assigned Solicitor' Tab. This is the correct set up as the Export Wizard will pull *Assigned Solicitor* information from the back end if it is used. Please do not make any changes to this tab.
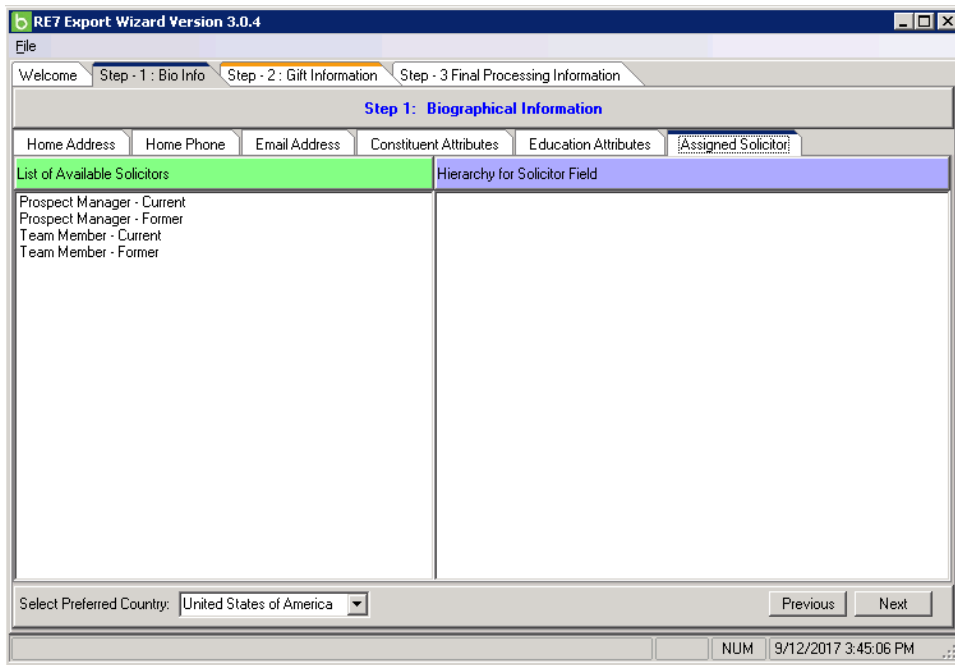
- At this point you can click the 'Next' button or the 'Step - 2: Gift Information' tab at the top of the Export Wizard. From this tab, you do not need to make any selections unless specifically requested by your Project Coordinator. You may now click the 'Next' button or the 'Step – 3: Final Processing Information' tab to move forward.
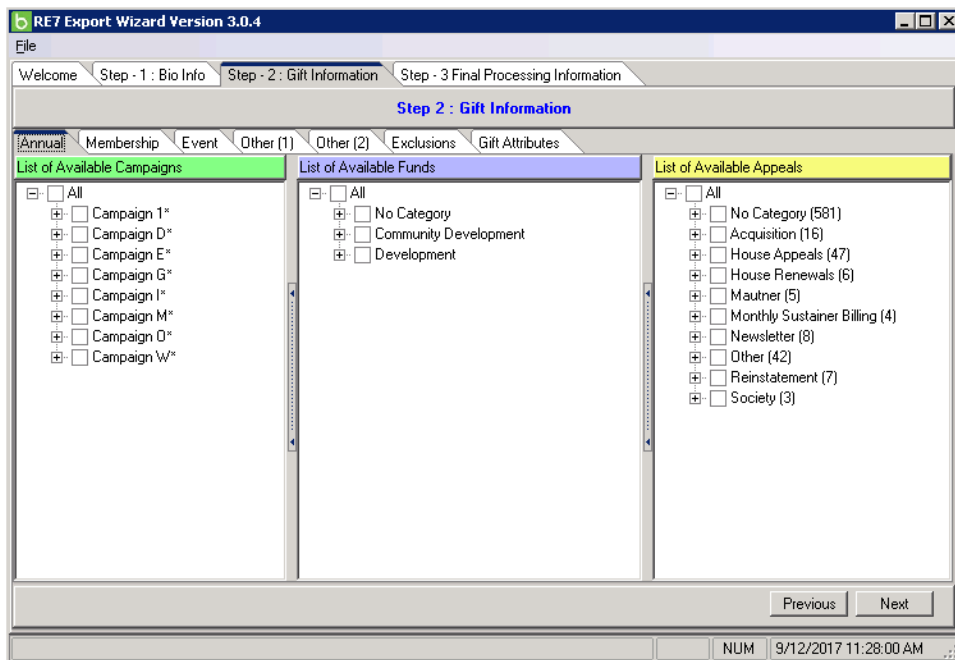
- In the 'Step 3 - Final Processing Information' tab please do the following:
  - o **Designate a 'Folder to place output files in'** – Please browse to a location where you know you can create files. We suggest creating the files on your "Desktop" and then moving them to a secure location after the export has completed.
  - o **FTP Info –** These fields can remain blank as the RE Export Wizard can no longer automatically upload exported data to Target Analytics due to changes to organizational network protocols. Please refer to the manual file transfer instructions (using FileZilla) your Project Coordinator or the Target Analytics FTP Support team provided in the project data request materials—these outline the steps that will need to be taken to submit the ZIP file created by the RE Export Wizard which contains the exported data files.
  - o **You may now click the 'Process' button to initiate the export.** Click the 'No' button when the "FTP information is incomplete! Do you wish to transfer the file when the process is complete?" prompt appears. Please refer to the manual file transfer instructions (using FileZilla) your Project Coordinator or the Target Analytics FTP Support team provided in the project data request materials.

Things to keep in mind:

- Numerous files are created when you run the Export Wizard. The most important—and the only one that needs to be submitted to Target Analytics—is the ZIP file which contains all of the exported data files.

- To unzip the ZIP file created by the RE Export Wizard you will need a password. Please email your Project Coordinator and the Target Analytics FTP Support team (ftpsupport@blackbaud.com) to request this password.

- If you chose to "Use Last Configuration" the next time you run the RE Export Wizard you will be able to skip to 'Step 3 – Final Processing Information' tab and click the 'Process' button as all previous settings used (including where the ZIP file will be saved) are entered in the 'Step 1' and 'Step 2' tabs.

For support with the Raiser's Edge Export Wizard please contact:

1-800-468-8996
Option 1 → Target Analytics Support

or

Chat with a Support Analyst
https://www.blackbaud.com/support/needhelp.aspx