The Raiser's Edge™

7.94 New Features Guide

022315

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RE7Enterprise-Update-2015

New Features and Enhancements

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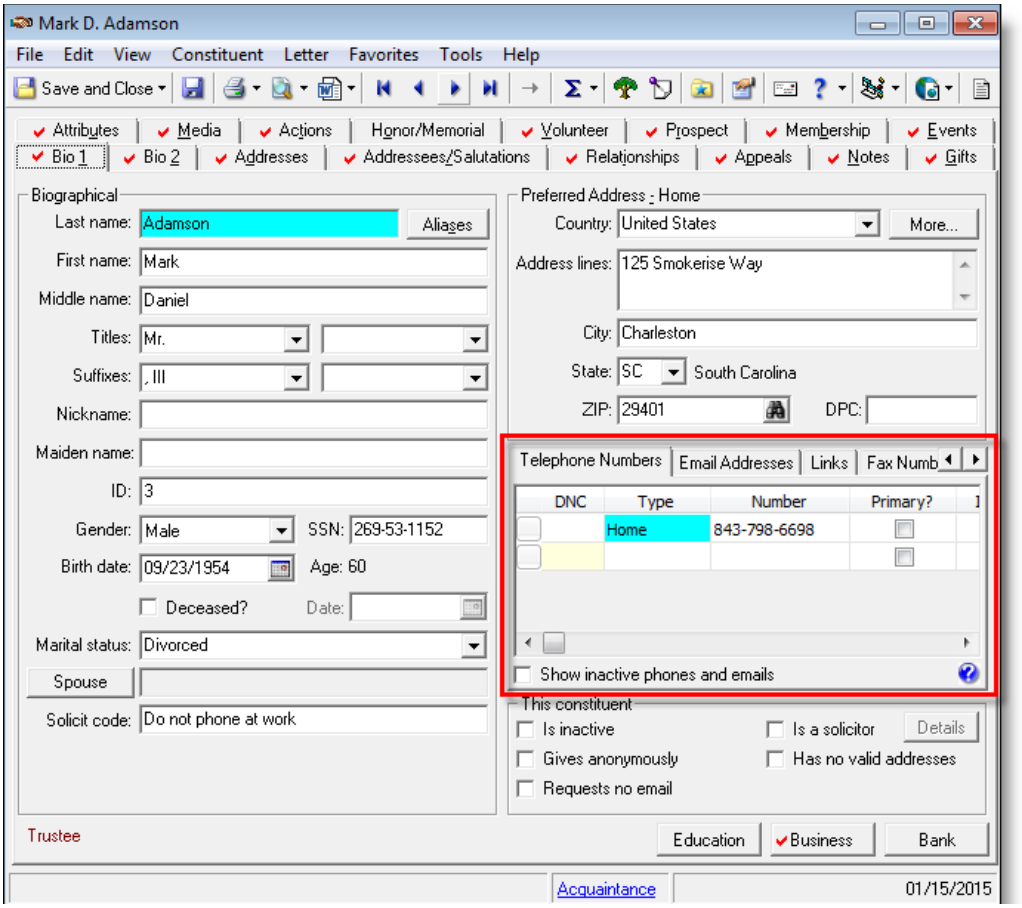
The Raiser's Edge Enterprise 7.94 includes changes to addresses, phones numbers, and email addresses on constituent records, as well as a few enhancements to *Dashboard* and pivot reports. This chapter includes an overview of all the new features in ***The Raiser's Edge***.

Constituent Records

Phone numbers and email addresses on the constituent record are no longer part of the address block. Phone numbers, email addresses, Web links, fax numbers, and any other contact numbers are now in a tabbed grid below the address block. The same grid appears on relationship records, participant records for events, and anywhere else address and phone information are stored.



Any phone numbers and email addresses that were associated with an addresses that was marked as anything other than "Preferred" on the constituent record are now considered inactive. To display these phone numbers and email addresses, select **Show inactive phones and emails**.

Phone and Email Information in Relationships

With the way phone and email information is stored and shared in ***The Raiser's Edge 7.94***, it is important to understand how this all works in constituent relationships.

- **Individual to Individual Relationships**
  - You can only edit phone information from the constituent record, and not the relationship record. Changes will persist to the relationship record, but will appear in yellow to indicate they cannot be changed.
  - You can, however, edit phone information from the relationship record for non-constituents, such as a spouse record. If you promote the non-constituent to a full constituent, the phone information becomes locked on the relationship record.
  - When you add or edit a non-constituent's phone information, it will follow them to any new relationships that are created.
  - These same rules apply to organization to organization constituent relationships.
- **Individual to Organization Relationships**
  - From an individual's organization relationship record, you can add or edit phone information for the individual, such as to add an office phone number, but you cannot edit phone information for the organization.
  - From an organization's individual relationship record, you cannot edit the individual's phone information.
  - As a general rule, you can only change phone information from the source record. For example, if you added a phone number for an individual in this type of relationship, you can only edit that information from the individual's constituent record, and not the organization's record or the relationship record.
- **Other Phone and Email Information**
  - Since you can no longer have relationship-specific phone information, all phone numbers listed on individual to individual relationships in ***The Raiser's Edge 7.93*** now appear on the Bio 1 tab of the main constituent's record. For example, if Mr. Smith has a spousal relationship with Mrs. Smith, and they had a relationship-specific phone number that was added from the Relationships tab of Mr. Smith's record, that phone number would appear on Mr. Smith's constituent record after the upgrade to ***The Raiser's Edge 7.94***.

Phone and Email Data Concerns After Upgrading

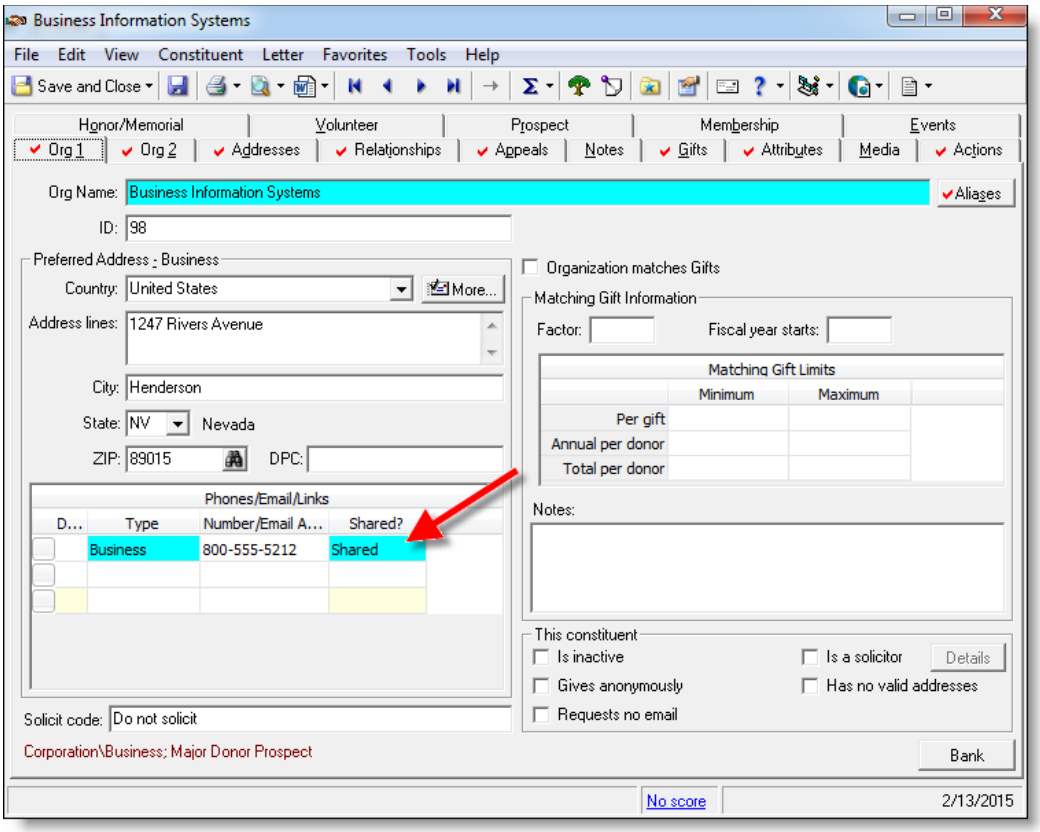
Due to the removal of the concept of shared phone numbers and email addresses in ***The Raiser's Edge***, you may find that your phone and email information appears differently than you would expect. For example, you may open an organization's relationship record with an individual, and notice replicated phone numbers. This is not an error, or representative of bad data. Rather, it is a result of the new rules that apply to phone and email sharing, as well as relationship functionality.

Replicated Phone Numbers on Individual to Organization Relationships

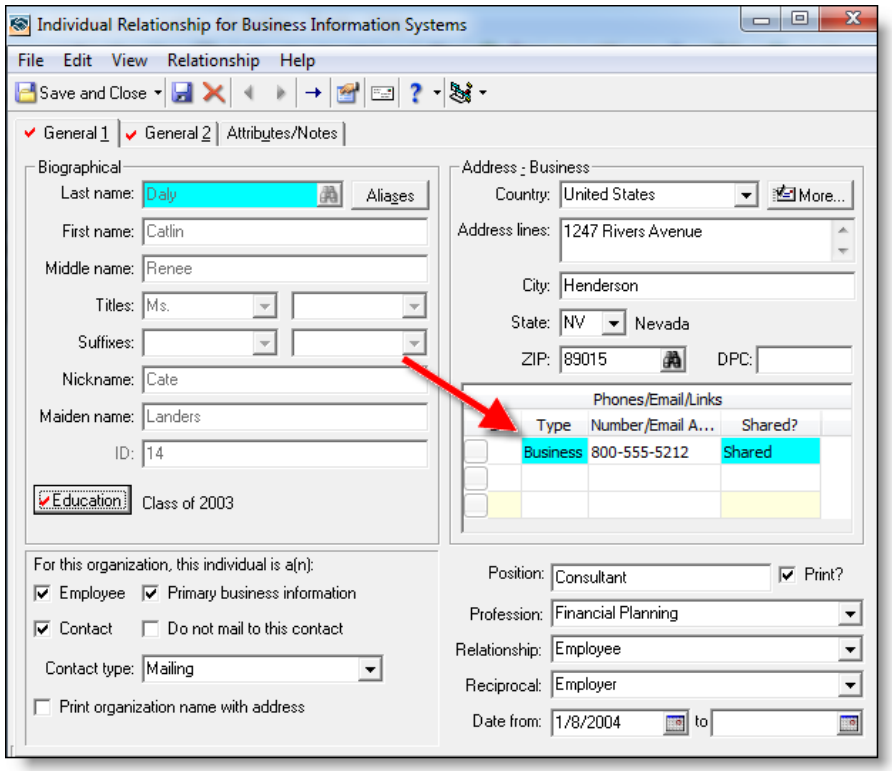
You may see replicated phone numbers on your individual to organization relationship records. This is the result of the removal of phone sharing that previously existed in ***The Raiser's Edge***. Any phone numbers or email addresses that were marked as **Shared** in ***7.93***, will now appear on relationship records for individual to organization relationships. Use the scenario below for reference:

Your constituent, Business Information Systems, has an employee named Catlin R. Daly. Because Catlin is an employee of theirs, they have a relationship in ***The Raiser's Edge***.

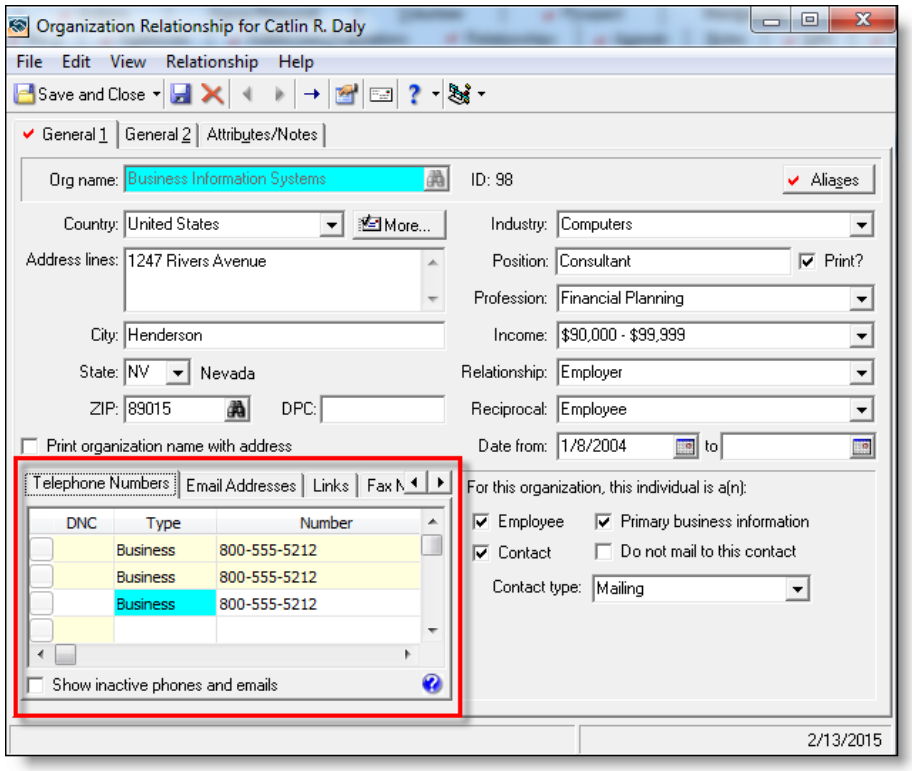
In ***7.93*** Business Information Systems has a shared phone number. See their record in the screenshot below.



As you can see, the phone number is marked as **Shared**. Because the number is marked as **Shared**, it is reflected as such on their relationship record, shown below.



When you upgrade to ***The Raiser's Edge 7.94***, that phone number will now appear as replicated three times on that same relationship record. Here's what it looks like:

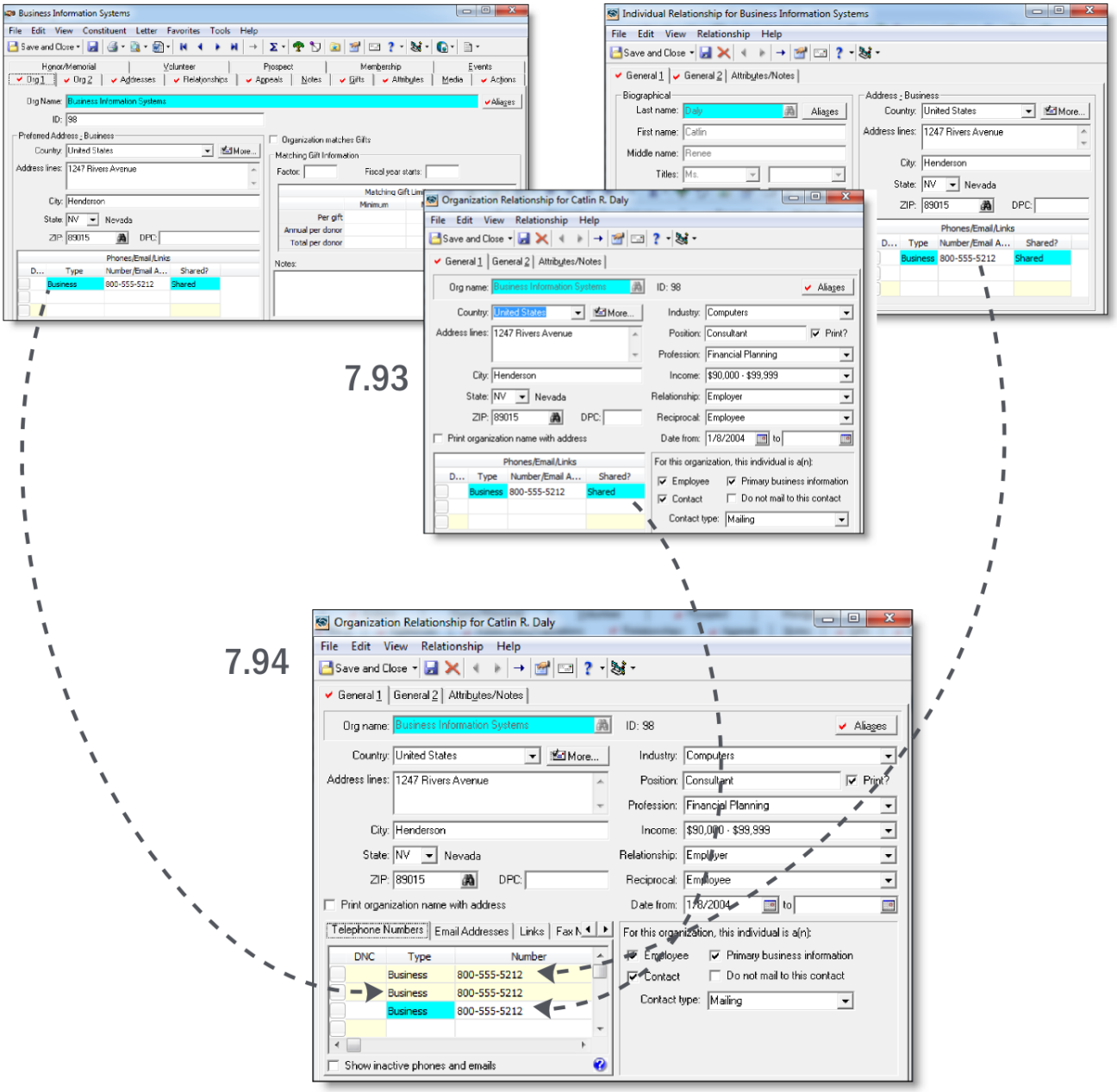


This is happening because the phone number was marked as **Shared** in ***7.93***, and that concept has been removed in ***7.94***.

The first phone number in the list represents Business Information System's constituent-level phone number. The second phone number in the list represents Business Information System's relationship-specific phone number to Catlin. The third phone number in the list represents Caitlin's relationship-specific phone number with Business Information Systems, and is editable because you are viewing this from her point of view.

To clean this replicated information, you can manually delete the phone number on Caitlin's relationship record, and then do the same from Business Information System's relationship record.

Here's a quick diagram to summarize where the information came from in ***7.93***, and where it is in ***7.94***.

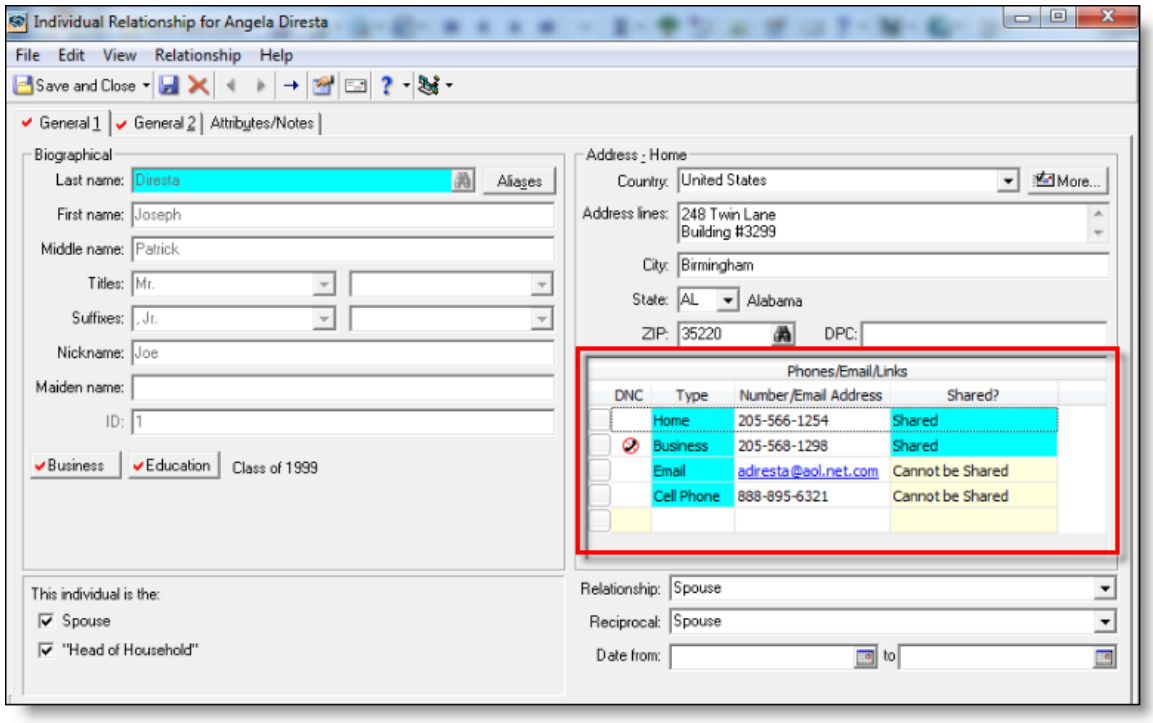


Multiple Phone Types on the Bio 1 Tab

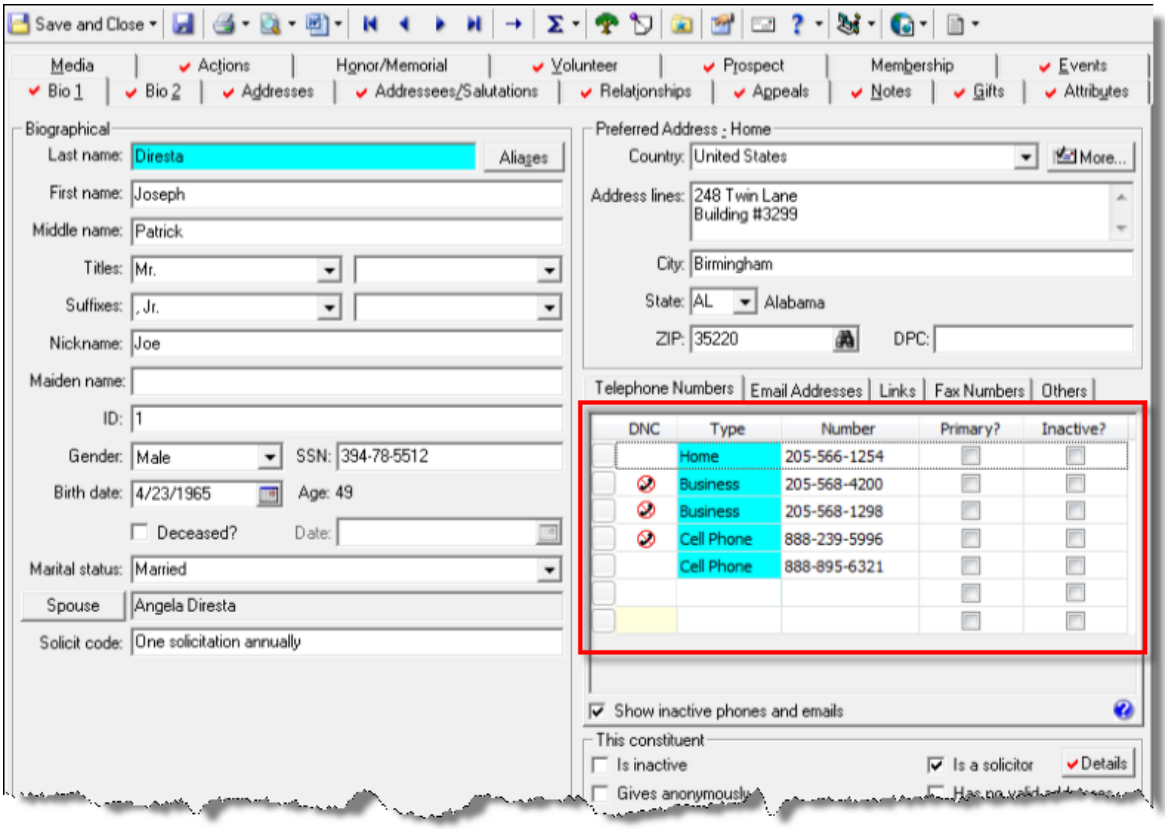
You may see multiple phone types and phone numbers on an individual constituent's Bio 1 tab in ***The Raiser's Edge 7.94*** that did not exist in ***7.93***. This is because there is no longer the concept of relationship-specific phone numbers in individual to individual constituent relationships.

Use the example below as a reference for this scenario.

In ***The Raiser's Edge 7.93***, Angela Diresta has an individual constituent relationship with Joseph Diresta. Their relationship contains multiple relationship-specific phone numbers.



Since you can no longer have relationship-specific phone numbers in ***The Raiser's Edge 7.94***, the phone numbers and email addresses from Angela's relationship record with Joseph are moved to the Bio 1 tab of Joseph's record.



In the above screen shot, you see multiple Business phones and Cell Phones. That is because one Business Phone and one Cell Phone were already on Joseph's record. The other two came from his relationship-specific phone numbers with Angela in ***7.93***.

As a general rule, any relationship-specific phone numbers for individual to individual relationships in ***7.93***, will be moved to the Bio 1 tab of the reciprocal constituent in ***7.94***.

Duplicate Cleaning Performed by The Raiser's Edge

In ***The Raiser's Edge 7.94***, phone numbers and email addresses are no longer stored on the Addresses tab of the constituent record. Instead, all phone numbers and email addresses are moved to the Bio 1 tab. All phone numbers and emails associated with alternate addresses are marked as inactive.

During this move, any phone numbers and email addresses that have the same phone or email type, and the same phone number and email address, are removed to alleviate duplicate information. The same applies to any relationship-specific phone numbers or email addresses in individual to individual relationships; when that information is moved to the Bio 1 tab of the appropriate constituent, duplicates are removed.

Mark Phones Primary Plug-In

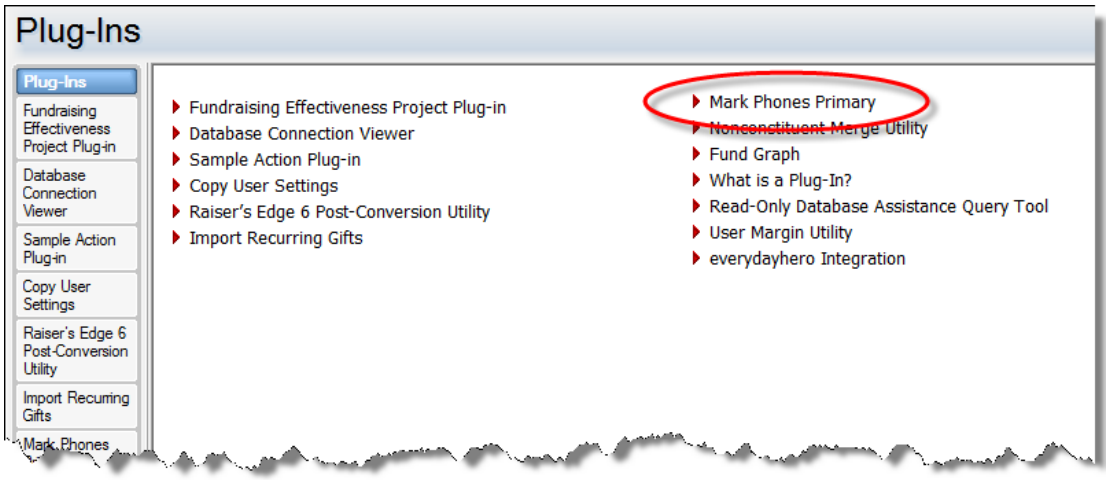
You can use the Mark Phones Primary plug-in to automatically mark or unmark all phone numbers of a specified phone type as Primary, based on a query.

Since all phone information associated with alternate addresses is marked as inactive in ***7.94***, you can also use this plug-in to mark those numbers as active again.

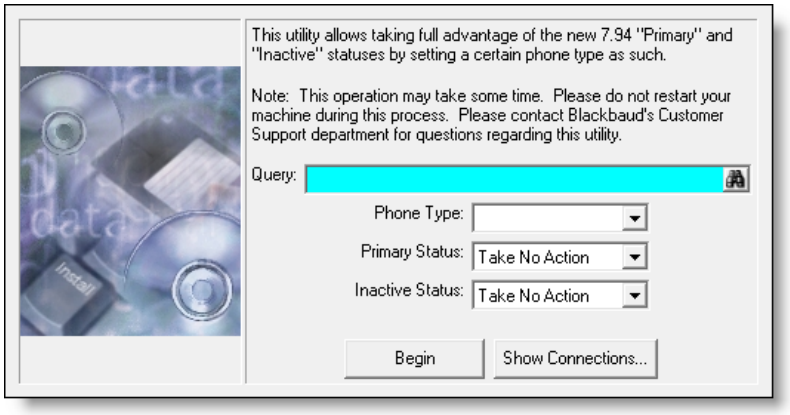
The Mark Phones Primary plug-in is automatically installed when you update to ***The Raiser's Edge 7.94***.

- **Mark phone types as Primary**

1. Click *Plug-Ins* on ***The Raiser's Edge*** bar. The Plug-Ins page appears.



2. On the Plug-Ins page, click **Mark Phones Primary**. The Mark Phones Primary plug-in screen appears.

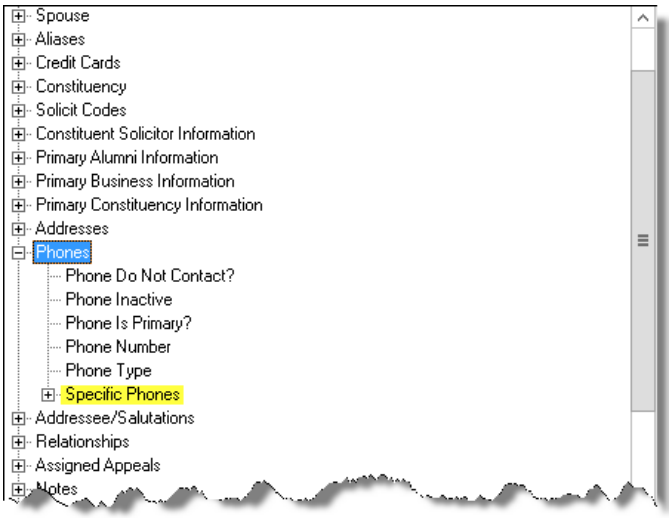


3. In the **Query** field, click the binoculars to search for and select a query of constituents to edit.
4. Select a phone type to edit.
5. In the **Primary Status** field, select whether to mark the selected phone types as Primary, unmark them as Primary, or elect to take no action on the primary status.
6. In the **Inactive Status** field, select whether to mark selected phone types as inactive, to reactivate them, or to take no action on the inactive status.
7. Click **Begin**. The process may take some time to complete, but when it does, all phone information for the specified phone type will be edited accordingly.

Query and Export

As a result of the phone number and email address changes on the constituent record, all existing queries with phone fields will still return active phone numbers in the results. However, if there were phone numbers or email addresses that were associated with an address other than the preferred address, they are now considered inactive, and that information will not appear. Queries and exports do not return inactive information. If there are any inactive phone numbers or email addresses you would like to appear in your results, we recommend you move that information to the be associated with the constituent's preferred address.

When you create your queries and exports, phone numbers are now nested under their own **Phones** node. Email addresses, Web links, fax numbers, and any other contact numbers are under the **Specific Phones** node.



Import

Existing “Constituent Phone” imports have been renamed to “Constituent Phone Legacy.” You can still run them, but you cannot create new “Constituent Phone Legacy” imports. Instead, a new “Constituent Phone” import is now available. The new import does not require address phone import ID, and the **Phone is primary?** and **Phone inactive** fields have been added to all applicable import types.

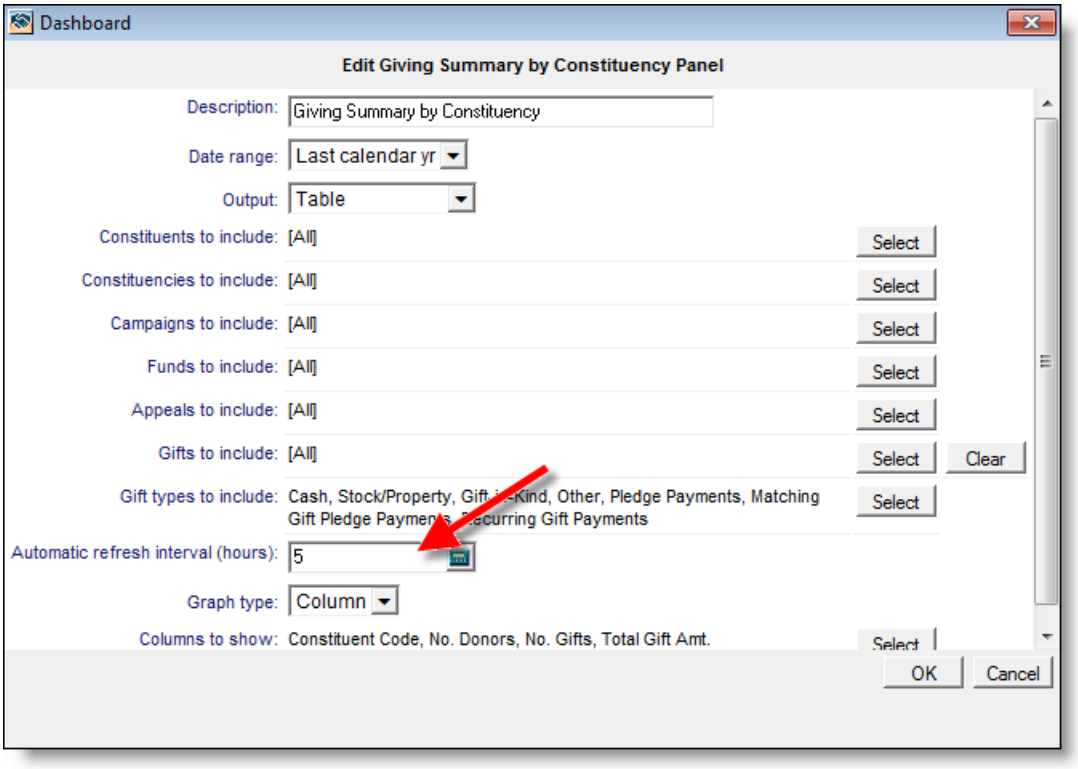
Custom Reports

Due to the phone number and email addresses change on the constituent record, any phone numbers and email address that are associated with alternate addresses will no longer appear when you run your reports. To get those phone numbers and email addresses to appear, you will have to edit your report to include inactive fields, or associate those phone numbers and email addresses with the constituent’s preferred address.

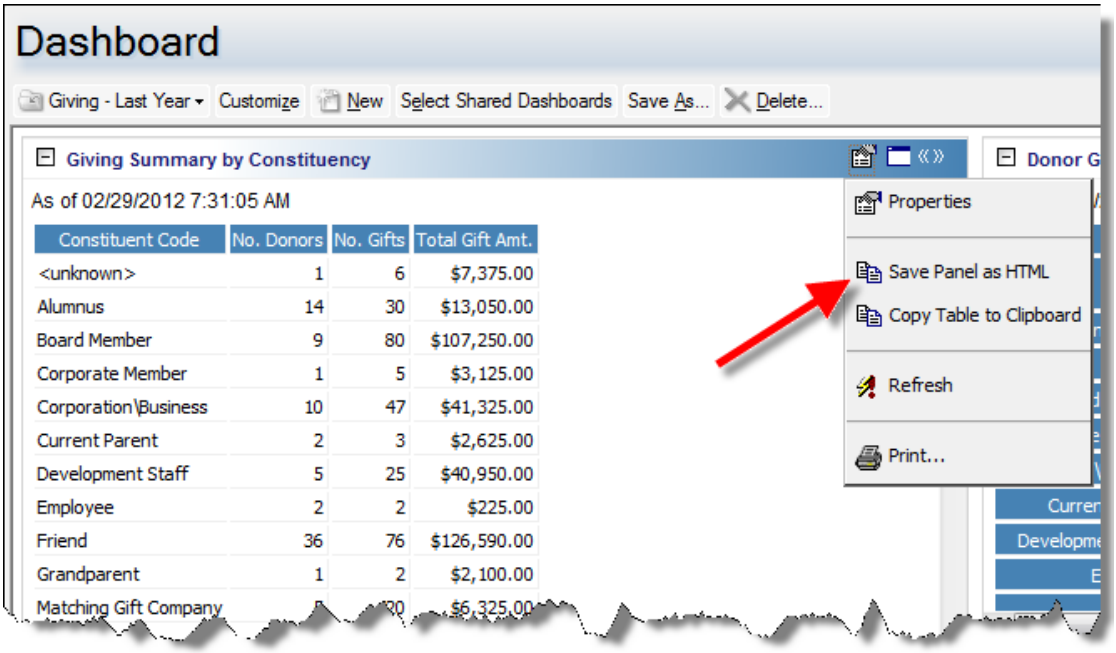
Dashboard

To use *Dashboard*, you no longer need to have *Microsoft Office Web Components* installed.

There is now an automatic refresh setting for *Dashboard* panels. Every time the *Dashboard* module is opened in ***The Raiser's Edge***, each panel that is ready to be refreshed, based on the automatic refresh time intervals you set, will reload with up-to-date data.



In *Dashboard*, you no longer have the option to send a panel as an email or copy the graph to your clipboard. Instead, you can now save the panel as an HTML file. After you save a panel as an HTML file, you can then attach it to an email as you would any other file attachment.



Pivot Reports

Pivot reports are now generated in *Microsoft Excel*.

Existing pivot reports will be maintained in ***The Raiser's Edge 7.94,*** but you will need to re-create each axis to get results to appear in *Excel*. In *Excel*, the pivot report will be divide into three sheets: the PivotChart, the data pulled from the query you selected to use to create the pivot report, and the pivot report itself.

Send As Email

The **Send as email** option no longer requires Microsoft *Outlook* to send information from ***The Raiser's Edge*** as an email. Send as email now works with any desktop email application, such as *Thunderbird*.

Compatibility

The Raiser's Edge 7.94 is now compatible with Microsoft *SQL Server 2012*, *Microsoft Windows 8*, *Microsoft Windows 2012*, and *MapPoint 2013.*