ATS Guide To The Raiser's Edge

Getting Started – Raiser's Edge Overview

Version: 1.0 Date: 26 March 2018

Overview

This document describes the basic components of Raiser's Edge. With Raiser's Edge NXT, you can view and manage your Raiser's Edge data through both a web view in any browser or device and the database view accessed through Citrix. This guide provides an overview of both views. If you see something that does not look correct, please alert Advancement Services by submitting a ticket at atshelp.happyfox.com.

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WHAT IS RAISER'S EDGE?

Raiser's Edge is a program that Advancement uses to manage its Alumni/Donor database. Primary records that Raiser's Edge calls "Constituents" are added for individuals and organizations that have certain relationships with ATS/Technion. A new constituent record is added for every new alumnus of Technion, for every individual or organization that donates to Technion/ATS and in a few other instances. On each constituent record, there are tabs in which we store all the pertinent data that we have for the person or organization. That includes biographical and address information, contact info, giving history, education information, event participations, prospect info and many other pieces of data. Raiser's Edge provides us tools for entering, grouping, reporting, exporting, importing and securing the data.

BASIC PRINCIPLES

There are a number of basic principles which must be observed when using a Corporate Relationship Management System (CRM) such as The Raiser's Edge NXT:

- Never delete information – always end-date it and inactivate it if appropriate
- Use start and end-dates always where available (e.g. in addresses, relationships, etc.)
- Thoroughly search for duplicates before adding a new record
- Close out of The Raiser's Edge when you leave for lunch or leave the office for an extended period.
- Close out The Raiser's Edge by always using the File, Exit and Sign Out
- Close out of Citrix by always Logging Out

OBTAINING CONSTITUENT INFORMATION

When a constituent calls with updated information, the following information should be obtained:

- Home address & home phone number
- Place of business & business phone number
- E-mail address

This information is needed not only to update The Raiser's Edge database, but also in case we need to verify information provided or to obtain additional information.

Please obtain as much of this information as the constituent is willing to provide. An individual calling to notify us of another individual's death should also be asked to provide as much of this information as possible (e.g.: the date of the death and the funeral date of the deceased). Any other background information is also welcome, e.g. marital status, name of spouse and/or other relatives, employer, civic and professional activities, etc.

SECURITY

Information contained in The Raiser's Edge is strictly confidential and is not to be disclosed.

You are responsible and accountable for any transactions made to The Raiser's Edge under your user name and password. The integrity of the data must be protected from improper process or modification.

To protect our donor's information and ATS all Raiser's Edge users are required to use two-step authentication. Please see Appendix 2 to activate the extra layer of security.

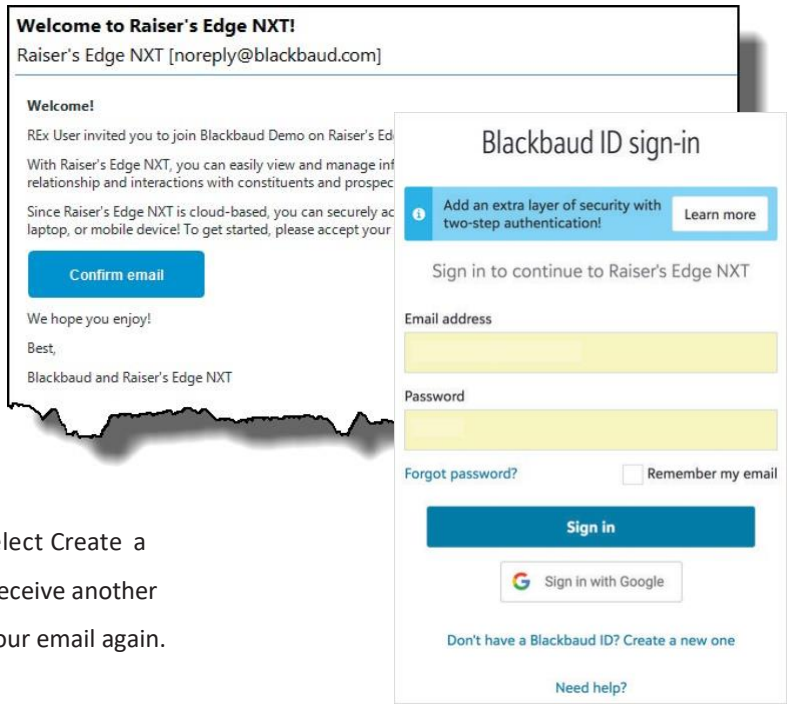
COMPUTERS

The log-on IDs and passwords are your "keys" to access the database. Access must be secured to ensure the integrity of the data. You are responsible for the security of your password. Your password is confidential, and you must not share your password with anyone.

Raiser's Edge NXT

Getting In

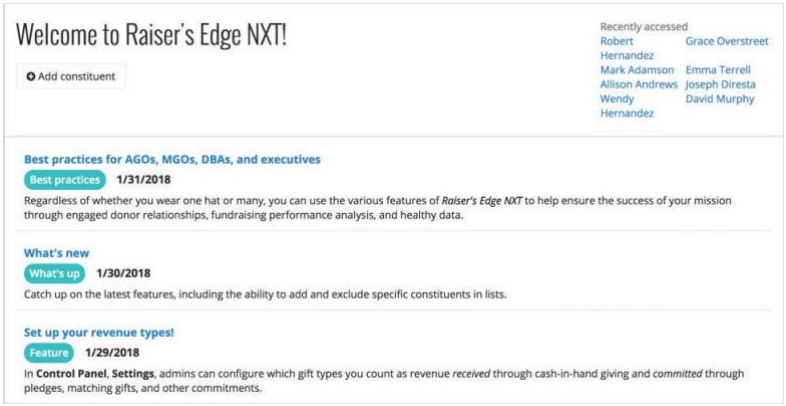
Raiser's Edge NXT, you'll receive a Welcome email invitation. After you select Confirm email in your invitation, simply sign into *Raiser's Edge NXT* with your Blackbaud ID.



- If you already have a Blackbaud ID, enter its email address and password and select Sign in.
- If you don't have a Blackbaud ID, select Create a new one to sign up and, when you receive another Welcome email message, confirm your email again.

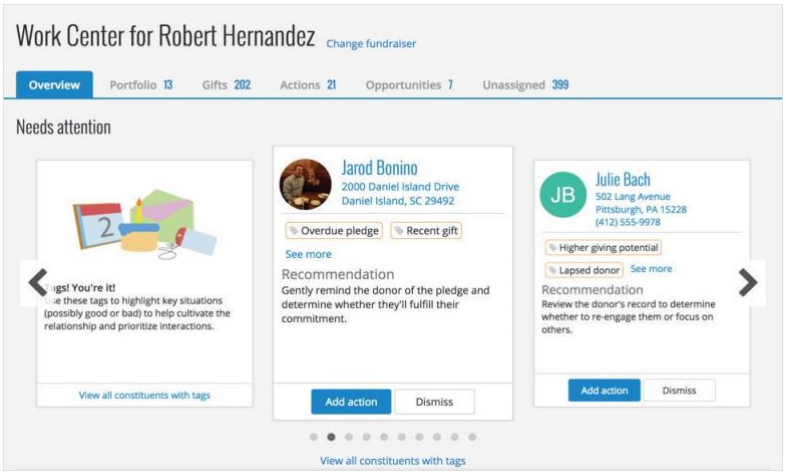
Home

Raiser's Edge NXT continually evolves and introduces new features and enhancements on a regular basis. From Home, you can keep current with the latest features, training opportunities, and best practices to get the most of Raiser's Edge NXT. You can also add new constituents and quickly revisit recently accessed records.



Fundraising Work Center

Fundraisers have easy access to their assigned constituent relationships and related activity such as gifts and actions, and fundraising managers can view and strategize fundraiser assignments from a central location.



Work center is the one-stop shop for everything a fundraiser needs to cultivate relationships and secure giving. From here, you can filter and analyze your portfolio of assigned constituents and manage the tasks, interactions, and opportunities required to help cultivate those relationships.

> You can customize the lists in **Work Center** to focus on only what you want. To view only specific records, select **Filters**. To select the information to view, select **Choose columns**.

Overview. Under Overview, you can quickly gauge your fundraising performance and identify where to focus your energies. From this dashboard, you can check, at-a-glance:

- Which of your assigned relationships need attention, based on special situations such as upcoming birthdays, lapsed giving, or a lack of communication.
- How many relationships you manage, and how many of them are new or lapsing.
- How many of your assigned actions are open, completed, or past due.
- Your progress toward goal amounts for campaigns, funds, and appeals.
- How many gifts you raised over the current fiscal year, and how many are new or past due.
- How much you asked for, expected, and funded through your opportunities.

> For a list of items tied to a total under **Overview**, such as to manage your new relationships, past due actions, or overdue pledges, select the amount.

Portfolio. On the Portfolio list, you can manage all your assigned constituent relationships. From here, quickly add new actions and opportunities, track activity, and compare wealth and giving information.

Gifts. On the Gifts list, you can view all giving you receive credit for and gifts received from your assigned constituents. From here, view detailed information, analyze giving by amount and time period, and track the effectiveness of your fundraising efforts.

Actions. On the Actions list, you can manage all your assigned tasks and interactions, as well as actions added to your assigned constituents. From here, track and analyze your activity by date or status, mark tasks as complete and add follow-up interactions.

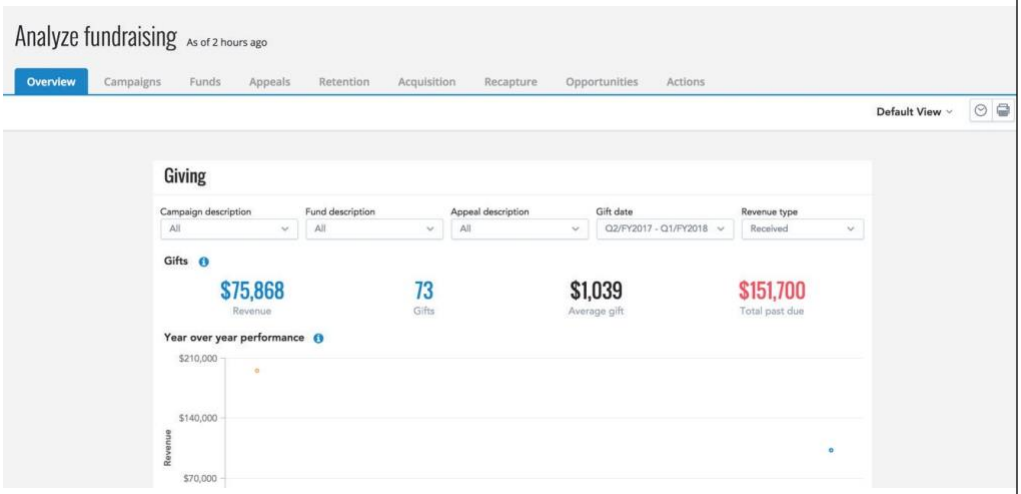
> By default, the **Actions** list includes only open and past due actions, like a To Do list.

Opportunities. You can manage all your assigned opportunities — as well as those added to your assigned constituents — on the Opportunities list. From here, track your efforts, stay on top of deadlines, and analyze efforts by status, dates, or how much was asked, expected, or received from the constituent.

Unassigned. On the Unassigned list, you can quickly view all active constituents not currently assigned to a fundraiser. To help cultivate these relationships and make sure no one gets left behind, you can easily assign these constituents to a fundraiser — either one-off or in-bulk — from the list.

FUNDRAISING ANALYZE

From Analyze, you can track and gauge overall organization fundraising performance.



To take analysis offline or share it with someone outside of ***Raiser's Edge NXT***, select **DownloadPDF** to save metrics in **Analyze** as a portable document file (PDF). You can also select **Schedule emailing of this dashboard** to automatically receive a PDF via email on a regular basis.

Overview. Under Overview, you have — at a glance — a pulse-check of how well the organization acquires donors and gifts, completes actions and opportunities, raises money towards its fundraising efforts, and much more.

Campaigns, funds, and appeals. Under Campaigns, Funds, and Appeals, you can quickly assess the organization's effectiveness toward its overall fundraising initiatives or specific cause, or through its solicitations.

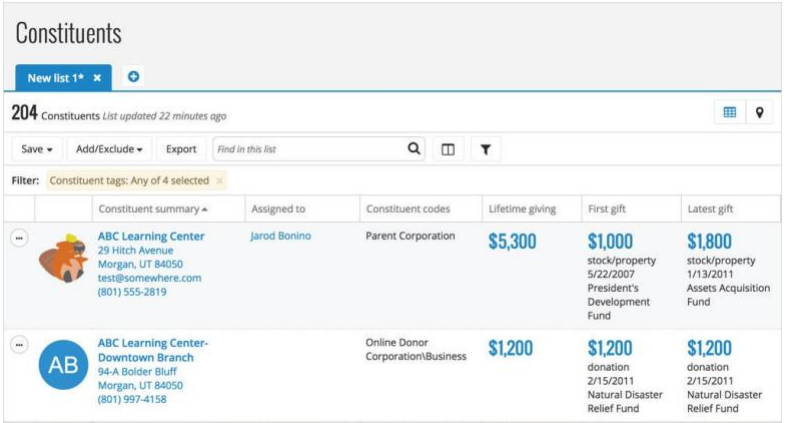
Retention and acquisition. Under Retention and Acquisition, you can analyze how many donors give year-over-year or for the first time — or again after more than five years since their previous gift — as well as their giving.

Opportunities. You can quickly assess the performance of the organization's opportunities to build relationships with prospects and secure major gifts under Opportunities. Here is where you will enter what was previously known as strategies. After creating the opportunity you can enter the actions directly linked to the final outcome of the opportunity.

Actions. Under Actions, you can assess the overall activity of fundraisers' interactions and tasks to cultivate relationships with constituents. You will utilize actions to track interactions or touch points with constituents that do not have a direct correlation with a particular opportunity.

Lists

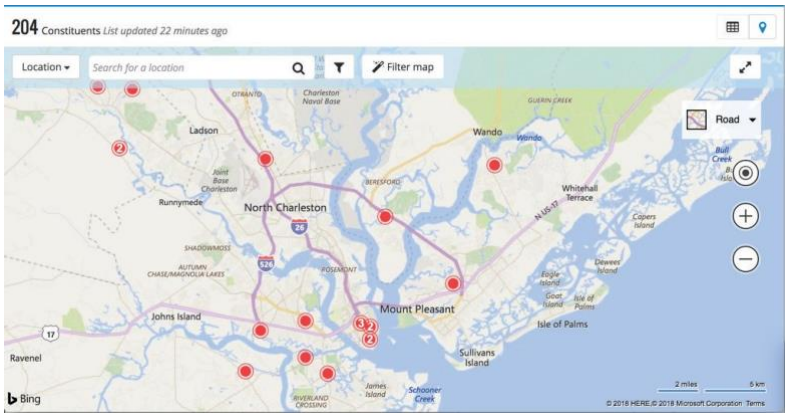
From Lists, you can create and manage custom lists of constituents, gifts, actions, and opportunities, such as to analyze fundraising effectiveness or refine recipients for a communication.



To create a list, you can work from scratch or start with a saved list or static query from the database view. You can work with multiple lists at once, such as to slice-and-dice and compare different groups of records on different filter choices.

When you work with a list, you can:

- Select columns and filters to define which information and records to include in the list.
- Export the records and information included in a list as a comma-separated values (CSV) file, such as to use in Microsoft Excel or Google Sheets.
- Add or exclude specific records or lists to a constituent list, regardless of the filter criteria.
- Save filter settings for the latest records based on the criteria and save the records as static queries or — with constituent lists — query lists in the database view.
- Share a link to a saved list with others within the organization.

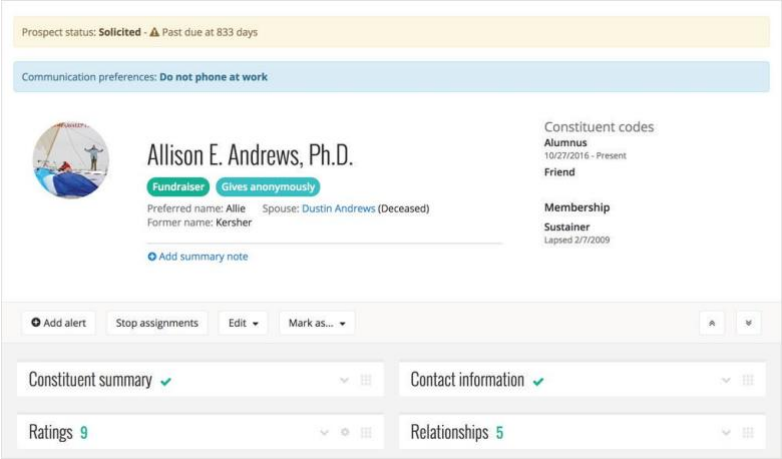


To locate constituents on a map, such as to identify nearby donors or plan meetings with prospects, select Map from a constituent list. Powered by Microsoft Bing, the map pinpoints constituents based on their primary addresses.

To identify a constituent at a location, select their pin on the map to view their name and address. You can also search the map for a specific constituent or a general location, such as to plan for an interaction.

Constituent Relationships

To view and manage details about your relationship with a constituent, simply select their name in a list or search for them by name or email address — like you would in Google — to open their record. From the search results, you can also select Search to find other individuals and organizations, such as constituents' relationships.



The constituent record provides a flat, single-page view of your relationship, similar to a profile page on a social networking site like Facebook or LinkedIn.

From the record, you can view and manage details about the individual or organization, including their constituent codes, spouse, assigned fundraisers, membership status, and more.

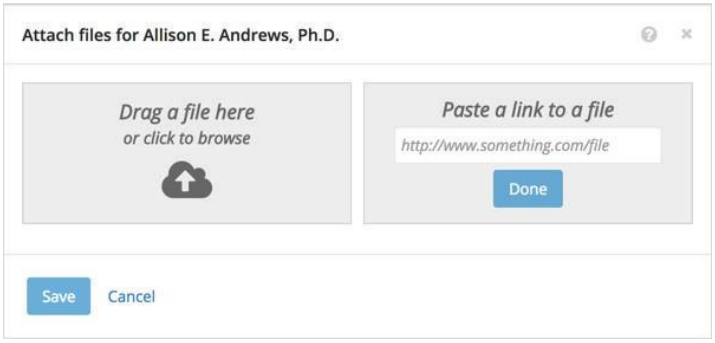
➤To help focus on what you find important or need most, you can expand or collapse the sections of a record and arrange them however you like.

Alert. To give a reminder or special instruction to someone about a constituent's record, set an alert to appear in the profile information. For example, you can set an alert as a reminder to not update the record without first contacting its assigned fundraiser or with instructions to handle a high-priority donor with care.

Appeals. Under Appeals, view which solicitations the constituent received. For each appeal, you can view details such as its name, date, package, and how much the constituent gave in response. With this information, you can quickly gauge how often you ask the constituent for gifts and the effectiveness of each solicitation.

Assigned fundraisers. Under Assigned fundraisers, view and manage who's assigned to cultivate your organization's relationship with the constituent. For each fundraiser, you can quickly view their type and when the relationship began and ended. For additional details, such as any goal amounts and notes, simply expand the fundraiser's row.

Attachments. Under Attachments, view and manage files and collateral that help paint a full picture of the relationship. You can upload files directly from your device or network, or link to files found online or in a cloud storage account such as *Dropbox* or Google *Drive*.

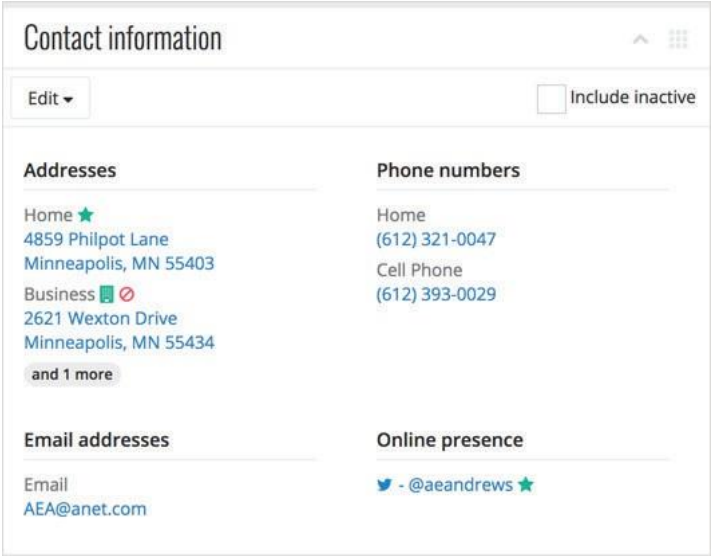


Communication preferences. Under Communication preferences, view and manage specific rules of contact with the constituent, such as to not call after 8:00 p.m. or on weekends.

Constituent summary. Under Constituent summary, view and manage pertinent details about the individual or organization, including how to address them in mailings and communications, and important demographic and business information.

Contact information. Under Contact information, view and manage where to contact the constituent online — through websites, blogs, or social networking sites like *Facebook*, *Twitter*, and *LinkedIn* — or by mail, email, or phone.

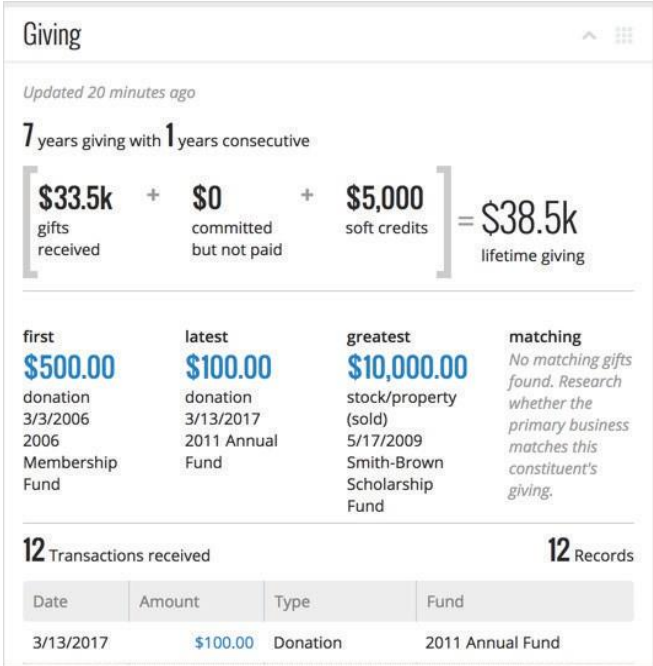
Custom fields. Under Custom fields, view specialized information your organization tracks about the constituent, such as hobbies, dietary preferences, or special requests.



Education. Under Education, view information about an individual's academic history, including where and when they attended school, whether they graduated, and with what degree.

Events. With *Events Management*, view which of your organization's events — such as fundraising galas, volunteer luncheons, or other activities — the constituent registered for. With this information, you can quickly gauge the constituent's involvement with your organization and plan for upcoming opportunities for interactions.

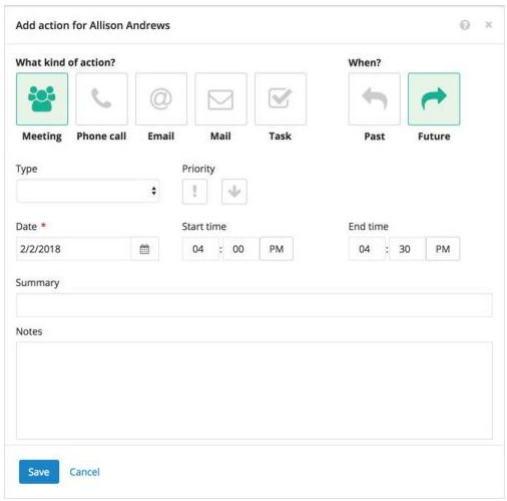
Giving. Under Giving, view a summary of the constituent's gifts to your organization, including their estimated lifetime giving, open commitments, and soft credits; the frequency of their giving; milestone gifts, such as first, latest and greatest; and a history of all their gifts.



For a more detailed view of their giving, select Work with gifts to open a list of their gifts. From the list, you can filter and analyze giving patterns – such as by campaign, amount, or time period – and select which columns to view to help focus on only what matters to you. To view detailed information about a gift, such as its credited fundraisers, soft credit recipients, acknowledgement and receipt status, general ledger post status, and intended campaign or fund, simply select its amount to open its record.

Membership. With *Membership Management*, you can view constituents that are members of the Board of Directors (BOD), Board Committees, and Board of Regents (BOR). Under Membership, view details about the constituent's memberships, such as the category, program, and expiration date. With this information, you can quickly view the constituent's activity as a member to see how engaged they are with the organization.

Notes and actions. Under Notes and actions, track information about your relationship and your tasks and interactions to cultivate the relationship, such as mailings and face-to-face meetings with the constituent. When you add an action, you can assign it to yourself or another fundraiser to make sure it happens. With the web view, you can save details about actions and mark them as complete as they happen, through your smart phone, tablet, or other device. For a full list of a constituent's notes or actions, select their total under Notes and actions.



Opportunities. Track your plans and efforts to build relationships with donors and secure major gifts. To view detailed information about an opportunity, such as its assigned fundraisers, pertinent amounts, and the campaigns and funds its gifts apply to, simply select its name to open its record.

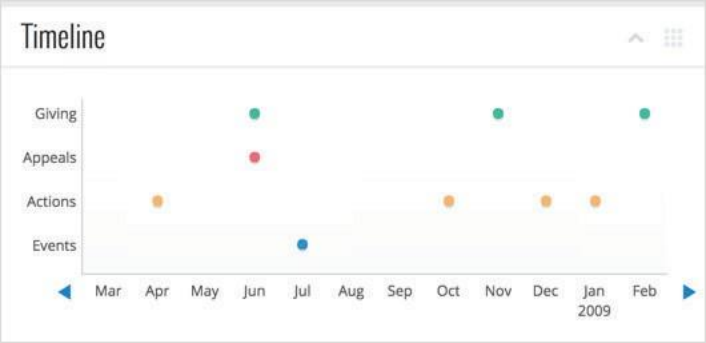
Ratings. For constituents, you can analyze their estimated wealth and their capacity to give — based on information from prospect research, or sources such as *Target Analytics*, a division of Blackbaud Inc. — under Ratings. Under Custom ratings, you can also view details about a constituent's wealth gathered from sources like *ResearchPoint*. Use this information to help determine where to focus your efforts, whether to pursue a prospect or major gift, and how much to ask from a donor.

Relationships. Under Relationships, view the people and organizations that share an immediate relationship with the constituent, such as family, friends, or employers. To view any additional information about a related individual or organization, simply select their name to open their record (even if they're not also a constituent).

Tags. To help focus on relationships that need your attention, *Raiser's Edge NXT* automatically listens to your constituent records and tags them based on special situations such as upcoming birthdays or lapsed giving. Under Tags, you can view which situations apply to the constituent, such as to prioritize interactions and determine how to best cultivate the relationship.

Timeline. Under Timeline, you can quickly scroll through a history of the constituent's activity with your organization.

- Gifts they've given (not including soft credits)
- Appeals they've received
- Events they've attended or registered to attend
- Tasks and interactions used to cultivate their relationship.



GIFTS

In the web view, you can track the many types of gifts acquired through fundraising efforts.

Donations. Charitable gifts paid outright as cash, check, payment card, or direct debit.

Gifts-in-kind. Gifts-in-kind are contributions of goods or services that have an estimated monetary value, such as auction items, furniture, computer equipment, or pro bono work by a professional.

Stock/property. Stock/property gifts are contributions of stock certificates, land, or estates, which your organization may opt to keep or sell to benefit your fundraising efforts. If you sell the stock or property, you can track its value as a gift of Stock/property (sold).

Pledges and pledge payments. Pledges are commitments to donate in the future with a single gift or through multiple installments, such as a gift of $1,200 as 12 monthly payments of $100. When the donor pays toward an installment, you can track the gift as a pledge payment.

Recurring gifts and recurring gift payments. Recurring gifts are commitments to donate at regular intervals, such as an automatic monthly gift of $50. When the donor fulfills their regular commitment, you can track the gift as a recurring gift payment.

Matching gift pledges and payments. Many companies donate matching gifts when an employee or corporate partner also donates a gift to a nonprofit. With matching gift pledges, you can track matching gifts you expect to receive from a company based on their relationships with other donors. When a matching gift company fulfills the commitment, you can track the gift as a matching gift payment.

Planned gifts. Track gifts your organization expects to receive from a donor through a bequest, annuity, trust, pooled income fund (PIF), estate, or life insurance policy.

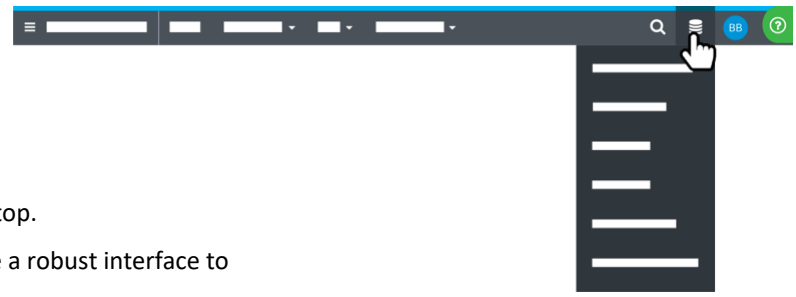
Other. For other gifts that don't fall under another type, you can track them as gifts of Other.

To analyze your giving, you can view and manage gifts from their records or in lists. To open the record of a gift, simply select its amount, such as in a list or on the donor's record. Like with constituents, the gift record provides a flat, single-page view of many details about the contribution, such as:

- Its amount, type (and subtype), donor, date, and payment method
- Whether it was given anonymously or has soft credit
- The fundraisers who receive credit for its acquisition
- The ID or number of its record, mailing or marketing effort, and, if applicable, the batch it was added through

- The fundraising effort — the *campaign* or *fund* — it applies toward, and the appeal and package used to solicit it
- Its donor's constituent code in context of their giving
- Whether its donor received an acknowledgement or receipt
- Whether it posted to the general ledger for accounting
- Notes and attachments — such as a PDF of a formal gift agreement — to help paint a full picture of the gift
- Any custom fields or additional reference notes to track gifts
- Related transactions, such as matching gifts, pledges, recurring gifts, or event registrations
- For a recurring gift, its status — such as Active or Held — and payment history
- For a pledge, its balance, schedule, and payment history

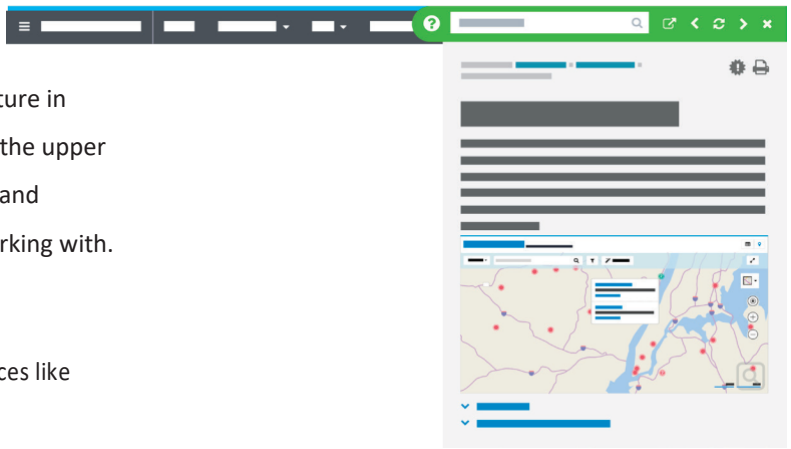
Database View



For detailed administration of constituents and gifts, you can select Database, open database view to manage data through Citrix on your desktop. From the database view, you use a robust interface to view and manage all aspects of your fundraising efforts, including:

- Track detailed constituent and relationship information, including matching gift programs and memberships.
- Manage gifts and fundraising efforts such as campaigns, funds, appeals, events, and mailings.
- Create detailed queries to group, analyze, and export records.

In-Product Assistance



Have a question about a concept or feature in *Raiser's Edge NXT*? Simply select the ? in the upper right corner for Help content, How-tos, and best practices based on what you're working with.

If you still have questions, you can also quickly access additional resources like Knowledgebase and Chat Support.

Web-to-Database View

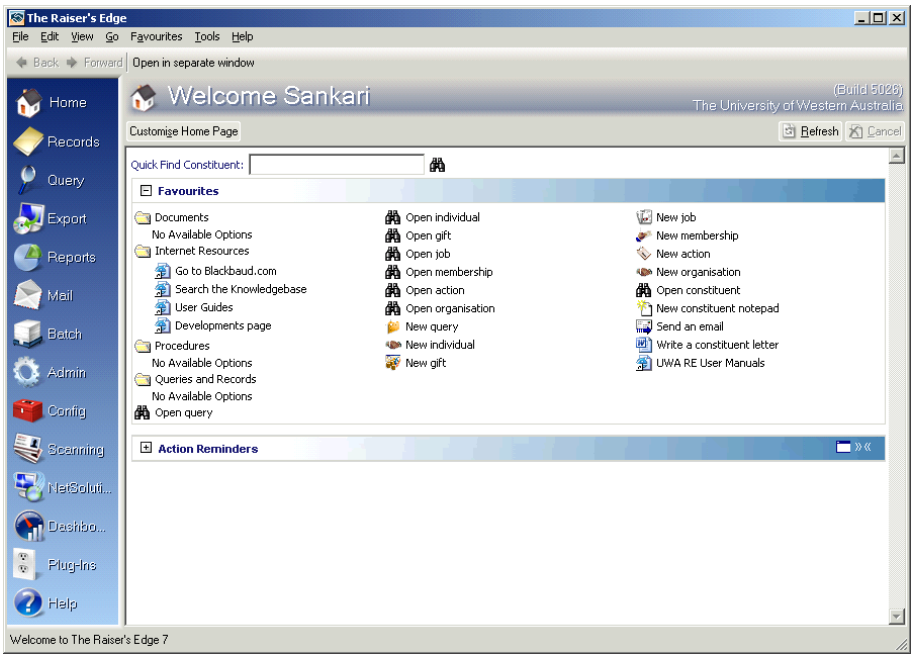
As you work in the two views of *Raiser's Edge NXT*, some features in the web view are named differently in the database view.

This web view feature...	is this in the database view...	and means this.
Alert	Annotation	Reminder or special instructions to someone when they open a constituent's record.
Attachment	Media	Files and collateral about a record, such as correspondence with a constituent or a plan for a major gift ask. Unlike media in the database view, attachments live in the cloud and can be opened directly in their native applications.
Communication preference	Solicit code	Rule of contact for a constituent, such as to not call after 9:00 p.m. or on weekends.
Custom field	Attribute	Specialized information about a record, such as a constituent's dietary preferences or interests.
Donation	'Cash' gift	Charitable gifts of money, regardless of payment method.
Former name	Maiden name	Name a person previously went by, such as before a name change or before marriage.
Fundraiser	Solicitor	Person who researches and interacts with constituents, manages actions and proposals, or asks for gifts – in short, works to successfully fund-raise – on behalf of your organization.
Opportunity	Proposal	With *Prospect Research Management*, plan or effort to cultivate donor relationships and secure major gifts.
Opportunity likelihood	Proposal rating	How confident you are a proposal will result in giving.
Pledge payment	'Pay' gift	Payment toward a pledge installment.
Preferred name	Nickname	Informal name a constituent likes to go by in familiar situations, such as "Bob" for Robert.

RAISER'S EDGE (DATABASE VIEW)

GETTING STARTED

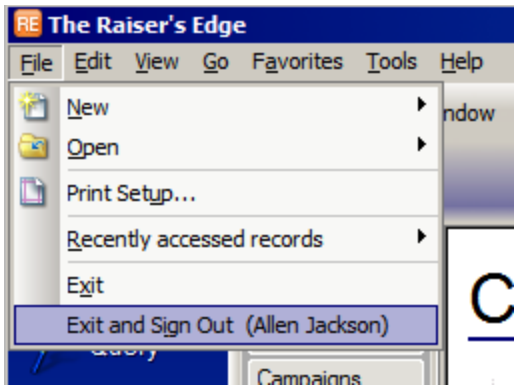
Logging On. Raiser's Edge (database view) can be accessed by visiting login2.blackbaudhosting.com. However, Citrix is required to access the system. For steps to download Citrix and login, please see Appendix 1.



Logging Off. It is important that you sign out of Raiser's Edge if you will not be using the database for extended periods.

To sign out of Raiser's Edge:

1. click on "File" from the title bar
2. Click on "Exit and Sign Out (username).



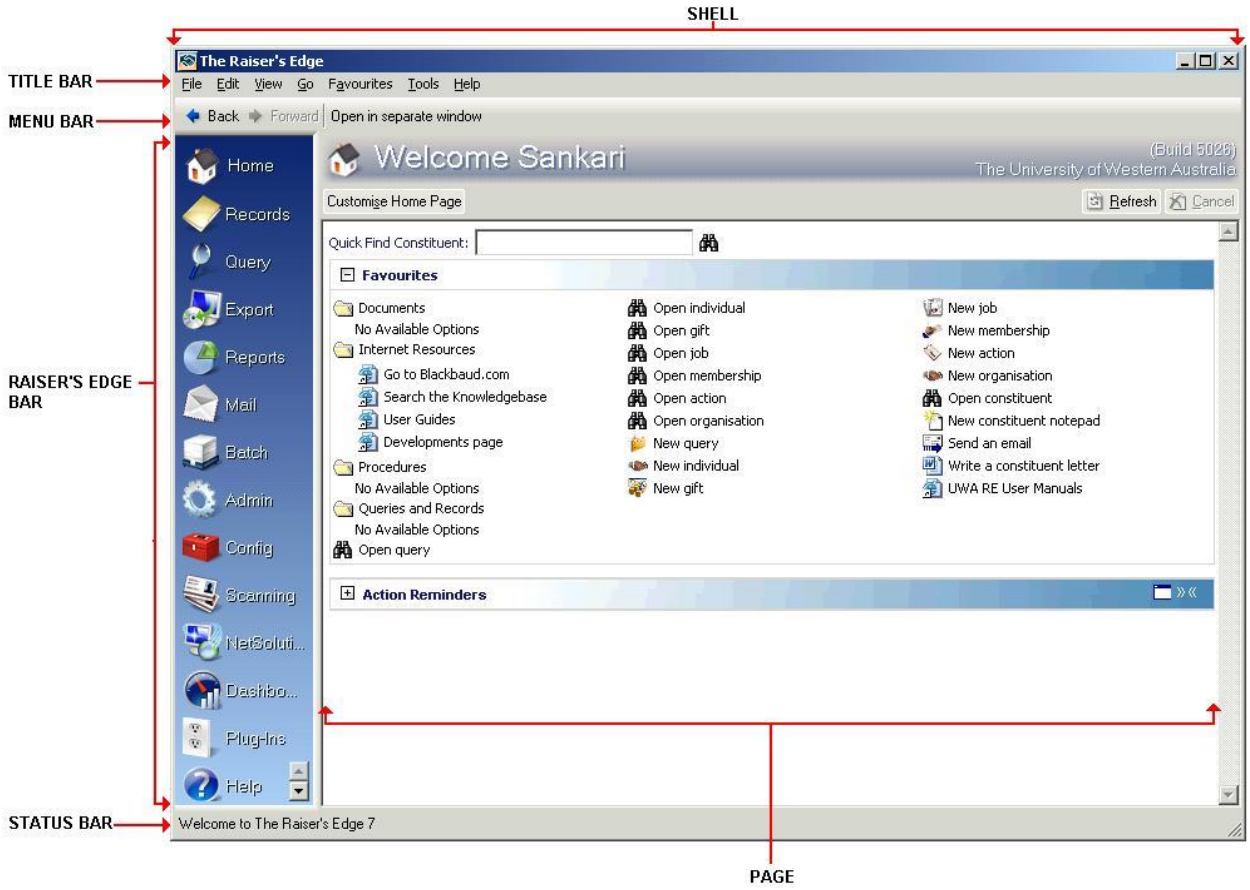
Raiser's Edge Basics

The Raisers Edge Bar. This is a list of common functions available to users of Raiser's Edge. Please note that not all of these functions may be available to you, based on your security and level of training and access. For example, if you do not need access to 'Export', it will never show up on your menu bar. Access, is granted based on training and your role in the organization.

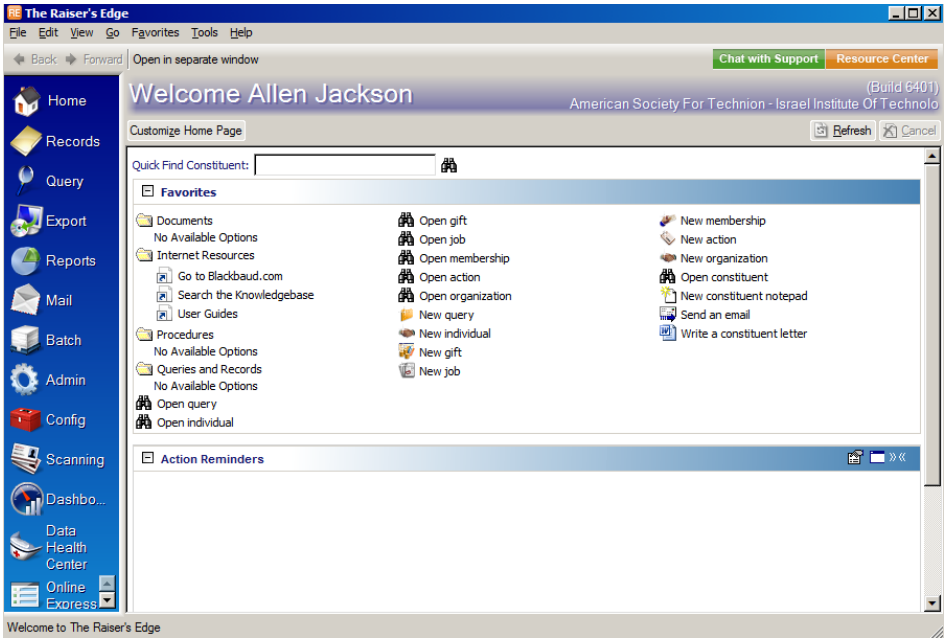
Home	Where you can store links to your favorite or most frequently used functions
Records	Find information on constituents, prospects, gifts, actions, campaigns, funds, appeals, and events
Query	Used to define groups of records for reports, mailings, exports, and a variety of other functions
Export	Used to send data to other programs such as Excel, Access or Crystal Reports
Reports	Choose from various reports to analyze information in the database
Mail	Use this feature to prepare letters, invitations, mailing labels, and name tags
Dashboard	Get a quick analysis of your database.
Plug-Ins	Link external programs and add-ons.
Help	Online manuals and help provided by Blackbaud

Navigating in Raiser's Edge. Each area in Raiser's Edge has a name:

- **Shell** - The shell provides a central area from which you can enter all main areas of the program. When you click a link, it appears as a page in the shell. By default, The Raiser's Edge opens to the Home page.
- **Title Bar** - The title bar includes the name of the program on the left, and buttons to minimize, maximize, and close the program on the right. The Title Bar tells you where you are
- **Menu Bar** - The menu bar contains commands for various functions throughout the program. The available commands depend on which area of the program you have open.
- **Raiser's Edge Bar** - The Raiser's Edge bar on the left side of the screen contains links to all main areas of the program.
- **Page** - Each link you click on the Raiser's Edge bar displays a different page. For example, you click the Records link to display the Records page or click the Reports link to display the page containing reporting types.
- **Status Bar** - The status bar displays helpful messages as you use the program; e.g., "Press F3 for today's date, F7 for calendar" message displays when you click in a date field.



Home Module and Favorites



The primary function of the home page is to give Raiser's Edge users access to their favorites and action reminders. Favorites are quick access functions such as opening a record or document, running a query or other functions that you want to do quickly. Liken the Favorites section in for Raiser's Edge to a desktop on your PC or Mac. *To add a favorite* - go to the "Favorites" menu at the top of any

record/query/export/report and click “Add to Favorites”. You can then name the favorite and choose a “default action” if appropriate. The default action will depend on the favorite you add. For example, you can choose to print, export or preview a report or just run a query. You can use the “open” action to just open the item. *To add a document as a favorite* - Drag the document from your desktop into the favorites section on your home page. Then name the favorite and then choose a folder from the “create in” drop down menu to specify where in your favorites to store it.

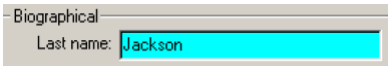
RECORDS

Information in Raiser’s Edge is stored in Records. The following types of records can be found in Raiser’s Edge:

- **Constituents** - Detailed information on individuals and organizations
- **Gifts** - Detailed information on donations including designation, gift date, and acknowledgement information
- **Actions** - Detailed information on contacts with constituents
- **Campaigns** - Information on the main categories for gifts and donations
- **Funds** - Information on the specific designations for gifts and donations
- **Appeals** - Information on the methods used to solicit donations or to communicate with large groups of constituents
- **Events** - Information on special events including registration and payment

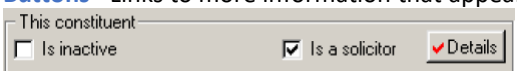
Records have a number of components:

- **Fields** - Place where data is stored -usually consists of a field name plus an open box for storing the information, i.e.:

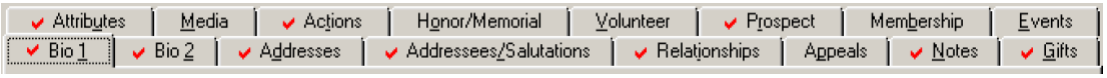
  You can type information in a field or choose the correct information from a dropdown menu. If the open box next to a field is coloured turquoise (as above), then that is a required field. You will not be able to save the record without entering data in that field.

- **Buttons** - Links to more information that appear as raised boxes, i.e.

If you click on the button, it opens another window with that information. If a red checkmark appears on a button, it indicates there is data stored there.

- **Tabs -** Rows of headings appear across the top of the record. This is the way information is organized in a record. Clicking on a tab shows you the information residing in that part of the record. A red checkmark on a tab indicates there is some data stored there.



Hot Keys

These keys increase efficiency when using raises Edge

- **F1 -** Accesses help for the screen you are currently on
- **F3 -** inserts the current date in the date fields
- **F7 -** access lookups in tables, calendars in date fields, calculators in currency fields and zooms in on note fields

The **Tab** button on your keyboard will move you from field to field

The **Binocular icon** equals “advanced search” functions

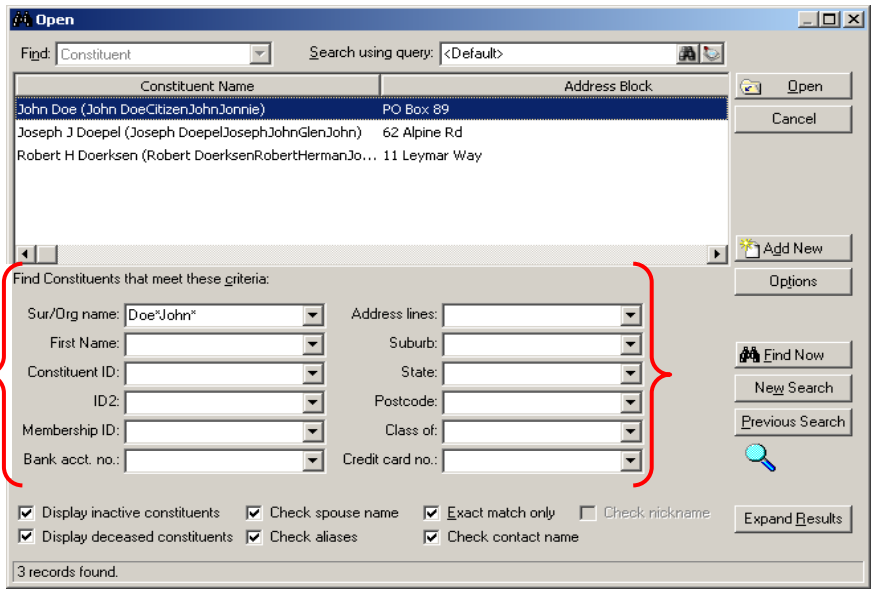
Searching for Records

There are two ways to search for and access a record:

- Go to the Home Page and click on the "open Individual" or "open Organization" buttons

  OR

- Go to "Records" on the Raiser's Edge Bar, click on "Constituents" and use the "Quick Find" option or "Open a Constituent" options. A search screen will be displayed:



Enter search criteria in these fields.

In Raiser's Edge, it is possible to search for records even if you know very little about them. Searches are easier if you know how to use Wildcards. There are 3 types of wild cards:

- Question mark (?) replaces a single character
- Asterisk (*) replaces a series of characters
- Brackets ([ ]) queries several characters or a range of characters. Brackets are not recommended unless you do not know a lot of information or you have the time to sift through the search results).

For example, if you were searching for Mr. John Doe, you could enter the surname and first name into the respective fields and click on "Find Now"

Similarly, if you were searching for a "Mr. Robert Rodriguez" and unsure of the spelling, you could

- enter the surname with various spellings
- enter the surname up to what you know is correct (Rodri)
- replace the questionable characters with a question mark (Rodri?uez)
- replace a series of letters in the search with the asterisk (Rodri*ez)
- use the brackets to pull a larger list (ro[d-z] would give you last names Rod…, Roe…, Rof…, etc. up to Roz.

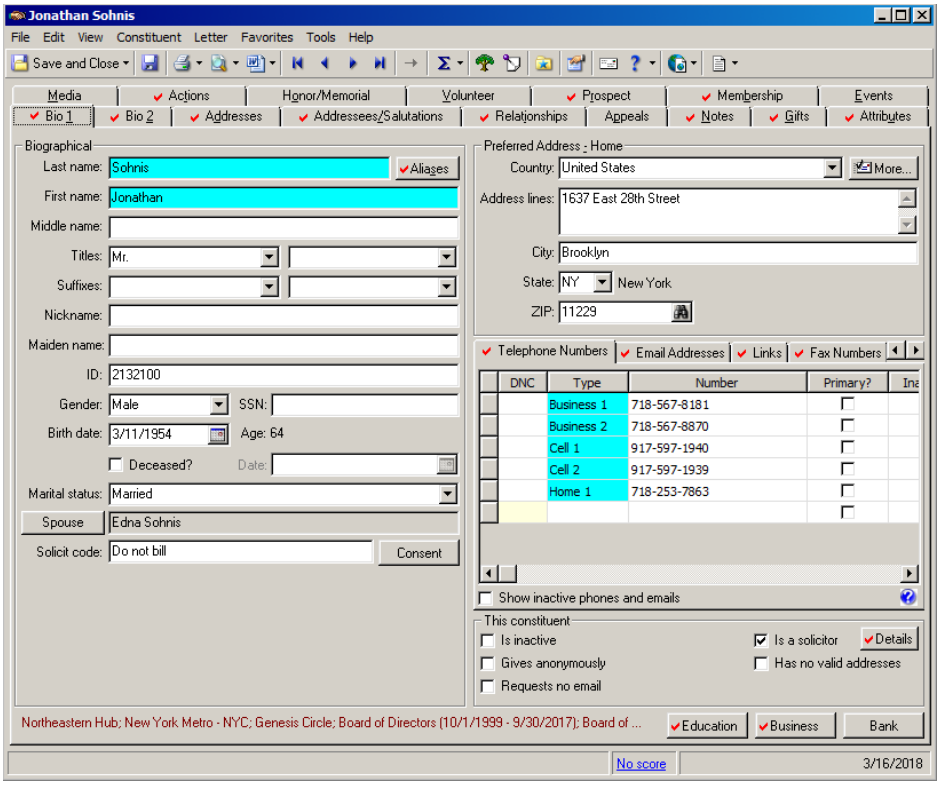
The above search wildcards characters will work in any of the search fields given. To limit results even further, use the various checkboxes at the bottom of the screen.

Constituent Records

Constituent Records are where information is stored on all individuals and organizations that have a relevant connection to the organization. Constituent records can be divided into 2 types:

- Individuals (this type is ONLY for people!)
- Organizations (this type is for everything else).

Bio 1 Tab (for individuals)



The Bio 1 tab stores basic biographical information.

Fields colored in Turquoise are required fields and must be completed - you will not be able to save and close a record without entering the data.

The **Biographical** area lists the basic information for the constituent and

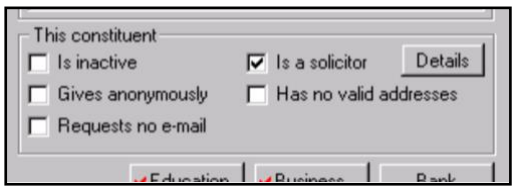
The **Aliases** button gives you a number of other choices that you can use to identify a constituent.

The **Spouse** button allows you to access information on the constituent's spousal relationship. Spouses can either have their own constituent record or just exist as a relationship on the record.

The **Preferred Address** is the address that the constituent has elected to receive mail. The

The **More** button beside the address gives you more complete information on the mailing address, including source for that address.

The "**This Constituent**" checkboxes should be used when appropriate, to further classify the constituent. These help to add or remove the constituent from certain search processes. We do not have a policy of marking constituents as "Is inactive". If a constituent is deceased or has asked not to receive any mailing or phone calls, the fact is noted in the "**Solicit code**" area.



The **Education** button at the bottom of the record is the link to the constituent's Primary Education record (degree information).

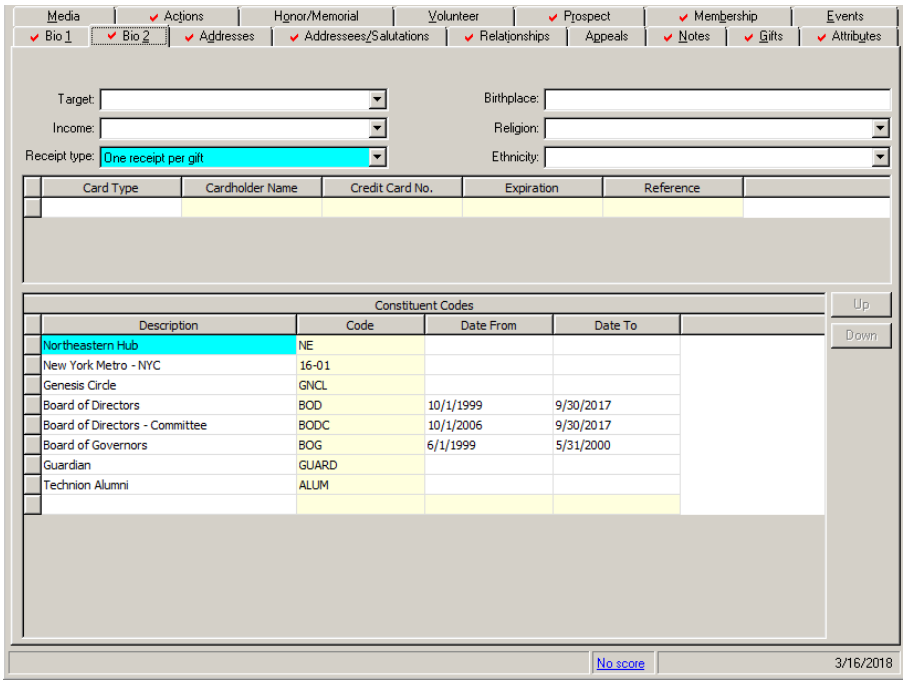
The **Business** button is the link to the constituent's Primary business information.

Bio 2 Tab

This tab stores additional biographical information about the constituent.

The Bio 2 tab is where constituent codes are stored. Constituent Codes are identifiers that are used to organize constituents into broad groups.

Every individual must have at least one constituent codes.



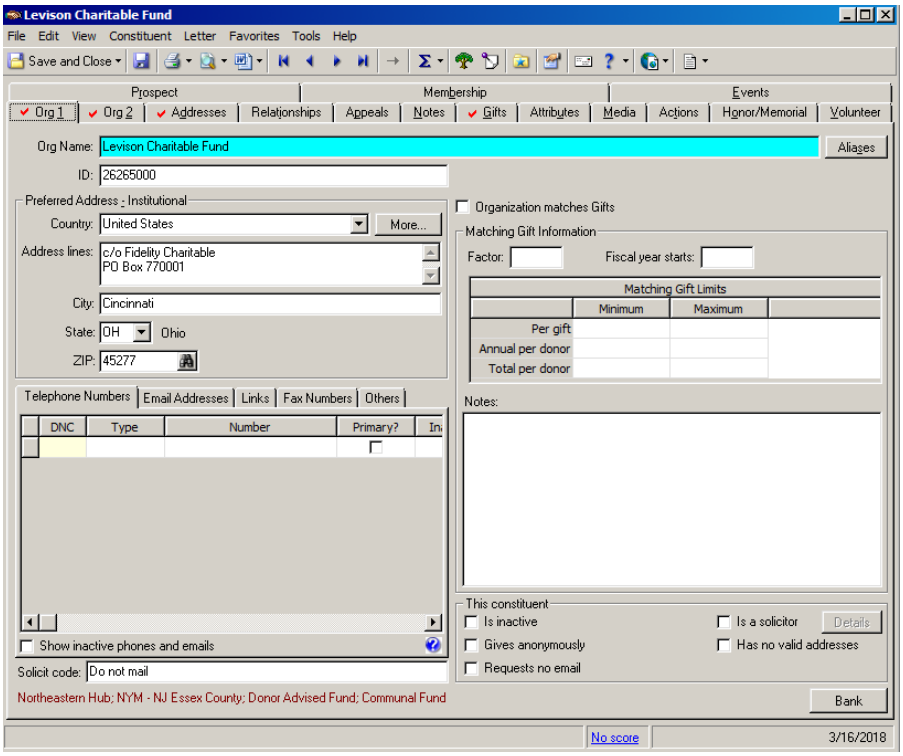
Org 1 Tab (for Organizations)

The Org 1 tab is where you store general info on an organization.

The **Org Name** area lists the complete name of the organization.

The **Aliases** button gives you a number of other choices that you can use to identify a constituent.

The **Preferred Address** is the address that the organization receives mail.



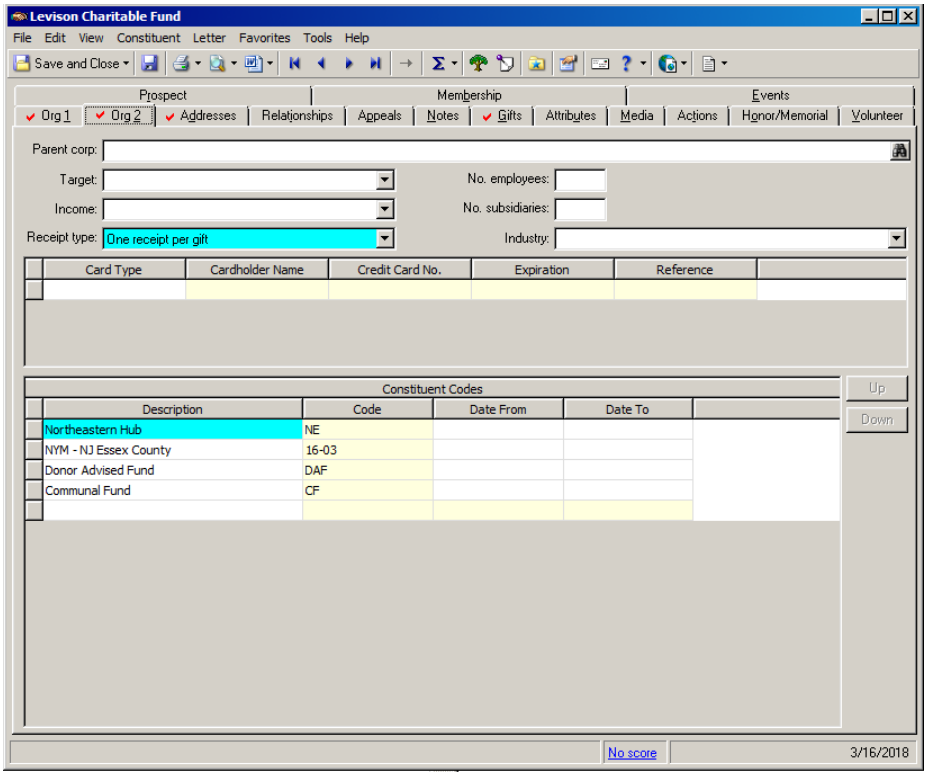
Org 2 Tab

The Org 2 tab stores additional biographical information about the constituent.

Every organization must have at least one Constituency Code that tells what type of organization it is.

Constituency codes also indicate the type of organization and the relationship to the university.

Date to and From - Date from and Date to are fuzzy dates and should be included if known and appropriate.



The **Parent Corp** area links to the company to which this organization belongs.

Other Tabs:

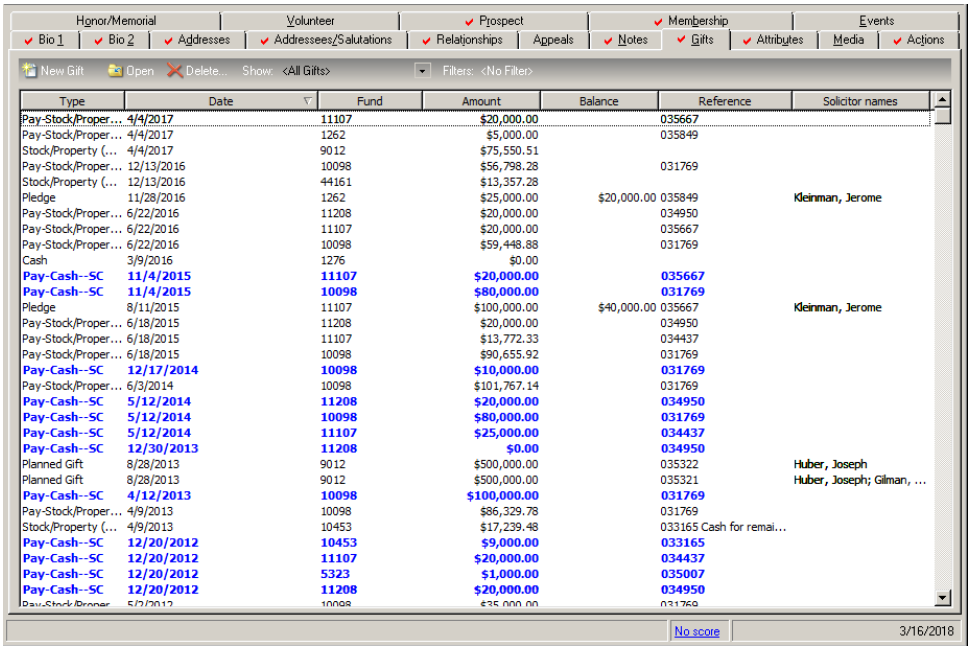
- **Addresses Tab** - This tab will display all addresses related to the individual.
- **Addressee/Salutation Tab** - Addressees and salutations are used throughout Raiser's Edge in almost any function you perform. The Primary addressee/salutation should reflect how you address your constituent in the majority of correspondence and are required fields. Standard formats for the addressee/salutations have been set up through configuration. Additional addressees/salutations are used to specify how to address couples or how to address the constituent and guest.
- **Relationships Tab** - This tab displays all of the constituent's relationships including: spouse, family, friends, affiliations, education information, business information, and solicitors.
- **Appeals Tab** - The appeals tab will show what solicitations you have sent to a constituent. Gifts given to each appeal can be linked back to the appeal.
- **Notes Tab** - The Notepad will allow you to record notes about a constituent that contain more information than is possible to record in other sections. Only enter comments that are fact-based and not based on opinions. Do not store any information that you would not feel comfortable to show the constituent. For a list of current notepad types, click F7 when you are in the Notepad Type field

- **Attributes Tab -** Attributes are additional characteristics of the constituent that we wish to track and query on. They can be the newsletters, mailings and interests indicated by the constituent or assigned by the users of the database. If you need to request a new attribute category or description contact, Advancement Services, atshelp.happyfox.com.
- **Media Tab -** The Media tab will allow you to store links to scanned articles and pictures, as well as electronic versions of documents regarding the constituent. (Note: please upload all Media (Attachments) in the web view. Media uploaded via the database view will only live in the database view and is not available in the web view. Media uploaded via the web view will appear in the database view, however, there is a delay.)
- **Gifts Tab -** The Gifts tab lists all the gifts that a constituent has made. This includes donations, gifts in kind, sponsorships, grants, pledges and payments to special events. If you open a particular gift, you will find a great deal of specific information related to that gift.
- **Actions Tab -** Actions allow you to track all your tasks and activities involving a constituent. This would include phone calls, meetings, mailings, emails, contact reports and other tasks. Each action has a status of New, In Progress, Pending or Completed. You can have action reminders on your home page to remind you of actions you need to complete.
- **Honor /Memorial Tab -** We currently do not use the Honor/Memorial tab. A constituent is an honor/memorial recipient when gifts are received in their honour or in their memory. In Honour of occurs usually for birthdays, anniversaries, graduations, retirements etc. Memorials only occur when the constituent has passed away.
- **Events Tab** - On the Events tab, you can see the list of events the constituent has been invited to as well as whether they attended, the amount due and paid for the event. Examples of events would be Alumni reunions, lectures & tours and Fund Raisers.
- **Prospect Tab -** The Prospect tab contains information on the constituent that pertains to major gift solicitation. It allows you to track proposals, gifts to other organizations and interests.

Navigating the Gifts Tab and Gift Record

When you first open the gifts tab, you will see a list of all the constituent's gifts with details about the gifts such as gift date, amount, fund, type and balance.

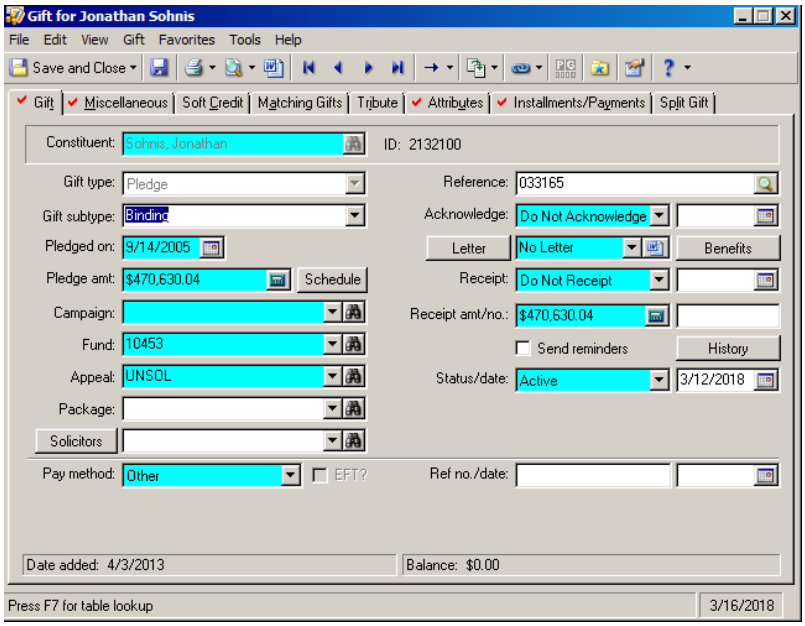
To add or remove columns which appear on the gifts tab- hover over any of the column headings and right click. Choose the "Columns" option and pull any fields that you want to see into the "Display these columns" section on the right. If you want to remove columns, pull them back to the left. You can also **sort** gifts by any column by clicking on that column.



Type	Date	Fund	Amount	Balance	Reference	Solicitor names
Pay-Stock/Proper...	4/4/2017	11107	$20,000.00		035667	
Pay-Stock/Proper...	4/4/2017	1262	$5,000.00		035849	
Stock/Property (...	4/4/2017	9012	$75,550.51			
Pay-Stock/Proper...	12/13/2016	10098	$56,798.28		031769	
Stock/Property (...	12/13/2016	44161	$13,357.28			
Pledge	11/28/2016	1262	$25,000.00	$20,000.00	035849	Kleinman, Jerome
Pay-Stock/Proper...	6/22/2016	11208	$20,000.00		034950	
Pay-Stock/Proper...	6/22/2016	11107	$20,000.00		035667	
Pay-Stock/Proper...	6/22/2016	10098	$59,448.88		031769	
Cash	3/9/2016	1276	$0.00			
Pay-Cash--SC	11/4/2015	11107	$20,000.00		035667	
Pay-Cash--SC	11/4/2015	10098	$80,000.00		031769	
Pledge	8/11/2015	11107	$100,000.00	$40,000.00	035667	Kleinman, Jerome
Pay-Stock/Proper...	6/18/2015	11208	$20,000.00		034950	
Pay-Stock/Proper...	6/18/2015	11107	$13,772.33		034437	
Pay-Stock/Proper...	6/18/2015	10098	$90,655.92		031769	
Pay-Cash--SC	12/17/2014	10098	$10,000.00		031769	
Pay-Stock/Proper...	6/3/2014	10098	$101,767.14		031769	
Pay-Cash--SC	5/12/2014	11208	$20,000.00		034950	
Pay-Cash--SC	5/12/2014	10098	$80,000.00		031769	
Pay-Cash--SC	5/12/2014	11107	$25,000.00		034437	
Pay-Cash--SC	12/30/2013	11208	$0.00		034950	
Planned Gift	8/28/2013	9012	$500,000.00		035322	Huber, Joseph
Planned Gift	8/28/2013	9012	$500,000.00		035321	Huber, Joseph; Gilman, ...
Pay-Cash--SC	4/12/2013	10098	$100,000.00		031769	
Pay-Stock/Proper...	4/9/2013	10098	$86,329.78		031769	
Stock/Property (...	4/9/2013	10453	$17,239.48		033165 Cash for remai...	
Pay-Cash--SC	12/20/2012	10453	$9,000.00		033165	
Pay-Cash--SC	12/20/2012	11107	$20,000.00		034437	
Pay-Cash--SC	12/20/2012	5323	$1,000.00		035007	
Pay-Cash--SC	12/20/2012	11208	$20,000.00		034950	

To open a Gift record, double click on the row of the gift.

After you open a gift record, you'll see the Gift tab which displays general information about the gift



Type of gift: Cash, pledge, stock/property, gift-in-kind, other, recurring gift, planned gift an American Technion Society defined sub-classification of a gift (payroll deduction, bequest, online) for examples The $ amount of the gift (amount on check or pledge agreement) The date the foundation deposits the gift This is the account(s) which the gift is designated to The assigned solicitors from the relationships tab will automatically populate this field. This indicates that a gift has or has not been acknowledged by the Regional Office this indicates that a gift has or has not been receipted.

Pledges and Pledge Payments. A pledge is a promise to pay a specified amount in either one or multiple installments. If you look on the installments tab of a pledge type gift record, you can see detailed information about the schedule and how many payments have been made so far. Pay-Cash type gifts are cash gifts that have been applied to pay off a pledge.

Soft Credits. A Soft Credit enables multiple constituents to get credit for one gift without double counting the receipt amount. For instance, if you gave a $1000 gift, you may want your spouse to get credit along with yourself. Since the check is in your name, you would get the hard credit (and tax receipt) and your spouse would get the soft credit. Soft credits are entered on the soft credit tab of the gift record. Spouses are automatically soft credited for all gifts made by the other spouse. Owners of companies will also often be soft credited for gifts given by the company.

Matching Gifts and Matching Gift Soft Credits. Sometimes individuals are affiliated with or employed by organizations/companies that match individual giving. Before a matching gift can be entered in the system, the original gift from the individuals must be entered on their own record. Based on that gift being entered, an MG-pledge is automatically created and saved on the company's record. When the payment comes in from the company, it's applied to the MG-pledge from the Organization's record and pays off the MG pledge.

Previewing a Constituent's Gift Summary. To produce a quick overview of a constituent's giving, run the gift summary report. To view the summary, first open up the constituent whose giving you want to see. From the record, go to the "View" menu and select "Summaries > Gift Summary". From the parameter screen, choose a date range and any other appropriate filters (or leave defaults for all gifts and dates) and then click "Finish" at the bottom right. The "Giving Statistics" portion lists the constituent's first, latest and greatest gifts. The "Breakdown" portion lists the constituent's total giving by fiscal year. Click on the link below for a detailed description of how the breakdown columns are calculated.

Fund Records and Viewing a Fund Summary

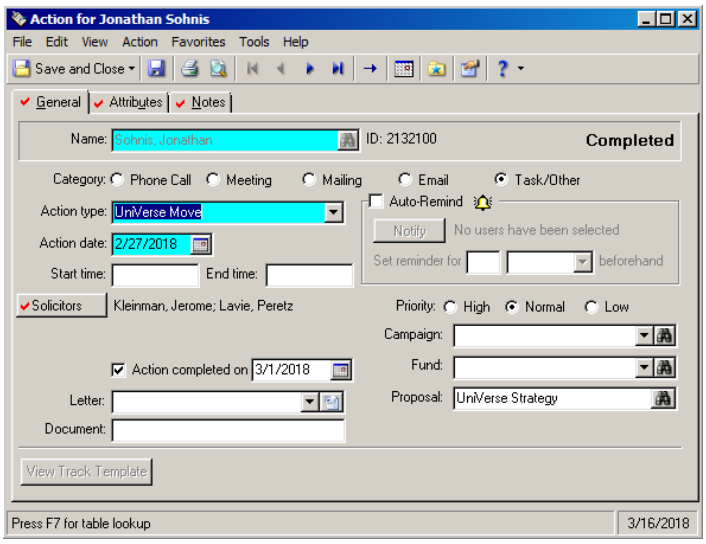
The Fund record stores information about the account the fund was set up for and people give to. To open a fund record, go to Records>Funds>Open a Fund and then search using the fund ID or fund description. The general tab of the fund gives you some basic information such as the ID/Description, start date, category and purpose. If you go to the Attributes tab of the fund, you can see attributes that tell which fund it goes to and also the GL Credit number.

Viewing the Fund Summary. The fund summary gives you an overview of the gifts given to that fund. To run the fund summary, from the fund record go to View>Summaries>Fund Summary. Then if needed, select appropriate filters (such as gift dates or solicitors) and click Finish. The fund summary reads similarly to the constituent gift summary. To see exactly how the columns are totaled, click the F1 key on your keyboard while viewing the

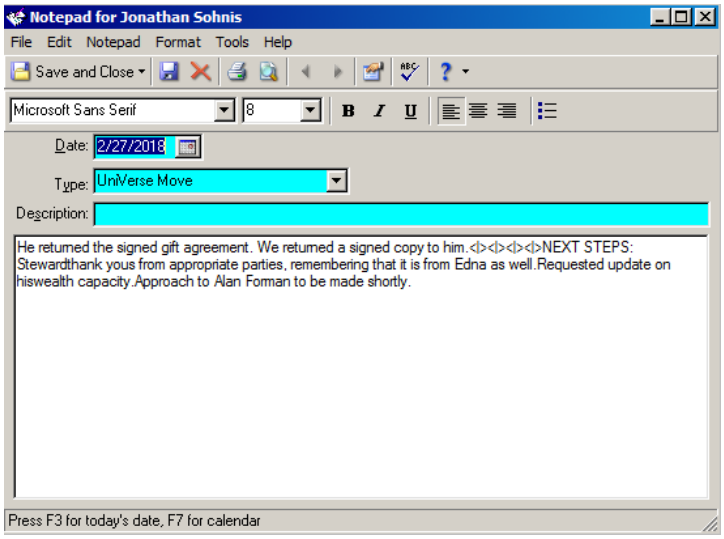
summary.

Actions and Action Reminders

The purpose of an Action is record communication or an interaction between an American Technion Society representative and one of our constituents. Here are some examples of actions we would want to record: A Development Officer meets with a donor to make a solicitation, a parlor meeting, or a major donor joined you for a trip to Israel.

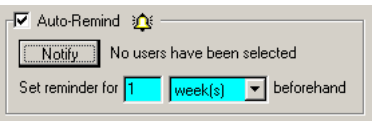


Notes Tab. The communication method (phone call, meeting, mailing, email, task/other) American Technion Society defined drop menu to categorize what the action is for Date the communication or interaction occurs or will occur The solicitor(s) who is doing the action. The purpose of the action (related to the prospect status) Check this box when the action is completed. To add details about what happened during the meeting, phone call etc., enter a new notepad on the notes tab of the action (click "new notepad").

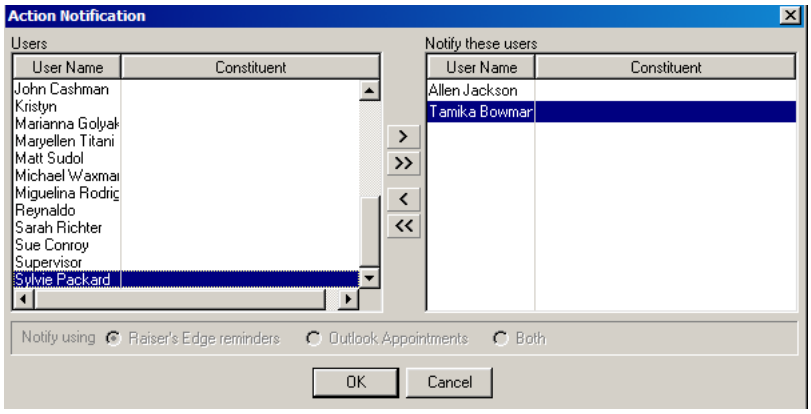


Include a clear, concise description (in the description field) and enter extra details in the notes box. The note type of Contact Report is used to track communication with prospects/donors.

Action Reminders. Action reminders enable you to remind yourself (and others) about actions that will occur in the future. For reminders to work, the action must be in the future (meaning the action date must be a future date). Also, make sure the action isn't marked as completed. On the right side of the general tab of the action, check the "Auto-Remind" box. Then click on the Notify button and select the Raiser's Edge user name(s) associated with the people you want to remind (yourself and others if necessary). At the bottom of the notify window you can select

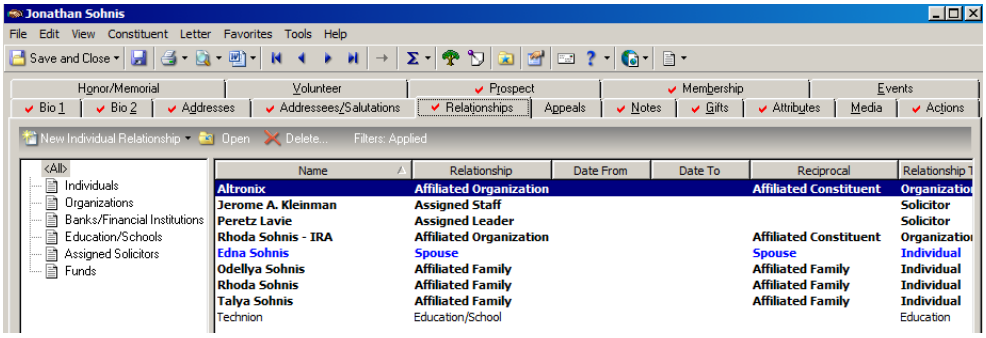


"Raiser's Edge Reminders, Outlook Appointments or Both". Choosing Raiser's Edge reminders will create a reminder in the action reminder section on your home page. Choosing Outlook appointments will send an appointment reminder to your Outlook account. In the "Set Reminder For" box, select the number of days/weeks/months ahead of time (before the action date) that you want to be reminded.



Relationship Tab

The relationships tab houses individual, organization, education and solicitor relationship records of the constituent. By default, you will see all relationships when you first go to this tab. You can select a single type by clicking on it on it from the menu on the left (Individuals, Organizations, Education/Schools, and Assigned Solicitors). *To open a specific relationship record, double click on the row where it's listed.*



Individuals - spouse, parents, children, siblings, friends, associates

Organizations - Employers, Family Foundations, Corporations, MG Companies

Education/Schools - Education record of an Alumnus time at Technion. Major, Class Year, College, Clubs, etc.

Assigned Solicitors - Dev. Officer who is assigned to the constituent, "Primary" is the main solicitor

NOTES for Education Relationships

1. After opening an education relationship, click on the "attributes" tab of that record to view clubs, sports, frats, student organizations, student body, awards and other info about the student's time at the Technion.
2. If a constituent has multiple education relationships, they likely have multiple degrees. A student will have a Technion University relationship for each degree that they have earned.

Attributes

Attributes are flags on a record that store data that doesn't fit into the hard coded fields that Raiser's Edge provides. There are attributes on constituent, gift, action and several other types of records. They are stored on the attributes tab of each record. Here are some commonly used constituent attributes on constituent records: (Note: additional attributes will be added)

- Universe Events
- Prospect Groups
- Univ. Misc. Code
- Awards
- 21st Century Status

Events Tab

The Events tab lists events that a constituent was invited to. Each "Participant" record holds information related to the constituent's participation for that event. Each row on the events tab is a separate participant record and you can open and view details for each by clicking on the corresponding row.

Fields on a Participant Record

Event Name - Name of the event

Start Date - Date of the Event Invite? - Indicates that a person was invited

Response? - Indicates a person's response to the invitation (not always populated)

Registration? - Indicates that a person plans to attend and has paid registration fees (if necessary)

Tags/Cards Button - Shows how a participant's nametag will appear and if it's been printed

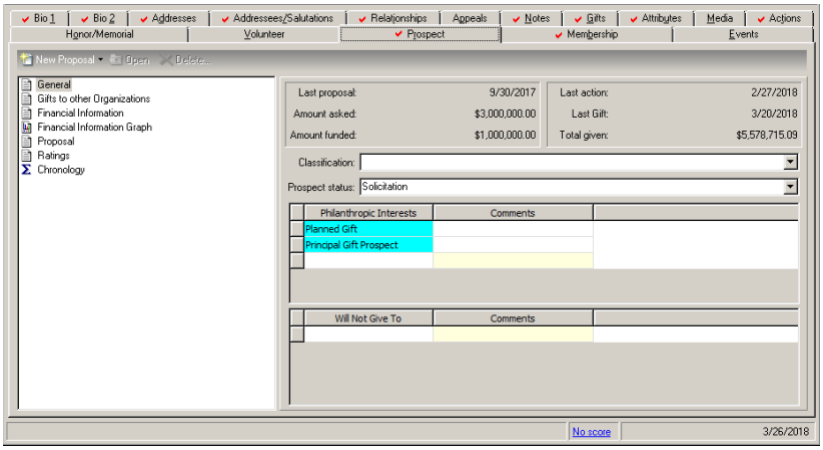
Guests Button - Lists guests that a participant will bring Group - If an event is part of a group, the group will be listed in this field

Registration Fees Tab - Lists any registration fees that are required for the event

Amount Paid (from Registration Fees tab) - Lists amount of registration fees paid

Prospect Tab

The Prospect Tab organizes prospect information using six categories: General, Gifts to other Organizations, Financial Information, Financial Information Graph, Proposal, and Ratings. The tab also includes a Chronology category that displays proposal information for select record types.



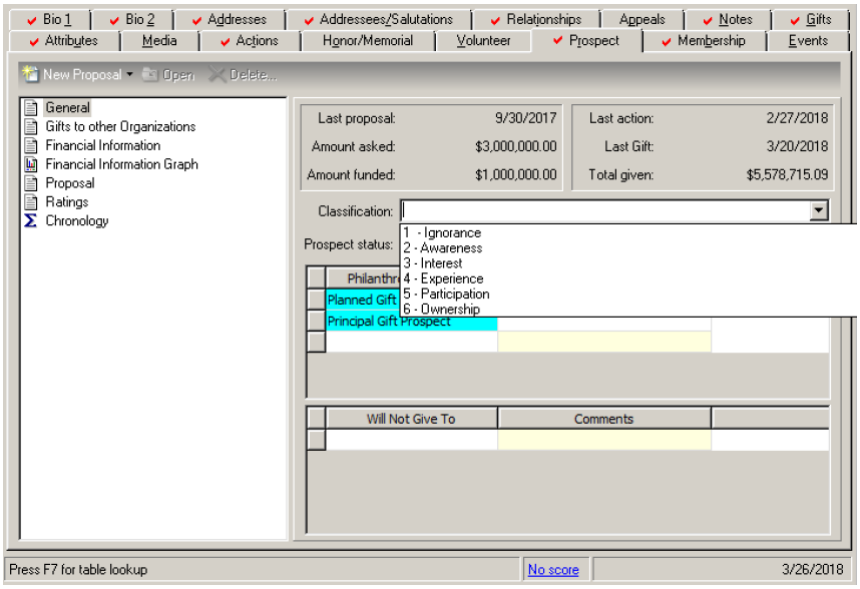
General

To enter general information about prospects, including classification, status, philanthropic interests, and areas to which they will not give, select the General category.

Proposal display. The top section of the General category screen displays information entered in the constituent's most recent proposal record. All the information is taken from the corresponding fields in the proposal record. For example, the Amount asked, is taken from the Amount asked field on the proposal record.

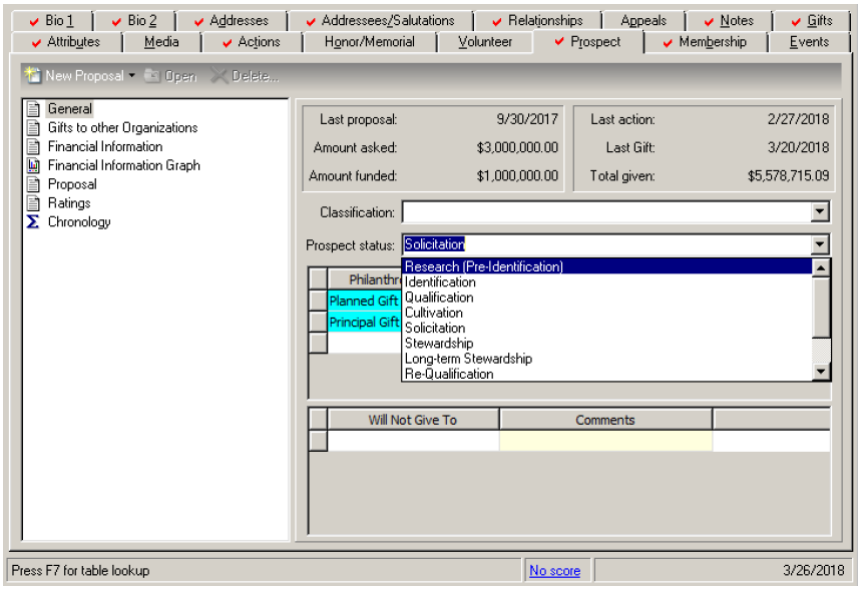
Classification.

Classification identifies and classifies prospects and varies from organization to organization. ATS has chosen to use this field to indicate where the donor is within the Donor Continuum (i.e. Ignorance, Awareness, Interest, Experience, Participation, or Ownership).



Prospect status.

Prospect status tells you where a prospect is in the solicitation process. Identification, Qualification, Cultivation, Solicitation, and Stewardship are a few Prospect status options an organization may use.

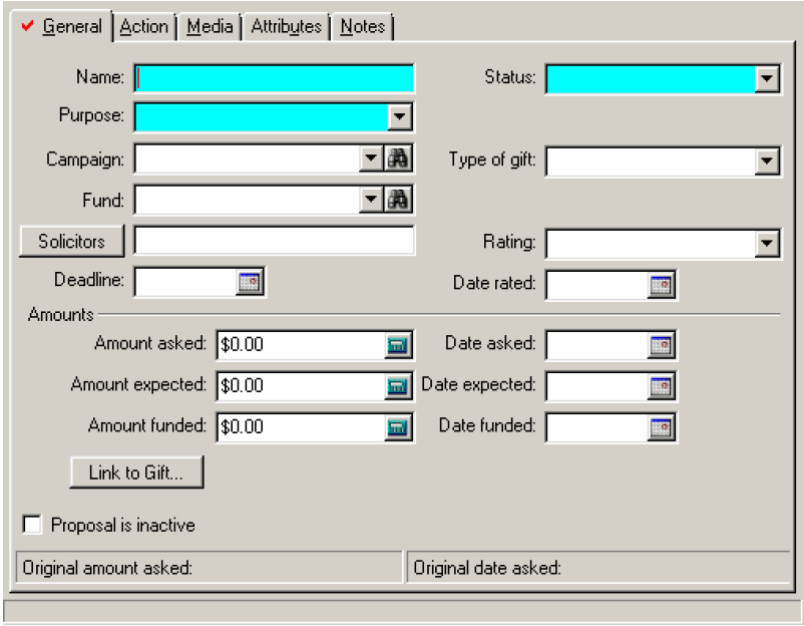


Philanthropic Interests grid. Philanthropic Interests shows you the philanthropic areas in which a prospect has displayed an interest. Planned Gift, Principle Gift, and Mission are a few Philanthropic Interests options. You can also enter any comments about the interest in the Comments column.

Will Not Give To grid. Will Not Give To shows you the philanthropic areas to which a prospect has refused to donate. If there is an area you would like to add to the Will Not Give To grid or Philanthropic Interest grid, please submit a ticket with your request to Advancement Services via Happy Fox.

PROPOSAL

In this category, you can create or open proposals. A proposal is a formal plan, detailing how your organization intends to win funds from a prospective donor, how much financial support you expect, and where the money will be used. You can record this information in the various categories on the Prospect tab, and use the **Proposal** category to determine how and how much you intend to solicit from this constituent.



Proposals information is arranged based on five tabs: General, Action, Media, Attributes, and Notes. On the General tab, you enter basic information about the proposal, such as name, where the money is to go, amounts, dates, and progress information.

On the Action tab, you tack the actions taken or planned to help your organization win the donation. An action is a specific step you take towards securing a donation from a constituent. It may include meetings, mailings, telephone calls, and e-mail messages. Actions allow you to build a history of the contacts and communications involved in creating a successful relationship with a constituent.

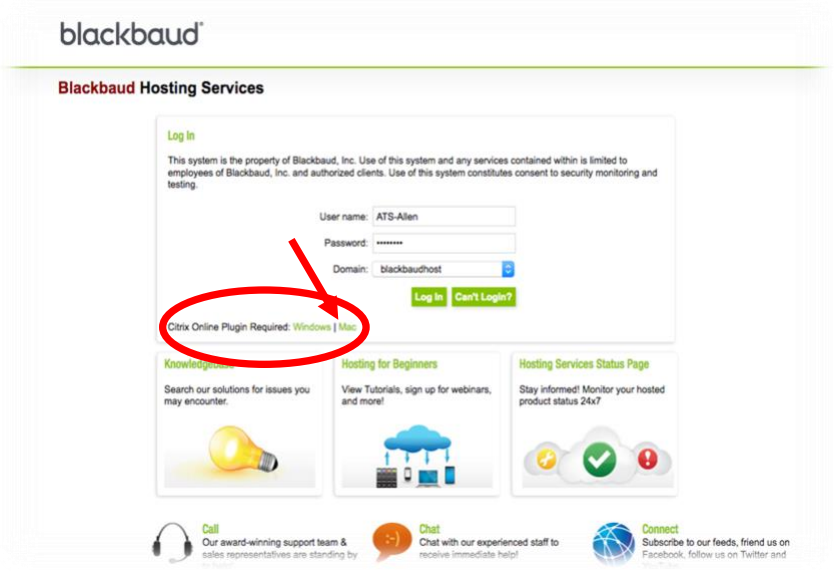
On the Notes tab, you can enter any additional information about your prospect. Notes make it easy to maintain helpful pieces of information you heard, read, or need to remember about a constituent. The Notes box accepts free-form text and holds an unlimited amount of information.

Appendix 1: How to Access Raiser's Edge (Database View)?

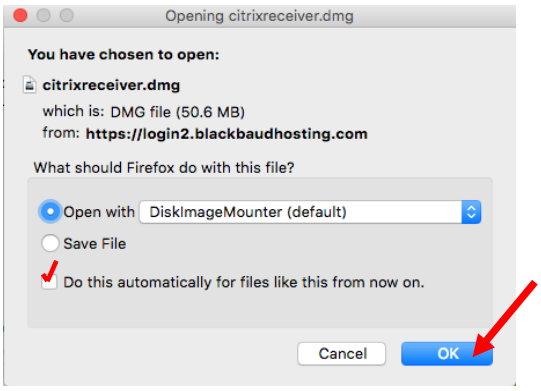
Before logging into Raiser's Edge, you must first access the Blackbaud Hosting site. Steps and screenshots on how to do so are listed below.

1. Visit https://login2.blackbaudhosting.com

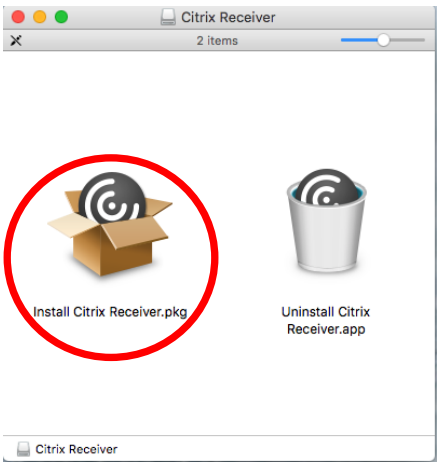
2. Before entering your username and password, download the Citrix Online Plugin for Mac. (Circled in the screenshot below) – The Citrix Online Plugin download steps only need to be completed once during initial setup.



3. After clicking Mac, you will receive the pop-up below. Check the box that says, "Do this automatically for files like this from now on." Then click okay.



4. Citrix receiver should then be added to your downloads folder and the install file should automatically pop-up. Double click "Install Citrix Receiver.pkg"



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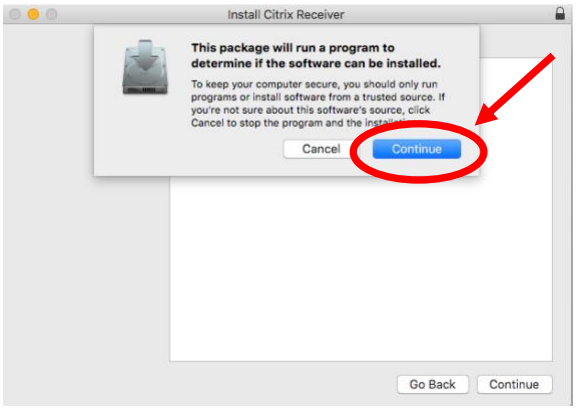
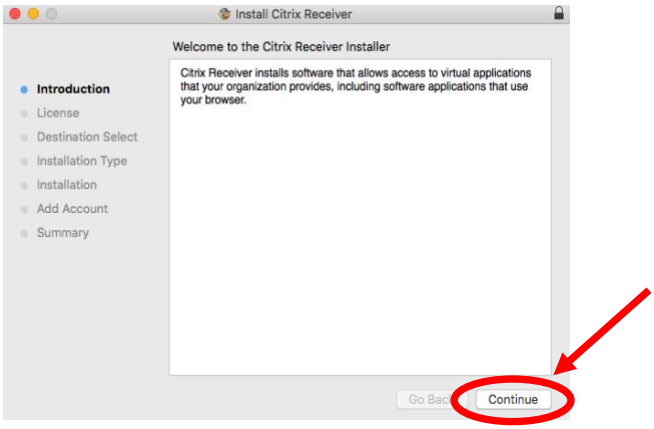
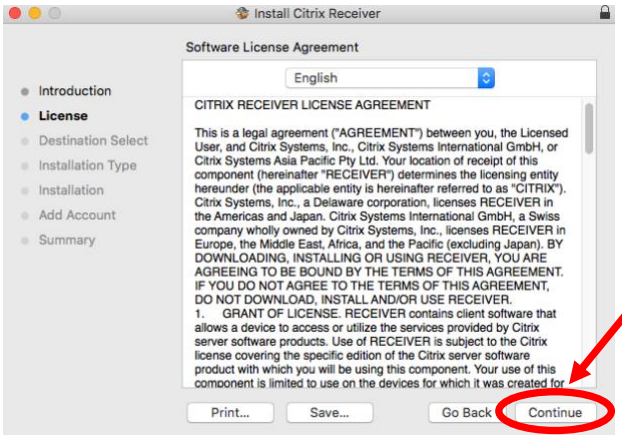
5. Next, click “continue” on the pop-up illustrated below.

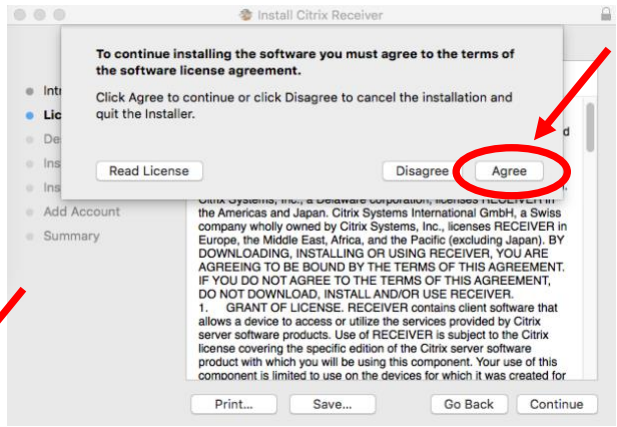


6. Next, click “Continue” on the pop-up illustrated below.

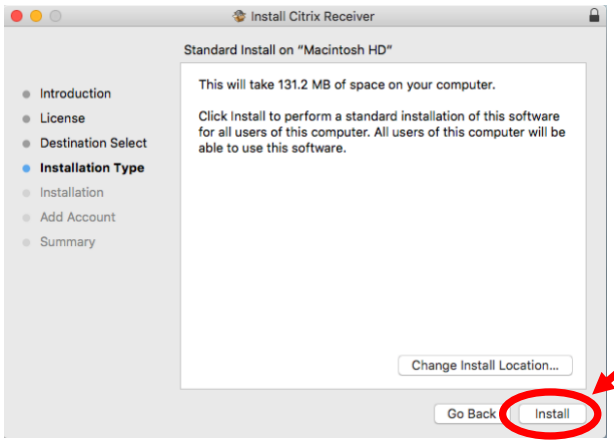


7. Click “Continue” on the License agreement and then select “Agree”.

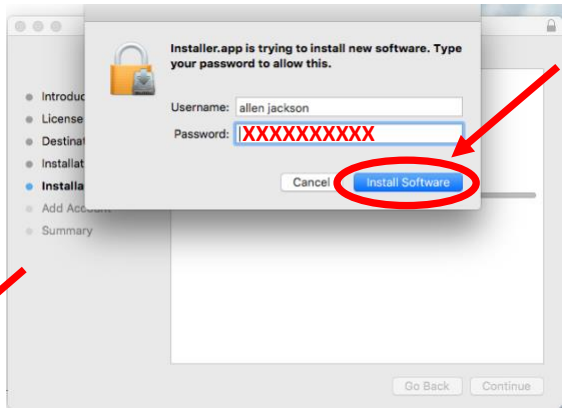




8. Then click, “Install”.



9. Enter your computer password and click “Install Software”.



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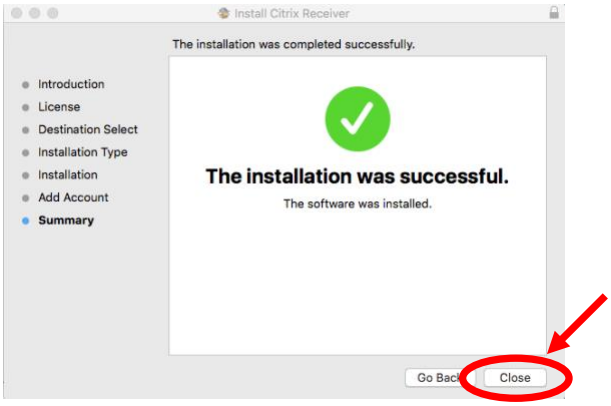
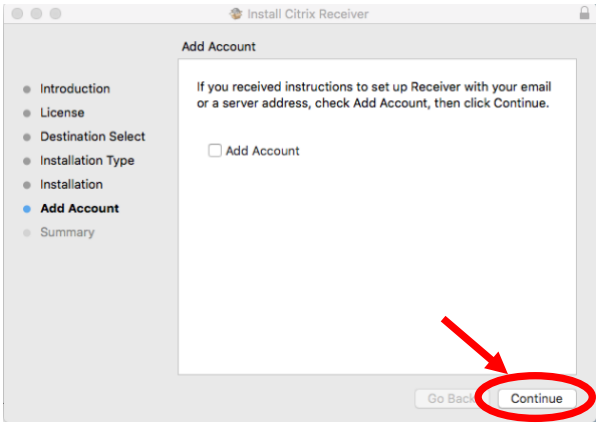
10. Next click, “Continue”.

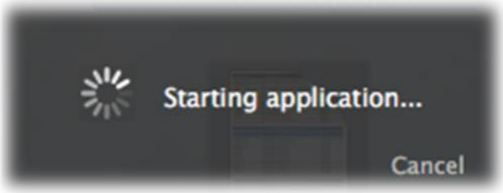


11. The installation should have been completed successfully. Click, “Close”.



12. Once you have downloaded Citrix, you are now ready to login.
13. Enter your username and password. Your user name is **ATS-*Your First Name*** (For example, **ATS-Allen**), unless told otherwise. Also, please make sure you capitalize ATS and the first letter of your last name. Your default password is ***Technion98***. You will be prompted to change this password upon logging in.

14. After clicking log in, Citrix will begin running in the background.



15. You should be taken directly into the Raiser’s Edge database. If not, you will receive the pop-up below and have to enter an additional username and password. For this screen, your username is your ***First and Last Name*** (the first letter is capitalized). The password is ***Technion98***.

If you have any questions or require assistance, please contact Allen Jackson at x6344 or allen@ats.org

Prepared by: A. Jackson
Last updated: 3/13/18

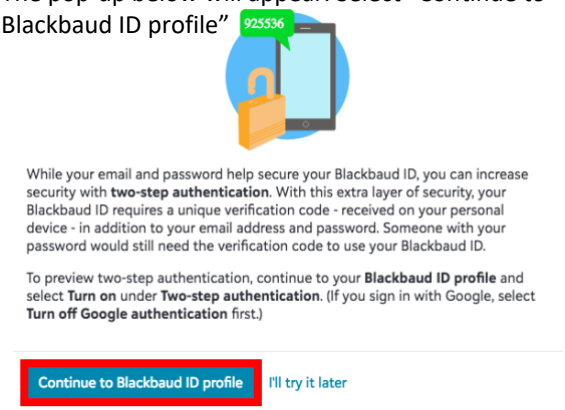
APPENDIX 2: HOW TO TURN ON TWO-STEP AUTHENTICATION?

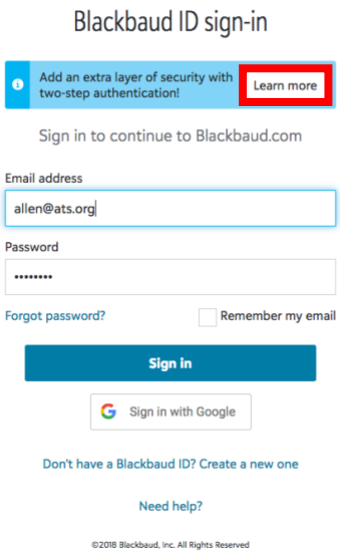
Step 1: Open your internet browser and go to Blackbaud.com or renxt.blackbaud.com.

Step 2: Go to the sign-in page by clicking "sign in" in the upper right hand corner. If you accessed the site using renxt.blackbaud.com you are already on the sign-in page.

Step 3: Next, click the "Learn more" button

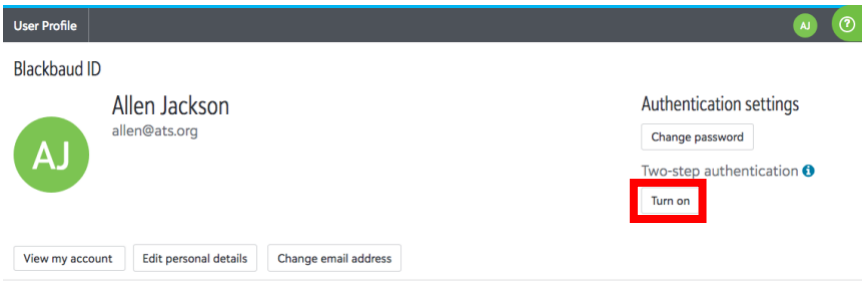
Step 4: The pop-up below will appear. Select "Continue to Blackbaud ID profile"



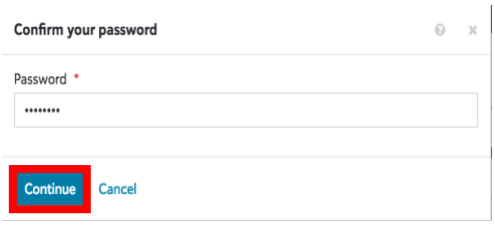


Step 5: Enter your Email address and Password. Then click "Sign in".

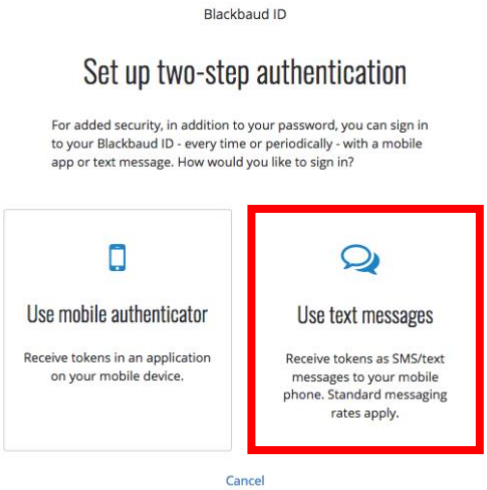
Step 6: After you have successfully signed in. click "Turn on". Illustrated below.



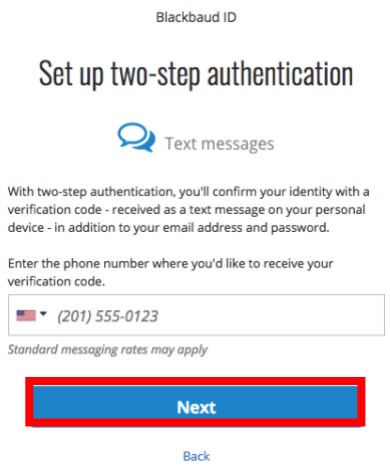
Step 7: Enter your Blackbaud password and click, "continue".



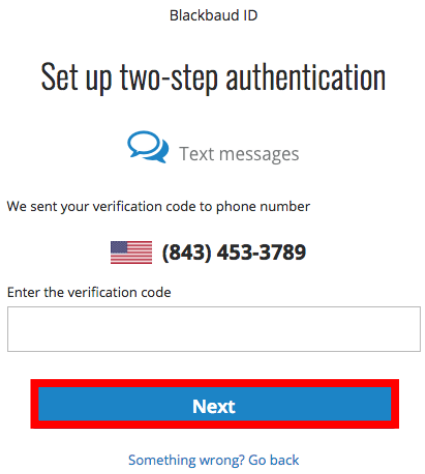
Step 8: Click "Use text messages".



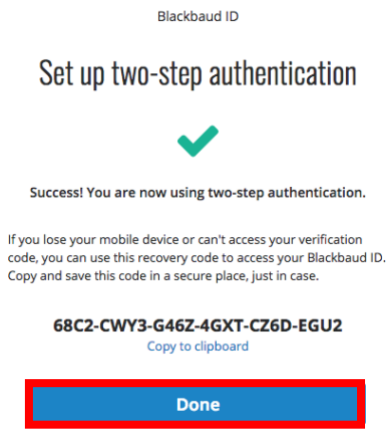
Step 9: Enter your cell phone number and click, “Next”.



Step 10: You will receive a text with a verification code. Enter the verification code.



Step 11: Copy your recovery code to clipboard and paste it into Notes. Then click, “Done”.



APPENDIX 3: REPORTS

I. Constituent Profiles Report

The constituent profile is a very flexible report that lets you select different pieces of information about a constituent to report on. To run the report, open a constituent's record and go to File>preview>constituent profile. When the box that says, "Select a Parameter File" pops up, either select an existing profile or click on "Add New" on the right to add a new one. By default, the report will only show information for the constituent record you're in. You can click on "include>select records" to choose a query if you wish. If running an existing profile, don't change the parameters because others users run the report. If creating a new profile, go to the Profile Contents tab and select the information that you need to see. Notice that you can select options for each section of data. When you're finished setting up the report, click on preview or print at the bottom right. If you save the report parameter, you can select it from the list of existing reports the next time you run a constituent profile (instead of adding a new one each time).