

## Raiser's Edge Course Listing June 2017

### CURRENT TRAINING OFFERINGS

#### RE 101

Prerequisite	FERPA Training
Frequency	Bi-monthly
Audience	Any UDP staff that needs access to RE
Description	Introductory course exposing users to logging in, navigating through RE, constituent records, gift records, action records, queries, reports, exports, dashboards and setting user options.
Materials	<a href="#">RE 101 manual</a>

#### Constituent Maintenance

Prerequisite	RE 101
Frequency	Bi-monthly
Audience	UDP staff that need to update records, manage prospects, or process gifts
Description	Course dedicated to teaching users how to accurately enter and manage constituent records in RE including submitting action records for advanced maintenance tasks.
Materials	<a href="#">Constituent Maintenance manual</a>

#### Gift Processing

Prerequisite	RE 101, Constituent Maintenance
Frequency	Bi-monthly
Audience	UDP users that process gifts regularly
Description	Course dedicated to teaching users how to accurately enter gifts via batches in RE. Gift processors should also take the UAF Financial Services quarterly Policy training.
Materials	<a href="#">Gift Processing manual</a>

#### Event Management

Prerequisite	RE 101, Constituent Maintenance
Frequency	Monthly or every other month depending on demand
Audience	UDP staff that manage events
Description	Course dedicated to teaching users how to enter and manage events in RE. Note: Users who have not taken gifts processing will not be able to remove participants from an event.
Materials	<a href="#">Event Management manual</a>

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### Data Analysis Basics Workshop

Prerequisite	RE 101
Frequency	Monthly or every other month depending on demand
Audience	RE users that need more in-depth knowledge of reports, exports, queries, and dashboards.
Description	This workshop is designed to be an interactive training on reports, exports, queries, and exports modules of RE. Users are expected to provide the trainer with a current project or report they'd like to create during the workshop.
Materials	<a href="#">Data Analysis Basics manual</a>

### DO Refresher

Prerequisite	RE 101, Constituent Maintenance, Prospect Development
Frequency	Quarterly
Audience	UDP development officers and support staff
Description	This class is designed for frontline development officers that would like a refresher on key tasks in RE. Topics covered include searching tips, using query templates, dashboards, and a brief review of proposals and internal assessments. Guides and videos accompany this course.
Materials	<a href="#">Internal Assessment Tip sheet</a> , <a href="#">Query Tip sheet</a> , <a href="#">Export Tip sheet</a>

### Prospect Development

Prerequisite	RE 101, Constituent Maintenance
Frequency	Monthly or every other month depending on demand
Audience	UDP development officers and support staff
Description	This course is designed to teach UDP staff about the policies and procedures surrounding changing a portfolio, entering internal assessments, entering contact reports, and how to enter and manage proposals.
Materials	<a href="#">Prospect Development manual</a>

### Mail & Letters

Prerequisite	RE 101, Data Analysis Basics
Frequency	Monthly or every other month depending on demand
Audience	RE users that need more in-depth knowledge of mail and communication tasks.
Description	This training is designed to be an interactive introduction to letters, labels, and donor acknowledgements using the Mail and Export modules.
Materials	Mail & Letters manual

### One-on-one

Prerequisites	Vary
Frequency	On Demand
Audience	Current RE users
Description	Private sessions designed to enhance user competencies beyond training classes.

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### ON DEMAND TRAINING

#### TRAINING VIDEOS

##### General

- Installing/Updating Citrix Receiver
- RE File Locations
- Customizing the RE Home Page
- Setting the Fund Format
- Customizing Colors

##### Prospect Development

- Entering Personal Visits
- Add a proposal
- Non-Responsive Constituent
- Future Prospect Qualified
- UA MG Disqualification
- UA MG Qualification-Affinity
- Unit Disqualification

##### Dashboards

- Dashboard Overview
- Using Queries in Dashboards