

RE Reports Standard Course Outline

This course provides users with a solid working foundation for using the many built-in reports in The Raiser's Edge®. The class is designed for any user who is responsible for generating reports from RE 7 data.

Please note: Crystal Reports are not covered in this standard class, but can be added. This is typically a one day class.

Prerequisites: The Raiser's Edge® Constituent and Gift Data and RE Queries or equivalent experience.

Topics:

- ◆ Gain an understanding of the entire report process
- ◆ Explore the many categories of the built-in reports
- ◆ Become comfortable with the various Tabs and their uses.
- ◆ Create the most common types of reports
- ◆ Discover how to export to Word and PDF
- ◆ Learn to use Pivot Tables reports
- ◆ Explore ways of formatting your reports
- ◆ Non Report Module tools:
 - Custom View Reporting
 - Dashboard Panel Reports
 - Summaries
- ◆ Reporting Options in Raisers Edge
- ◆ Best Practices in Fundraising benchmarks & trend analysis
- ◆ Communication Tips for Executive and Team reporting

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