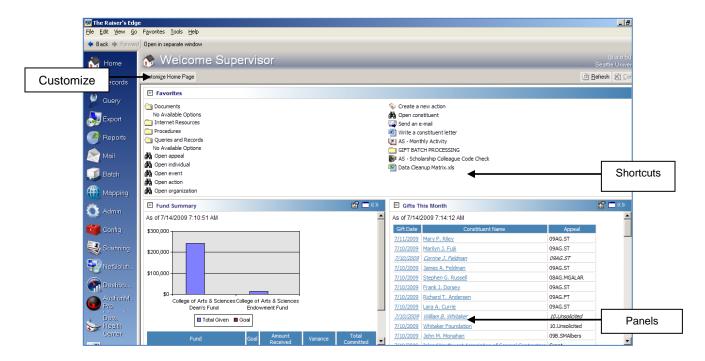
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Customizing your Raiser's Edge Home Page

Your Home Page is the gateway to information stored in Raiser's Edge. You can customize your Home Page to include shortcuts to commonly accessed tasks and records as well as quick overviews of specific information. Shortcuts appear on the top half of the screen, Panels on the bottom half.



You can customize your own Homepage following the instructions below or contact REHelp@seattleu.edu to get assistance.

To begin customizing your RE Home Page, open it up and click on the button "Customize Home Page" button. From there, you can:

Modify Your Shortcuts:

- Choose the shortcut items for tasks you'd like to see when you open the page. Checking them adds task shortcuts to your Home Page, unchecking removes them.
- Clicking the "Organize Favorites" button lets you create/remove folders and arrange your shortcuts by changing their order or placing them in folders. When you "Favorite" items in Raiser's Edge, you can place them in these folders.

Note: You can also open the "Organize Favorites" screen by right-clicking anywhere in your Home Page Favorites section and choosing to "Organize Favorites".

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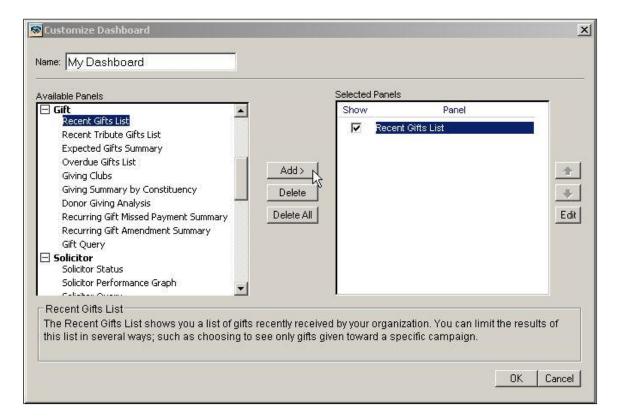
Modify Your Panels:

There are a number of report snapshots called "Panels" that can display on your RE Home Page. To add/remove a Panel from your Home Page, click on the "Panels" button, and then:

- 1. Select the type of Dashboard you want from the Available Panels box. When you highlight an item, you will also get a description of what that Dashboard displays at the bottom of the window.
- 2. After you select a Dashboard, click "Edit" to select your specific criteria and to choose what data should appear.
- 3. Click on "Apply" and "OK" to exit and be returned to the home page.
- 4. To refresh data, click on "Refresh" in the upper right corner each time you enter Raiser's Edge. This will ensure your Dashboards display the most up to date information.
- 5. To make panels smaller or larger, use the icons on the top right of each panel.

Example: Add a 'Recent Gifts' Dashboard to your homepage

1. With the Customize Dashboard screen open, select 'Recent Gifts List' from the 'Available Panels' list box and click 'OK'. The dashboard will open with the Recent Gifts List panel included. This list will be blank at first but will soon populate with data.



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- 2. To customize the panel, click the properties icon in the upper right hand corner and select 'Properties'.
- 3. Use the criteria selections to filter the gift list. These criteria may include dates, constituencies, gift types, etc.
- 4. Use the 'Columns to Show' criteria selection to alter what data will be displayed.
- 5. Click 'OK' when you are finished with you selections. The list will take a few moments to refresh again considering your new criteria.

You can hide or delete Panels you've added to your Homepage from the "Customize Dashboard" window (shown on the previous page).

- To hide a panel on your Home Page, uncheck the "Show" box.
- To delete a Panel, highlight it in the "Selected Panels" box and click the "Delete" button.