# Data Entry Shortcuts

This document describes shortcuts that may help speed up and simplify your common data entry tasks. These shortcuts include setting a default start up page, setting default start up tabs for records, loading default data sets on records, using shortcut keys and working with data grids:

How to Set a Start Page:

When you open Raiser's Edge, you can specify what page to open first:

1. Open your User Options (Tools>User Options). An Options window will open.
2. Click the "General" tab.
3. Select one of the pages listed in the "Start Raiser's Edge on this page" drop down box. This page will open first the next time you log into Raiser's Edge.

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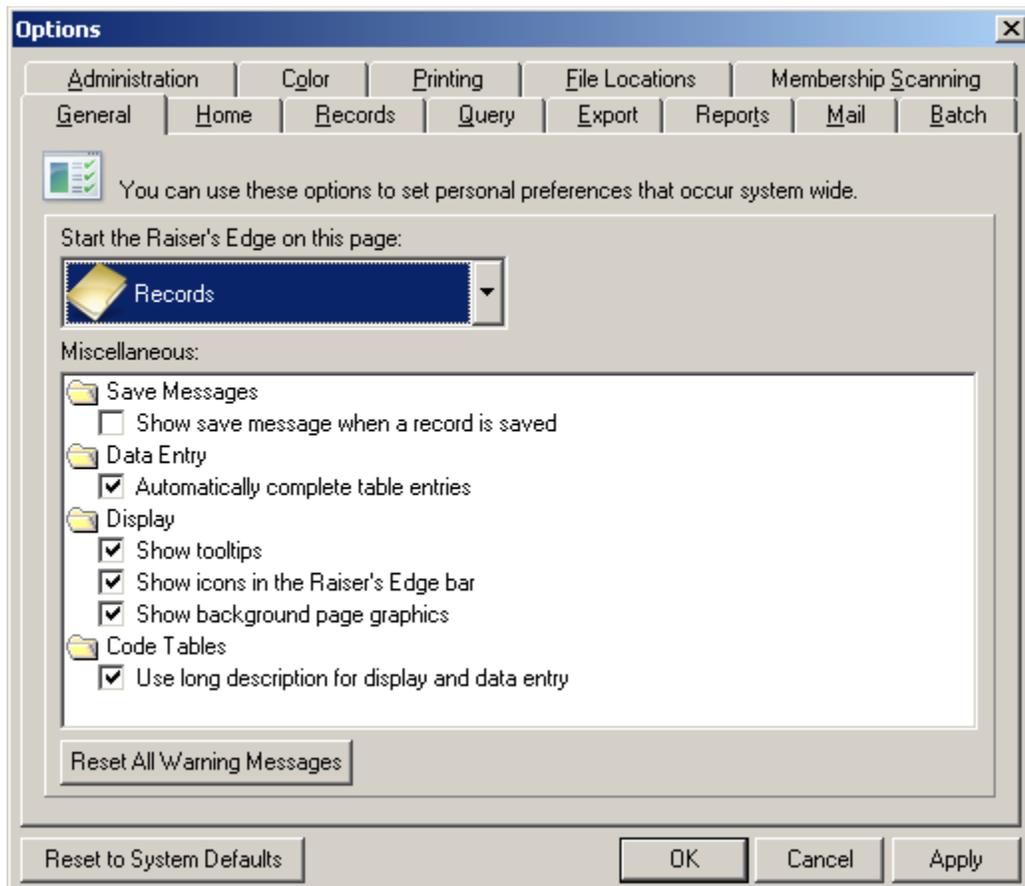
How to Set a Default Tab:

When you open a specific type of record in Raiser's Edge, you can specify which tab to display first:

1. Open your User Options (Tools>User Options). An Options window will open.
2. Click the "Records" tab.
3. Highlight the record type you want to set a default tab for by clicking it.
4. Choose the tab you want to set as the default by selecting it from the "Default tab" drop down box. This tab will open first the next time you open that type of record.
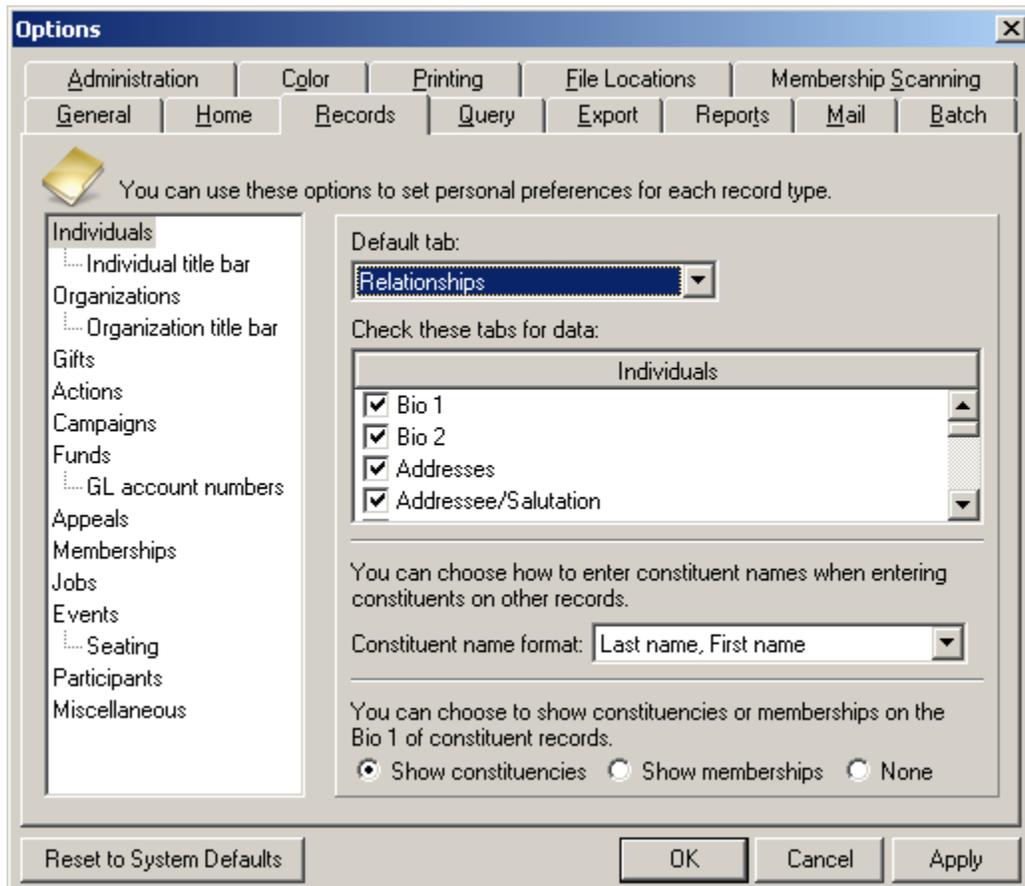
Loading a Default Data Set:

When you open a record, you can automatically load pre-set values onto that record. You can add default values to the following types of records: Constituents, Individual and Organization Relationships, Gifts, Actions, Jobs, Events and Participants

1. Open the type of record you are performing data entry on. A window for that record will open.
2. In the title bar of the record window, click the <record type name> and select "Load defaults from…". A Default Set window will open. If you are working with a Constituent record, <record type name> will be "Constituent". If you are working with an Action record, <record type name> will be "Action", and so on.
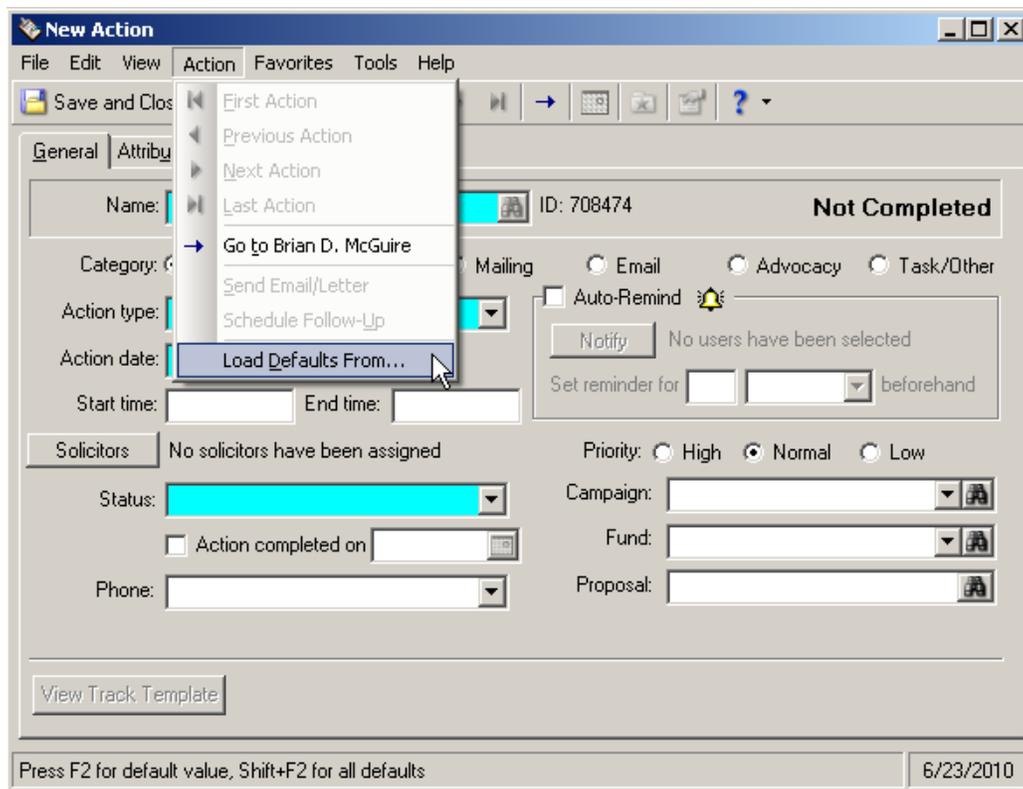
3. Highlight the default set you want to load, make sure the "Load default values now" box is checked, and click "OK". The default values of the selected set will be loaded onto the record you're working with.

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Notes:
- Default values will not overwrite data that already exists on the record.
- If there is a default set already on a record and you repeat it, when you save the record, RE will let you know that you have duplicates. Delete the dups.
- Send an email to REHelp@seattleu.edu to ask Advancement Services staff to create/modify default sets for you, or if you'd like to be trained how to create them yourself.

Using Shortcut keys:

There are numerous short-cut keys available to you when performing data entry in certain areas of Raiser's Edge:

Ghost spouse:
- F3 for adding the last name of spouse
- F7 to search for an individual
- F8 to validate the address

Address updates:
- F7 for table lookup
- F8 to validate the address
- Shift+F2 to load default values

Adding Relationships:
- F7 to search for an individual
- F8 to validate the address
- Shift+F2 to load default values

Actions:
- Action type: F7 for the table lookup
- Action date: F3 for today's date
- Action date: F7 for the calendar

Working with Data Grids and Their Legend:

Many Raiser's Edge records have tabs of information displayed in sortable, filterable and customizable grids. Such tabs on a Constituent record include Gifts, Actions, Events and Relationships. Below are examples of how you can work with grids to increase their usefulness in general or for specific tasks:

1. **Sorting**: Click the column header of the column you wish to sort by. Clicking the same header again will sort the list in the opposite direction.
2. **Exporting**: Right-click the grid and click "Export Grid…" or "Export Grid to Excel" from the context menu. The "Export Grid…" option allows you to choose the export file type and save location. Either option will export the data as displayed on the grid, factoring in your column choice, filtering and sorting.
3. **Filtering**: Filter the grid to only display desired items.
4. **Add/Remove Columns**: Right-click any whitespace in the grid and click "Columns" in the context menu. From there, you can choose to show or hide desired grid columns.
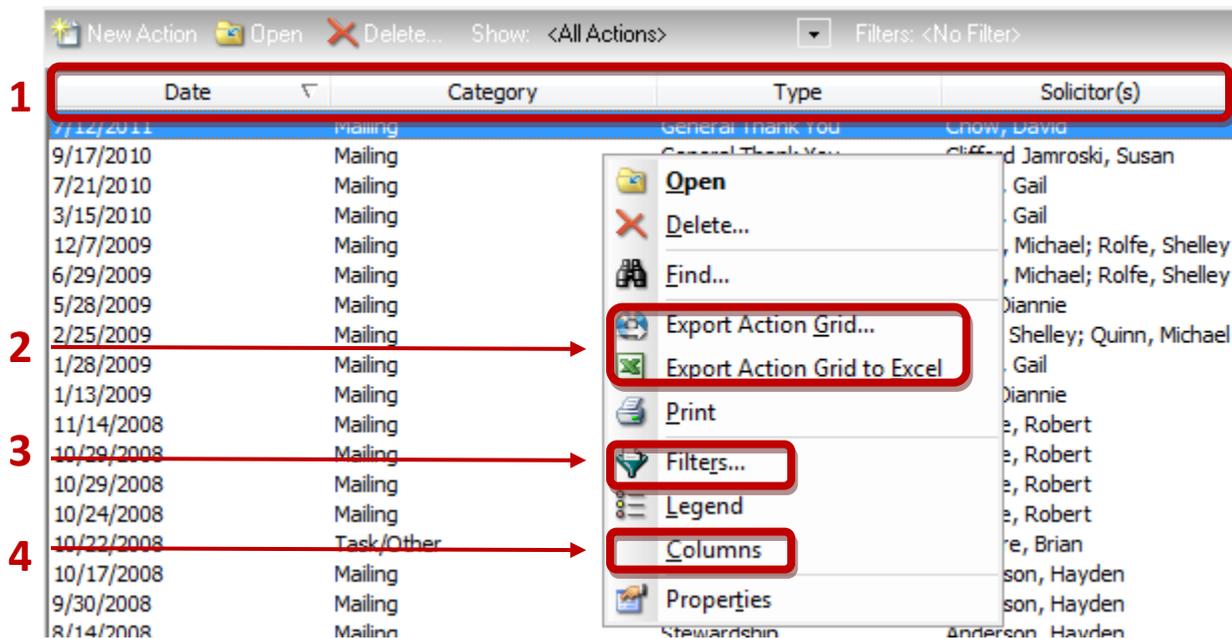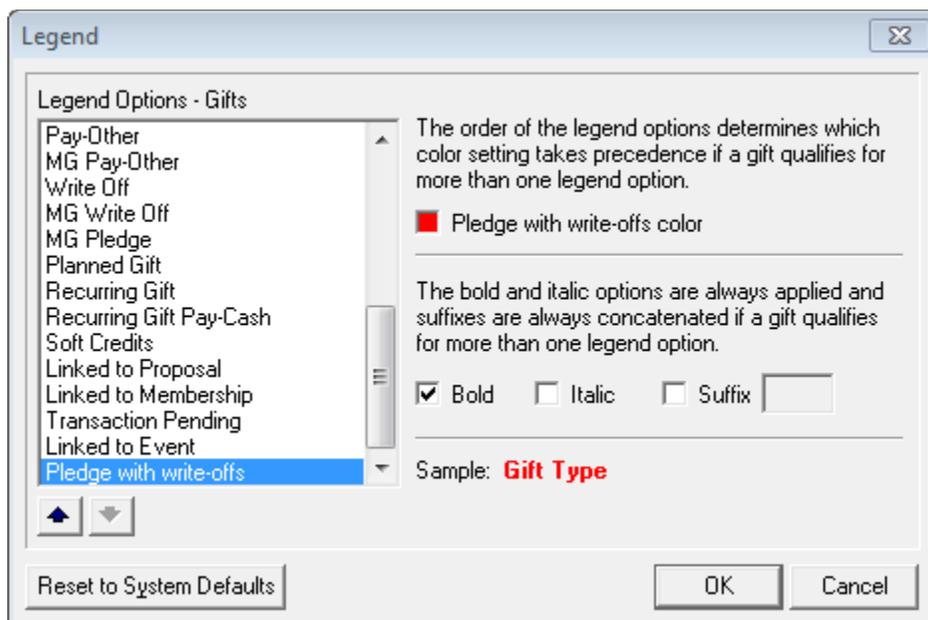
The Legend:

Using a grid's Legend lets you format items found in the grid, depending on what that item is. This formatting includes changing font color and decoration (bold/italics). Custom formatting may help specific items stand out in the grid for easier identification. To access a grid's Legend:

1. Right-click any whitespace in the grid and click "Legend" from the context menu. The "Legend" window will open.
2. Pick the type of item you want to alter the formatting for from the Legend Options window on the left.
3. Select the color, decoration and suffix (not available on all grids) you want for the selected item.
4. Click "OK" or pick another item from the list to format.

Below is a Legend window for a Gifts grid:

Notes:

- Legend formatting can get out of hand if you aren't careful. If this becomes the case, clicking the "Reset to System Defaults" button to return to default Legend formatting.
- Formatting the Legend does not affect other users' settings.