

Tracking sources of information in Raiser's Edge NXT

It is good practice to track where you get your information about constituents from. Doing so eliminates guesswork, improves data integrity, helps with privacy law compliance, and provides answers to any constituent requests as to where you obtained their data from. Below are the places in The Raiser's Edge where you can track information source. I've split these into web view (unified view) and database view and noted which fields can be made required for data entry. Scroll to the end for some tips in getting your users on board with recording information sources.

Standard places to store where you got data from

Field	Web/unified view	Database view
Consent Source	Cannot yet be made required	Can be made required
Address Info Source	Visible on existing addresses but cannot add or edit	Can be made required
Gift Aid Declaration Source (UK only)	Cannot yet be made required	Can be made required
Prospect → Financial Info Information Source	Cannot yet be made required	Can be made required
Prospect → Financial Info Ratings Source	Not yet in web view	Can be made required

Places that require a little more set up

Field	Web/unified view	Database view
<i>Attributes are Custom Fields in web view. All types are managed in Settings but not necessarily visible on records:</i>		
Constituent Attributes	Can add/edit on records and be made required	Can be made required
Participant Attributes	Cannot yet view/add/edit on participants	Can be made required
Education Attributes	Can add/edit on records and be made required	Can be made required
Address Attributes	Cannot yet view/add/edit on addresses	Can be made required
Individual Relationship Attributes	Cannot add to new relationships; can use Individual Relationship Notes instead but cannot make this required	Can be made required
Organization Relationship Attributes	Cannot add to new relationships; can use Organization Relationship Notes instead but cannot make this required	Can be made required
Account Attributes (on Bank Relationship)	Cannot yet view/add/edit on relationships	Can be made required

Field	Web/unified view	Database view
Attribute Comments - on all the above types of attributes	Only Constituent Attribute comments are in web view; cannot make these required	Cannot be made required
Email Address Comments	Not yet in web view	Cannot be made required
Phone Number Comments	Not yet in web view	Cannot be made required
Link Comments	Not yet in web view	Cannot be made required
Notepad Author	Not yet in web view	Can be made required
Notepad Title	Not yet in web view	Can be made required; can be repurposed as note info source as it can be made a lookup field
Notepad Description	Renamed 'Summary' field; cannot yet be made required	Can be made required
<i>Media is not in web view. Attachments is the equivalent:</i>		
Media Author	Attachment author field not editable	Can be made required
Media Title	Attachment Name required; Attachment Description cannot yet be made required	Can be made required; can be repurposed as media info source as it can be made a lookup field

Getting users on board

- Explain why understanding the source of information is important to your organization. It's about compliance with your privacy policy and compliance with best practices and any privacy laws applicable to your organization.
- Keep lookup tables concise and intuitive to avoid confusion and minimize errors.
- Make fields required (where possible) to minimize guesswork.
- Set up Default Sets in database view for users to trigger when creating a new record.
- Monitor gaps in data entry and remind users of what they need to do. Try and do this at least monthly as the repetition of reminders will eventually improve things. To track field-level authorship you may be able to use a plugin like Zeidman Development's [Audit Trail](#).