# Implementing the Blackbaud Raiser's Edge NXT Web View into Your Organization: A Year of Big Change

bbcon 2025
Bill Connors, CFRE, bCRE-Pro
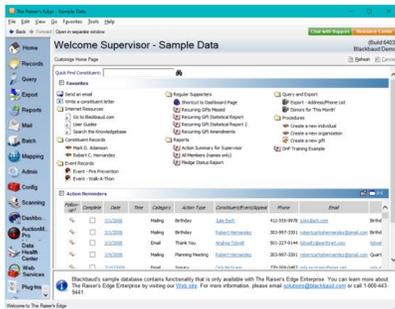Independent Consultant and Trainer on Raiser's Edge

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# Slide deck

You can download the slide deck – anonymously, no login or forms to fill out – at

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# Terminology

## "Raiser's Edge"

The Raiser's Edge version 7

**Raiser's Edge NXT**

**Database View**

Citrix

**Web View**

**Raiser's Edge NXT**

**Unified View**

the "Total Web Solution"
or
the **"Unified View"**:

web view when the database view goes away

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# Introduction and Agenda

- Why…Who…How
- Why we need to move and why I'm supportive
- The database manager's role in the move
- Best sources of information for the move
- What to do each time a change is announced
- What to do and not do today in the web view
- What to do and not do today in the database view

# Raiser's Edge NXT PUB May 2025

## Timeline for a Unified View

| 2H 2025 | 2026 | 1H 2027 |
|---|---|---|
| **Complete Critical Workflows** | **Complete Advanced Administration Tools** | **Unified View + Innovation** |
| • Unified View – Query, Standard Reports, Batch.... <br> • Integrated Ecosystems – RENXT- FENXT post to GL, Constant Contact <br> • More.... | • Unified View – Import, Export... <br> • Integrated Ecosystems – Membership forms, Payments – Reconciliation, Volunteers <br> • More... | • Exclusively in Unified View (No database view) <br> • Continuous Enhancements <br> • Ongoing Innovation |

Move functions exclusively to the unified view

# Why?

- The database view is The Raiser's Edge version 7 released in <u>2000</u> based on <u>1990's</u> design and technology

# Planning Your Upgrade to
## *The Raiser's Edge 7*

Bill Connors

Fund-raising System Consultant

Blackbaud

San Francis

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**Planning Your Upgrade to RE 7: The Technical Side**

Bill Connors
and Gregg Bohner
Blackbaud

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## Server Operating System

- Support Novell but recommend Windows
  - Multi-processors
  - Dynamic caching
  - 2 GB limit on Novell
  - *The Raiser's Edge for the Web*
- NT vs. Windows 2000

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## Workstation Operating System

- Windows 95 not supported
- Windows 98 supported but not recommended
- Windows NT or 2000 recommended

# Why?

- The database view is The Raiser's Edge version 7 released in <u>2000</u> based on <u>1990's</u> design and technology

- Citrix

- We need, pay for, and deserve product improvement and upgrades

- My perspective

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# Who: the Raiser's Edge database manager

## Session Details

### The Role of a Blackbaud Raiser's Edge NXT Web View Database Manager: What's New, What's Not

Being a "database manager" is a different role with different responsibilities than being the fundraising team's chief writing queries, creating reports, and making mailing lists. It's long been different than it ~~~~~~~~~~~~ system configuration, policy and procedure, development documentati~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ liaison, and more. This session will discuss what it means to be a "datab~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ the same since moving from Raiser's Edge 7 and database view to the fu~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ changed to make the role more knowledgeable, engaged, and technicall~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ Raiser's Edge consultant, thinks and get a chance to ask questions and s~~~~~~~~~~~~~~~~~~~~~~~

**Track**
Fundraising & Donor Management

**Produ**
Blackb~~~~~~~

| Date | Time | Location |
|------|------|----------|
| Tue, Oct 07 | 11:30 AM - 12:15 PM | Ballroom B |

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# Role of an RE DBM

## What's new

- Upgrading, implementing, change management to the web/unified view
  - See slides from my other bbcon 2025 presentation
  - This takes time, thought, being methodical, working with your users

- Talk to your supervisor about this

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# Don't

- Believe everything you read or hear
- Buy the hype
- Panic or get stressed out
- Only pay attention to *your* tasks and uses
- Indefinitely postpone
- Make a plan
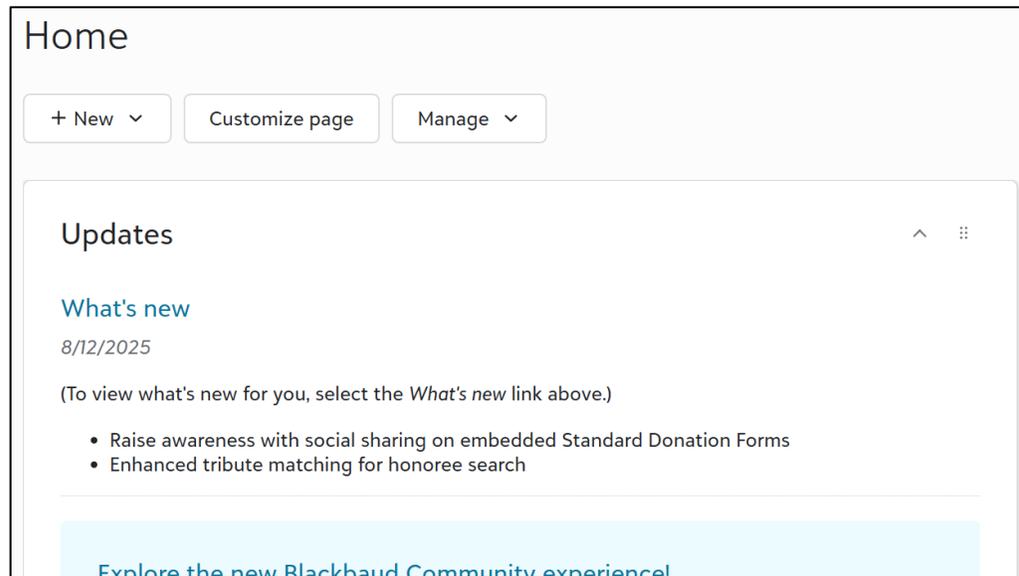
# Blackbaud Resources

- Blackbaud Community RE NXT Blog
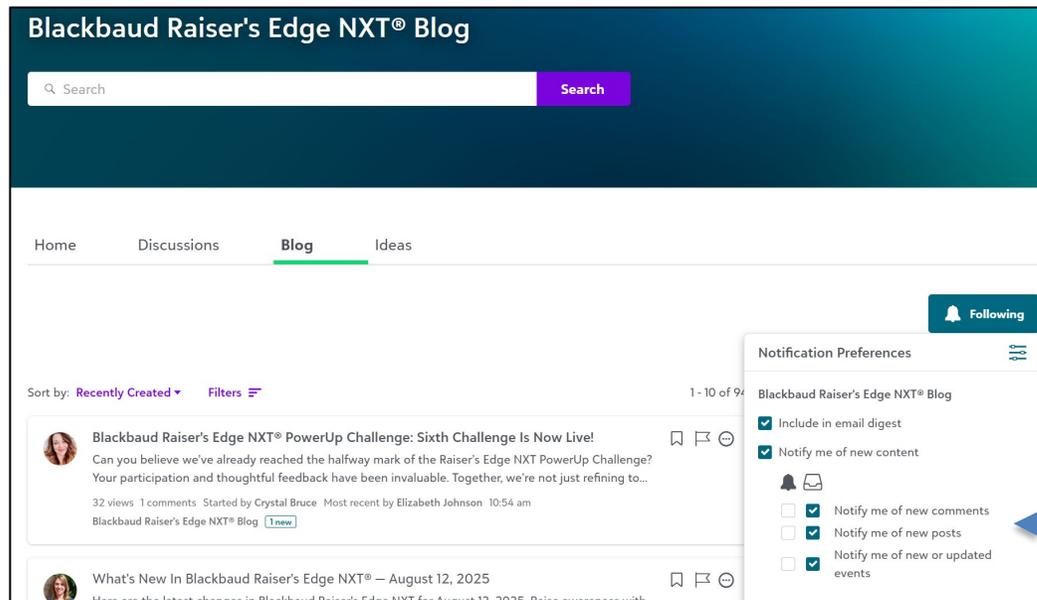
Community.Blackbaud.com

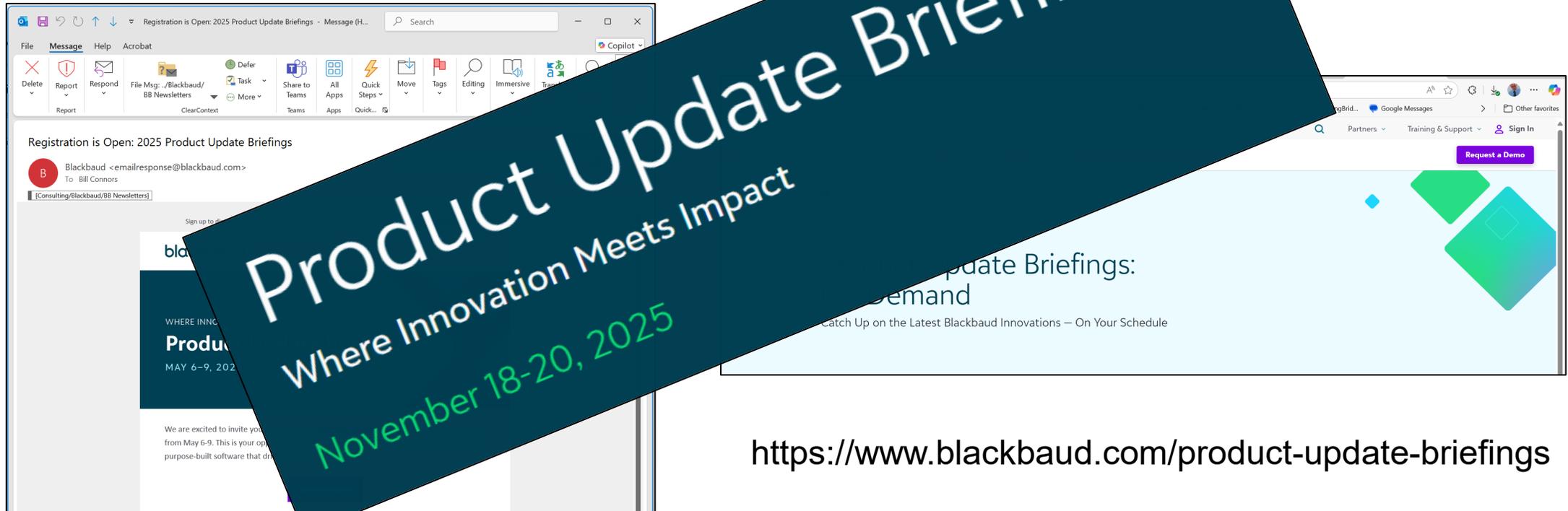Uses the same login as Raiser's Edge

# Blackbaud Resources

- ## In-product notifications
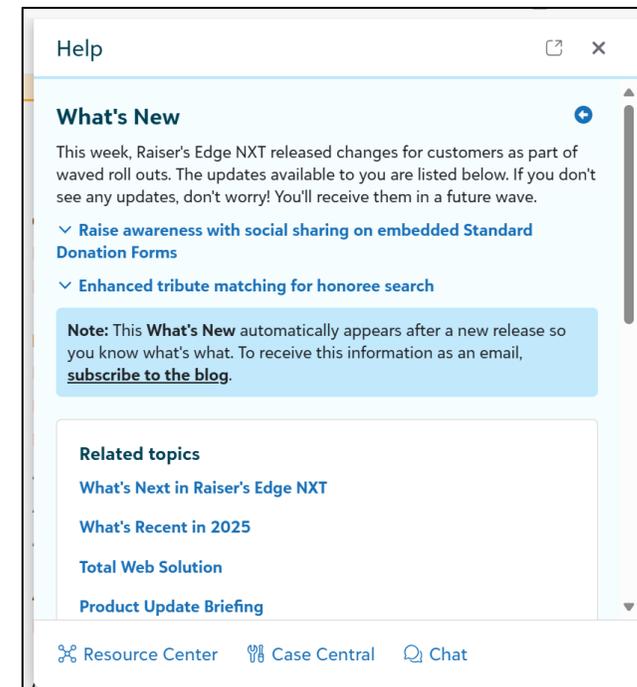
# Blackbaud Resources

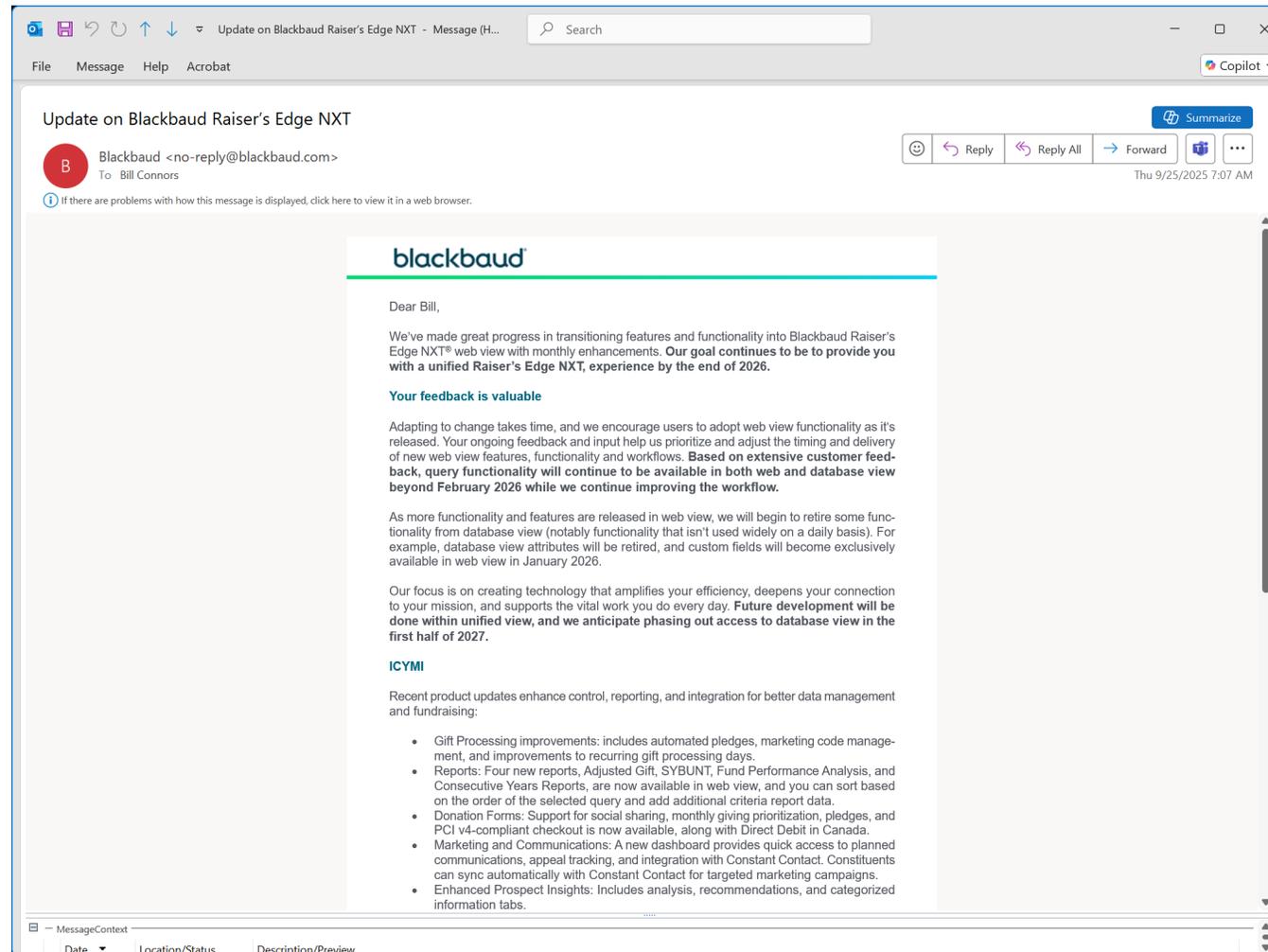- RE NXT Product Update Briefings



https://www.blackbaud.com/product-update-briefings

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# Blackbaud Resources

- Emails

# Other Resources

- Blackbaud Raiser's Edge NXT Resource Center
- Blackbaud Product Management town halls
- Blackbaud Customer Success webinars
- Blackbaud University
- RE online/social media communities on the Blackbaud Community and Facebook

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# As each announcement is made…

- Read what is released from Blackbaud

- Read the documentation/Help

- Watch related online events

- Evaluate it
  - Web view vs. database view
  - Applicability for your team
  - What others are saying

# As each announcement is made…

- Discuss with your team

- Decide with your team

- Document (which is <u>not</u> re-write the Blackbaud/BBU material)

- Implement


- Repeat…

- Get help if you need to

### Policy and Procedure Documentation

In addition to chapter 8 of Bill's **book** about Raiser's Edge (pages 211-215):

- Blackbaud Conference presentation available on **YouTube**
- Policy and Procedure Documentation (bbcon presentation slides) **DOWNLOAD** ⬇
- Documentation Example 1 — Process for Generating Direct Mail Files **DOWNLOAD** ⬇
- Documentation Example 2 — Annual Report Process **DOWNLOAD** ⬇
- And see Chapter 8 and Appendix C of Bill's **book** on Raiser's Edge

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# You absolutely *must*…

- Security

- Settings
  - Including within the constituent records

- Table management

- Custom field (Attribute) management
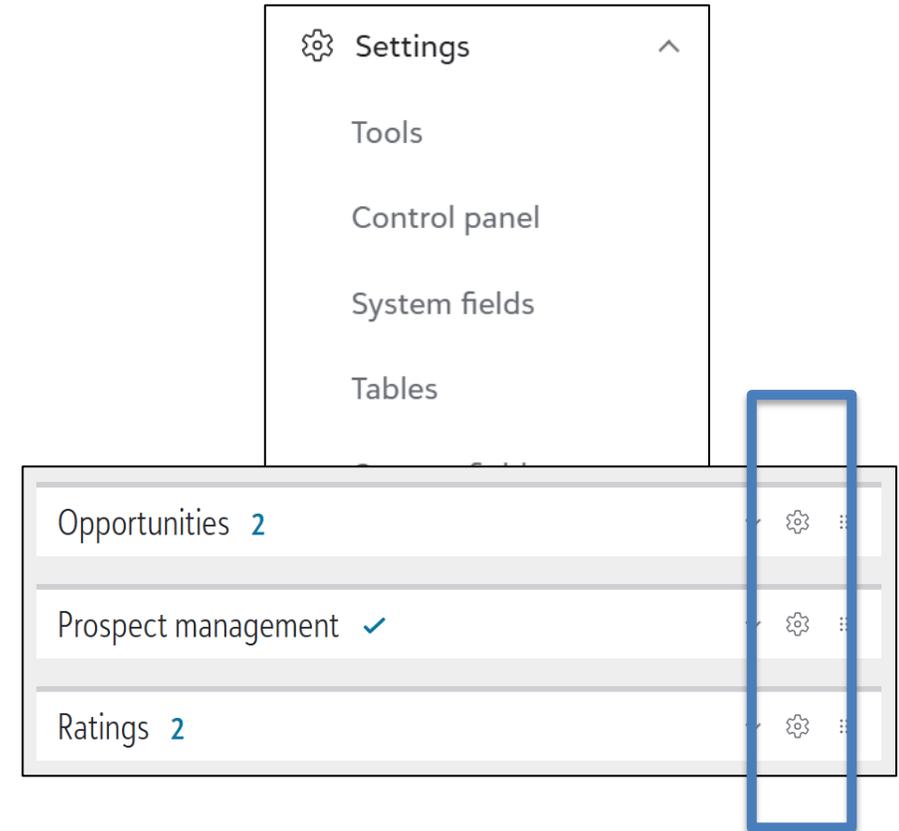
*Slides were due from speakers to the bbcon staff in mid-August, so these slides are as of August 15, 2025, and these recommendations are subject to change based on information that comes out between these slides' creation and their bbcon presentation.*

# I *suggest* you do in the web view

- Query…
  - A word about Query Lists…
- Anyone with a portfolio should be using
  - Constituents, Actions, Notes, Opps, Lists (all 4), Work Center
  - But do NOT export lists!!  Especially for mailings!!
- Leadership and fundraisers should be using standard dashboards*

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# I *suggest* you do in the web view

- Event management and online event registration forms
- Online donation forms if you can deal with donors and gifts
- Reports if you must export them to Excel
- Duplicate detection and merging is better

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# *Consider* doing in the web view

- Very specific gift tasks: in-person credit card, auto RG pays, auto Pledge pays, online donation and event reg form payments; otherwise wait for new grid batch experience

- Email?

- Marketplace apps like LetterBox

- Emailed receipts for offline gifts

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# *Consider* doing in the web view

- Home page

- Dashboard builder and Insight Designer

- Prospect Insights

- Power Automate and Power BI

- Post to GL if you use Blackbaud Financial Edge

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# *Don't* do in the web view

- Day-to-day constituent maintenance
- Gift entry other than previously noted
- Mailings
- AI Acknowledgements
- Address Finder
- Workflow designer
- Giving statements

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# Do in the database view

- Everything else!

- Do what you can in the web view and stop using the database view for that, otherwise use the database view as always

- Exporting, mailings, globals, constituent entry and maintenance, gift entry, reporting, importing, plug-ins, CFA maintenance, Address Finder, Deceased Finder?, acknowledgements, receipts, reminders, membership, volunteers, …

# Put another way, use the db view for…

- Almost everything in Records
- Everything in Export (NOT web view Lists or Query!)
- Everything in Reports unless the goal is an Excel file
- Everything in Mail
- Most everything in Batch
- Everything in Admin except perhaps Post to GL

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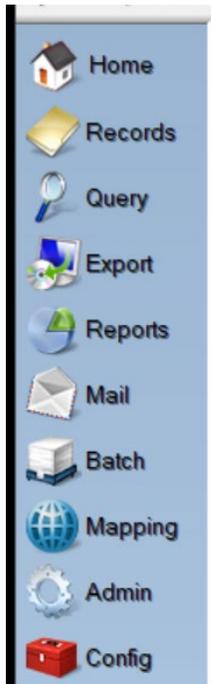
# Use the database view for



- Most everything in Configuration

- [Drop Dashboards in db view]

- Everything in Data Health Center

- Online Express, perhaps, for email and online donation forms

- Plug-ins, such as ImportOmatic, Importacular, Unpost, etc.

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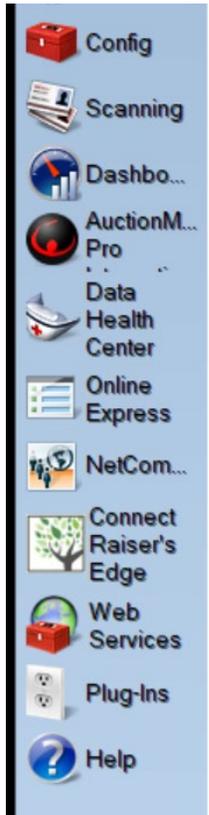
# Giving feedback to Blackbaud and others

- Idea bank in the Blackbaud Community
- Town halls
- Discovery sessions
- Direct contact with Blackbaud product managers
- Social media

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# Thank you!

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for Raiser's Edge NXT (database and web views) and The Raiser's Edge version 7

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