



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

bbcon 2025

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Slide deck

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

BillConnors.com/Resources

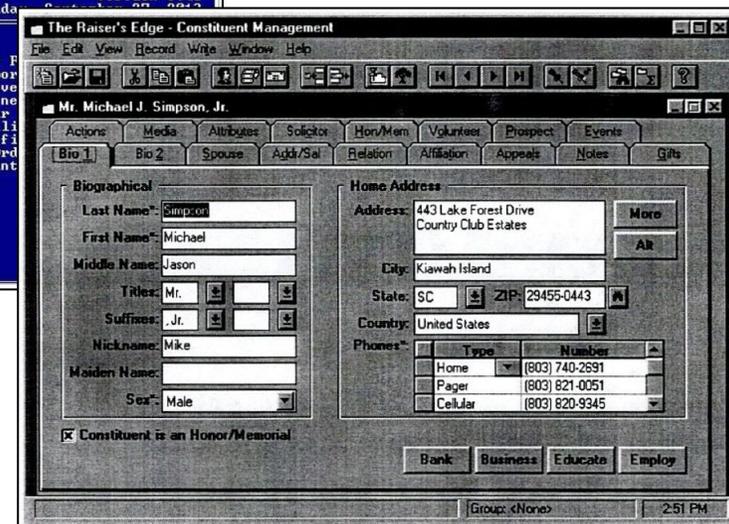
Agenda

1. The way it was
2. The way it has developed
3. How it's become
4. What it's like now
 - What's no longer needed
 - What's still the same
 - What's new

Pre-2000 into the 2000s

- Back office
- Gift processing
- Receipts and acknowledgement letters

➔ What “support” people and secretaries do



My book on RE released in 2010

The Database Administrator

The roles and responsibilities of the database administrator are discussed in detail in Chapter 8, but the position is relevant to the Raiser's Edge implementation.

Tip: Database Administrator Roles and Responsibilities

There are several roles with The Raiser's Edge that often get interwoven:

APPENDIX B

Database Administrator Task List

Fundraising with The Raiser's Edge®

A Non-Technical Guide



Bill Connors, CFRE

billconnors.com/book/

2010 book roles & responsibilities

- Technical oversight, such as
 - Backups
 - Technical maintenance
 - Upgrades

Technical Oversight

It is extremely important to oversee the correct handling of the “back end” of the data so that it does not become corrupted or lost. Otherwise, the perfect handling of the front end of the data might all be for naught.

Typically, these tasks are completed by IT staff or consultants, but the database administrator should ensure that these processes are being done regularly and successfully.

1. Backups should be performed regularly and thoroughly through the Blackbaud Management Console (BMC) on the server. By “thoroughly” I mean:
 - Schedule backups to run nightly.
 - Check the backup status in the BMC regularly, at least monthly. For a variety of reasons, the BMC backups may stop running on schedule.
 - Ensure that manual backups are run from the BMC before large imports, global changes, or global deletes.
 - Ensure that manual and scheduled backups do not build up on the server and create the risk of filling the hard drive. Servers should have enough disk space to save at least one month of compressed backups. Additional backup copies are nice to have but not necessary.
 - Copy the “backup” the BMC makes to tape or another portable media device using standard backup software.
 - Store portable media off-site. Fireproof safes on-site should not be considered acceptable alternatives. Consider the security of data stored off-site to ensure that it does not fall into the wrong hands or is used improperly.

2010 book roles & responsibilities

- User oversight
 - Security
 - Training
 - Documentation

User Oversight

The database administrator is responsible for all the users who access The Raiser's Edge. The Raiser's Edge is not Word, Outlook, or the web—users must be trained, supported, and managed if your organization is going to be successful with The Raiser's Edge.

1. When you add a new staff person who will use The Raiser's Edge:
 - a. Add the user as a constituent. Pay attention to the following areas:
 - i. Mark the constituent as a solicitor so you can link the user's constituent record to the user account in Security and everyone can add the user as a solicitor in actions.
 - ii. Use the **Business** button on the Bio 1 tab to link the constituent to your organization's constituent record, and complete the other fields.
 - iii. Give the constituent a "Staff"-type constituent code. The **Date From** should be the day they started.

2010 book roles & responsibilities

- Data oversight
 - Support/help desk to users
 - Data maintenance
 - Configuration

Daily

Update policy and procedure documentation when decisions are made about the use of The Raiser's Edge. This is the database administrator's responsibility and is much more manageable if done as it occurs rather than saved for one overwhelming, large project.

Weekly

1. Run a query to ensure that all individuals have a primary addressee and primary salutation.
2. Run a query to ensure that all contacts have a primary addressee and primary salutation.
3. Run a query to ensure that no gifts are left marked as "Not Acknowledged."
4. Run a query to ensure that all tribute acknowledgement (notification) letters have been sent.
5. Run a query to ensure that all gifts from last week marked "Do Not Acknowledge" are properly marked this way.
6. Communicate to accounting all gift changes made this week beyond the addition of new gifts:
 - a. Stocks sold
 - b. Pledges written off
 - c. Gifts adjusted
 - d. Posted gifts deleted

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Managing the “Manager” Part of Database Manager in the Fundraising Profession Today

Bill Connors, CFRE, bCRE-Pro

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Role of the Database Manager

In addition to chapter 8 of Bill's [book](#) about Raiser's Edge (pages 203-216):

- Managing the “Manager” Part of Database Manager in the Fundraising Profession Today (bbcon 2019 presentation slides)
[DOWNLOAD](#) 
- Why Database Managers Should Use Blackbaud Raiser's Edge NXT Web View (bbcon 2021 presentation slides)
[DOWNLOAD](#) 

bbcon 2019: it's not this

It is not the fundraising database administrator's job to sit in their office and run reports, lists, and mailings...

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The Problem

Fundraising database administrators are treated like, and act like, support personnel there to respond to the needs and whims of the fundraising and other staff to get data in and get it out where and when told

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bbcon 2019: title change

Tip 1: Change Our Titles

Database Administrator

Database Manager

Data Manager

Data Leader

Database Manager

Database Manager

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bbcon 2019: database roles

Database Roles

Typical roles (not jobs) in database use:

- Gift and constituent entry and updates
- Data entry management
- Power user
- Database administrator (and backup)

Depending on the size of the organization, more than one of these “hats” are often worn by a single person

But data entry and data management are often not the best combo

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bbcon 2019: responsibilities

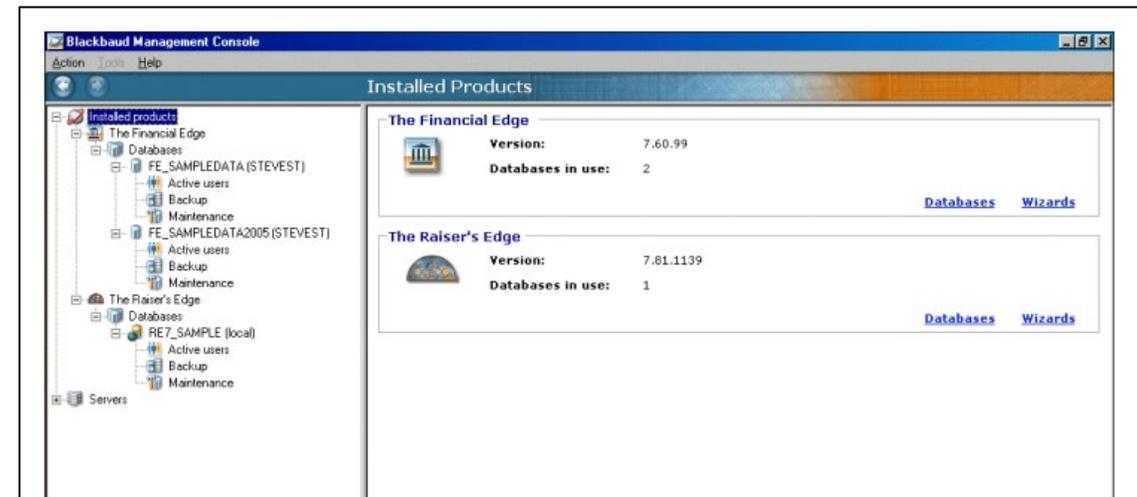
Responsibilities of the DBA

- Liaison with the vendors (invoice, support, updates, sales...)
- Have a good sense of the marketplace (social media, third parties...)
- Liaison with other departments (Finance, IT, HR, Registrar...)
- Security (technical and database)
- Documentation
- Staff use and training
- Setup and configuration of the database (show some care!)
- Maintenance of the data and database and oversight of proper use
- Integration of the database and data with other systems

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What's no longer needed

- Most of the technical work...
 - No longer actively manage and store backups (*but...*)
 - System Maintenance
 - API risks
 - Server and workstations
 - Database file size
 - Software updates and upgrades



What's no longer needed

- Doing all the data maintenance work

Weekly

1. Run a query to ensure that all individuals have a primary addressee and primary salutation.
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5. Run a query to ensure that all gifts from last week marked "Do Not Acknowledge" are properly marked this way.

What's still the same

Responsibilities of the ~~DBA~~ DBM

- Liaison with the vendors (invoice, support, updates, sales...)
- Have a good sense of the marketplace (social media, third parties...)
- Liaison with other departments (Finance, IT, HR, Registrar...)
- Security (technical and database)
- Documentation
- Staff use and training
- Setup and configuration of the database (show some care!)
- Maintenance of the data and database and oversight of proper use
- Integration of the database and data with other systems

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Raiser's Edge Security

In addition to chapter 8 of Bill's [book](#) about Raiser's Edge (pages 208-210):

Bill presented a free webinar series in partnership with Blackbaud in March and April 2021 on Security in Raiser's Edge. The recordings are no longer available, but the other resources from the series are below.

Resources from webinar 1, **Creating a Culture of Security**, on March 23, 2021, with Ashley Wyand from Blackbaud's cybersecurity team:

- Raiser's Edge NXT: What's Called What? [DOWNLOAD](#)
- Adding and Inactivating Users in Raiser's Edge NXT [DOWNLOAD](#)
- Bill's slides from the presentation [DOWNLOAD](#)

New resources from webinar 2, **Understanding Security in Blackbaud Raiser's Edge**, on March 30, 2021:

- Bill's slides from the presentation [DOWNLOAD](#)
- This presentation discussed a move then in progress from what it called "Not Azure" and "Blackbaud Hosting Services" (with database view login directly from blackbaudhosting.com) to Blackbaud ID (with database view only available through the web view). In December 2021 that process was completed, so all access to the database view must be through blackbaud.com using Blackbaud ID where multi-factor authentication must now be used. Blackbaudhosting.com no longer functions. The term "Blackbaud Hosting Services" is **today** being used more broadly to refer to *all* the Blackbaud environments where RE is hosted: Azure, Boston, Vancouver, etc. Otherwise, the content of this presentation is still accurate and applicable.
- This presentation and the following were delivered before the 2025 changes to the primary web view navigation menu and other web view Security changes. The presentations' concepts still apply, but there will be visual differences between the slides used in the presentations and the current state of the web view.

New resources from webinar 3, **Deep Dive into Raiser's Edge Security Options**, on April 6, 2021:

- Bill's slides from the presentation [DOWNLOAD](#)
- Bill's [answers to two questions](#) that arose during the webinar for which there was not time to answer then

Policy and Procedure Documentation

In addition to chapter 8 (pages 211-215) and appendix C of Bill's [book](#) about Raiser's Edge:

- 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](#)

What's new

- Database backups
- Overseeing data maintenance work

What's new

- Data, technical, and cyber- security as it relates to activities *outside* RE, too
 - Computers
 - Phones
 - Files
 - Phishing, vishing, social engineering

Summary: To create a culture of security, every organization needs a...

1. Creative person in charge of creating a culture of security and a team of helpers
2. BYOD policy for use of smartphones and personal computers
3. Password creation, storage, and sharing policy and education
 - And should consider a password manager/password vault solution
4. Multi-factor authentication policy
5. Constituent data export, transfer, and storage policy
6. Social engineering education and testing program
7. Crisis management plan
8. And Executive involvement, education, and buy-in

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Consulting and Training on Raiser's Edge

Resources from webinar 1, **Creating a Culture of Security**, on March 23, 2021, with Ashley Wyand from Blackbaud's cybersecurity team:

What's new

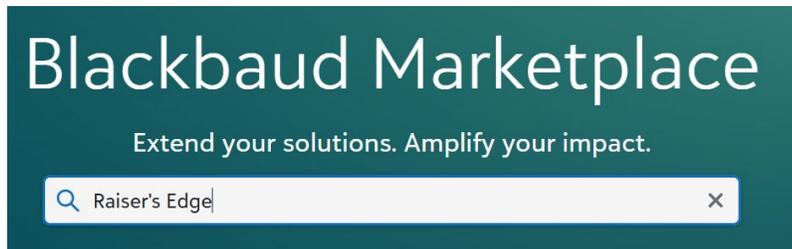
- Active user intervention and support
 - Asking users what they need and want, what they're doing
 - Jumping in at meetings, inviting yourself to meetings
 - Offering recommendations, identifying opportunities

What's new

- Reporting and analytics
 - Metrics, KPIs
 - Tools, in and out of RE
 - “What *should* we be looking at?”
 - E.g., analysis I did of high number of direct mail asks to those giving \$0

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
- Knowing and exploring extensions for Raiser's Edge



What's new

➔ Greater data
leadership

Conclusion: 2019 & today

Therefore...

This is a role that will never be “done,” “all caught up,” etc.

This is not a job about getting it all done, this is a job about getting the right and best things done

It's your job to get the right and best things done

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So...

Who's doing these things if the “~~DBA~~ DBM” is busy running reports, making lists, preparing mailings, and doing the occasional import all the time?

If the “~~DBA~~ DBM” isn't doing these things, who is?

These are the ~~DBA~~'s DBM's role, no one else's.

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Conclusion: 2019 & today

Conclusion

It's not just about how we want to be treated, it's also about how we act.

If you do not want to do these things, that's okay, but let your organization know so they can hire someone who will be the DBM.

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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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