



aasp 2026
SUMMIT

Database Documentation

There's No One Write Way

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Slide deck

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

BillConnors.com/Resources



Premise 1



We're not the fundraising CRM/database vendor documentation team and we shouldn't write our documents as if we are.

Premise 2



There are different types of documents and documentation we should create for different needs and audiences for different experiences.

The Problem

What I see far, far more often than not is:

1. Highly granular, illustrated, step-by-step, click-by-click documents
2. Written for someone who knows absolutely nothing about the software
3. That the vendor and others have written a thousand times over already
4. That only addresses data entry like gift entry and constituent record maintenance
5. That doesn't explain why anything was set up the way it is

This is a problem because



- It takes – wastes – a huge amount of time
- Nobody reads it or uses it or wants to
- It's not kept up to date
- It does very little useful
- It doesn't answer what *is* needed:
 - What do things mean? (e.g., options in drop-down lists)
 - Why was it done this way?
 - Who said to do it that way?
 - What alternatives were considered and rejected?
 - What unusual but intentional uses were decided upon and why?

Anonymous examples



The recommended alternative

- What I've *done* instead
- What I recommend instead
- I'm very much open to others' opinions and experiences, but these are mine for your consideration. I'm not saying this is the "right," "best," or "only" way you "should" do them, I'm sharing my experiences and thoughts on the matter in the hope it will save you time and help you use your time most efficiently and effectively.
- I very much welcome comments and discussion

First: there's more than one type

1. User guides and Help documentation
2. Training workbooks
3. Cheat sheets
4. How-to documentation
5. Policy and procedure documentation

Second: let's talk about suggestions to write each type

User Guides & Help Documentation



- Written by the software vendor
 - PDFs
 - Help in the software itself
- Use them, don't re-create them or have your team members do so

Training Workbooks



- 2026: New users need training, not being a tossed a “manual”
- Vendor or third-party training is fine
- Internal training workbook
 - Lots of large screenshots
 - Lots of white space
 - Minimal text
- Focus is on trainer, not workbook
- Writing notes reinforces the learning
- Learning software is like learning to ride a bike or drive a car...

Cheat Sheets



- If someone isn't trained, they shouldn't have rights to do the task, let alone be left to their own devices or a manual
- But once trained, some tasks are legitimately complicated enough to require written support for the user until mastery
- Long documents with lots of screenshots and lots of "click here" directions and other text are annoying and unhelpful
- So cheat sheets are helpful if the user has been trained, knows the software but needs some pointers, and wants easy access
- Created for specific situations for specific users, not everything
 - E.g., Fundraiser contact reports, Address updates

Cheat Sheets

1. Step-by-step directions, that are
2. Not overly detailed and are rarely illustrated, but are
3. Organization specific, that are for
4. A specific process, for
5. A user already trained who knows the process but needs an easily-usable *reminder* how to do the details.

Policy & Procedure Documentation



- Usually written by the database manager
 - For their *own* use
 - For their successors
 - For their database manager backups in the DBM's absence?
 - *Not* usually for others in the office
- Written for someone who already knows the program
 - I tell clients to pretend they're writing it for me

Policy & Procedure Documentation



- *Not* step-by-step or illustrated
- Organization specific
- Documents policy as well as procedure
- Addresses setup and output as much as input
- Explains *why*, *who*, alternatives considered and rejected

Policy & Procedure Documentation



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

<https://billconnors.com/resources/#policy>

Again, free and anonymous, no login or form to fill out

How-To Documentation



- What I usually see well-meaning users creating as their “policy and procedure documentation”
- More text, more details, more screenshots
- When is it to be used? Who’s the audience?
- Again, train the user, don’t toss them a manual
- If they can’t learn the process without lots of directions and text, should they be doing the process?
- There might be occasional and rare situations in which it’s needed, but otherwise use the other formats

Technology options and tools

- No more one-stop-shop “binders” or “manuals” we hand over to new employees
- KISS
 - Can others and your successors access, update and support the tool?
- Excel or Sheets, OneNote, project management software, etc.
- Videos...
- My go-to: Word (in SP or on a network drive) or Google Docs
- One document per topic, not one document for everything

Caltech's MediaWiki



A screenshot of the Caltech MediaWiki Main Page. The page has a light blue header with navigation links: "Main Page" (selected), "Discussion", "Read", "Edit", "Edit source", "View history", "More", and a search bar labeled "Search Webster". On the left, there is a sidebar with the "WEBBSTER" logo and a list of links including "Webbster Info Hub", "Biographic Data", "Gift Processing", "Reporting & Business Analysis", "Advancement Analytics", "Enterprise Data Warehouse", "Webbster Tutorials", "Recent Changes", "Random Page", and "Help about MediaWiki". The main content area is titled "Main Page" and "Webbster Information Hub". It displays six orange icons in a 2x3 grid, each representing a different service: "Biographic Data" (person icon), "Gift Processing" (gift box icon), "Reporting & Analysis" (report icon), "Advancement Analytics" (line graph icon), "Data Warehouse" (laptop with code icon), and "Webbster Tutorials" (gears icon).

For Advance; aasp 2026 Sapphire Aspire Award for Gift Administration & Data Services

Caltech's MediaWiki





WEBBSTER

Webbster Info Hub
Biographic Data
Gift Processing
Reporting & Business Analysis
Advancement Analytics
Enterprise Data Warehouse
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Tools

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Category **Discussion**

Read Edit Edit source View history More

Category:Biographic Data Policies and Procedures

- [Contact Information](#)
- [Educational Information](#)
- [Employment Information](#)
- [Relationships](#)
- [Entity Activity](#)
- [Demographic Information](#)
- [Organization Management](#)
- [Donor Management](#)
- [Advance Management](#)
- [Biographic User Guides](#)

Pages in category "Biographic Data Policies and Procedures"

The following 48 pages are in this category, out of 48 total.

A • Address • Affiliations • Alternative IDs • Alumni Portal User Updates • Awards/Honors	• Email • Employment • Entity Detail • Entity Merge	P • Picture • Publications
B • Biographical Detail	F • Former Spouses	R • Race/Ethnicity • Record Creation - Organization • Record Creation - Person • Record Type • Registrar Gains & Losses • Relationships
C • Children • Committee Participation • Corporate Hierarchy • Corporation Board Maintenance	I • Institutional Suffixes • Interests	S • Salutations • SIC Codes
	M • Mailing Lists • Marital Info • Mass Add/Modify	

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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