Why Database Managers Should Use Blackbaud Raiser's Edge NXT Web View

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VIRTUAL

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billconnors.com

See especially billconnors.com/resources/ (free and anonymous)

"DBAs are fond of saying that they never work in NXT [web view] and that it's for the non-technical employees in their offices."

RAISER'S EDGE ONLINE COMMUNITY PARTICIPANT

"Database Manager" does NOT include

- Constituent entry and updates

- Gift entry

- Writing queries

- Running reports

- Mailings

- Exports

These are the tasks of "power users"

The role of a Database Manager

- Secure the system

- Set up the system

- Develop and document policies and procedures

- Oversee and maintain the use of the system

- Monitor and implement changes to the system

- Train and support users

That is, *manage* the system and data, not *use* them

"It's about more than just filling requests and mailing lists and reports. We are the subject matter experts for the organization's data, integrations, trends, etc."

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LUIS MORALES, SENIOR DIRECTOR OF INFORMATION STRATEGY AT ANN & ROBERT H. LURIE CHILDREN'S HOSPITAL OF CHICAGO

Three reasons DBMs should use the web view

1. To accomplish their own DBM responsibilities

2. To train and support their users

   - And obtain the foundational knowledge for #1

3. Because most DBMs are also power users and the web view has new and better tools for power users as well

Bad excuse: switching between screens

Bad excuse because you already have

- Multiple tabs in a browser

- Multiple programs running at a time

- Multiple areas of the Raiser's Edge database view

Both RE NXT views run at the same time just fine, and they're just as easy to switch between as anything else.

#1: To Accomplish DBM Responsibilities

DBM-specific responsibilities in the web view

- Security

- Control Panel > Settings (~db view Configuration > Business Rules)

- Control Panel > Fields and tables (~db view Configuration > Fields)

- Constituent records > Options (gear icon on tiles) (~db view Configuration > Business Rules)

DBM-specific responsibilities in the web view

- Tools > Settings

- Data Health > Address Finder

- Data Health > Possible duplicates

- Updates (Home page and Blackbaud Community blog: https://community.blackbaud.com/blogs/13)

- Marketplace and third-party tools

- API and Microsoft Power Platform

So…

1. You have to be in the web view to do these things

2. You have to understand the web view to set up these things

3. You have to be in the web view to refine and update these things

4. You have to be in the web view to document these things

#2: To Train and Support Users (and know the web view)

Fundraisers need to use

1. Constituent records

    - Find records

    - Navigate records

    - Add and edit actions and notes

2. Lists

3. Work Center

4. Reporting

So, do *your* day-to-day work here as well

If you can do it in both places, do it here

- Add and edit constituents

- Create a list if a fundraiser needs to review it

    - Stop daily gift reports

- Push and support users to their Work Center, not spreadsheets

- Do the reporting you can in the web view

Push your team to be better

- Use tags

- Clear Needs Attention cards each day

- Review Overview looking for data cleanup needs

- Watch for Next Action on the Portfolio tab in Work Center

- Access the web view on phones and in meetings

#3: For Power User Tools

Those tools that fundraisers use

- Lists
  - Create here, not spreadsheets! Query is overused
  - Radius and map selections database view can't do
  - Send links – more secure, reinforces good practice
- Work center – far easier to do new solicitor assignments
- Reporting – create here first!

Power user tools

- Gift Management, esp. for automated recurring gifts*

- Approving batches for web view online donations, recurring gifts

- Gift Receipting for email receipts for offline gifts

- Giving statements for January tax statements by email

- Mass email to your constituents

- Events has many improvements over database view

Power user tools

- Analysis
  - Custom dashboards
  - Insight Designer for customer insights
- Workflow designer
- Donation form designer
- Move a gift between constituents

In Summary

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Thank you!

All the resources mentioned can be found here:

billconnors.com/resources

Bill can also be reached from this website.