

BEFORE THE NXT STEP: OPTIMIZING FOR NXT

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What Is Raiser's Edge NXT Exactly?

- Is NXT a new database?
- Is NXT an overlay of RE7?
- Or is NXT somewhere in between these two concepts?
- And why does it matter?



The Best Way to Describe NXT

NXT is more than a new version of Raiser's Edge 7, but it is still mostly the same database

- The architecture, nearly all the fields, and most of the configuration tools are the same
- And for the time being, many important tools in Raiser's Edge haven't been built out in NXT or are still being phased in for all users (for example, gift entry through Batch)
- NXT's major changes are in user interface and the ability to move between different types of record (i.e. Constituent, Gift, Action, etc.)



Bottom Line with NXT

NXT is not, and will not for the foreseeable future, be a standalone product

- You'll still need to use RE7 to run NXT, and you'll still need to understand how to use RE7 to understand how to administer and maintain NXT



Why Does This Matter?

- For those of us who do most of our work in the “back end” (or “database view”) of the Raiser’s Edge database, not much of what you do will change in NXT
- But for those who use the front end of Raiser’s Edge, there are many new features which will help with entering Actions, Proposals, and other data
- I’ll be discussing the other important new features of NXT in the context of preparing for it



A Few Differences Between RE7 and NXT

- Moving between different types of record
- There are some field names that are different in NXT (although the fields themselves are the same)—for example, “Opportunity” vs. “Proposal”
- Some fields (for example, “consecutive years giving”) are saved in NXT but not in RE7 (or can be different in NXT)— and it can be difficult to export these fields



Preparing for Any Database Change

- Database cleanup—it's not ideal to take old database problems through an upgrade, transfer, migration, or any other change
- Since the data fields in NXT are nearly identical to those of RE7, there's no need to ensure that your data fields are correctly mapped and formatted
- In my experience, it's not the data itself that's the problem with an RE7->NXT upgrade...



Preparing Specifically for NXT

- The most important segment to prepare when you're getting ready for NXT are Tables and Codes, and especially fundamental data codes like Constituencies and Campaigns, Funds, and Appeals
- Tables and Codes are how NXT's built-in reporting structures populate their fields
 - This was always an issue with RE7's canned reports, but because of NXT's data visualization parameters, it's more important in that platform



Cleanup tips for NXT's reports

- Fewer code entries are generally better
 - If you can't entirely get rid of entries, consider inactivating them
 - If you can't inactivate them, consider what you should and shouldn't be using over the course of a year
- Consider what your organization uses for external audiences
 - For example—CASE/VSE constituency types, if you're an educational institution



Cleanup tips for NXT's reports

- Which NXT reports and dashboards are your co-workers going to use on a regular basis? How can you clean up your data to ensure that those reports work?
 - If you can, use the practice database
 - Also consider what those reports and dashboards will look like on mobile (both phones and tablets)



One thing you will need to know...

- Because NXT's data visualization reports are canned, they are extremely hard to “tweak”
 - Example—year-on-year reports can't be moved to a different 12-month period (other than calendar or fiscal)



Training staff on NXT

- Much of what “development” users will work with is the Constituent web view
 - In particular—because it’s such a new feature—I would really concentrate on the “Timeline” feature for gifts and actions

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AS

Anthony O. Smith

Fundraisers: [Gregory Duke](#)

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Constituent codes

Alumni

Major Donor

[+ Add alert](#) [Edit](#) [Mark as...](#)

Constituent summary

[Edit](#)

Primary name formats

Addressee
Anthony O. Smith
Salutation
Smith

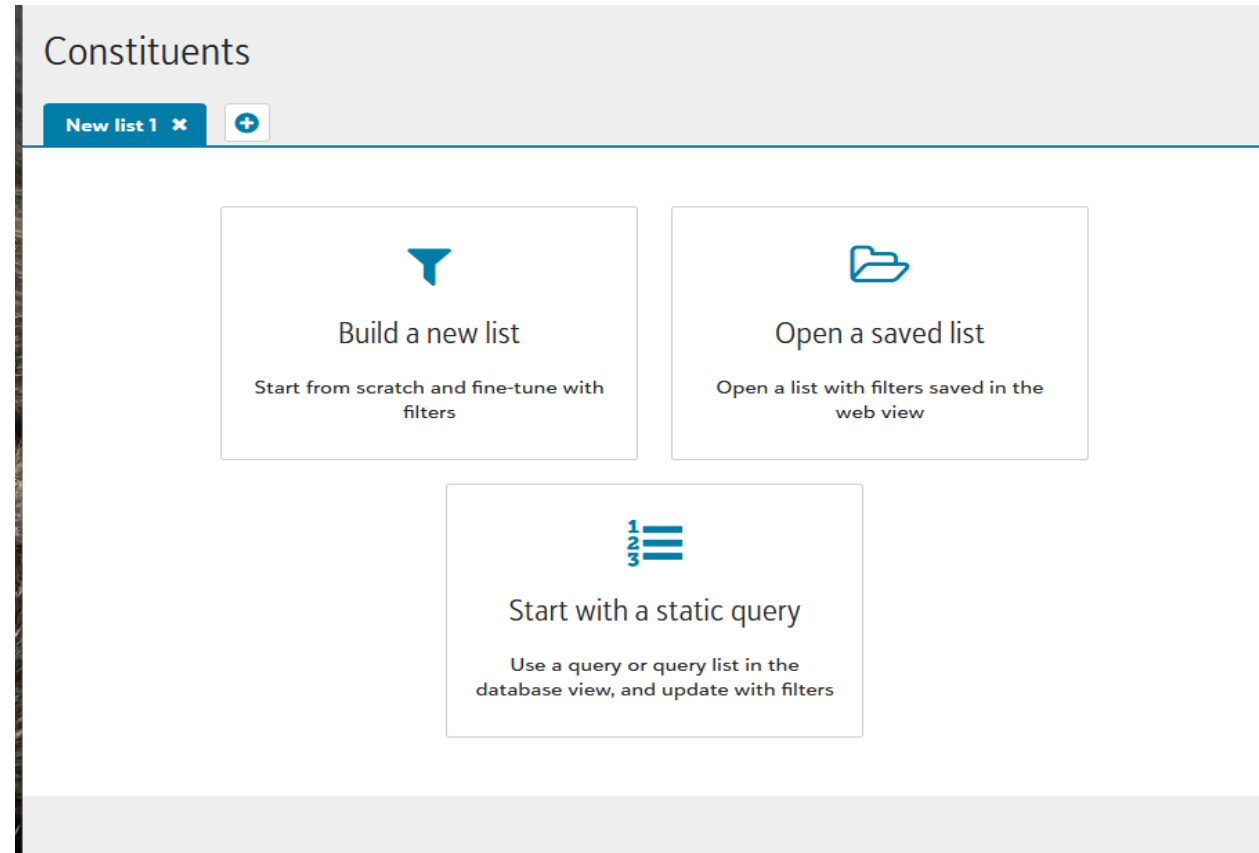
Personal info

Gender
Male
Date of birth Age



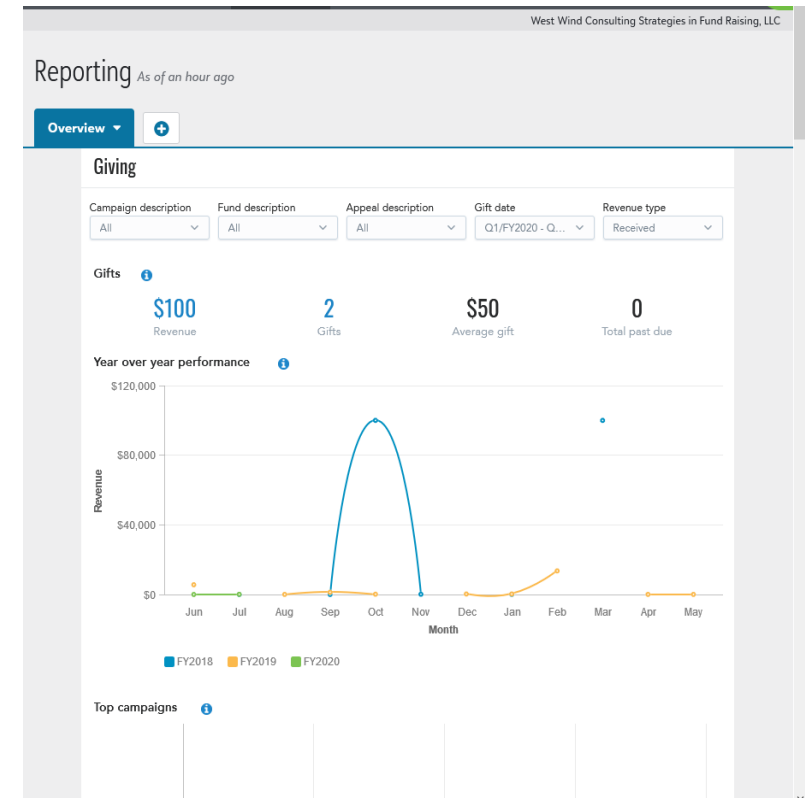
Building and working with lists

- Start by showing development officers and others how lists work and what they can be used for
- In my experience—be careful with how development officers are building lists. Think like a director of Prospect Management.



Canned reports!

- How to walk your team through...



Stuff You Should Know

- And which I'm leaving off this slide so only you know



Questions/comments

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