

Understanding Security in Blackbaud Raiser's Edge NXT® and Raiser's Edge®

MASTERING SECURITY IN BLACKBAUD RAISER'S EDGE NXT AND RAISER'S EDGE | WEBINAR 2



Bill Connors, CFRE, bCRE-Pro

Independent Consultant and Trainer
on Raiser's Edge (NXT and v7)

billconnors.com



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Manager, Blackbaud

linkedin.com/in/taylorsfrancis/

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The #1 responsibility of the database manager is Security.

Nothing is more important than protecting this data asset and constituents' private information...

from external and internal threats.

Two points on that DBM responsibility:

The Raiser's Edge NXT database manager needs to learn the web view to set up web view Security correctly.

Setting up Security correctly requires the combined efforts of those with technical knowledge and fundraising management. The DBM needs to coordinate these efforts.

10:18 B 94%

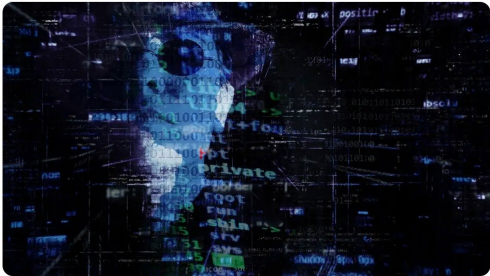
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HIGHER EDUCATION

Data stolen from universities of Colorado, Miami, published by ransomware actors

6:56 B 95%

TechRadar



Microsoft Exchange servers are under attack once again

2 days ago

6:56 B 95%

Yesterday



Drew Jaehning, the chief of the Fourth Estate optimization program and chief of the...

FEDERAL NEWS NETWORK

Two large government conference organizers suffer data breach

20 hours ago


0011010110011101101011001111101011001111010110011001010

6:44 B 96%

Google News

superncharged

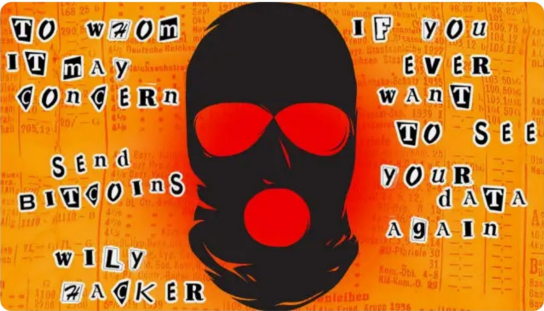
2 days ago



Three billion phishing emails are sent every day. But one change could make life much harder for scammers

6:55 B 95%

Google News



Ars Technica

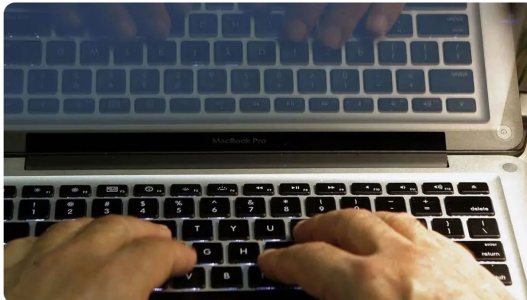
Ransomware operators are piling on already hacked Exchange servers

16 hours ago

6:47 B 96%

Google News

video 21 hours ago



THE SACRAMENTO BEE

California office holding \$10 billion in unclaimed assets hacked in spear phishing attack

14 hours ago

6:58 B 95%

ZDNet

SECURITY GOVERNMENT : US

MUST READ **DIGITAL TRANSFORMATION: WHY CIOs NEED TO STAY BRAVE AND KEEP ON INNOVATING**

IT admin with axe to grind sent to prison for wiping Microsoft user accounts

The victim company's operations ground to a halt following the attack.

By [Charlie Osborne](#) for [Zero Day](#) | March 23, 2021 -- 09:02 GMT (02:02 PDT) | Topic: [Security](#)

A former IT contractor with a grudge has been sentenced after mass-deleting the majority of a company's Microsoft accounts.

Deepanshu Kher was sentenced to two years in prison for breaking into the network of a Carlsbad, California-based firm after being fired potentially in connection to a consultancy job the firm hired him for.

III O <

Risks from...

Outsiders


- Incidents over the past year

Insiders


- Some people should not see everything
- Most people should not be able to do everything
- Purposeful and accidental harm
- In certain RE NXT situations, Blackbaud cannot restore backups

A DONOR BILL OF RIGHTS


DEVELOPED BY:




Association of Fundraising Professionals (AFP)



ASSOCIATION FOR
HEALTHCARE
PHILANTHROPY
Connecting People • Enriching Lives



Council for Advancement and
Support of Education (CASE)



THE
Giving
Institute™
Specialized Leadership
For the Good Cause

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

VI

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VII

Terminology

See the Resources page of my website at billconnors.com for a brief whitepaper that explains this in more detail

“Raiser’s Edge”

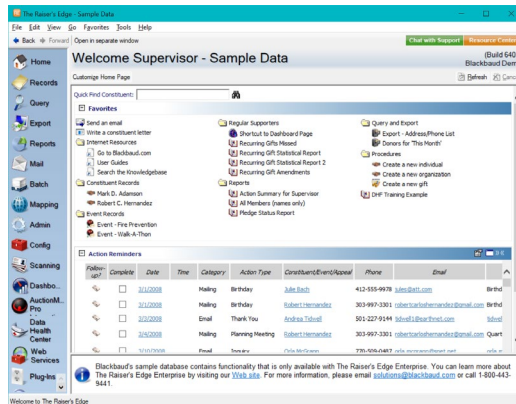
“Raiser’s Edge” ≠

- The Raiser’s Edge version 7
- The database view

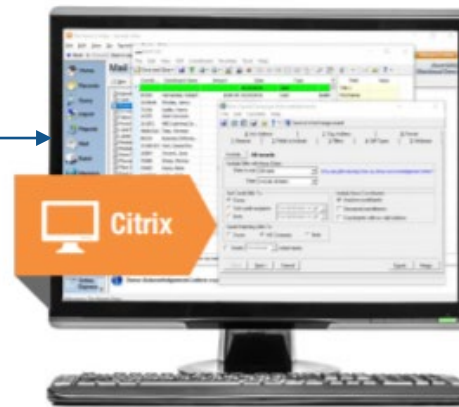
“Raiser’s Edge NXT” ≠

- The web view

The Raiser’s Edge version 7



Database View



Web View



Raiser's Edge NXT

Four Legs of the Chair of Raiser's Edge Security

Webinar 1

#1: Blackbaud Technology

#2: Your Culture of Security

Webinars 2 (today) and 3

#3: Raiser's Edge Security Setup

#4: Users' Use of Raiser's Edge

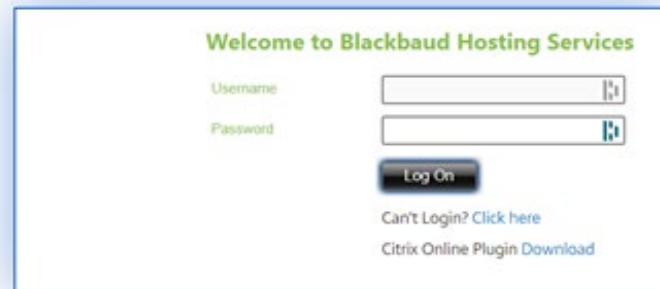


Know Your Environment

Raiser's Edge 7 Environments

Security works differently based on where your data is

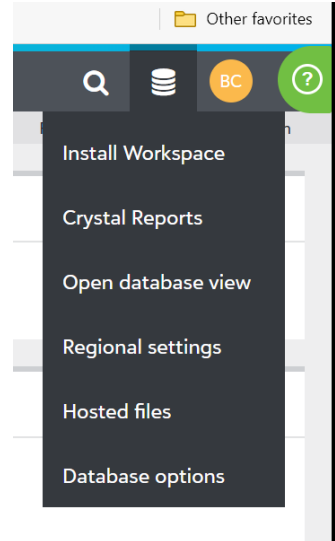
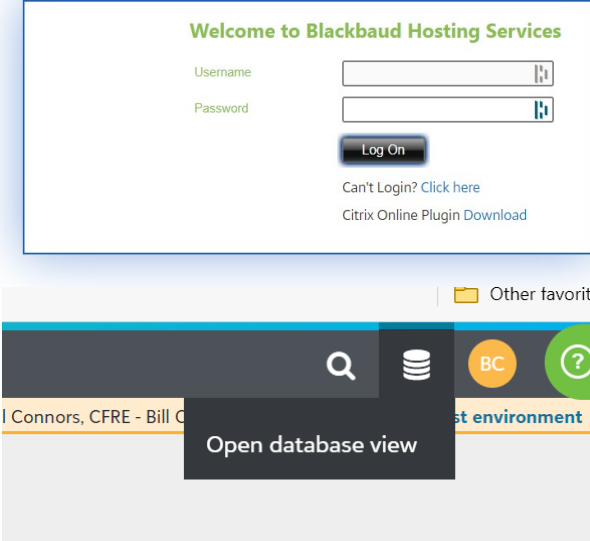
- 1. On-premise:** The data is on a server in your office and the RE software is (probably) installed on the hard drive of your computer
 - Although your IT might have made remote access available to you through other means
- 2. Third-party hosting:** A company other than Blackbaud hosts your RE data
- 3. Blackbaud Hosting:** Blackbaud hosts your data in what I'll refer to today as the "Not Azure" environment and you must log into a website like that below to start RE



The screenshot shows a login interface for Blackbaud Hosting Services. It features a title "Welcome to Blackbaud Hosting Services" in green. Below the title are two input fields: "Username" and "Password", each with a small icon to its right. A "Log On" button is positioned below the password field. At the bottom, there are two links: "Can't Login? Click here" and "Citrix Online Plugin Download".

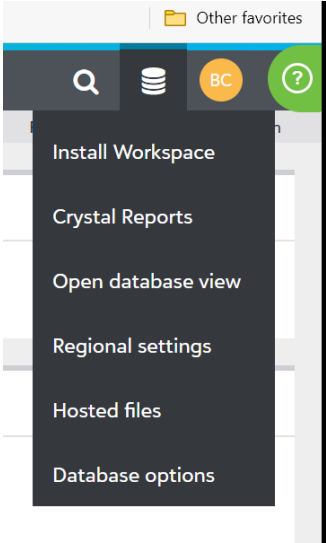
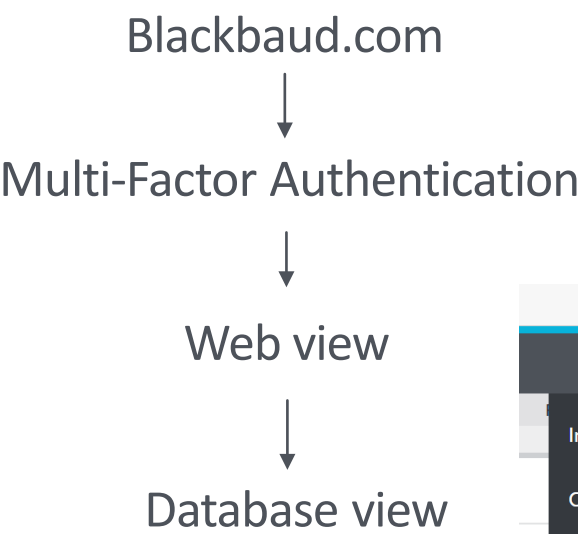
Raiser’s Edge NXT Environments: Azure or Not Azure

Security works differently based on where Blackbaud hosts your data.

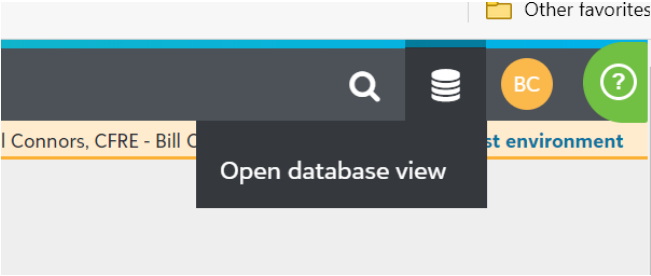
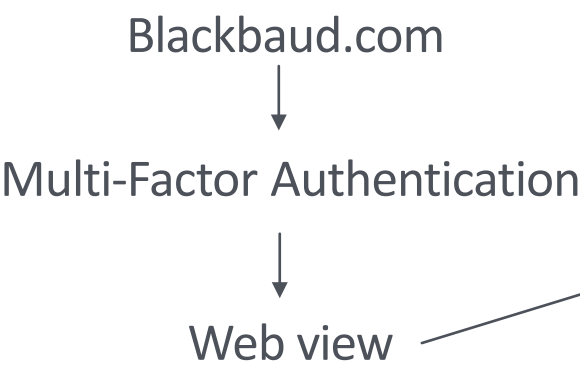
Azure	Not Azure	Colloquially Called	Correctly Called
Also “public cloud”	www.login2.blackbaudhosting.com	<ul style="list-style-type: none">• “Boston”• “Vancouver”• “Amsterdam” or “European data centre”• “Citrix”*	<ul style="list-style-type: none">• Blackbaud Hosting Services
		<p>*Azure also uses Citrix for access to the database view</p>	<p>Technically referred to as:</p> <ul style="list-style-type: none">• Blackbaud’s self-hosted (private cloud) environment• Blackbaud’s colocation data centers

Azure or Not Azure

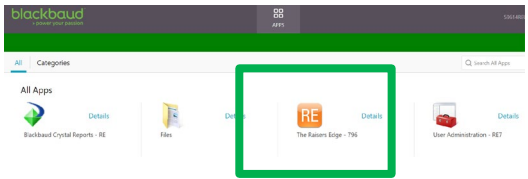
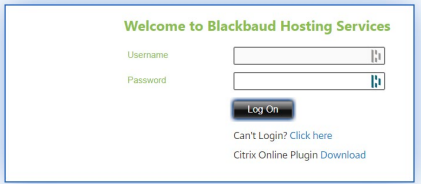
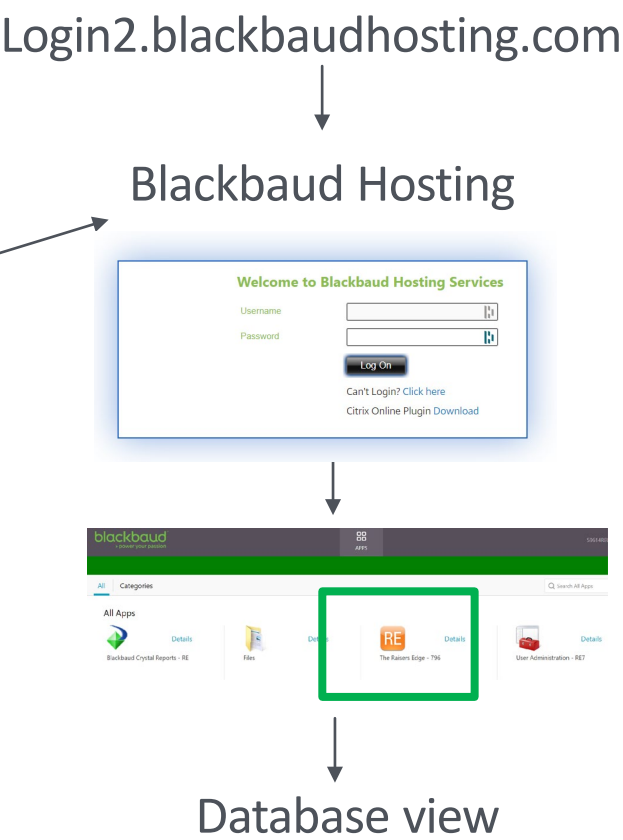
Azure:



Not Azure (currently for most):



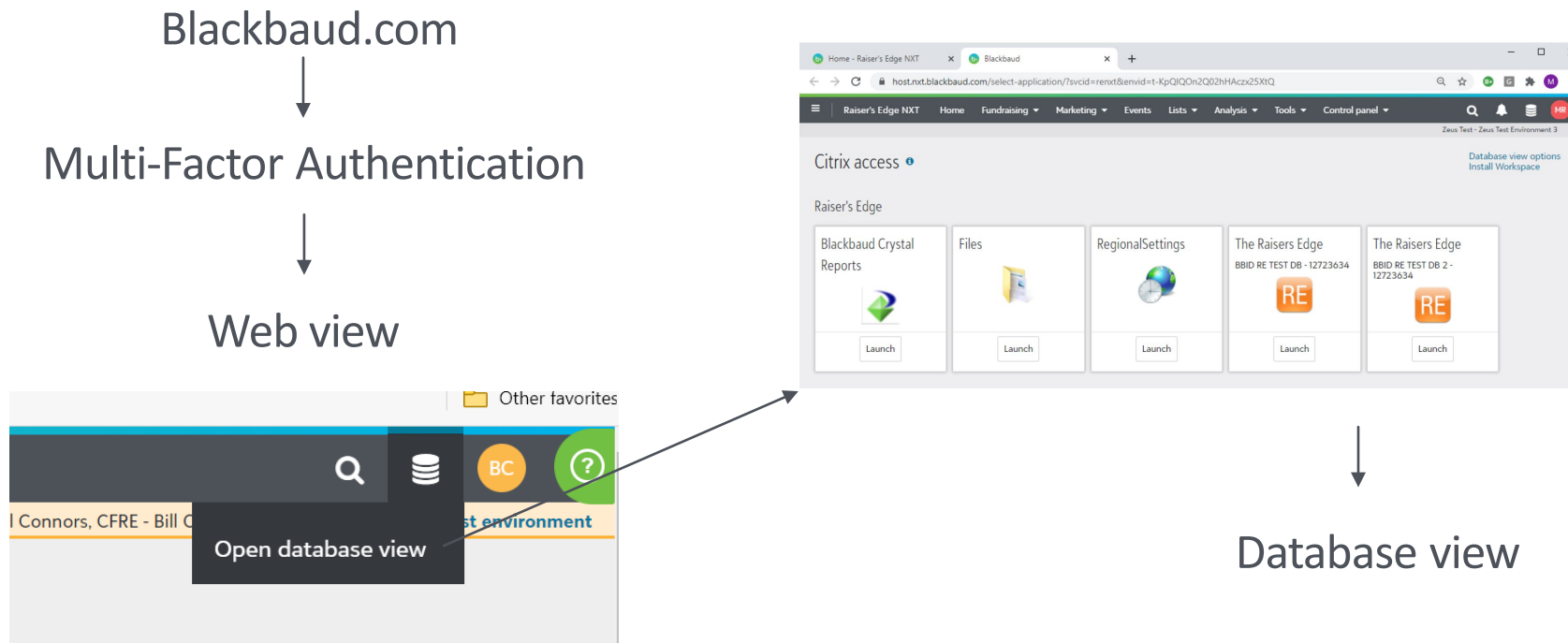
(RE 7 in Hosting also)



Two Changes In Progress for Environments

1. Moving some Raiser's Edge NXT clients from “Not Azure” to Azure
2. Moving everyone else from Blackbaud Hosting Services to Blackbaud ID via Blackbaud.com

NXT “Not Azure” Update Rolling Out Now

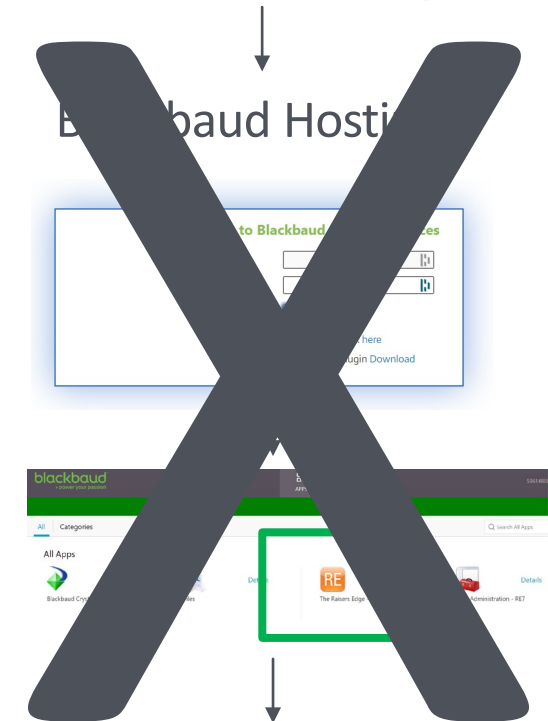


<https://community.blackbaud.com/blogs/13/7533>

<https://kb.blackbaud.com/knowledgebase/Article/195392>

Database view

(RE 7 in Hosting also)
Login2.blackbaudhosting.com

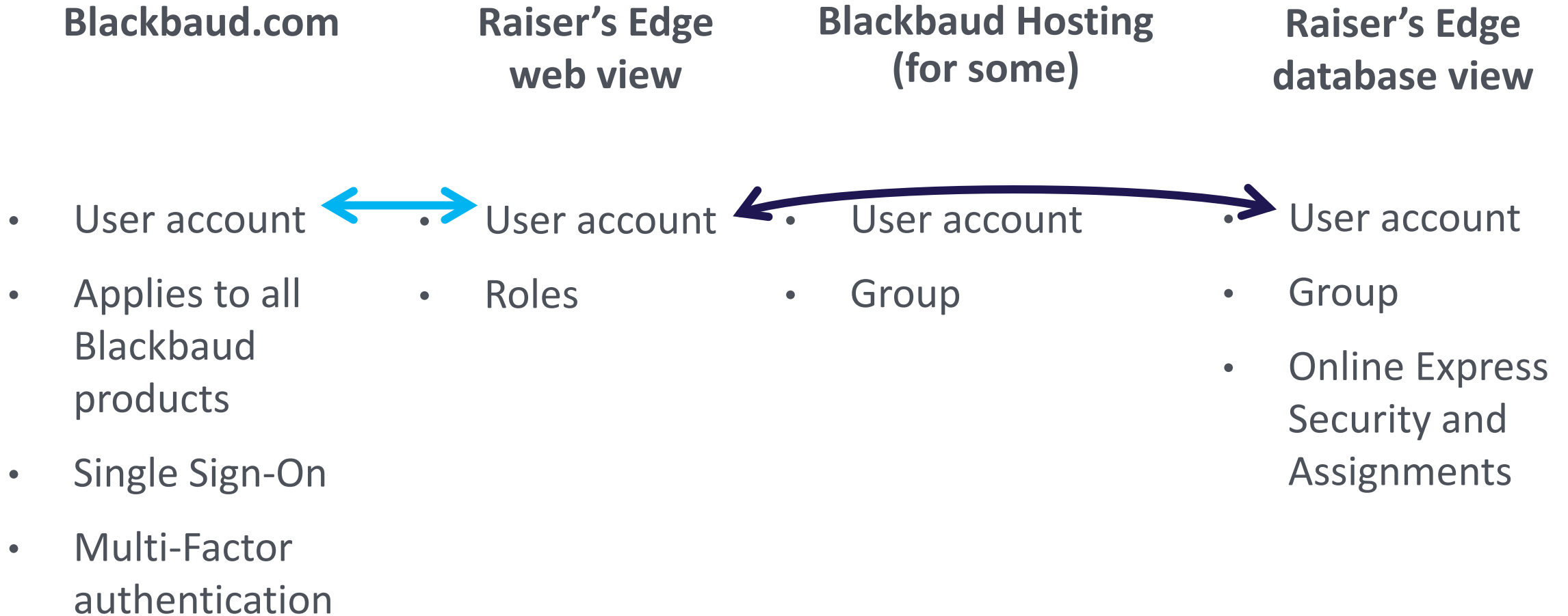


Database view

Locations Where Security
Needs to be Set Up



Blackbaud and Raiser's Edge NXT Security



Blackbaud.com Account – Admin

Blackbaud

https://host.nxt.blackbaud.com/admin-console/?leid=p-l8LYpXulp0a8eBBtwholaA

Admin

Home

Users and admins

Authentication

Settings

BC?

Bill Connors, CFRE

Users and Admins for Bill Connors, CFRE

Users 4

4 users

+ Add user

+ Add admin

Columns

Find in this list

Q

Active and invitation sent

	User summary	Email address	Status	Admin status
...	Bill Connors	bill@billconnors.com	Active	Admin
...			Active	
...			Active	
...			Active	

Blackbaud.com Account – User

re...

BC

Bill Connors
bill@billconnors.com

Blackbaud ID profile

Raiser's Edge NXT

Home

Fundraising

Marketing

Events

Lists

Analysis

Tools

C

Blackbaud ID

BC

bill@billconnors.com

Blackbaud ID email address

Bill Connors

Edit name

bill@billconnors.com

Edit BBID email address

Password

Edit password

Two-step authentication

Enabled

Turn off

New recovery code

FTP information

View FTP information

Blackbaud ID

Set up two-step authentication

For added security, in addition to your password, you can sign in to your Blackbaud ID - every time or periodically - with a mobile app or text message. How would you like to sign in?

★

Use mobile authenticator

Receive tokens in an application on your mobile device.

Use text messages

Receive tokens as SMS/text messages to your mobile phone. Standard messaging rates apply.

Cancel

Blackbaud ID

Set up two-step authentication

Mobile authenticator

With a mobile authenticator, you'll receive one-time verification codes to confirm your identity when you sign in to your Blackbaud ID, even if your device is off-line or with poor service. To get started, download and install one of these apps on your personal device.

Google authenticator

Microsoft authenticator

Auth0 Guardian

Learn more

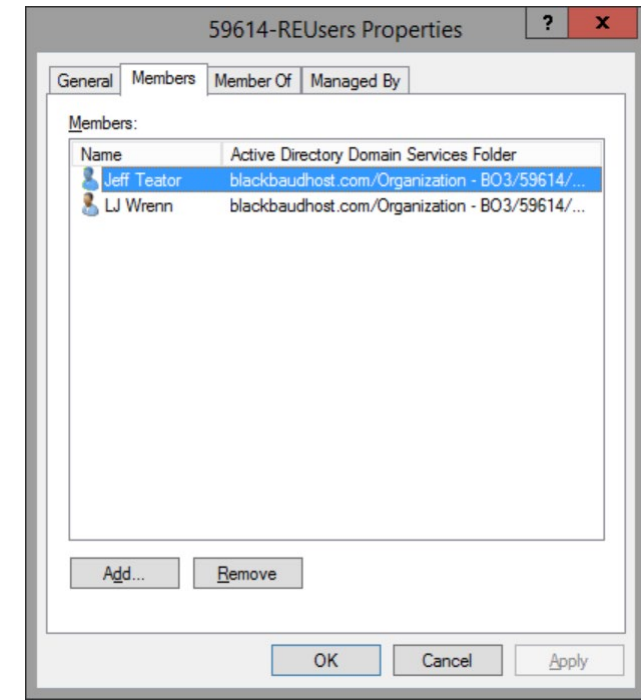
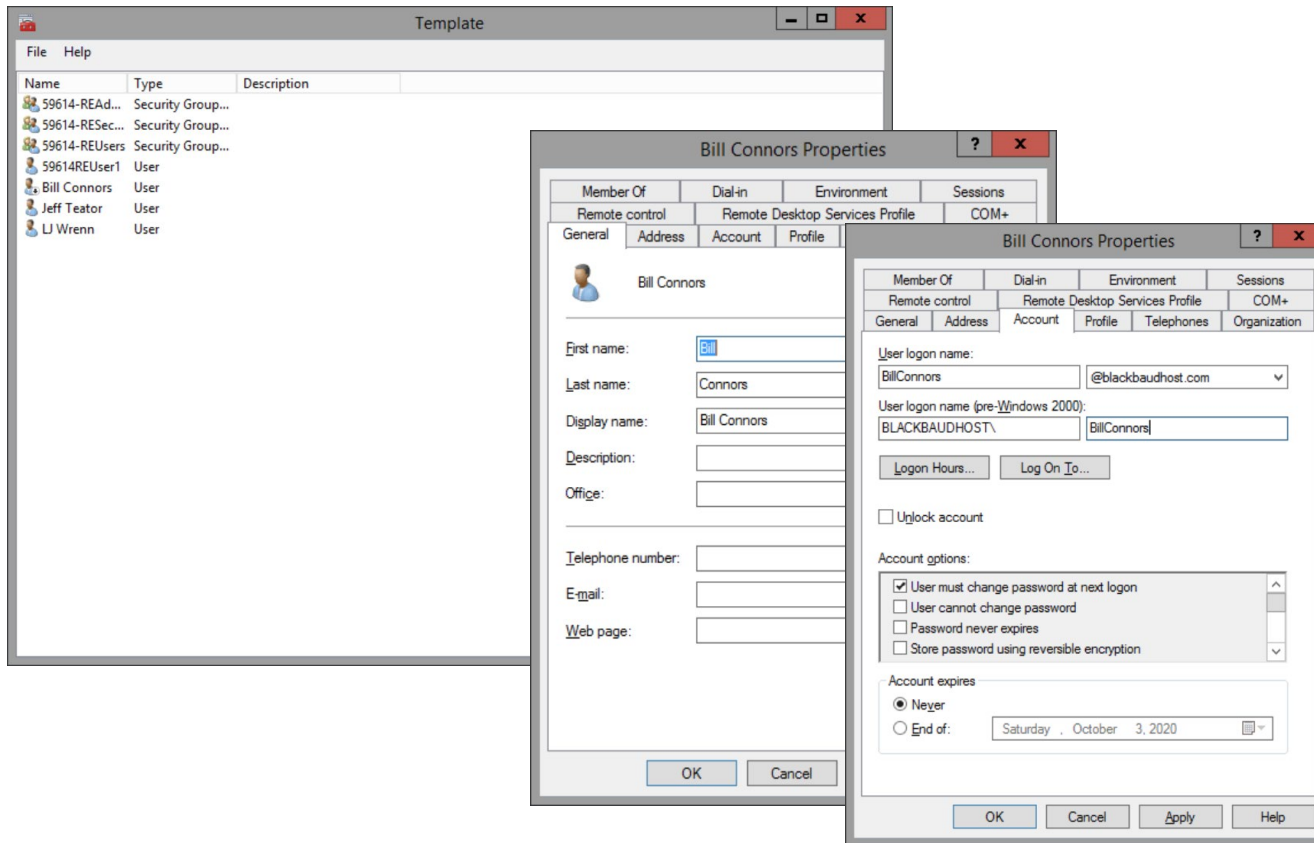
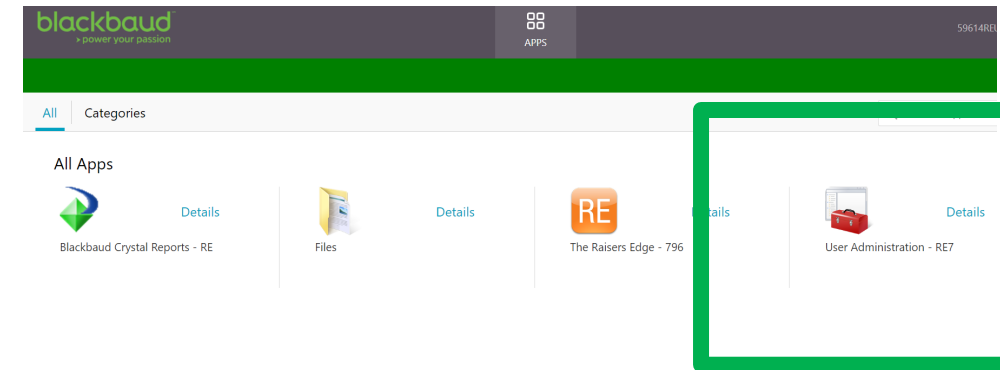
Next

Back

Web View Security

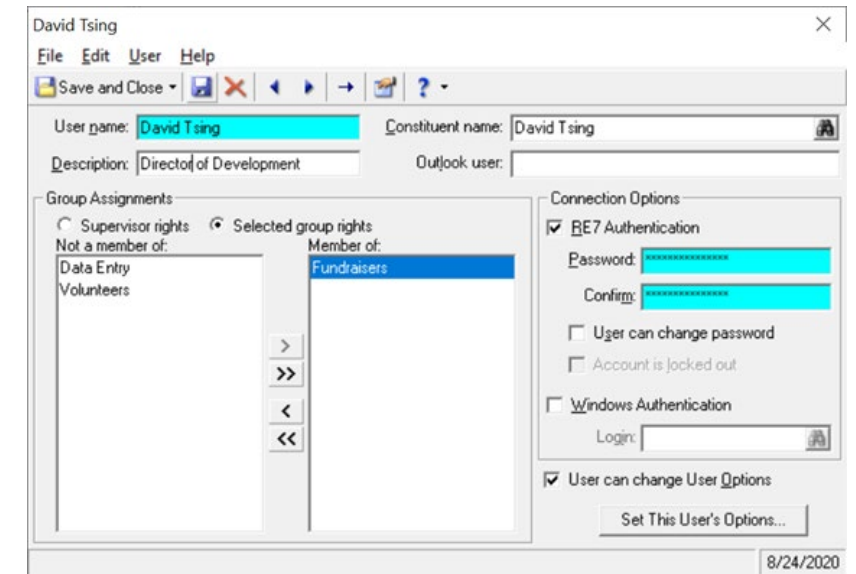
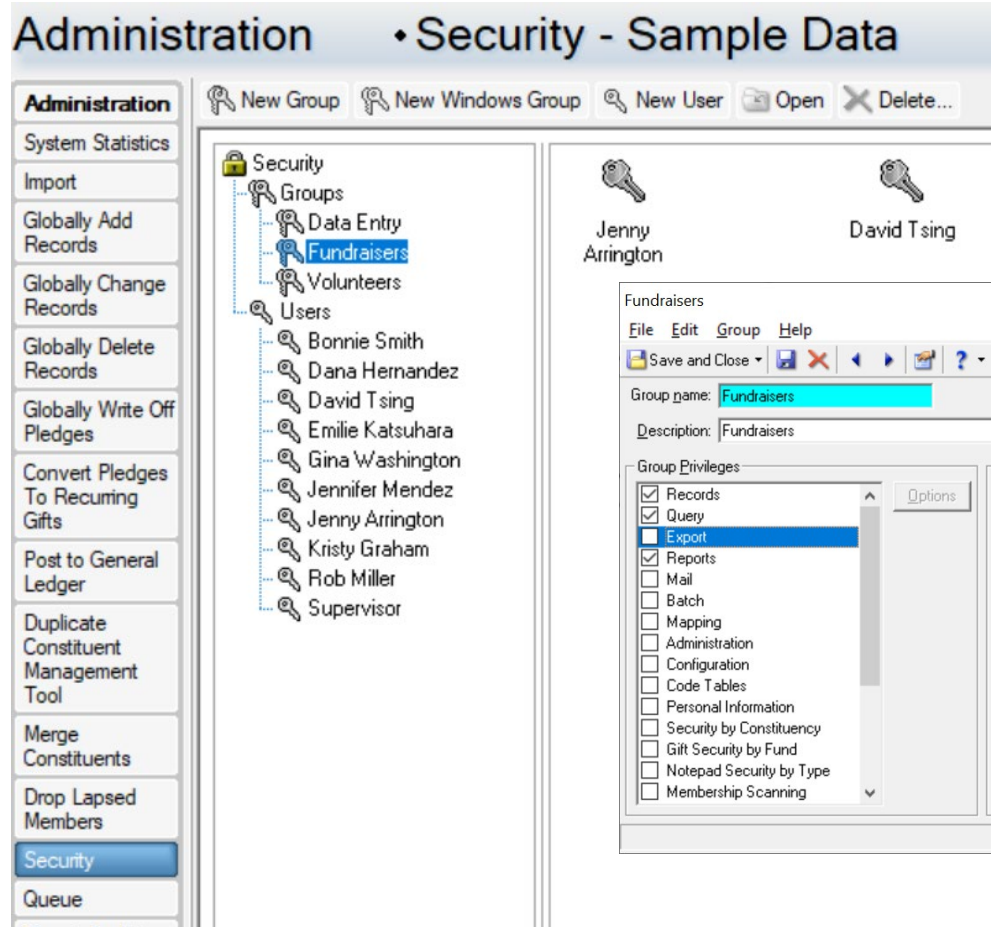
The screenshot displays the 'Security' interface for 'Bill Connors, CFRE' in the 'Test environment'. The main navigation bar includes 'Raiser's Edge NXT', 'Home', 'Fundraising', 'Marketing', 'Events', 'Lists', 'Analysis', 'Tools', and 'Control panel'. The 'Security' section shows 'Users 4' and 'Roles 14'. Below this, a table lists users, with 'Bill Connors' (bill@billconnors.com) highlighted. To the left, a sidebar shows 'Add user' and 'Security' options, including 'Make environment admin' and 'Make solution admin'. The 'Security' section is divided into 'Analysis', 'Events', 'Fundraising', 'Marketing', 'Settings', and 'Tools'. The 'Fundraising' section is expanded, showing 'Director of Development' as the selected role. On the right, a detailed view of the 'Fundraising' role permissions is shown, including 'All Fundraising Rights', 'Analyze tasks', 'Attachment tasks', 'Lists tasks', 'Opportunities tasks', 'Receipt management tasks', and 'Work tasks'. The 'Work permissions' section is also visible, showing 'Portfolio', 'Gifts', 'Actions', 'Unassigned', 'Change fundraiser', and 'Export' permissions.

Blackbaud Hosting Services ("Not Azure") Security*



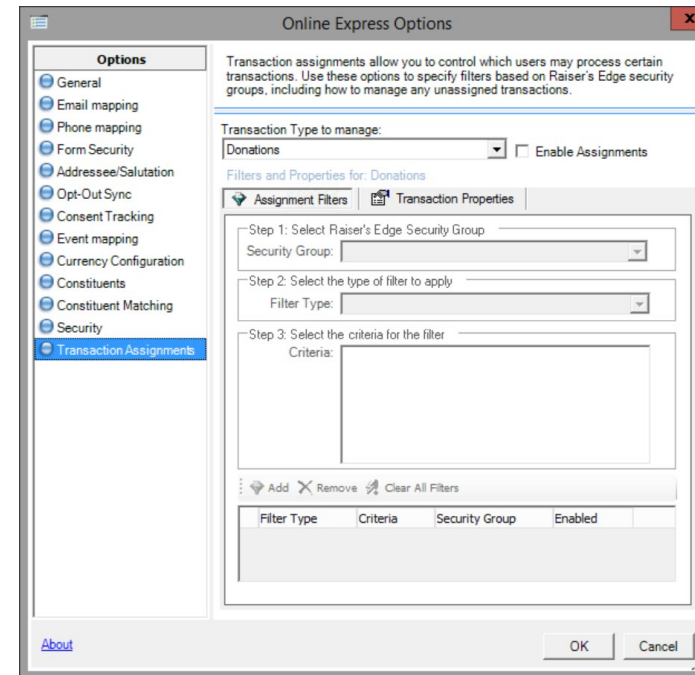
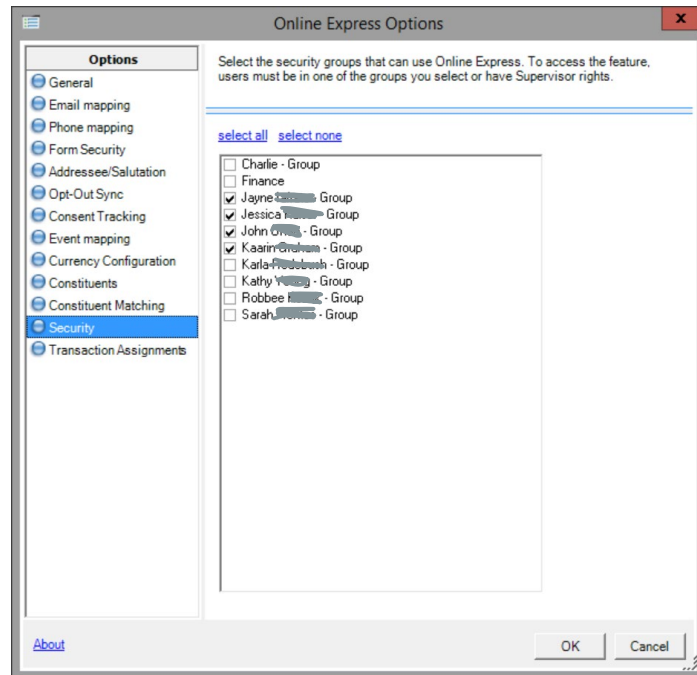
*Again, this is in the process of going away.

Database View (and RE 7) Security



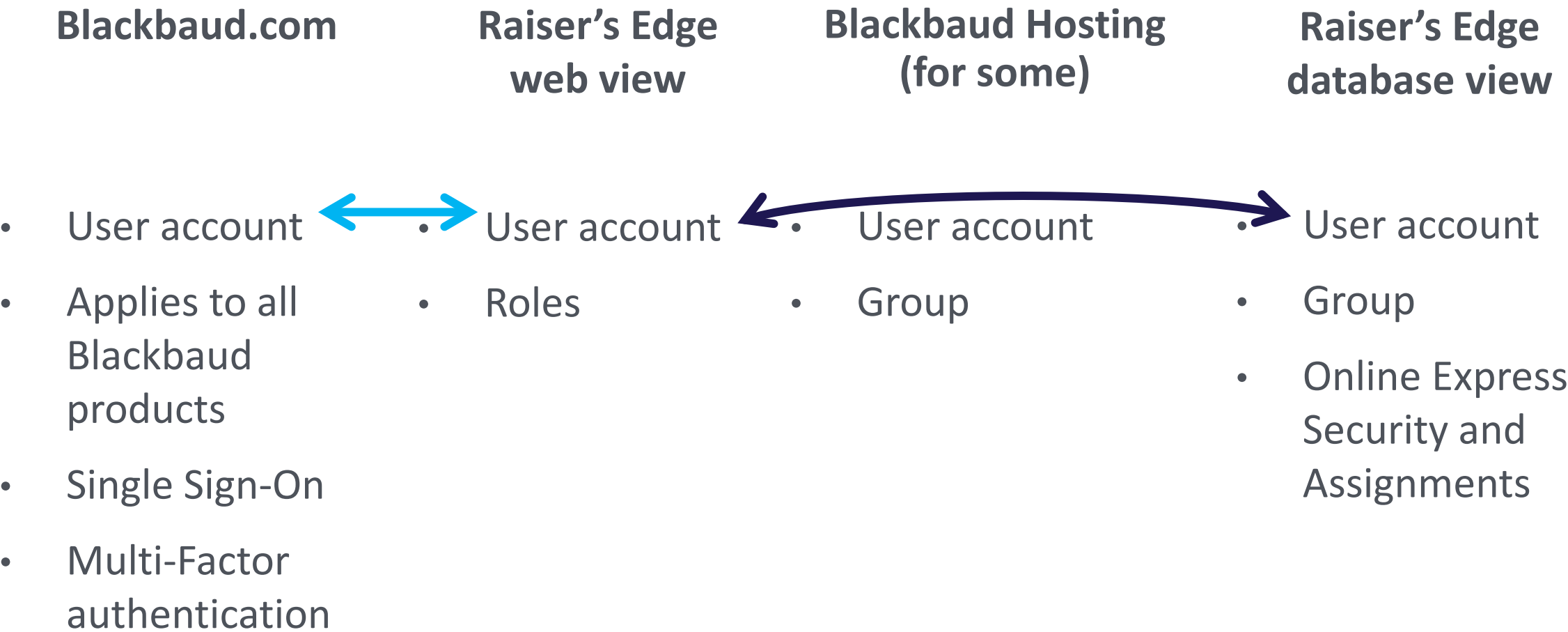
Online Express Security

If your organization uses Online Express in the database view for online donation forms, online event registration forms, or mass emails, that security is managed in Online Express itself.



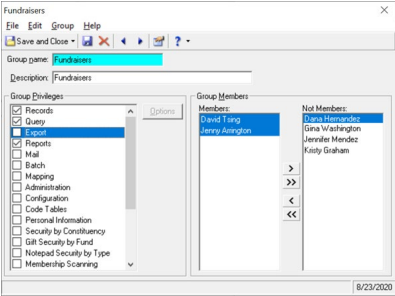
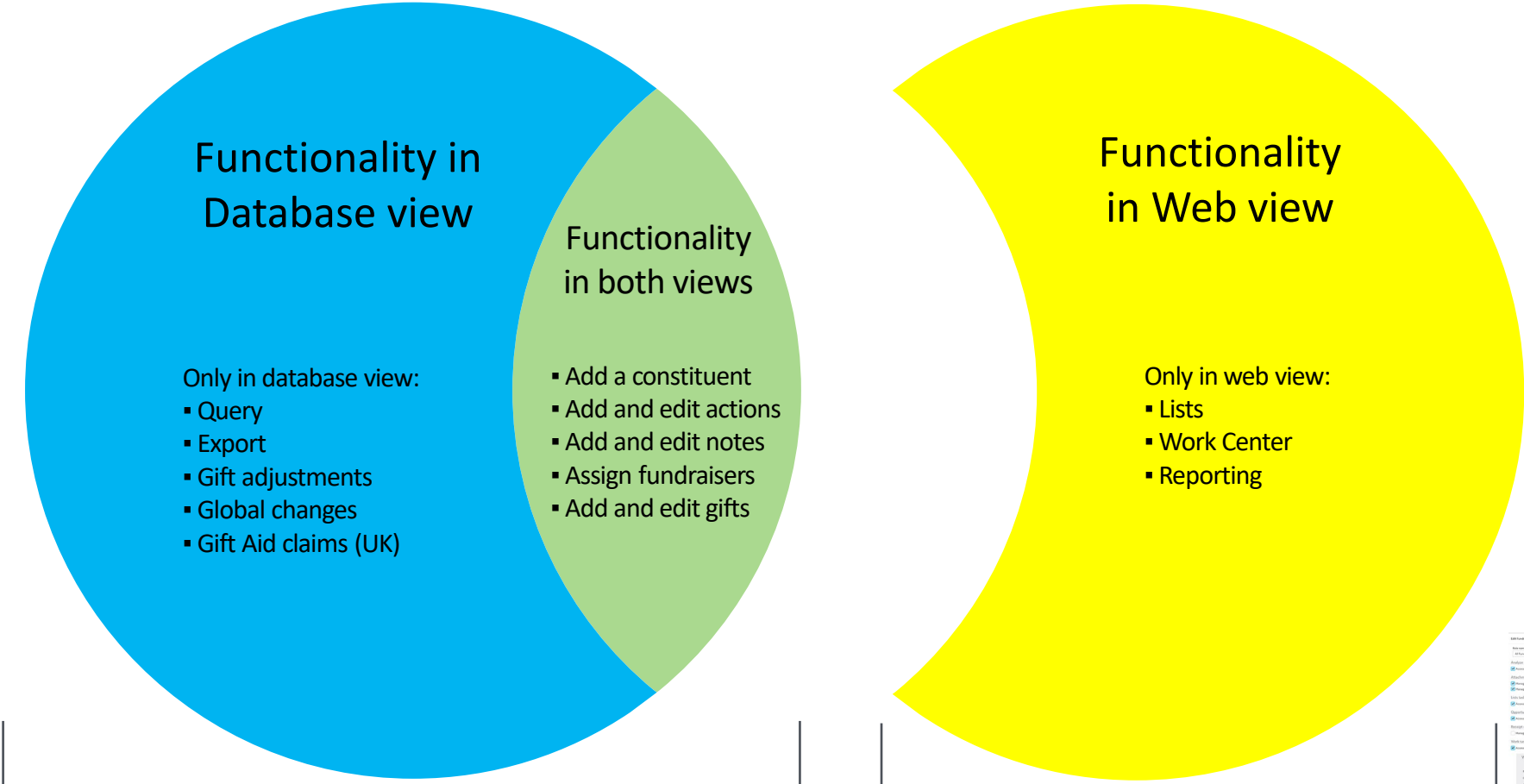


Blackbaud and Raiser's Edge NXT Security

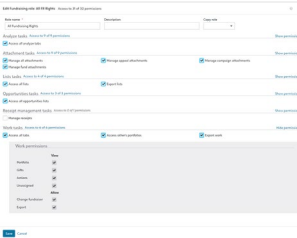


Database View and Web View Security Interaction

Database View and Web View Security Interaction



Controlled by Database View Security



Controlled by Web View Security

Exceptions to the Principle for Both Views

1. View and Add/Edit Events
2. View and Add/Edit event Participants
3. Data health tasks (Address Finder, Duplicate management)
4. Work Center list rights override database view Records rights

Keep in mind that in some cases there are similar but different tools. Each view's tool is managed by that view's Security (e.g., online donation and registration forms, reports/dashboards).

General Tips for Setting Up Raiser's Edge 7 and Raiser's Edge NXT Database View Security

Three Criteria for Security Rights

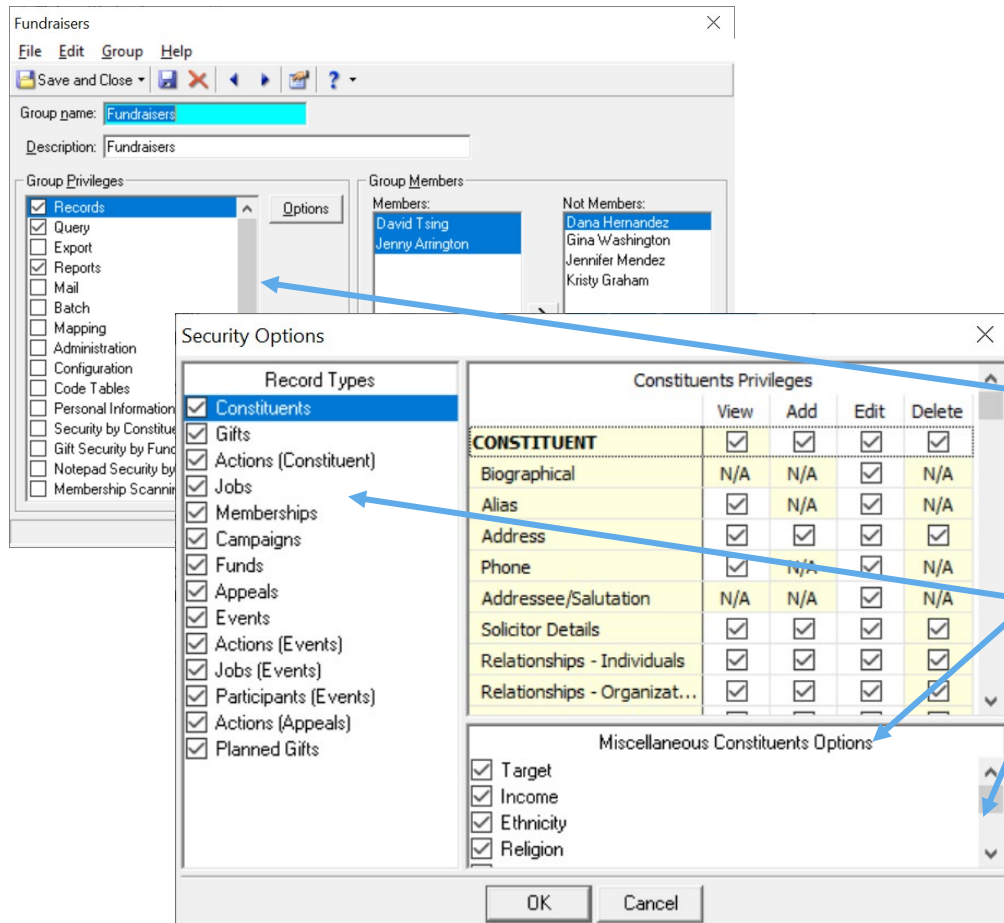
1. Training
2. Role
3. Aptitude

Takeaway: if you need a security group with only one user, created just for that user, that's entirely fine, even if all or most of your security groups only have one user in each of them.

My Four Rules of Thumb

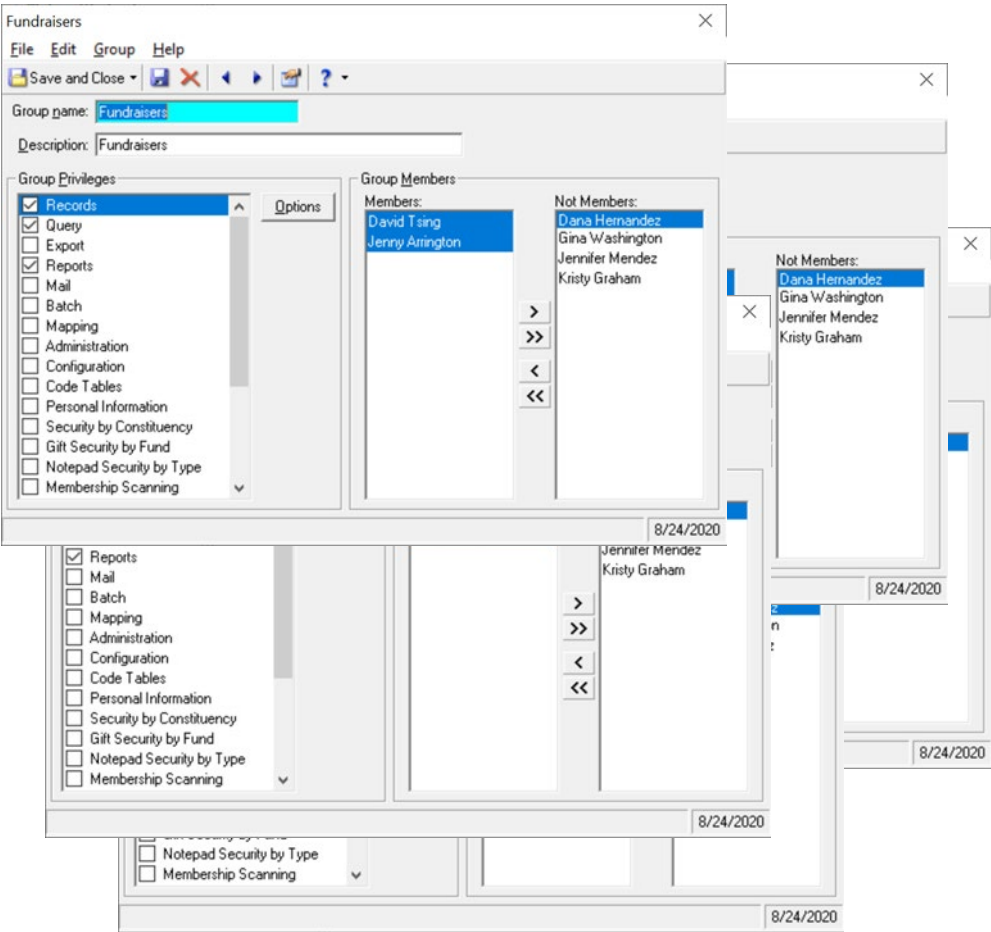
1. If in doubt with data *entry* rights (e.g., add, edit, delete) or data *output* rights (e.g., exports, mailings), do not give the rights
2. If in doubt with data *view* rights (e.g., lists, reports), give the rights, but:
 - Be careful with export and mailing rights! (distinguish output from view)
 - Users must be careful how they share and use information; be professional
 - For some users, simpler is better
3. If you make a mistake: It's easier to apologize and give rights than to have to revoke rights improperly used
4. Communicate, communicate, communicate

Tips on Database View (RE7) Security Groups



1. Create a group with only one user in mind at a time
2. If they're the only user in the group, that's fine!
3. Watch scroll bars
4. Watch Miscellaneous Options!
5. Watch all Record Types
6. Be methodical and meticulous

Only One Security Group per User



Knowledgebase > Article > 46503

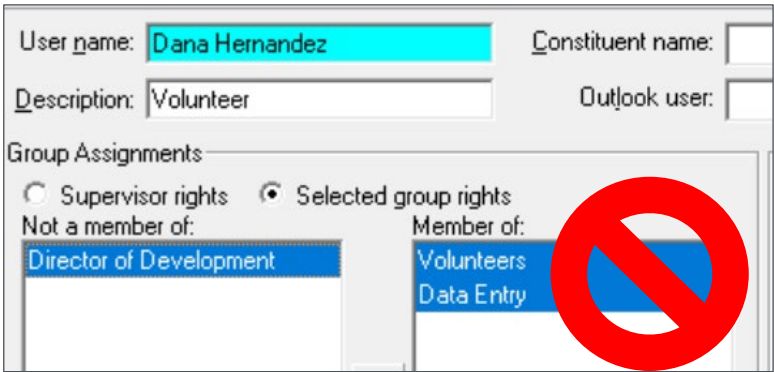
How are rights affected if a user is a member of more than one Security Group?

How are rights affected if a user is a member of more than one Security Group?

Answer:

We recognize that users may wear different hats and, therefore, need to be a member of multiple security groups. When the user is placed into multiple security groups, the rights are combined. For example, if security group A has rights to only Reports and security group B has rights to only Configuration, a user placed in both security groups will have rights to Reports and Configuration.

The exceptions to this rule are [Gift Security by Fund](#), [Security by Notepad Type](#), [Action Security by Type](#), and the "Restrict access from selected constituent codes" option in [Security by Constituency](#) in The Raiser's Edge 7. With these options, the most restrictive applies. For example, if security group A is marked as Cannot Edit/Cannot View for the Annual Fund and security group B does not have Gift Security by Fund marked, a user placed in both security groups will not have rights to view gifts with the Annual Fund.



Tips on Database View (RE 7) User Accounts

1. No generic user accounts other than Supervisor (no “Volunteer” or “Temp”)
2. Use First Name, space, Last Name
3. Link to the constituent record
4. One group only!
5. Former users: zz at beginning of name, no groups, change and forget password

David Tsing

File Edit User Help

Save and Close

User name: David Tsing

Constituent name: David Tsing

Description: Director of Development

Outlook user:

Group Assignments

Selected group rights

Member of: Fundraisers

Connection Options

BE7 Authentication

Password:

Confirm:

User can change password

Account is locked out

Windows Authentication

Login:

User can change User Options

Set This User's Options...

8/25/2020

User name: zzDavid Tsing

Constituent name: David Tsing

Description: Director of Development

Outlook user:

Group Assignments

Selected group rights

Member of: Fundraisers

Connection Options

BE7 Authentication

Password:

Confirm:

User can change password

Account is locked out

Windows Authentication

Login:

User can change User Options

Set This User's Options...

8/25/2020

A user should be in only one database view/RE 7 security group.

If a security group only has one user,
that is okay.

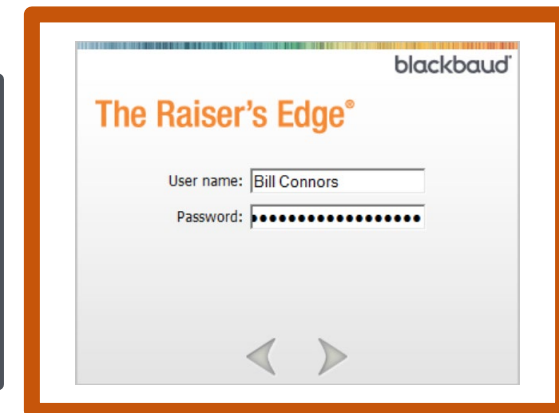
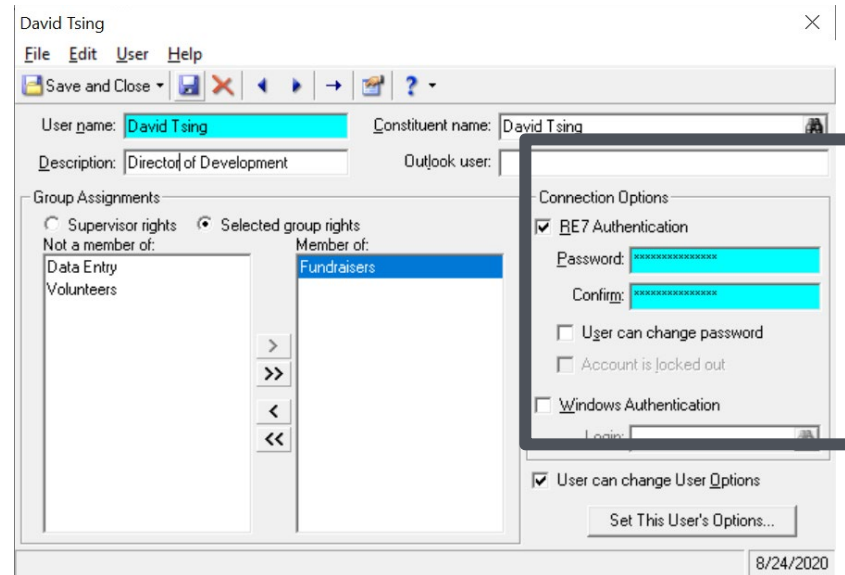
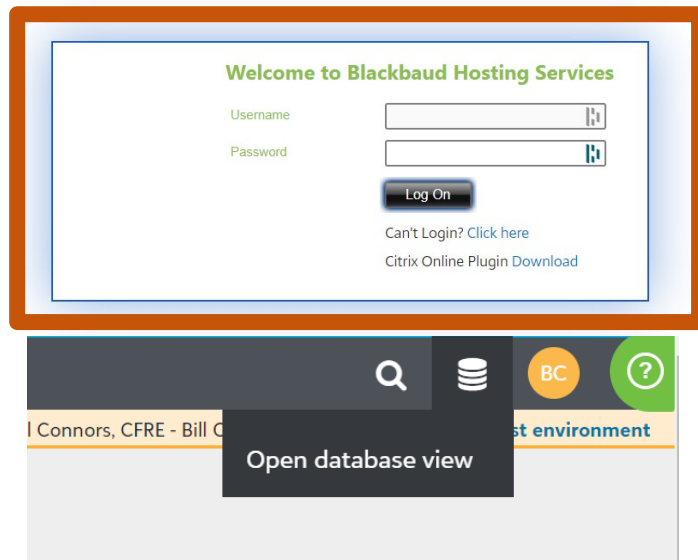
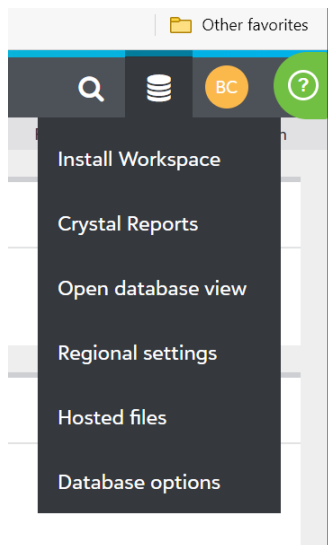
Tips on Database View (RE 7) User Accounts

If you're on RE NXT, and Blackbaud Hosting, and not yet ready for the upcoming change, do not use Windows Authentication in order to force a form of multi-factor authentication

Azure:

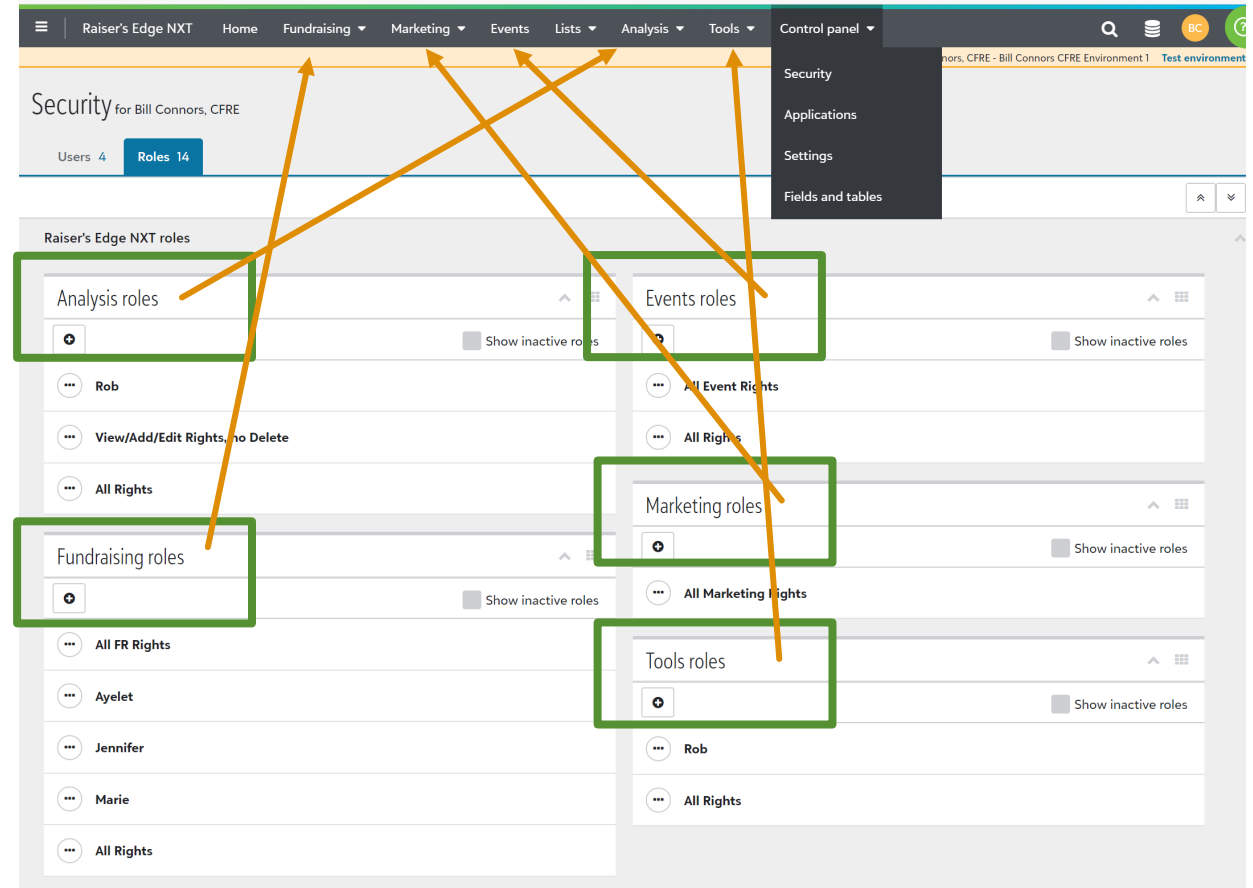
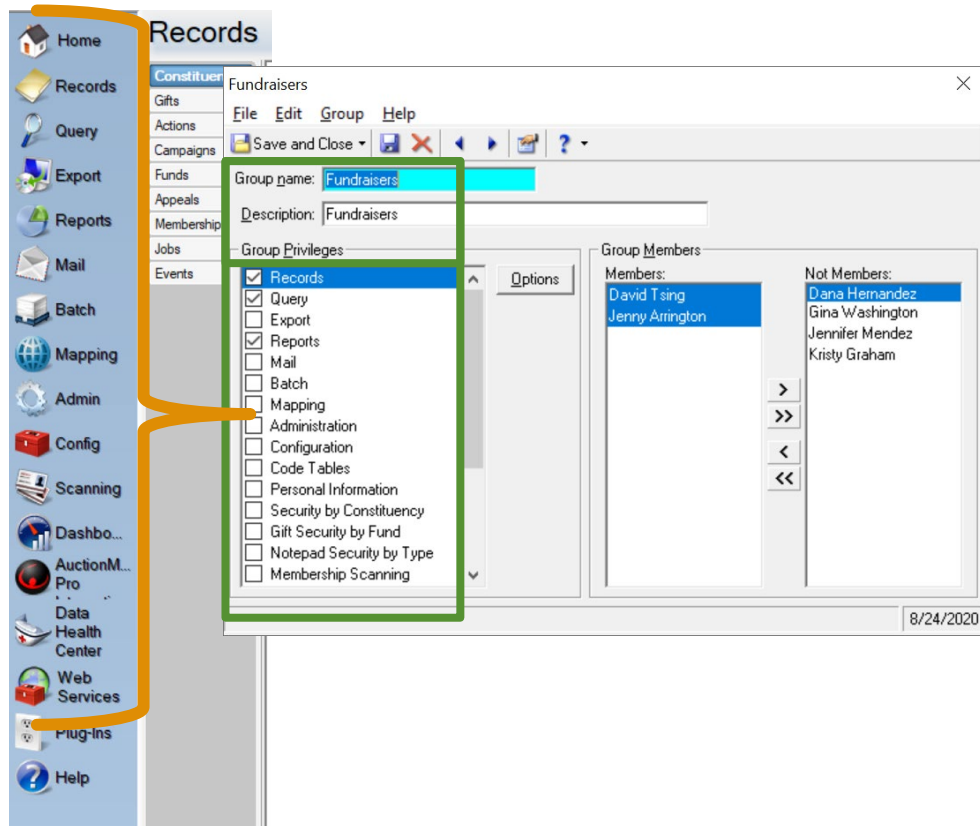
Not Azure:

www.login2.blackbaudhosting.com



General Tips for Setting Up Raiser's Edge NXT Web View Security

Difference Between Database View Security Groups and Web View Security Roles



Tips on Web View Roles

Each user in one database view group, but likely multiple web view roles

1. Be thoughtful with the Fundraising roles and use the same approach as with database view groups
2. Other roles, because they have so few permissions, might be fine to be more generic with multiple users

Create Marketing role Access to 1 of 6 permissions

Role name *

Access to Email

Email tasks Access to 1 of 1 permissions

☒ Manage email

Email permissions

Access

Email ☒

Social tasks Access to 0 of 5 permissions

☐ Social Administrator

Social permissions

	Create	Edit	Delete	Send
Social Posts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Connect				
Social Accounts	<input type="checkbox"/>			

Tips on Web View Roles

Edit Fundraising role: All FR Rights Access to 20 of 32 permissions

Role name * All FR Rights Description Copy role

Analyze tasks Access to 9 of 9 permissions

☒ Access all analyze tabs

Attachment tasks Access to 0 of 9 permissions

☐ Manage all attachments ☐ Manage appeal attachments ☐ Manage campaign attachments

☐ Manage fund attachments

☒ Access all lists ☐ Export lists

Opportunities tasks Access to 3 of 3 permissions

☒ Access all opportunities lists

Receipt management tasks Access to 0 of 1 permissions

☐ Manage receipts

Work tasks Access to 5 of 6 permissions

☒ Access all tabs ☒ Access other's portfolios ☐ Export work

Work permissions

	View
Portfolio	<input checked="" type="checkbox"/>
Gifts	<input checked="" type="checkbox"/>
Actions	<input checked="" type="checkbox"/>
Unassigned	<input checked="" type="checkbox"/>
Allow	
Export	<input type="checkbox"/>

Show permissions

Show permissions

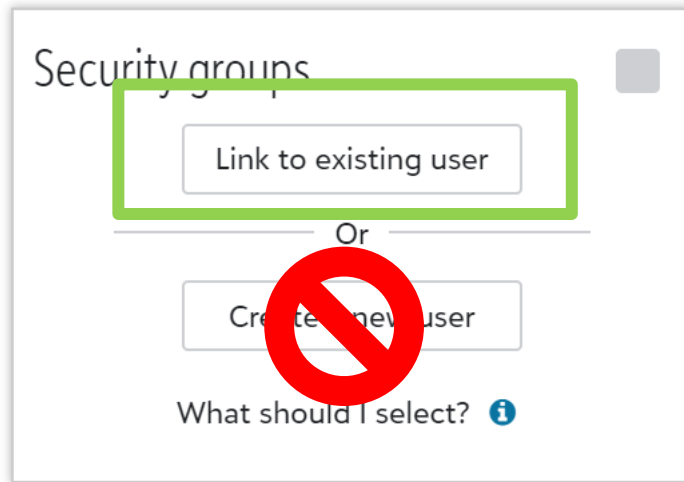
Show permissions

Show permissions

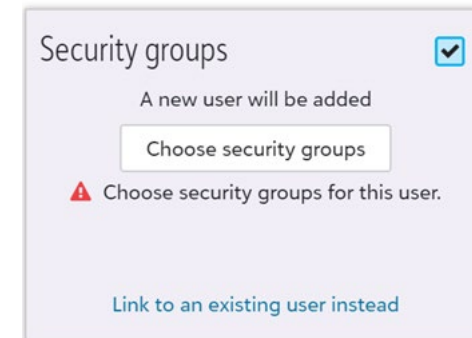
Hide permissions

1. Pay attention to the detailed permissions, not just the summary tasks
2. In the Fundraising role, pay special attention to Attachments and Export!

Tips on Web View Users



1. I recommend always starting in database view to create a new user with correct rights
2. Since the user already has an account in the database view Security, Link to existing user!
3. Go back and check your database view Security for duplicate accounts and fix them



A Final Word: Solution Admin rights

1. There should only be one active user account with Admin and Supervisor-level rights: the database manager
2. There should be one backup account in case of the absence of the database manager
3. This is true of both views

No one else should have all rights.

The #1 responsibility of the database manager is Security.

Nothing is more important than protecting this data asset and constituents' private information...

from external and internal threats.

Checklists for Adding and Inactivating Users

An updated list from my book of common tasks when users come and go can be found on the [Resources](#) page at:

billconnors.com

Also on this page:

- Raiser's Edge terminology whitepaper
- Last week's and today's webinar slides
- Link to watch last week's and today's webinar
- Link to register for next week's webinar

Webinar 3 next week, Tuesday, March 30: Deep Dive into Raiser's Edge NXT and Raiser's Edge Security Options

Records – Constituents

The screenshot displays the Raiser's Edge NXT interface. On the left, the 'Security Options' window is open, showing a list of 'Record Types' on the left and 'Constituents Privileges' on the right. The 'Record Types' list includes Constituents, Gifts, Actions (Constituent), Jobs, Memberships, Campaigns, Funds, Appeals, Events, Actions (Events), Jobs (Events), Participants (Events), Actions (Appeals), and Planned Gifts. The 'Constituents Privileges' table has columns for View, Add, Edit, and Delete. The 'Address' row is highlighted with an orange box, and the 'Add' and 'Edit' checkboxes are also highlighted. Below this, the 'Miscellaneous Constituents Options' section includes Target, Income, Ethnicity, and Religion, all of which are checked.

On the right, the 'Add individual' form is open. It contains fields for Title, First name (Armani), Middle name, Last name (Vidal), Suffix, Preferred name, Former name, Gender, and Date of birth. Below these are fields for Address, Phone, Email, Online presence, and Funds. There are also sections for 'Constituent codes' and 'Primary name formats'. At the bottom, the 'Possible duplicates' section shows a match for 'Mr. Armani Reinhard Vidal' with address '39 Wedgemont St. Mobile, AL 36615' and a date added of '5/20/7999'. The 'Save' button is highlighted in blue.

Let's Connect!

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