

# Deep Dive into Raiser's Edge Security Options

MASTERING SECURITY IN BLACKBAUD RAISER'S EDGE NXT®  
AND RAISER'S EDGE® | WEBINAR 3



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9:54 90% 100%

←

**ZDNet** SECURITY CLOUD

**MUST READ** ALGORITHMS WILL SOON BE IN CHARGE OF HIRING AND FIRING. NOT EVERYONE THINKS THIS IS A GOOD IDEA

## Billions of records have been hacked already. Make cybersecurity a priority or risk disaster, warns analyst

A new report warns against relegating cybersecurity to the bottom of the to-do list.

By [Daphne Leprince-Ringuet](#) | March 29, 2021 -- 13:54 GMT (06:54 PDT) | Topic: Security

More data records have been compromised in 2020 alone than in the past 15 years combined, in what is described as a mounting "data breach crisis" in the latest study from analysis firm Canalsys.

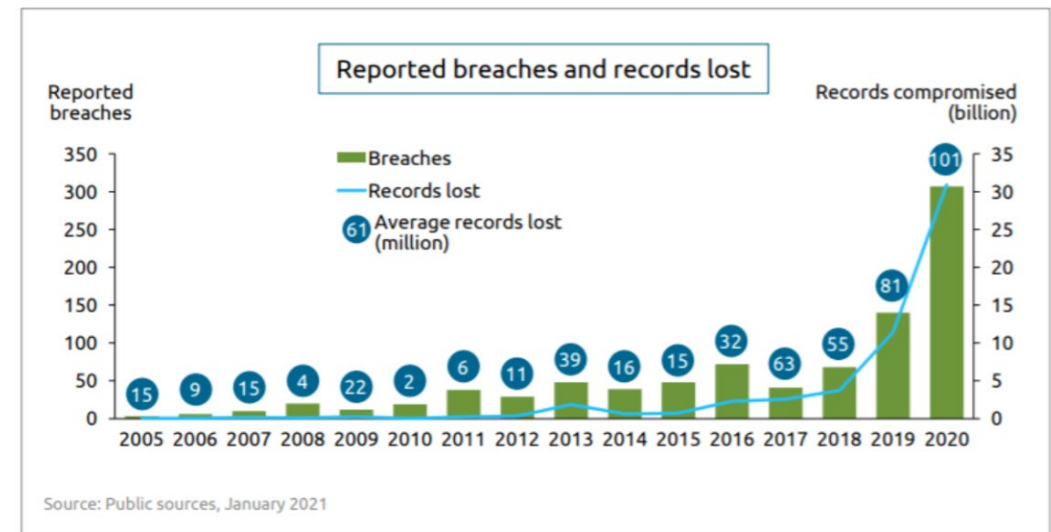
Over the past 12 months, 31 billion data records have been compromised, [found Canalsys](#). This is up 171% from the previous year, and constitutes well over half of the 55 billion data records that have been compromised in total since 2005.

Cases of ransomware – a specific type of attack that encrypts servers and data to block access to a computer system until a sum of money is paid – have been on the rise, with the number of reported incidents up 60% compared to 2019.

"Prioritize cybersecurity and invest in broadening protection, detection and response measures or face disaster," said Canalsys chief analyst Matthew Ball.


### SECURITY

**Microsoft: Firmware attacks are on the rise and you aren't worrying about them enough**



More data records have been compromised in 2020 alone than in the past 15 years combined.

### Data breach alert for Spotify



A security incident was reported for open.spotify.com. Over 300,000 Spotify Accounts Compromised in Credential-Stuffing Attack The database contained over 72 GB of data, such as verified Spotify account usernames, passwords, email addresses, country of residence. CHECK IF YOU WERE AFFECTED

Read more [here](#)

Protect yourself

March 30, the day of the second webinar:

The Washington Post  
*Democracy Dies in Darkness*

The Post's View

## Opinion: Ransomware attacks are crippling cities, schools and hospitals. Congress can help.



[https://www.washingtonpost.com/opinions/ransomware-attacks-are-crippling-cities-schools-and-hospitals-congress-can-help/2021/03/30/7ad9d248-90cc-11eb-bb49-5cb2a95f4cec\\_story.html](https://www.washingtonpost.com/opinions/ransomware-attacks-are-crippling-cities-schools-and-hospitals-congress-can-help/2021/03/30/7ad9d248-90cc-11eb-bb49-5cb2a95f4cec_story.html)

The Register

## And that's yet another UK education body under attack from ransomware: Servers, email, phones yanked offline

1 hour ago

Hacked companies had backup plans. But they didn't print them out before the attack.

New NCSC chief says businesses need to take cybersecurity more seriously.

<https://www.zdnet.com/article/hacked-companies-had-backup-plans-but-didnt-print-them-out-why-cybersecurity-still-isnt-being-taken-seriously/>

# Recap of Webinars 1 and 2

# Four Legs of the Chair of Raiser's Edge Security

Webinar 1

#1: Blackbaud Technology

#2: Your Culture of Security

Webinars 2 and 3 (today)

#3: Raiser's Edge Security Setup

#4: Users' use of Raiser's Edge



# Recap of What We've Covered

1. Who is responsible for security (DBM!)
2. Why security is important (external and internal threats!)
3. What Blackbaud does to protect your data (leg 1)
4. How to create a culture of security among your users (leg 2, the people part)

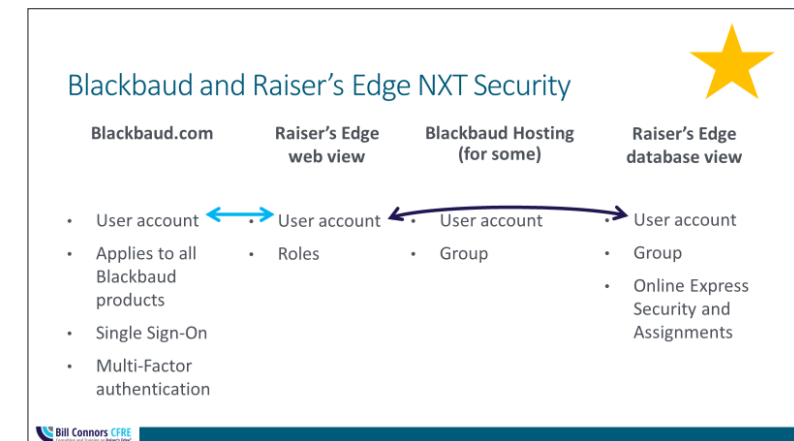
Summary: To create a culture of security, every organization needs a...

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



# Recap of What We've Covered

5. How to tell what environment you're in (Azure, "Not Azure," etc.)
6. Locations where security needs to be set up based on your environment
7. How database view and web view security interact
8. General tips for setting up RE 7/RE NXT database view security
  - Groups (e.g., groups configured for only one specific user are fine)
  - Users (e.g., a user should be in one group only)
9. General tips for setting up RE NXT web view security
  - Roles
  - Users





# Terminology

“Raiser’s Edge” =  
both versions & both views, so  
be specific when needed

“Raiser’s Edge” ≠  

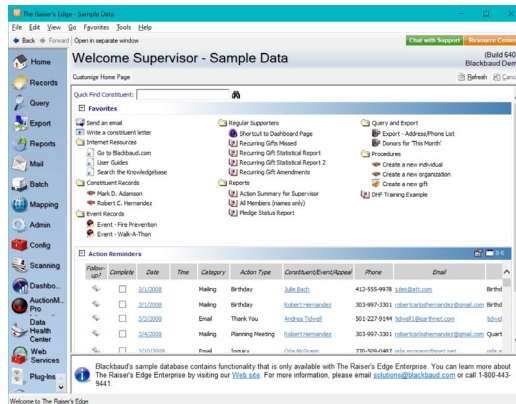
- The Raiser’s Edge version 7
- The database view

“Raiser’s Edge NXT” ≠  

- The web view

## “Raiser’s Edge”

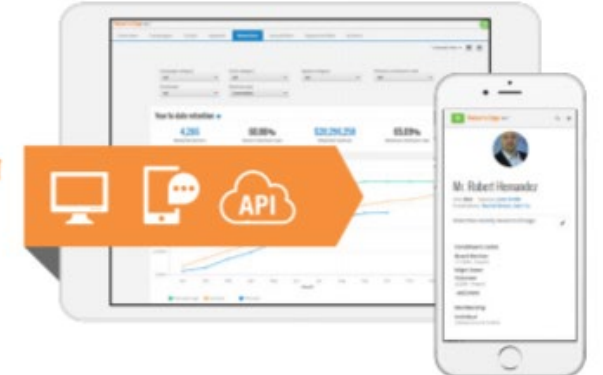
The Raiser’s Edge version 7



Database View

Raiser's Edge NXT

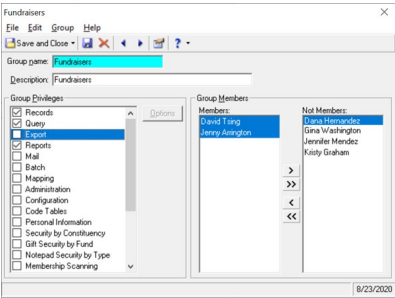
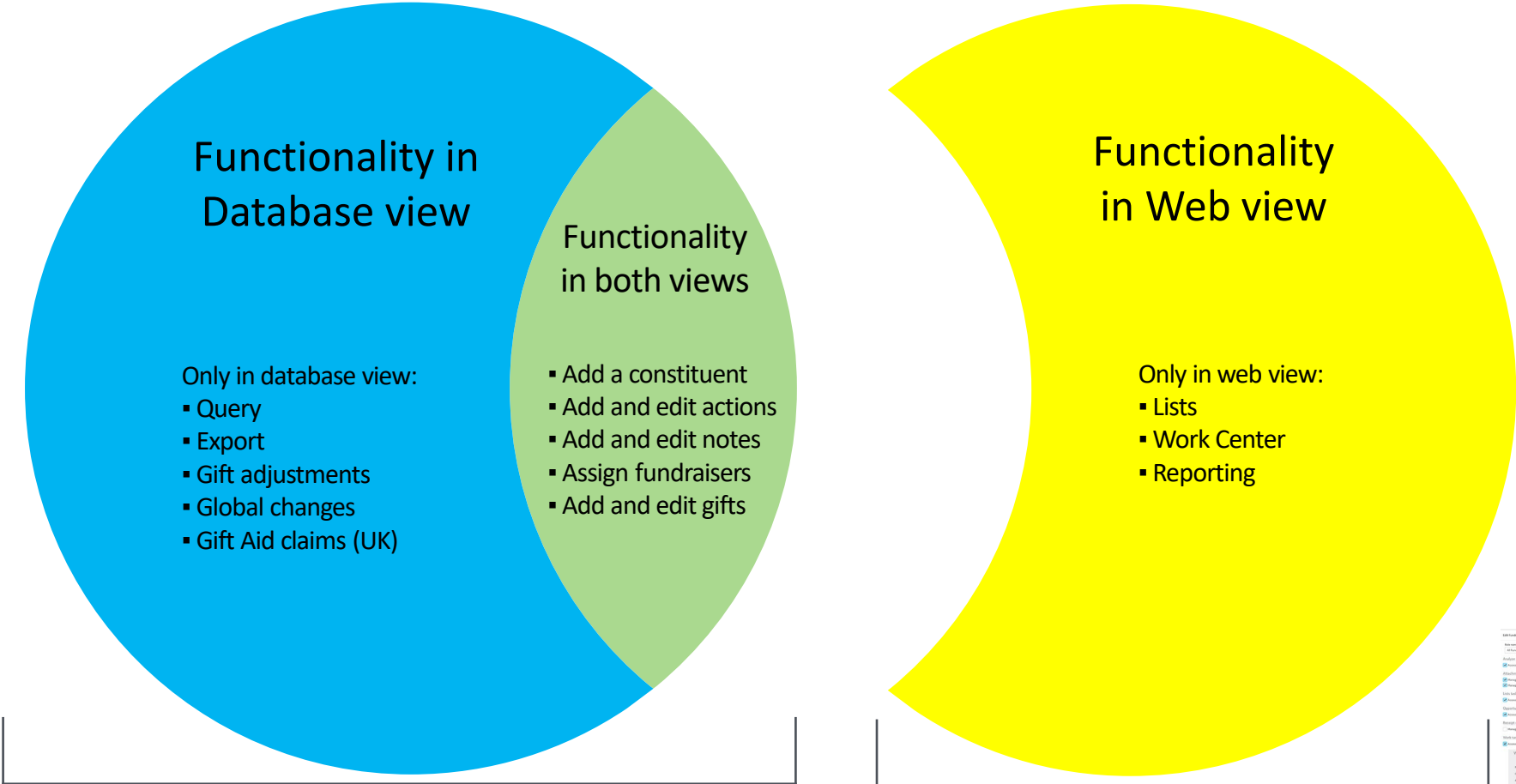
Web View



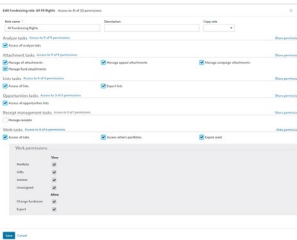
# Three Criteria for Security Rights

1. Training
2. Role
3. Aptitude

# Database View and Web View Security Interaction



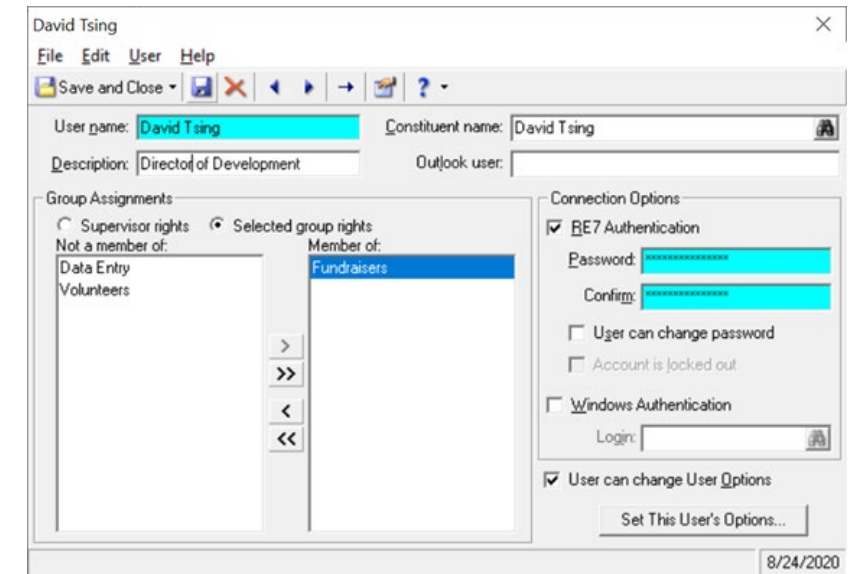
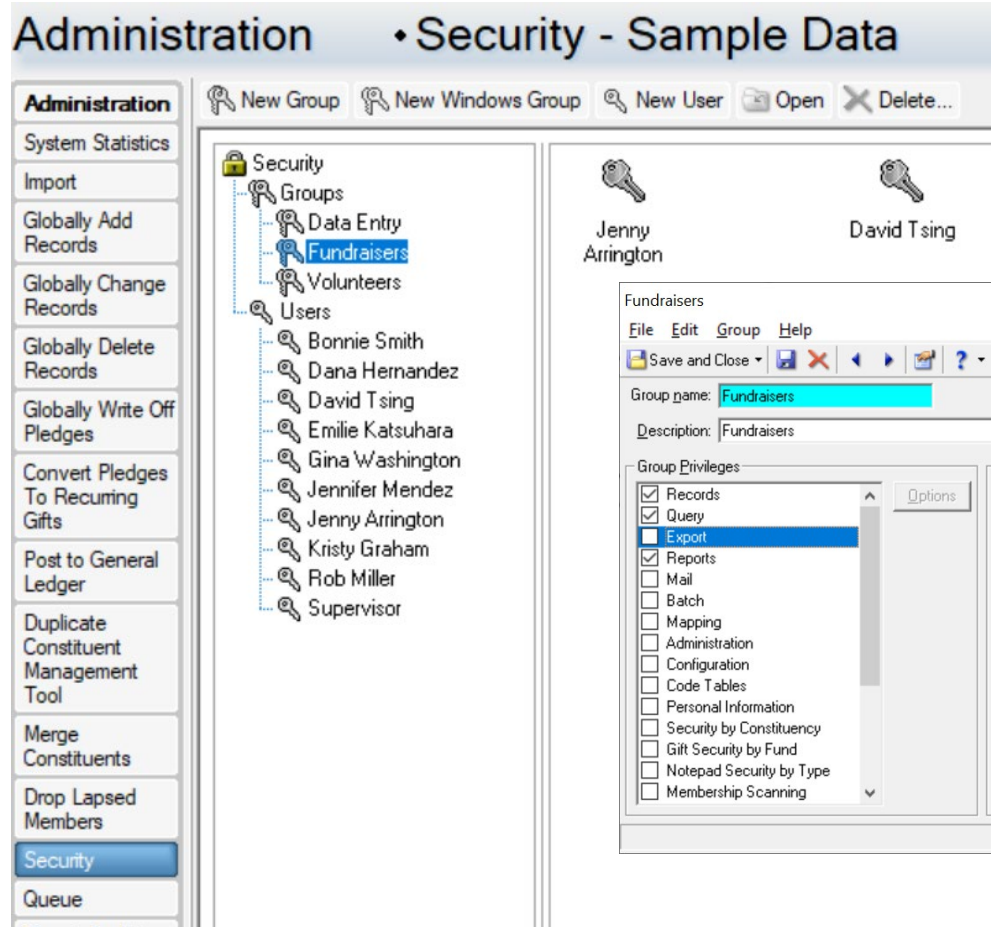
Controlled by Database View Security



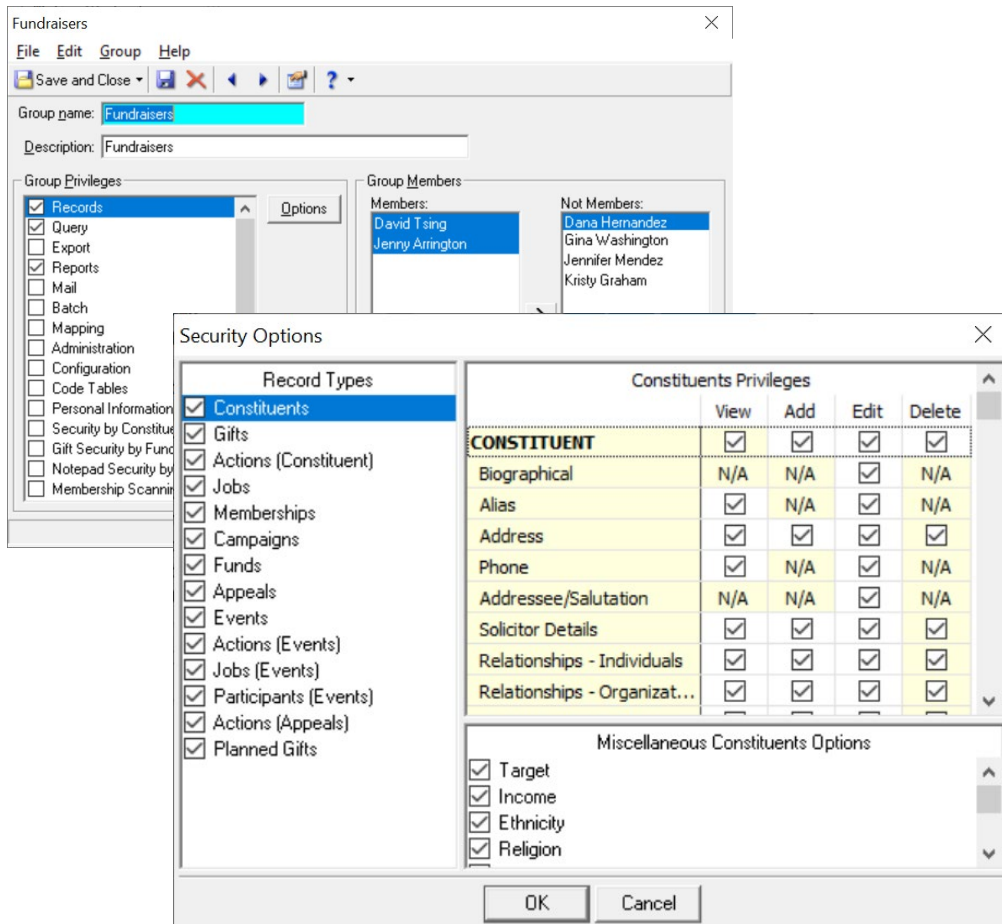
Controlled by Web View Security

Detailed Security Tips for  
Raiser's Edge version 7  
& Raiser's Edge NXT database view

# Database View (and RE 7) Security



# Tips on Database View Security Groups

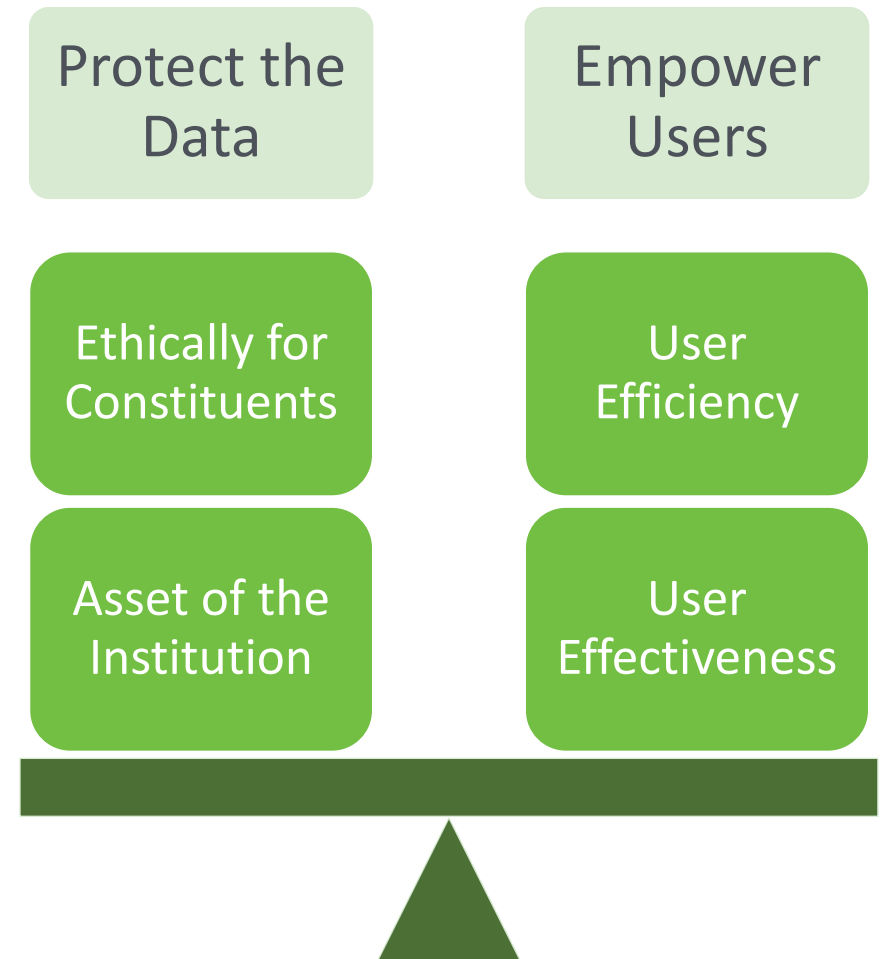


1. Create a group with only one user in mind at a time
2. If they're the only user in the group, that's fine!
3. Watch scroll bars
4. Watch Miscellaneous Options!
5. Watch all Record Types
6. Be methodical and meticulous

# Types of RE Users in the Modern Fundraising Operation

In the modern fundraising shop, Security is set up to both:

1. Protect the data in the database from both external and internal threats for the benefit of the constituents and the institution, and
2. Empower modern technology users to enable to do their jobs accurately, efficiently, and effectively.

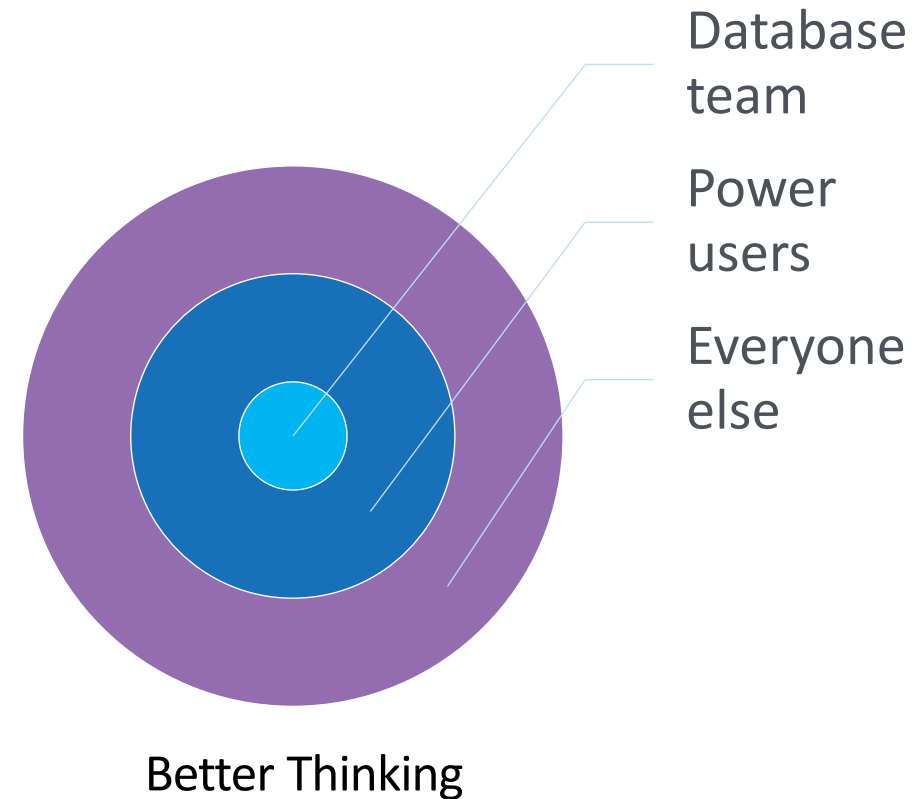
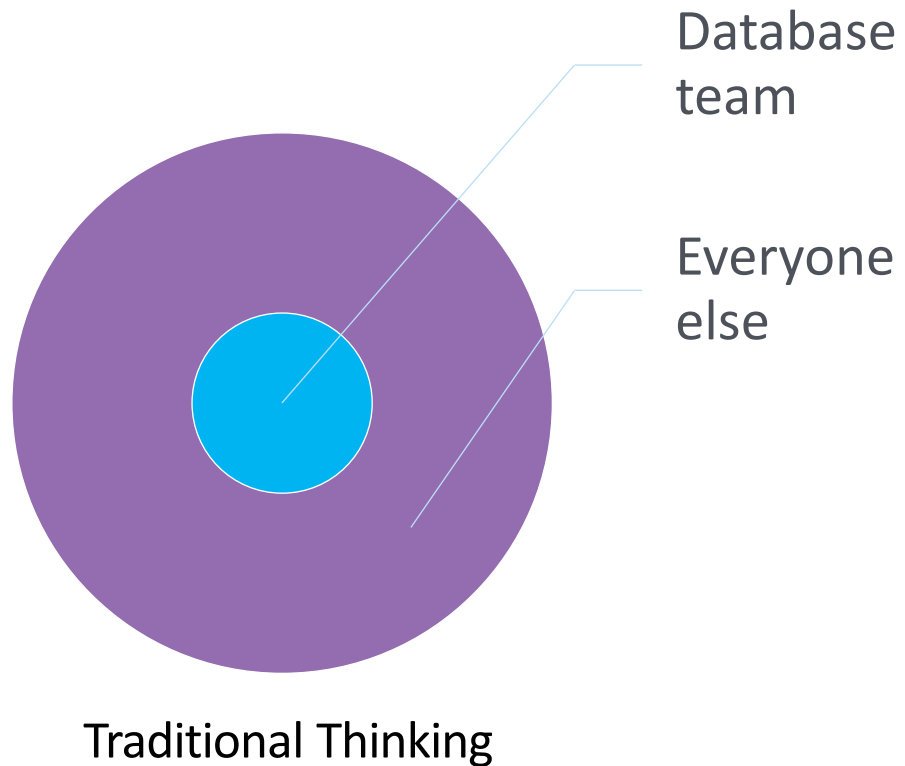




# Types of RE Users in the Modern Fundraising Operation

1. Database managers (Supervisor/Admin rights)
  - AKA Database administrator, but I like “manager” more!
2. Gift processors
3. “Power Users”
4. “Fundraisers”: broadly defined, includes fundraising management and leadership
5. Those outside the fundraising department: executive management, IT, Finance

# Types of RE Users in the Modern Fundraising Operation



# Records – Constituents

Security Options

Record Types

☒ Constituents

☒ Gifts

☒ Actions (Constituent)

☒ Jobs

☒ Memberships

☒ Campaigns

☒ Funds

☒ Appeals

☒ Events

☒ Actions (Events)

☒ Jobs (Events)

☒ Participants (Events)

☒ Actions (Appeals)

☒ Planned Gifts

Constituents Privileges

	View	Add	Edit	Delete
CONSTITUENT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Biographical	N/A	N/A	<input type="checkbox"/>	N/A
Alias	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A
Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A
Addressee/Salutation	N/A	N/A	<input type="checkbox"/>	N/A
Solicitor Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationships - Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Relationships - Organizat...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Miscellaneous Constituents Options

☒ Target

☒ Income

☒ Ethnicity

☒ Religion

OK

Cancel

Add individual

Title

First name

Armani

Middle name

Last name \*

Vidal

Suffix

Preferred name

Former name

Gender

Date of birth

Address

Add address

Phone

Add phone number

Email

Add email address

Online presence

Add account

Constituent codes

Add a constituent code

Primary name formats

Addressee \*

Choose name format

Salutation \*

Choose name format

Possible duplicates

Mr. Armani Reinhard Vidal 192535  
39 Wedgemont St. Mobile, AL 36615

Date added: 5/20/1999

Save

Cancel

Fields and tables

System fields

	Field name	Requirement status	Displays on record type
...	Assign to	Required	Action
...	Status	Optional	Action
...	Type	Required	Action
...	Addressee	Required	Constituent
...	Constituent codes	Required	Constituent
...	First name	Optional	Constituent
...	Gender	Optional	Constituent
...	Last name	Required	Constituent
...	Salutation	Required	Constituent
...	Title	Optional	Constituent

# Records – Constituents

Security Options

Record Types

- ☒ Constituents
- ☒ Gifts
- ☒ Actions (Constituent)
- ☒ Jobs
- ☒ Memberships
- ☒ Campaigns
- ☒ Funds
- ☒ Appeals
- ☒ Events
- ☒ Actions (Events)
- ☒ Jobs (Events)
- ☒ Participants (Events)
- ☒ Actions (Appeals)
- ☒ Planned Gifts

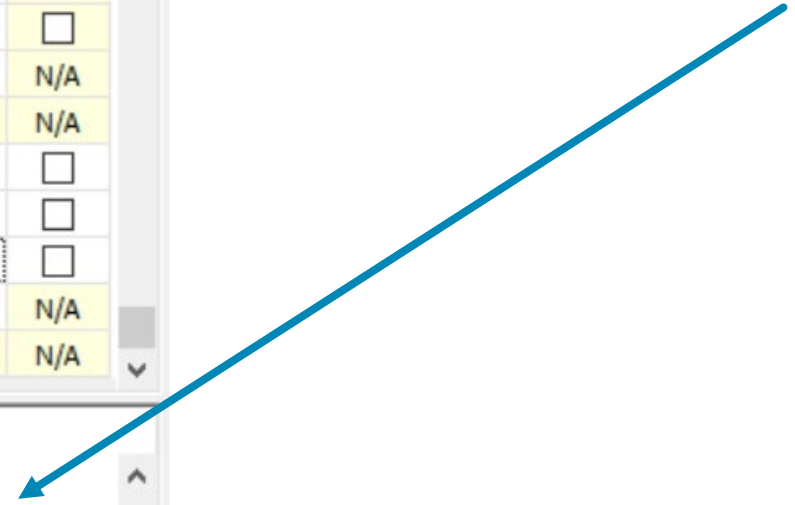
Constituents Privileges

	View	Add	Edit	Delete
Job Assignments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time Sheets	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Awards	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>	N/A
<b>Prospect</b>	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Financial	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Proposals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ratings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Annotations	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A
Giving Score	<input type="checkbox"/>	N/A	<input type="checkbox"/>	N/A

Miscellaneous Constituents Options

- ☒ Gift Summary
- ☐ Edit Constituent ID
- ☐ Solicit Codes
- ☐ Add Consent

OK Cancel



# Records – Gifts

The screenshot shows a 'Security Options' dialog box. On the left, under 'Record Types', a list of items is shown with checkboxes: Constituents, Gifts, Actions (Constituent), Jobs, Memberships, Campaigns, Funds, Appeals, Events, Actions (Events), Jobs (Events), Participants (Events), Actions (Appeals), and Planned Gifts. The 'Gifts' item is selected and highlighted in blue. On the right, under 'Gifts Privileges', there is a table with columns: View, Add, Edit, and Delete. The 'Gifts' row is highlighted in yellow, and the 'View' checkbox is checked. Below this, under 'Miscellaneous Gifts Options', there is a list of four items with checkboxes: Adjust Gifts, Sell Stock/Property, Write-Off Pledges, and Select "Posted" for GL Post Status. At the bottom of the dialog are 'OK' and 'Cancel' buttons. Two orange rectangular boxes are overlaid on the image: one around the 'Gifts Privileges' table and another around the 'Miscellaneous Gifts Options' section and the 'OK'/'Cancel' buttons.

Record Types	Gifts Privileges								
<input checked="" type="checkbox"/> Constituents									
<input checked="" type="checkbox"/> <b>Gifts</b>	<table border="1"><thead><tr><th>View</th><th>Add</th><th>Edit</th><th>Delete</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr></tbody></table>	View	Add	Edit	Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View	Add	Edit	Delete						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
<input checked="" type="checkbox"/> Actions (Constituent)									
<input checked="" type="checkbox"/> Jobs									
<input checked="" type="checkbox"/> Memberships									
<input checked="" type="checkbox"/> Campaigns									
<input checked="" type="checkbox"/> Funds									
<input checked="" type="checkbox"/> Appeals									
<input checked="" type="checkbox"/> Events									
<input checked="" type="checkbox"/> Actions (Events)									
<input checked="" type="checkbox"/> Jobs (Events)									
<input checked="" type="checkbox"/> Participants (Events)									
<input checked="" type="checkbox"/> Actions (Appeals)									
<input checked="" type="checkbox"/> Planned Gifts									

Miscellaneous Gifts Options
<input type="checkbox"/> Adjust Gifts
<input type="checkbox"/> Sell Stock/Property
<input type="checkbox"/> Write-Off Pledges
<input type="checkbox"/> Select "Posted" for GL Post Status

OK Cancel

# Records – Actions

The screenshot shows a 'Security Options' dialog box. On the left, under 'Record Types', a list of record types is shown with checkboxes. 'Actions (Constituent)' is selected and highlighted in blue. On the right, under 'Actions (Constituent) Privileges', a table shows privileges for the selected record type. The 'Actions (Constituent)' row is highlighted in yellow and enclosed in an orange box. Below this, under 'Miscellaneous Actions (Constituent) Options', two options are listed: 'Assign Constituent Action Tracks' and 'Define Constituent Action Tracks', with the latter selected and highlighted in blue. At the bottom are 'OK' and 'Cancel' buttons.

Record Types		Actions (Constituent) Privileges				
<input checked="" type="checkbox"/>	Constituents		View	Add	Edit	Delete
<input checked="" type="checkbox"/>	Gifts					
<input checked="" type="checkbox"/>	Actions (Constituent)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Jobs					
<input checked="" type="checkbox"/>	Memberships					
<input checked="" type="checkbox"/>	Campaigns					
<input checked="" type="checkbox"/>	Funds					
<input checked="" type="checkbox"/>	Appeals					
<input checked="" type="checkbox"/>	Events					
<input checked="" type="checkbox"/>	Actions (Events)					
<input checked="" type="checkbox"/>	Jobs (Events)					
<input checked="" type="checkbox"/>	Participants (Events)					
<input checked="" type="checkbox"/>	Actions (Appeals)					
<input checked="" type="checkbox"/>	Planned Gifts					

Miscellaneous Actions (Constituent) Options	
<input type="checkbox"/>	Assign Constituent Action Tracks
<input checked="" type="checkbox"/>	Define Constituent Action Tracks

OK Cancel

# Records – Campaigns, Funds and Appeals

The screenshot shows a 'Security Options' dialog box. On the left, under 'Record Types', a list of items is shown with checkboxes. 'Campaigns', 'Funds', and 'Appeals' are checked and highlighted with an orange box. 'Funds' is also highlighted with a blue selection bar. On the right, under 'Funds Privileges', a table lists various fund-related functions with columns for View, Add, Edit, and Delete. The 'Funds' row is highlighted in yellow. Below this, 'Relationships - Organizat...' has its 'Add' checkbox highlighted with a dashed orange box. At the bottom right, 'Miscellaneous Funds Options' includes 'View Gifts' and 'View Fund Summary', both of which are checked.

Funds Privileges				
	View	Add	Edit	Delete
<b>FUNDS</b>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solicitor Hierarchy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationships - Individuals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationships - Organizat...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Miscellaneous Funds Options

- ☒ View Gifts
- ☒ View Fund Summary



# Records – Events

Security Options

Record Types

- ☒ Constituents
- ☒ Gifts
- ☒ Actions (Constituent)
- ☒ Jobs
- ☒ Memberships
- ☒ Campaigns
- ☒ Funds
- ☒ Appeals
- ☒ **Events**
- ☒ Actions (Events)
- ☒ Jobs (Events)
- ☒ Participants (Events)
- ☒ Actions (Appeals)
- ☒ Planned Gifts

Events Privileges

	View	Add	Edit	Delete
<b>EVENTS</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events	N/A	N/A	<input checked="" type="checkbox"/>	N/A
Prices	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A
Expenses	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A
Attributes	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A
Media	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annotations	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A
Awards	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A

Miscellaneous Events Options

- ☒ View Goal Summary
- ☒ View Financial Summary
- ☒ Calendar
- ☐ Gift Defaults

OK Cancel

# Records – Planned Gifts

The screenshot shows a 'Security Options' dialog box with two main sections. On the left, under 'Record Types', a list of record types is shown with checkboxes. On the right, under 'Planned Gifts Privileges', a table shows permissions for the 'Planned Gifts' record type. Two orange boxes highlight specific areas: one around the 'Planned Gifts' record type in the list, and another around the 'Planned Gifts' row in the privileges table.

Record Types	View	Add	Edit	Delete
<input checked="" type="checkbox"/> Constituents				
<input checked="" type="checkbox"/> Gifts				
<input checked="" type="checkbox"/> Actions (Constituent)				
<input checked="" type="checkbox"/> Jobs				
<input checked="" type="checkbox"/> Memberships				
<input checked="" type="checkbox"/> Campaigns				
<input checked="" type="checkbox"/> Funds				
<input checked="" type="checkbox"/> Appeals				
<input checked="" type="checkbox"/> Events				
<input checked="" type="checkbox"/> Actions (Events)				
<input checked="" type="checkbox"/> Jobs (Events)				
<input checked="" type="checkbox"/> Participants (Events)				
<input checked="" type="checkbox"/> Actions (Appeals)				
<input checked="" type="checkbox"/> <b>Planned Gifts</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Query and Export

Director of Development

File Edit Group Help

Save and Close

Group name: Director of Development

Description: Fundraiser and management access

Group Privileges

- ☒ Records
- ☒ Query
- ☐ Export
- ☐ Mail
- ☐ Batch
- ☐ Mapping
- ☐ Administration
- ☐ Configuration
- ☐ Code Tables
- ☐ Personal Information
- ☐ Security by Constituency
- ☐ Gift Security by Fund
- ☐ Notepad Security by Type
- ☐ Membership Scanning

Group Members

Members:

- Jenny Arrington

Not Members:

- Dana Hernandez
- Gina Washington
- Jennifer Mendez
- Kristy Graham
- zzDavid Tsing

3/1/2021

Query Options

General Record Processing Gift Processing Advanced Processing

Query Type: Constituent Query Format: Dynamic

Query Name: Trustees

Category: General

Description: Query of all the Trustees in the database, sorted by Name.

☒ Other users may run this query

☒ Other users may modify this query

OK Cancel

# Reports

Security Options

Report Types	Report Names
<input checked="" type="checkbox"/> Action Reports	<input checked="" type="checkbox"/> Account Distribution Report
<input checked="" type="checkbox"/> Tribute Reports	<input checked="" type="checkbox"/> Adjusted Gift Report
<input checked="" type="checkbox"/> Campaigns, Funds, and Appeals Reports	<input checked="" type="checkbox"/> Annual Statement Report
<input checked="" type="checkbox"/> Analytical Reports	<input checked="" type="checkbox"/> Cash Receipts Journal
<input checked="" type="checkbox"/> Event Management Reports	<input checked="" type="checkbox"/> Constituent Giving History
<input checked="" type="checkbox"/> Pledge and Recurring Gift Reports	<input checked="" type="checkbox"/> EFT Participation Report
<input checked="" type="checkbox"/> <b>Financial Reports</b>	<input checked="" type="checkbox"/> Expected Maturity Year Report
<input checked="" type="checkbox"/> Prospect Research Reports	<input checked="" type="checkbox"/> General Ledger Audit Report
<input checked="" type="checkbox"/> Membership Reports	<input checked="" type="checkbox"/> Gift Detail and Summary Report
<input checked="" type="checkbox"/> Profiles, Lists, and Directories	<input checked="" type="checkbox"/> Gift Entry Validation
<input checked="" type="checkbox"/> Volunteer Reports	<input checked="" type="checkbox"/> Gifts-in-Kind Report

Select All Deselect All Select All Deselect All

OK Cancel

# Mail

Security Options

Mail Functions

- ☐ Appeal Cards
- ☐ Cards
- ☐ Donor Acknowledgement Letters
- ☒ Envelopes
- ☐ Follow-up Letters
- ☐ Honor/Memorial Acknowledgement Letters
- ☒ Label Truncation Report
- ☒ Labels
- ☐ Membership Card Truncation Report
- ☐ Membership Cards
- ☐ Name Tags
- ☐ Phonathon Forms
- ☐ Place Cards

OK Cancel Select All Deselect All

Security Options

Mail Functions

- ☐ Membership Card Truncation Report
- ☐ Membership Cards
- ☐ Name Tags
- ☐ Phonathon Forms
- ☐ Place Cards
- ☒ Quick Letters
- ☐ Receipt Report
- ☐ Receipts
- ☐ Reminder Report
- ☐ Reminders
- ☐ Renewal Notices
- ☐ Volunteer Follow-up Letters

OK Cancel Select All Deselect All

# Batch

Security Options

Batch Types	Batch Privileges
<input checked="" type="checkbox"/> Constituent	<input checked="" type="checkbox"/> Create Batch
<input checked="" type="checkbox"/> Gift	<input checked="" type="checkbox"/> Edit Batch
<input checked="" type="checkbox"/> Time Sheet	<input type="checkbox"/> Delete Batch
	<input checked="" type="checkbox"/> Commit Batch
	<input checked="" type="checkbox"/> Change Batch Projections
	<input checked="" type="checkbox"/> Automatically Generate Transactions/Payments
	<input checked="" type="checkbox"/> Create EFT Transmission Files

Select All Deselect All      Select All Deselect All

OK Cancel

# Administration

Security Options

Administration Security Options

- ☒ Import
- ☐ Globally Add Actions to Constituents
- ☐ Globally Add Appeals to Constituents
- ☐ Globally Add Attributes to Constituents
- ☐ Globally Add Businesses to Constituents
- ☐ Globally Add Constituent Codes to Constituents
- ☐ Globally Add Education to Constituents
- ☐ Globally Add Emails to Constituents
- ☐ Globally Add Financial Institutions to Constituents
- ☐ Globally Add Memberships to Constituents (RE:Member only)
- ☐ Globally Add Notepads
- ☐ Globally Add Participants to Event (RE:Event only)
- ☐ Globally Add Proposals to Constituents (RE:Search only)

OK Cancel Select All Deselect All

Security Options

Administration Security Options

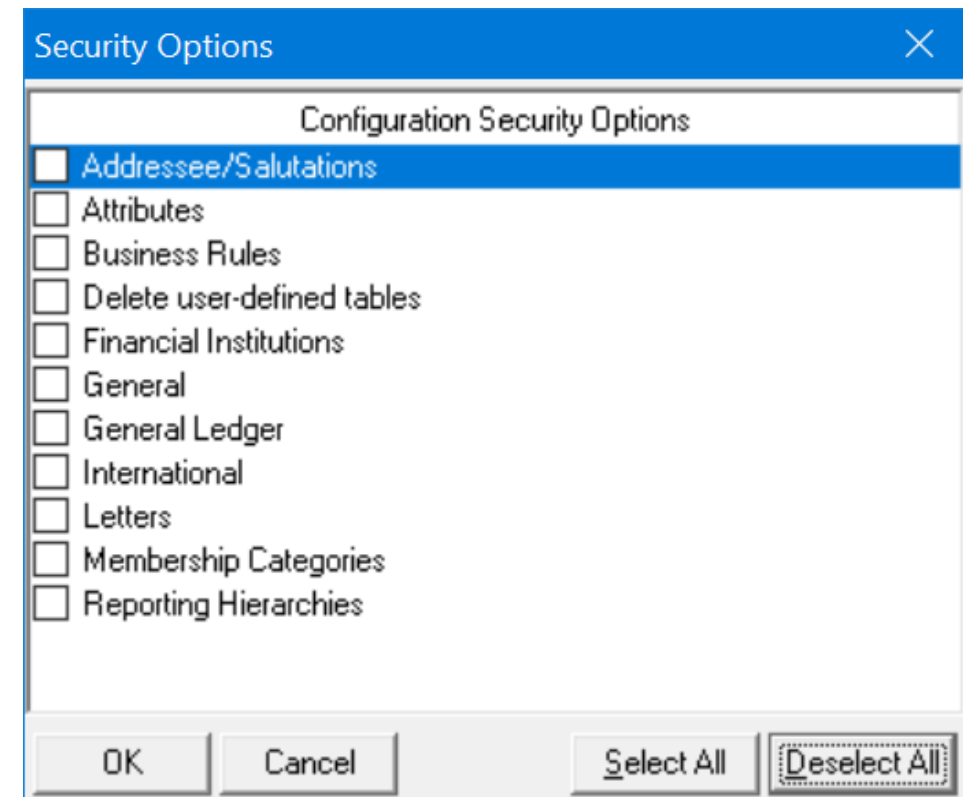
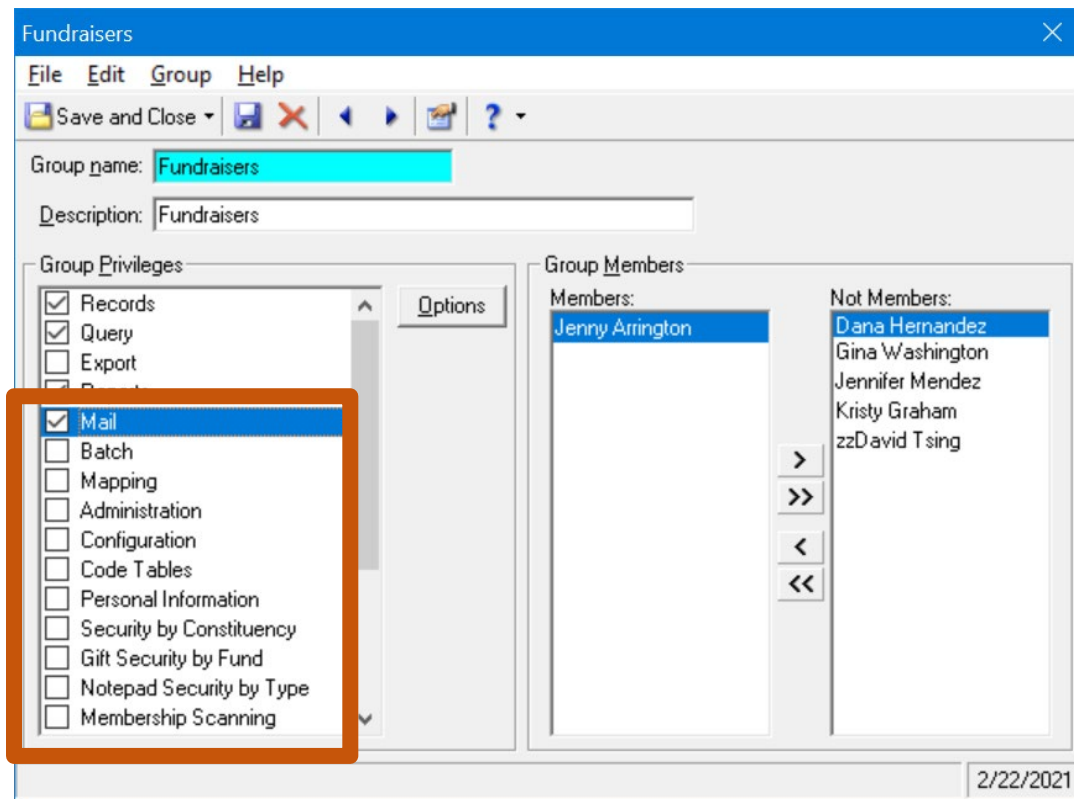
- ☐ Globally Change Records
- ☐ Globally Delete Records
- ☐ Globally Write Off Pledges
- ☐ Convert Pledges to Recurring Gifts
- ☐ Post to General Ledger
- ☐ Duplicate Constituents
- ☐ Merge Constituents
- ☐ Drop Lapsed Members (RE:Member only)
- ☐ Security
- ☐ Target Analytics
- ☐ RE:Queue
- ☐ GiftWrap Integration

OK Cancel Select All Deselect All

Remember the previous warnings: in many cases, Blackbaud cannot restore RE NXT backups to your live, production environment.



# Configuration



# Code Tables

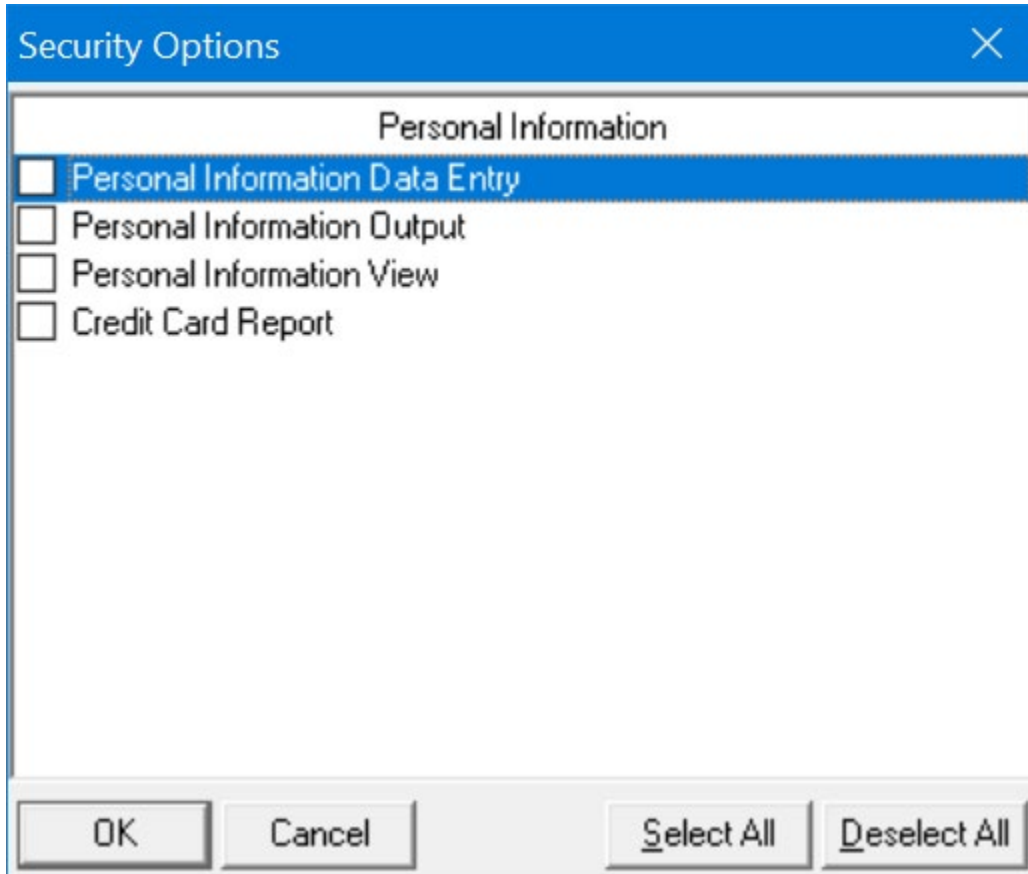
Security Options

Code Table Change Privileges

- ☐ # of Family Members
- ☐ Action Alert Title
- ☐ Action Delivery Method
- ☐ Action Issues
- ☐ Action Locations
- ☐ Action Notepad Types
- ☐ Action Status
- ☐ Actions
- ☐ Addr/Sal Types
- ☐ Address Info Sources
- ☐ Address Types
- ☐ Adopt An Animal
- ☐ Alias Types

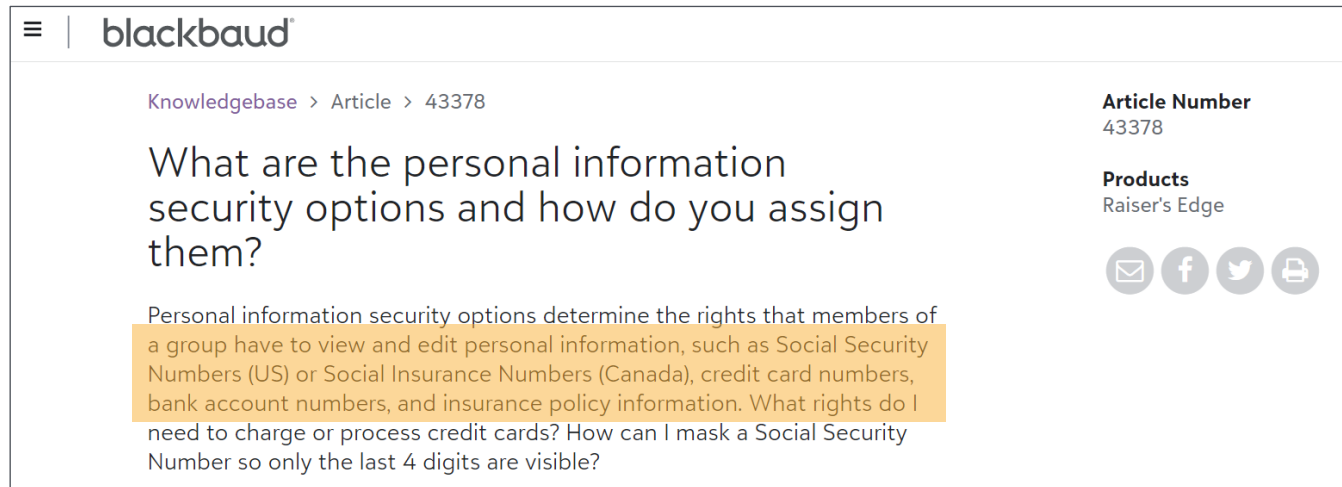
OK Cancel Select All Deselect All

# Personal Information



The screenshot shows a 'Security Options' dialog box with a blue title bar and a close button. The 'Personal Information' tab is selected. It contains four checkboxes: 'Personal Information Data Entry' (checked), 'Personal Information Output' (unchecked), 'Personal Information View' (unchecked), and 'Credit Card Report' (unchecked). At the bottom are buttons for 'OK', 'Cancel', 'Select All', and 'Deselect All'.

Personal Information	
<input checked="" type="checkbox"/>	Personal Information Data Entry
<input type="checkbox"/>	Personal Information Output
<input type="checkbox"/>	Personal Information View
<input type="checkbox"/>	Credit Card Report



The screenshot shows a Blackbaud Knowledgebase article page. The header includes the Blackbaud logo and a navigation menu. The article title is 'What are the personal information security options and how do you assign them?'. The article number is 43378. The products listed are Raiser's Edge. The article content discusses personal information security options and how to assign them, mentioning Social Security Numbers (US) or Social Insurance Numbers (Canada), credit card numbers, bank account numbers, and insurance policy information. The article includes a link to the full article and social media sharing icons.

blackbaud

Knowledgebase > Article > 43378

**Article Number**  
43378

**Products**  
Raiser's Edge

What are the personal information security options and how do you assign them?

Personal information security options determine the rights that members of a group have to view and edit personal information, such as Social Security Numbers (US) or Social Insurance Numbers (Canada), credit card numbers, bank account numbers, and insurance policy information. What rights do I need to charge or process credit cards? How can I mask a Social Security Number so only the last 4 digits are visible?

# Security “by”

Group Privileges

- ☐ Configuration
- ☐ Code Tables
- ☐ Security by Constituency
- ☐ Gift Security by Fund
- ☐ Notepad Security by Type
- ☐ Membership Scanning
- ☒ Dashboard
- ☐ Install Samples
- ☐ NetSolutions
- ☐ Proposal Security by Purpose
- ☐ Data Health Center
- ☐ AMP to Integration
- ☐ Action Security by Type
- ☐ Web Services

Security by Constituency

By default, all users will have rights to edit and view all constituents. **This feature will limit this group's access to constituents. Access will be limited in various places throughout The Raiser's Edge.**

☐ Allow access to only selected constituents  
Use this option to limit access to **only** constituents with **selected** constituent codes. NOTE: Only use this option when you want to restrict access to specific constituents.

Select Constituent Codes...

☐ Restrict access from selected constituents  
Use this option to restrict access to constituents with selected constituent codes. NOTE: Restricting access always means that the group will **never** have access to constituents restricted in this way.

Select Constituent Codes...

Security Options

This feature will limit this group's access to gifts. You can restrict access to gifts based on the funds listed below. Designate the funds that this group cannot view or edit.

Select All Deselect All Find

Funds	Cannot View	Cannot Edit
1999 Annual Fund	<input type="checkbox"/>	<input type="checkbox"/>
2000 Annual Fund	<input type="checkbox"/>	<input type="checkbox"/>
Acquisition Fund	<input type="checkbox"/>	<input type="checkbox"/>
Botanical Garden Fund	<input type="checkbox"/>	<input type="checkbox"/>
Building Fund	<input type="checkbox"/>	<input type="checkbox"/>
Natural Disaster Relief Fund	<input type="checkbox"/>	<input type="checkbox"/>
1999 Membership Fund	<input type="checkbox"/>	<input type="checkbox"/>
2000 Membership Fund	<input type="checkbox"/>	<input type="checkbox"/>
President's Development Fund	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

Security Options

This feature will limit this group's access to notes. You can restrict access to notes based on the notepad types below. Designate the notepad types that this group cannot view or edit.

Select All Deselect All Find

Notepad Types	Cannot View	Cannot Edit
Address Change	<input type="checkbox"/>	<input type="checkbox"/>
Alumni Notes	<input type="checkbox"/>	<input type="checkbox"/>
Biographical	<input type="checkbox"/>	<input type="checkbox"/>
Capital Campaign	<input type="checkbox"/>	<input type="checkbox"/>
Career	<input type="checkbox"/>	<input type="checkbox"/>
Confidential	<input type="checkbox"/>	<input type="checkbox"/>
Director's Notes	<input type="checkbox"/>	<input type="checkbox"/>
Financial	<input type="checkbox"/>	<input type="checkbox"/>
Personal	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

# Remaining Privileges

Director of Development

File Edit Group Help

Save and Close

Group name: Director of Development

Description: Fundraiser and management access

Group Privileges

- ☐ Configuration
- ☐ Code Tables
- ☐ Personal Information
- ☐ Security by Constituency
- ☐ Gift Security by Fund
- ☐ Membership Scanning
- ☒ Dashboard
- ☐ Install Samples
- ☐ NetSolutions
- ☐ Proposal Security by Purpose
- ☐ Data Health Center
- ☐ AMPro Integration
- ☐ Action Security by Type
- ☐ Web Services

Options

Group Members

Members:

- Jenny Arrington

Not Members:

- Dana Hernandez
- Gina Washington
- Jennifer Mendez
- Kristy Graham
- zzDavid T sing

2/22/2021

# Detailed Security Tips for Raiser's Edge NXT Web View

# Web View Security

The screenshot displays the 'Security for Bill Connors, CFRE' interface. At the top, a navigation bar includes links for 'Raiser's Edge NXT', 'Home', 'Fundraising', 'Marketing', 'Events', 'Lists', 'Analysis', 'Tools', and 'Control panel'. The main header shows 'Security for Bill Connors, CFRE' with 'Users 4' and 'Roles 14' counts. Below this, a '4 users' section includes an 'Add user' button and a search bar. A table lists users, with 'Bill Connors' (bill@billconnors.com) highlighted. To the left, an 'Add user' form shows details for 'Roberta Cho' (Roberta@org.org). The 'Security' section on the left includes checkboxes for 'Make environment admin', 'Raiser's Edge NXT', and 'Make solution admin', along with role selection dropdowns for 'Analysis', 'Events', 'Fundraising', 'Marketing', 'Settings', and 'Tools'. The 'Security groups' section lists 'Roberta Cho' and 'Director of Development'. On the right, the 'Edit Fundraising role: All FR Rights' configuration window is open, showing a list of permissions (e.g., 'All Fundraising Rights', 'Analyze tasks', 'Attachment tasks') with checkboxes for 'View' and 'Allow' permissions. A 'Work permissions' section at the bottom right shows a list of work-related permissions with 'View' and 'Allow' checkboxes.



# Web View User

Add user

Name \*

Roberta Cho

Email \*

Roberta@org.org

Security

☐ Make environment admin ⓘ

Analysis

☐

Events

☒

View Only

Fundraising

☒

Director of Development

Marketing

☒

View email history

Settings

☐

Tools

☐

Security groups

☒

Roberta Cho

Security groups [Edit](#)

Director of Development

[Back](#)

# Tips on Web View Roles

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

Role name <sup>\*</sup> 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
Change fundraiser	<input checked="" type="checkbox"/>
Export	<input type="checkbox"/>

Show permissions

Show permissions

Show permissions

Show permissions

Hide permissions

Pay attention to detailed permissions, not just summary tasks

To have “Manage” rights to a task gives the user full View, Add, Edit and Delete rights

# Analysis

Edit Analysis role: All Rights Access to 5 of 5 permissions

Role name \*

All Rights

Description

Fundraising tasks Access to 5 of 5 permissions

☒ Manage dashboards

☒ Manage insights and dashboards

☒ View insights and dashboards

[Hide permissions](#)

## Fundraising permissions

	View	Add/Edit	Delete
Dashboards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Insights		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

☰

Raiser's Edge NXT

Home

Fundraising

Marketing

Events

Lists

Analysis

Tools

Control Center

Your organization's trial for Insight Designer has ended. You will not be invoiced unless you order. [Learn more](#)

Report builder

As of 2 hours ago

Dashboards 7

Insights 81

+

Find in this list

Q

⋮

FSFPL

Updated 2/22/2021 by [Bill Connors](#)

## Tips:

- No rights are needed to view the custom dashboards under the Fundraising menu; most users should not have a role here.
- To Add/Edit Insights requires Insight Designer at an additional cost; purchased inside the software.

# Events

Edit Events role: All Rights Access to 7 of 8 permissions

Role name \*

Manage Rights

Description

Copy role

!

It may take several minutes for changes to take effect.

Event management tasks Access to 7 of 8 permissions

- ☐ Administer events
- ☒ Manage events
- ☒ Manage participants

Event management permissions		
	View	Add/Edit
Settings	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Participants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Online registration forms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Raiser's Edge NXT

Home

Fundraising

Marketing

Events

Lists

Analysis

Tools

Control panel

?

Bill Connors, CFRE - Bill Connors CFRE Environment 1 Test environment

All Reunion Breakfast Buffet

Date and time: 11/9/2014 8:00 AM to 9:30 AM

\$10 per person; Memorial Student Union, Hub Food Court

Edit

Details

Edit

Event details

ID	Category	Event goal	Capacity
19		\$0.00	250

Location

Memorial Student Union

1528 Royall Avenue

Columbia, SC 29202

Fees

Edit

Add fee

Campaign

No campaign found

Fund

No fund found

Individual

\$10.00 (\$0.00 contribution amount)

4 sold

Participants

Work with participants

Pre-event

Invited	2	Not attending	0	Interested
---------	---	---------------	---	------------

Post-event

Attended	0	No show
----------	---	---------

Online registration forms

Accept online registrations

Before you start, add at least one fee – even if there's no charge – under Fees. If there is a charge, you must also select Edit under Fees and set a fund.

Participant options

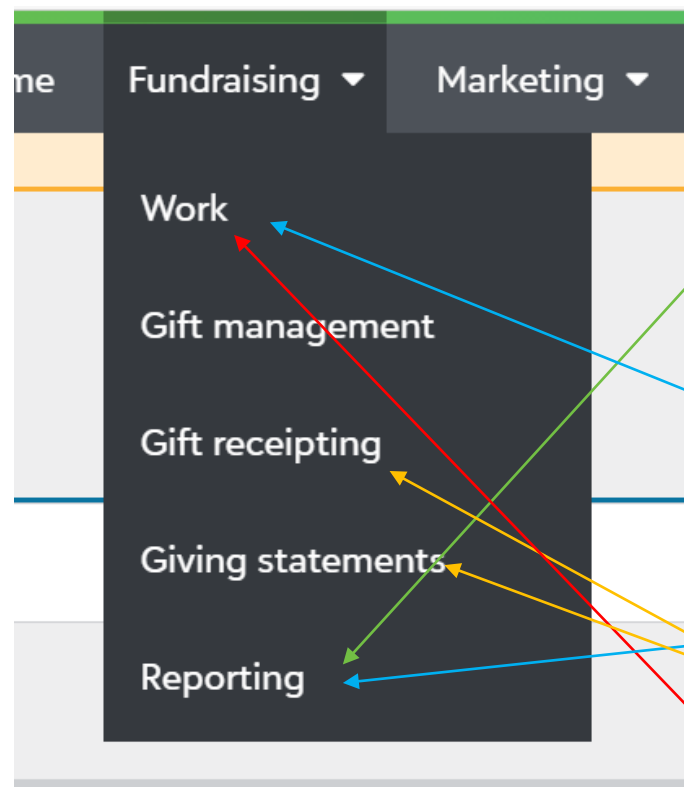
Add option

No participant options found

Bill Connors CFRE

Consulting and Training on Raiser's Edge®

# Fundraising



Create Fundraising role *Access to 0 of 34 permissions*

Role name \*

Director of Development

Analyze tasks *Access to 0 of 9 permissions*

☐ Access all analyze tabs

Attachment tasks *Access to 0 of 9 permissions*

☐ Manage all attachments

☐ Manage fund attachments

Lists tasks *Access to 0 of 4 permissions*

☐ Access all lists

Opportunities tasks *Access to 0 of 3 permissions*

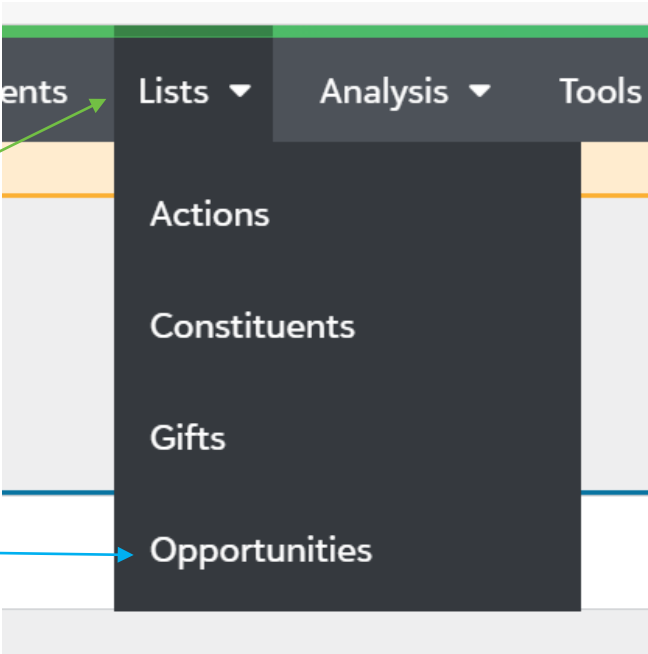
☐ Access all opportunities lists

Receipt management tasks *Access to 0 of 3 permissions*

☐ Manage receipts

Work tasks *Access to 0 of 6 permissions*

☐ Access all tabs



Gift management = DB view Batch

# Fundraising – Analyze

Create Fundraising role Access to 9 of 34 permissions

Role name \*  
Director of Development

Description

Analyze tasks Access to 9 of 9 permissions

☒ Access all analyze tabs

Analyze permissions

	View
Overview	<input checked="" type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>
Funds	<input checked="" type="checkbox"/>
Appeals	<input checked="" type="checkbox"/>
Retention	<input checked="" type="checkbox"/>
Acquisition	<input checked="" type="checkbox"/>
Recapture	<input checked="" type="checkbox"/>
Actions	<input checked="" type="checkbox"/>
Benchmarking	<input checked="" type="checkbox"/>

Raiser's Edge NXT Home Fundraising Marketing Events Lists Analysis Tools Control panel

Bill Connors, CFRE - Bill Connors CFRE Environment 1 Test environment

Reporting As of 2 hours ago

Overview Campaigns Retention Acquisition

Giving

CAMPAIGN DESCRIPTION All FUND DESCRIPTION All APPEAL DESCRIPTION All GIFT DATE Apr 1 1900 - Mar 31 2... REVENUE TYPE Committed

Gifts 1

\$116,701,620 Revenue

28,344 Gifts

\$4,117 Average gift

\$7,725 Total past due

Year over year performance

Tips:

- “Analyze tasks” in the Fundraising role refer to the “canned” reports in *Reporting*
- The Opportunities report is handled under Opportunities tasks

# Fundraising – Attachments

Attachment tasks Access to 0 of 9 permissions

- ☐ Manage all attachments ☐ Manage appeal attachments ☐ Manage campaign attachments  
☐ Manage fund attachments

## Attachment permissions

	View	Add/Edit	Delete
Appeal attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaign attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fund attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Raiser's Edge NXT

Bill Connors, CFRE - Bill Connors CFRE Environment 1 Test environment

### Ludlow Falls

\$20M Goal amount  
\$10.9M Revenue  
54% Progress to goal


Fund ID: FUND VS138  
Category: Research

Filter: Received At any time

#### Attachments

+ Add Any attachment tag

Privacy  
2/20/2021 | 164 KB



## Tips:

- Attachments in the web view are not written back to the database view:  
<https://kb.blackbaud.com/knowledgebase/articles/Article/96782>
  - See webinar #1 discussion regarding considerations about RE NXT backup restores
- Constituent* attachments are controlled with Media permissions in the database view security

# Fundraising – Lists

Lists tasks Access to 3 of 4 permissions

☒ Access all lists ☐ Export lists

Lists permissions

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

Raiser's Edge NXT Home Fundraising Marketing Events Lists Analysis Tools Control panel

Bill Connors, CFRE - Bill Connors CFRE Environment 1 Test environment

Constituents

Donors of \$10k or more\* New list 1\* New list 2\* Donors of \$

1,158 Constituents 1 Record excluded List updated about one minute ago

Save Columns Share Export Add/Exclude More Find in this list

Filters: Any gift Total giving: Greater than or equal to \$5,000.00 Address mapping Address radius Clear all values

Profile pi...	Constituent summary	Assigned to	Constituent codes	Lifetime givi...	First gift	Latest gift	Greatest gift	Prospe
TS	Mrs. Temperance Alessandra Sawicki 35 Teatro St. Fort Lauderdale, FL 33303 (954) 168-1505	Donor Beginning 03/2000 Major Donor		\$6M	\$10,000 one-time gift 2/13/2014 Bellville	\$35 one-time gift 3/8/2016 Ludlow Falls	\$3,000,000 one-time gift 12/19/2015 Briar	4 - Stev
	Mr. Armani Reinhard Vidal 39 Wedgemont St. Mobile, AL 36615 armani@gmail.com (959) 802-2383	Mr. Octavio Huston Juergens (Campaign) Mr. Ashton Wheeler Phan (Campaign) more	Board Member Beginning 12/13/2015 Board Member 04/01/2011 - 07/01/2013 more	\$6M	\$10,000 one-time gift 2/10/2014 Ludlow Falls	\$1,565 one-time gift 10/15/2015 Ludlow Falls	\$6,000,000 one-time gift 4/3/2015 West Fairlee	4 - Stev
JY	Jerrie Alysia Yee 86 Lden St. Fresno, CA 93780	Ms. Liza Netta Emuka (Campaign) Ms. Jaunita Rachael Rahming (Campaign) more	Alumni Major Donor	\$5M	\$5,000,000 pledge 5/22/2011 Valmeyer	\$5,000,000 payment to \$5,000,000 pledge 5/22/2011 Valmeyer	\$5,000,000 pledge 5/22/2011 Valmeyer	

Tips:

- Opportunities lists permissions are handled under Fundraising – Opportunities



# Fundraising – Lists

Lists tasks [Access to 3 of 4 permissions](#)

☒ Access all lists ☐ Export lists

Lists permissions

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

Raiser's Edge NXT Home Fundraising Marketing Events Lists Analysis Tools Control panel

Bill Connors, CFRE - Bill Connors CFRE Environment 1 Test environment

Constituents

Donors of \$10k or more\* New list 1\* New list 2\* Donors of \$

1,158 Constituents 1 Record excluded List updated about one minute ago

Save Columns Share Export Add/Exclude More Find in this list

Filters: Any gift Total giving: Greater than or equal to \$5,000.00 Address mapping Address radius Clear all values

	Profile pi...	Constituent summary	Assigned to	Constituent codes	Lifetime givi...	First gift	Latest gift	Greatest gift	Prospe
...	TS	Mrs. Temperance Alessandra Sawicki 35 Teatro St. Fort Lauderdale, FL 33303 (954) 168-1505		Donor Beginning 03/2000 Major Donor	\$6M	\$10,000 one-time gift 2/13/2014 Bellville	\$35 one-time gift 3/8/2016 Ludlow Falls	\$3,000,000 one-time gift 12/19/2015 Briar	4 - Stev
...		Mr. Armani Reinhard Vidal 39 Wedgemont St. Mobile, AL 36615 armani@gmail.com (959) 802-2383	Mr. Octavio Huston Juergens (Campaign) Mr. Ashton Wheeler Phan (Campaign) more	Board Member Beginning 12/13/2015 Board Member 04/01/2011 - 07/01/2013 more	\$6M	\$10,000 one-time gift 2/10/2014 Ludlow Falls	\$1,565 one-time gift 10/15/2015 Ludlow Falls	\$6,000,000 one-time gift 4/3/2015 West Fairlee	4 - Stev
...	JY	Jerrie Alysia Yee 86 Lden St. Fresno, CA 93780	Ms. Liza Netta Emuka (Campaign) Ms. Jaunita Rachael Rahming (Campaign)	Alumni Major Donor	\$5M	\$5,000,000 pledge 5/22/2011 Valmeyer	\$5,000,000 payment to \$5,000,000 pledge 5/22/2011	\$5,000,000 pledge 5/22/2011 Valmeyer	

## Tips:

- Opportunities lists permissions are handled under Fundraising – Opportunities
- I strongly recommend against giving permission to Export

# Fundraising – Opportunities

Work Center for Bill Connors [Change fundraiser](#)

Overview Portfolio 1 Gifts 11 Actions 1 **Opportunities 1** Unassigned 11,361

1 Opportunities List updated at 5:03 PM Refresh

[Add opportunity](#) [Columns](#) [Export](#) Find in this list

Opportunity summary	Constituent summary	Opportunity s...	Ask	Expected	Funded	Deadline	Last action
<a href="#">General Proposal</a> UHERO	Mr. Armani Reinhard Vidal 39 Wedgemont St. Mobile, AL 36615 armani@gmail.com (959) 802-2383	5 - Stewardship	\$2,000,000.00 1/1/2015	\$2,000,000.00 6/30/2015	\$2,000,000.00 4/3/2015	8/31/2015	None

## Opportunities tasks [Access to 3 of 3 permissions](#)

☒ Access all opportunities lists

### Opportunities permissions

Work  
opportunities

Lists  
opportunities

Analyze  
opportunities

Opportunities tabs



[Hide permissions](#)

## Reporting As of 2 hours ago

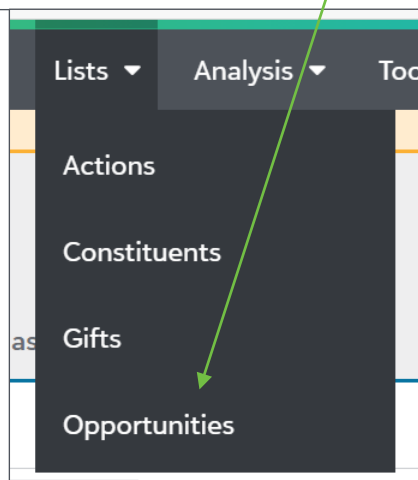
Actions ☒

Appeals ☒

**Opportunities ☒**

Overview ☒

Campaigns ☒



Tip:

- Access to opportunity *records* is controlled by Proposals privileges in database view security (in Records, Constituents)

# Fundraising – Receipt Management

Receipt management tasks Access to 0 of 3 permissions

☐ Manage receipts

Receipt management permissions

	View	Generate	Manage receipt templates
Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fundraising ▼Marketing

Work

Gift management

Gift receipting

Giving statements

Reporting

Gift receipting

Not receipted

Receipted

Email tasks

Receipt templates

27888 Gifts

Filter

Columns

Search by constituent name

Q

Select all

Clear all

	Constituent	Gift amount	Contribution amount	Gift date...	Gift type
<input type="checkbox"/>	Andy Connors	\$4,000.00	\$4,000.00	6/2/2020	Pledge payment

# Fundraising – Work

Work tasks Access to 3 of 6 permissions

☐ Access all tabs

☐ Access other's portfolios

☐ Export work

Work permissions

View

Portfolio ☒

Gifts ☒

Actions ☒

Unassigned ☐

Allow

Change fundraiser ☐

Export ☐

Fundraising

Marketing

Work

Gift management

Gift receipting

Giving statements

Reporting

Work Center for Ashton Phan

Change fundraiser

Overview

Portfolio 100

Gifts 1,039

Actions 33

Opportunities 19

Unassigned 11,268

160 Constituents List updated 6 minutes ago

Columns

Export

Find in this list

Filters:

Birthday

Total giving

First gift

Interests

Committees

Custom field options

Closing Codes

Birthday

Total giving

First gift

Interests


Committees

Custom field options

Closing Codes

Profile pi...	Constituent summary	Assigned to	Prospect stat...	Constituent codes	Lifetime giving	First gift	Latest gi
PA	Prudenzio Dwane Akpan 14 Elcone Rd. Hanksville, UT 84734	Mr. Ashton Wheeler Phan (Campaign)	Major Donor		\$5,050	\$5,000 one-time gift 6/27/2014 Ludlow Falls	\$25 one-tir 7/12/2014 Wyatt
JA	Janae Susheela Armer 63 Mendenhall Gdns. Davenport, IA 52805	Mr. Ashton Wheeler Phan (Campaign)	Alumni Major Donor		\$5,500	\$5,000 one-time gift 11/15/2014	\$500 one-tir 5/1/2014

Again, I strongly recommend against giving permission to Export

 **Bill Connors CFRE**  
Consulting and Training on Raiser's Edge®

# Marketing

Create Marketing role   Access to 1 of 7 permissions

Role name \*

Director of Development

Description

Email tasks   Access to 1 of 2 permissions

☐ Manage email

☐ View communication history

Email permissions

	Access
Communication history	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>

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"/>			

Email history	
19 Emails sent	
<b>Outcome Test</b> Hello from link click land	6/17/2020 Click 6/17/2020

Marketing ▾   Events   Lis

Email

Social

# Settings

Control panel ▾

Security

Applications

Settings

Fields and tables

Create Settings role Access to 0 of 4 permissions

Role name \*

Enter a role name.

Constituent records settings tasks Access to 0 of 2 permissions

☐ Manage constituent settings

Constituent records settings permissions

View

Edit

Deceased records settings ☐

Fields and tables tasks Access to 0 of 2 permissions

☐ Manage system fields

Fields and tables permissions

View

Edit

System fields ☐

records that are created or updated

Settings

Giving analysis

Constituent records

Gift management

Individual display name

Set how individual names display in web view.

Dr. Samantha Logan Hernandez, M.D.

Deceased constituent records

Configure rules for when a constituent's record is marked as deceased.

Constituent

Mark as **Do Not Mail** Yes

Set end date for constituent codes Yes

Spouse

Change to constituent Yes

Marital status Widowed

Edit

Fields and tables

System fields

Field name	Requirement status	Displays on record type
Assign to	Required	Action
Status	Optional	Action
Type	Required	Action
Addressee	Required	Constituent
Constituent codes	Required	Constituent
First name	Optional	Constituent
Gender	Optional	Constituent
Last name	Required	Constituent
Salutation	Required	Constituent
Title	Optional	Constituent

# Tools

Create Tools role Access to 0 of 11 permissions

Role name \*

Description

Copy role

Enter a role name.

Data health tasks Access to 0 of 4 permissions

☐ View data health information

☐ Manage data health information

Data health permissions

	View	Manage
Data health services	<input type="checkbox"/>	<input type="checkbox"/>
Duplicate management	<input type="checkbox"/>	<input type="checkbox"/>

Donation forms tasks Access to 0 of 3 permissions

☐ Manage donation forms

Donation forms permissions

	View	Add/Edit	Delete
Donation forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Workflow designer tasks Access to 0 of 4 permissions

☐ Build and activate workflows

☐ Manage workflows

☐ Apply workflows to constituents and lists

Workflow designer permissions

	View	Add/Edit	Delete
Workflows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action workflows	<input type="checkbox"/>		

Tools

Control panel

Workflow designer

Donation form designer

Data health

Settings

# Web View User

Add user

Name \*

Roberta Cho

Email \*

Roberta@org.org

Security

☐ Make environment admin ⓘ

Analysis

☐

Events

☒

View Only

Fundraising

☒

Director of Development

Marketing

☒

View email history

Settings

☐

Tools

☐

Security groups

☒

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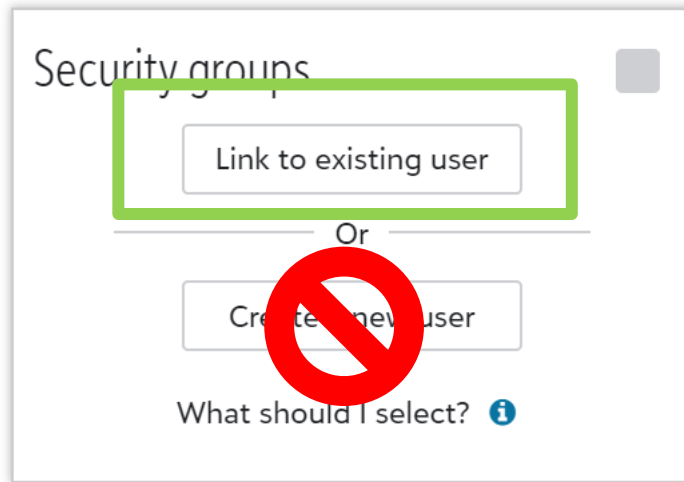
Security groups [Edit](#)

Director of Development

[Back](#)



# Tips on Web View Users



1. I recommend always starting in the database view Security with the user's group and account
2. Here in the web view, since the user already has an account in the database view, Link to existing user!

Reminder: check your database view Security for duplicate accounts and fix them

# Web View Admins

1. Solution admin
2. Environment admin
3. Organization admin

## Add user

Name \*

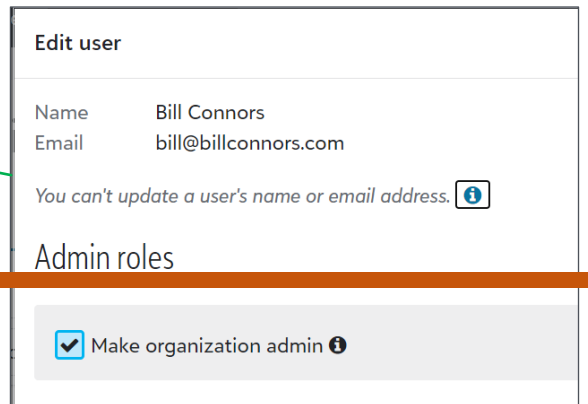
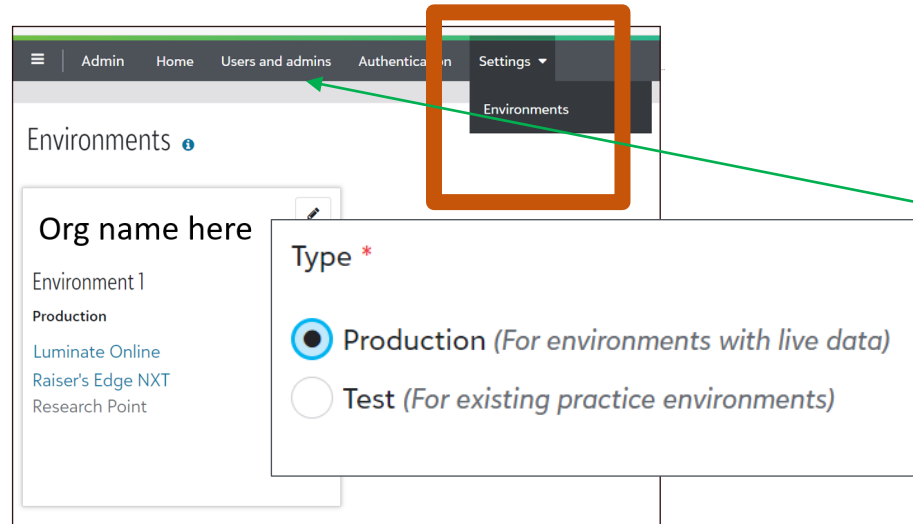
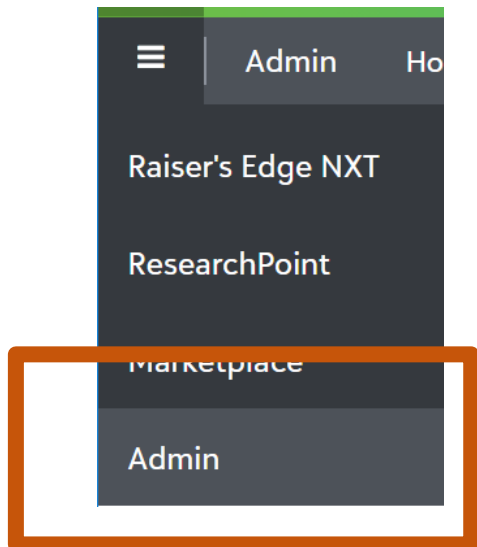
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## Security

☐ Make environment admin ⓘ

Raiser's Edge NXT ☐ Make solution admin ⓘ

See KB 192031  
and the link to  
help inside that



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](http://billconnors.com)

Also on this page:

- Raiser's Edge terminology whitepaper
  - All webinar slides
- Links to watch all webinars

# Let's Connect!

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