

# Mastering Security in Blackbaud Raiser's Edge NXT

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bbcon®2020  
VIRTUAL



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[billconnors.com](http://billconnors.com)

This PDF of the slides contains updates since the bbcon 2020 presentation.

*The content set forth in the following presentation reflects the views and opinions of the presenter and not those of Blackbaud, Inc.*

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# *Fundraising* with **The Raiser's** **Edge®**

A Non-Technical Guide



**Bill Connors, CFRE**



“

**In summary, there are serious concerns about security: everyone has too many rights. You need to start all over with security.**

”

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THE MOST COMMON START TO EVERY  
RAISER'S EDGE AUDIT REPORT I CONDUCT

The #1 responsibility of the database manager is Security.

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

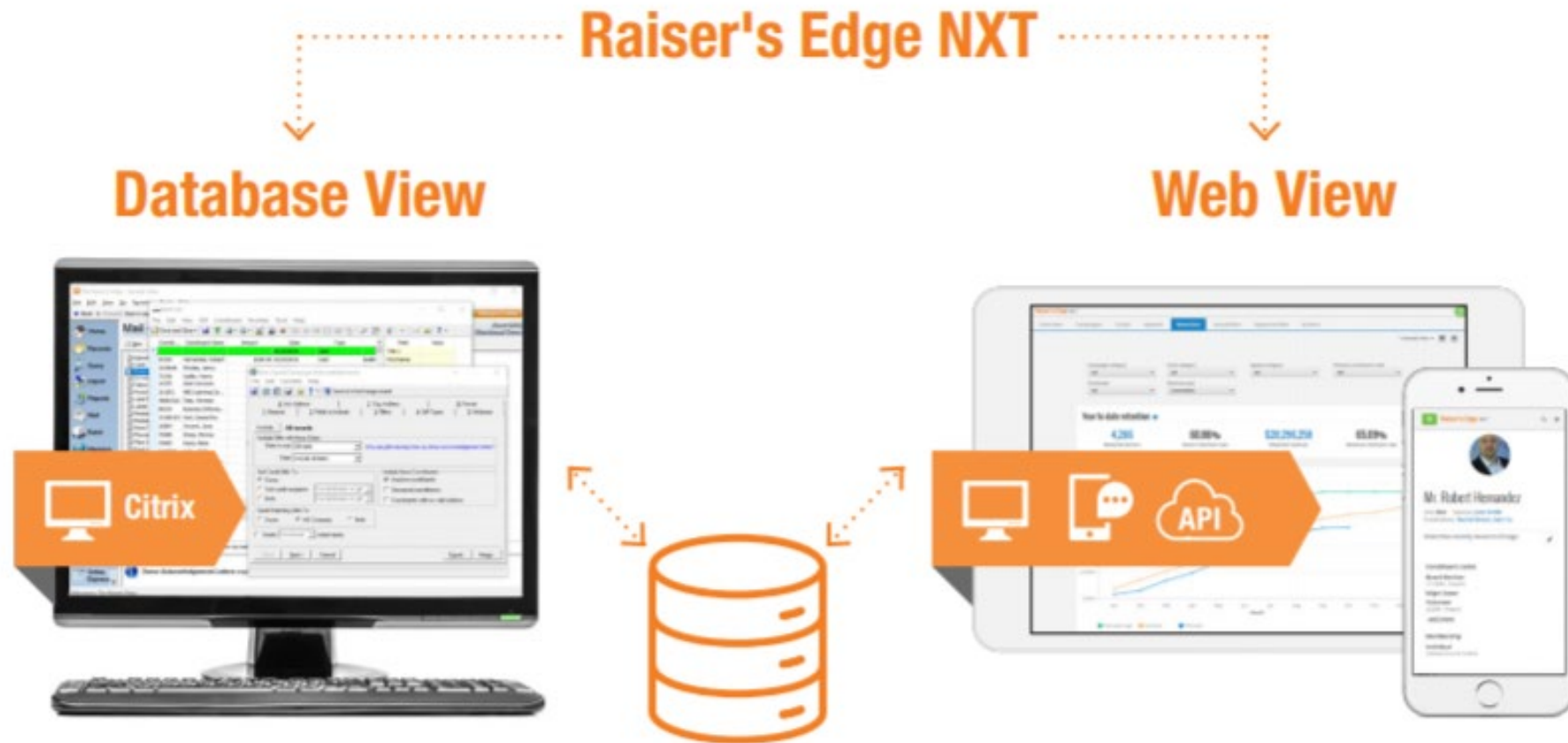
The DBM needs to learn the web view to set up web view Security correctly.





**Setting up Security correctly  
requires the combined efforts of  
those with technical knowledge  
and fundraising management.**

# Raiser's Edge NXT (correct) Terminology



# Components to Raiser's Edge Security

1. Security procedures external to Raiser's Edge
  - Password and data storage and sharing methods
  - Staff training on security awareness and practices
  - Procedures and enforcement
2. Security options provided by Blackbaud and Raiser's Edge

**This session is about #2.**



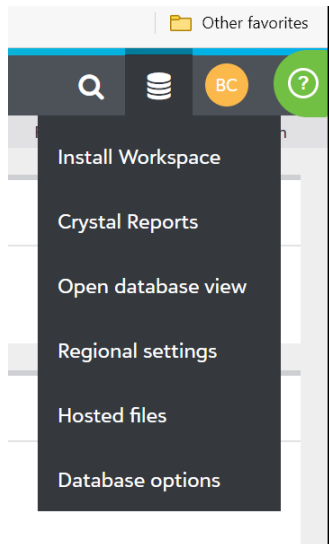


# Locations Where Security Needs to be Set Up

# Azure or Not Azure

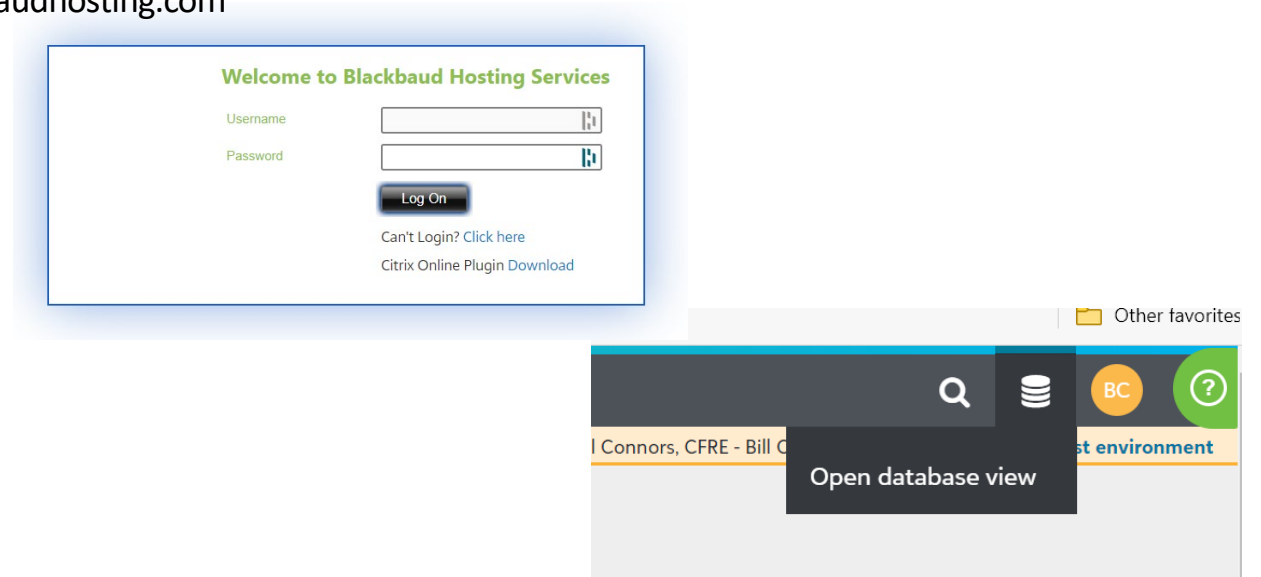
Security works differently based on where Blackbaud hosts your data

Azure:



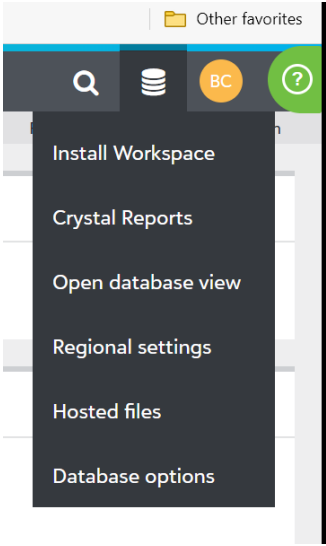
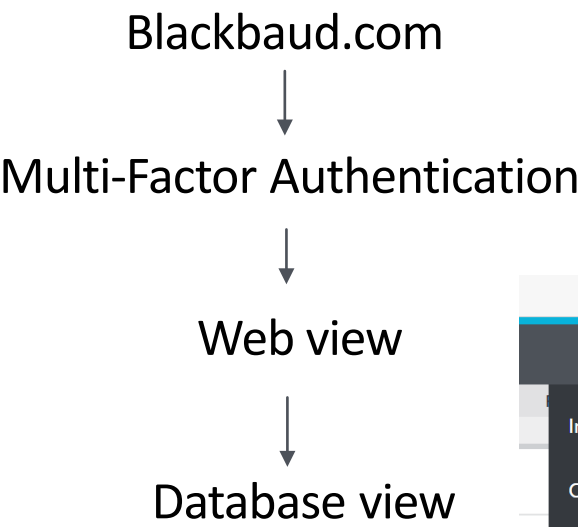
Not Azure:

[www.login2.blackbaudhosting.com](http://www.login2.blackbaudhosting.com)

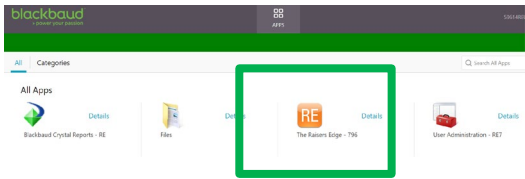
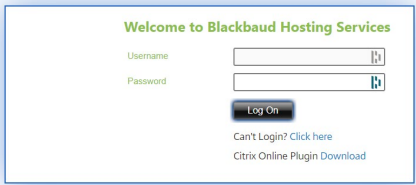
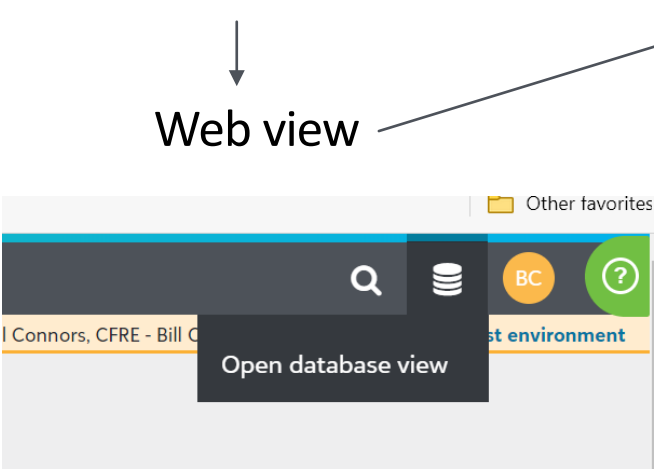
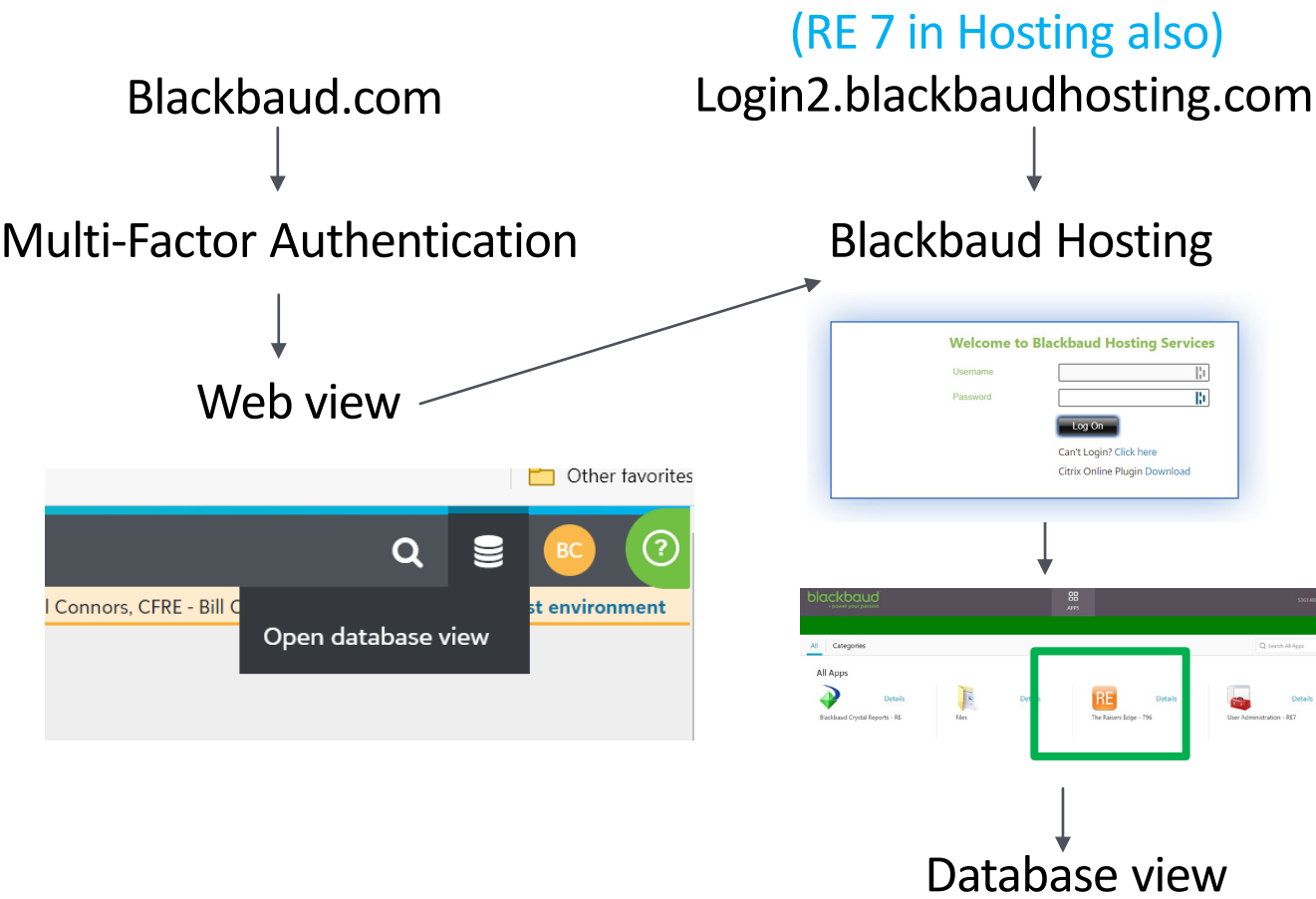


# Azure or Not Azure

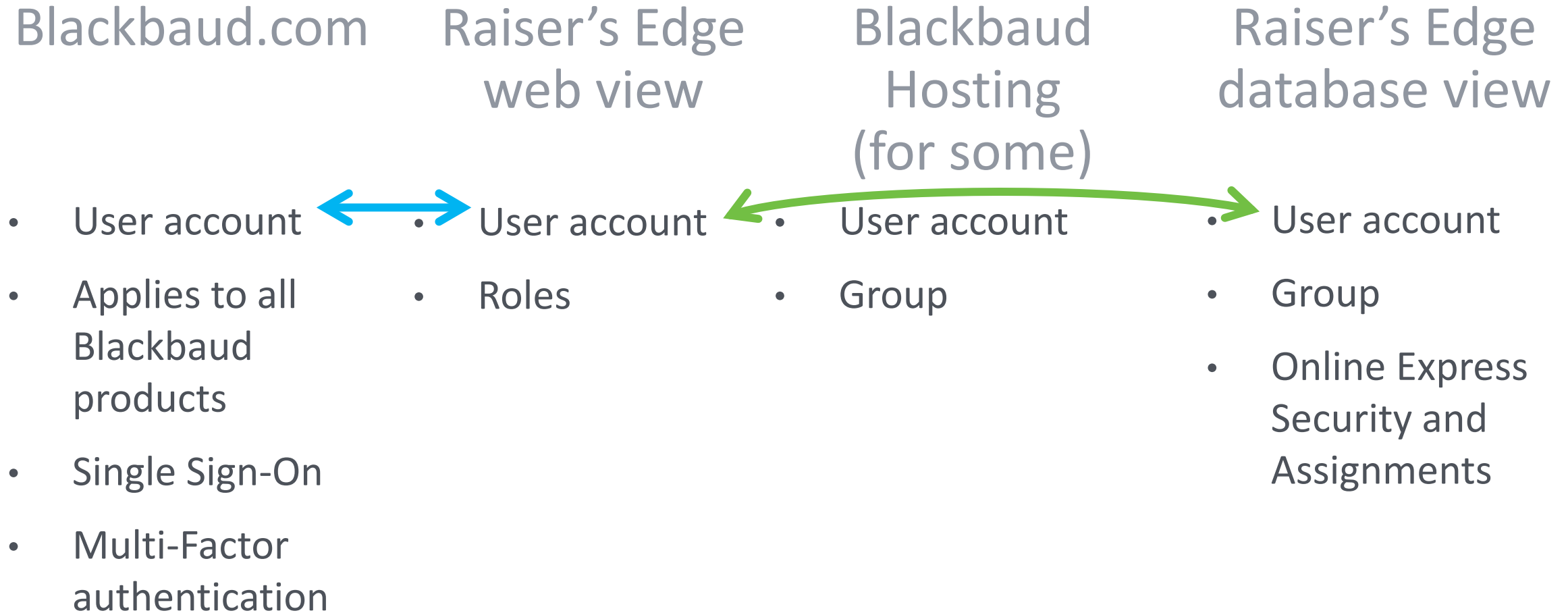
Azure:



Not Azure:



# 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

⋮

Raiser's Edge NXT

Home

Fundraising ▾

Marketing ▾

Events

Lists ▾

Analysis ▾

Tools ▾

Co

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

Raiser's Edge NXT

Home

Fundraising

Marketing

Events

Lists

Analysis

Tools

Control panel

BC

Bill Connors, CFRE - Bill Connors CFRE Environment 1

Test environment

Security for Bill Connors, CFRE

Users 4

Roles 14

4 users

+

Add user

Columns

Find in this list

Q

Active and invitation sent

	Name	Email	Status	Marketing	Analysis	Events	Fundraising	Tools	Settings	Raiser's Edge NXT account
	Bill Connors	bill@billconnors.com	Active	Full access	Full access	Full access	Full access	Full access	Full access	Bill Connors
			Active	Full access	Full access	Full access	Full access	Full access	Full access	
			Active		All Rights	All Rights	All Rights			
			Active	All Marketing Rights	All Rights	All Rights	All Rights	All Rights	All Rights	

Edit Fundraising role: All FR Rights Access to 31 of 32 permissions

Role name \*

All Fundraising Rights

Description

Copy role

Analyze tasks Access to 9 of 9 permissions

☒ Access all analyze tabs

Show permissions

Attachment tasks Access to 9 of 9 permissions

☒ Manage all attachments

☒ Manage fund attachments

☒ Manage appeal attachments

☒ Manage campaign attachments

Show permissions

Lists tasks Access to 4 of 4 permissions

☒ Access all lists

☒ Export lists

Show permissions

Opportunities tasks Access to 3 of 3 permissions

☒ Access all opportunities lists

Show permissions

Receipt management tasks Access to 0 of 1 permissions

☐ Manage receipts

Show permissions

Work tasks Access to 6 of 6 permissions

☒ Access all tabs

☒ Access other's portfolios

☒ Export work

Hide permissions

Work permissions

Portfolio

Gifts

Actions

Unassigned

Change fundraiser

Export

View

☒

☒

☒

☒

☒

☒

Allow

☒

☒

Save

Cancel

Manage roles for Bill Connors

Security

☒ Make admin

Raiser's Edge NXT ☒ Make solution admin 1

6 roles

Analysis

Full access

Events

Full access

Fundraising

Full access

Marketing

Full access

Settings

Full access

Tools

Full access

Security groups ☒

Bill Connors

x

Q

Security groups

Edit

Supervisor users

Back

Save

Cancel

# Database View (and RE 7) Security

The screenshot displays the 'Administration • Security - Sample Data' window. The left sidebar shows the 'Security' menu. The main area is divided into two panes. The left pane shows the 'Fundraisers' group configuration, including its name, description, and a list of group privileges. The right pane shows the 'David Tsing' user configuration, including their name, constituent name, description, and connection options.

**Administration • Security - Sample Data**

**Administration**

- System Statistics
- Import
- Globally Add Records
- Globally Change Records
- Globally Delete Records
- Globally Write Off Pledges
- Convert Pledges To Recurring Gifts
- Post to General Ledger
- Duplicate Constituent Management Tool
- Merge Constituents
- Drop Lapsed Members
- Security**
- Queue

**Security**

- New Group
- New Windows Group
- New User
- Open
- Delete...

**Fundraisers**

File Edit Group Help

Save and Close

Group name: Fundraisers

Description: Fundraisers

**Group Privileges**

Privilege	Selected
Records	<input checked="" type="checkbox"/>
Query	<input checked="" type="checkbox"/>
Export	<input checked="" type="checkbox"/>
Reports	<input checked="" type="checkbox"/>
Mail	<input type="checkbox"/>
Batch	<input type="checkbox"/>
Mapping	<input type="checkbox"/>
Administration	<input type="checkbox"/>
Configuration	<input type="checkbox"/>
Code Tables	<input type="checkbox"/>
Personal Information	<input type="checkbox"/>
Security by Constituency	<input type="checkbox"/>
Gift Security by Fund	<input type="checkbox"/>
Notepad Security by Type	<input type="checkbox"/>
Membership Scanning	<input type="checkbox"/>

**Group Members**

Members	Not Members
David Tsing	Dana Hernandez
Jenny Arrington	Gina Washington
	Jennifer Mendez
	Kristy Graham

**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**

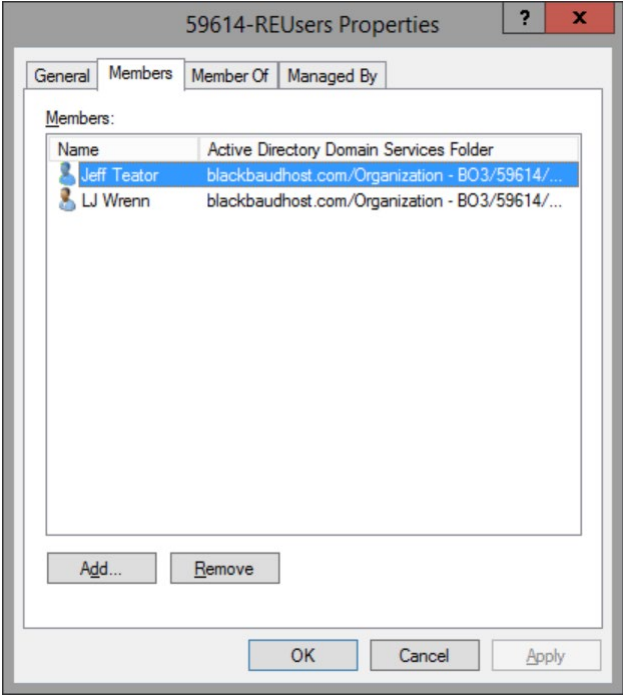
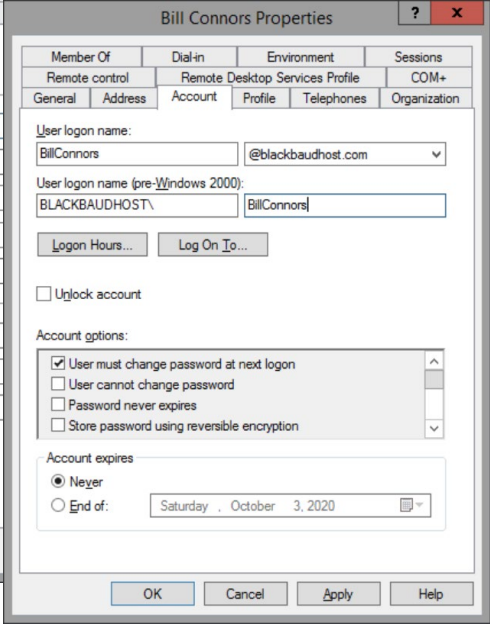
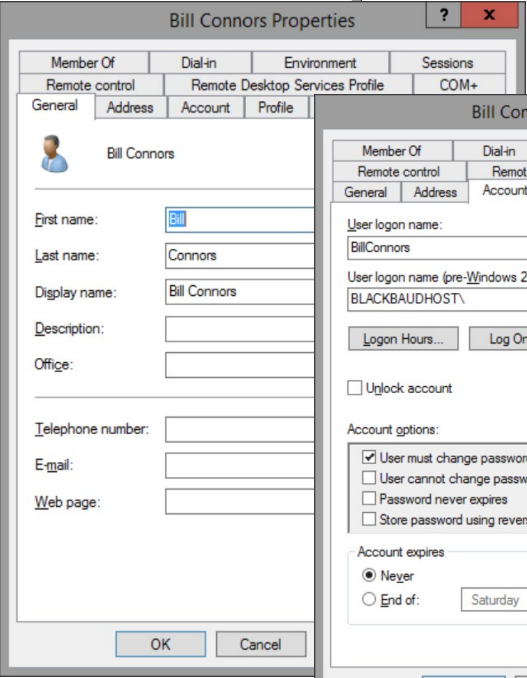
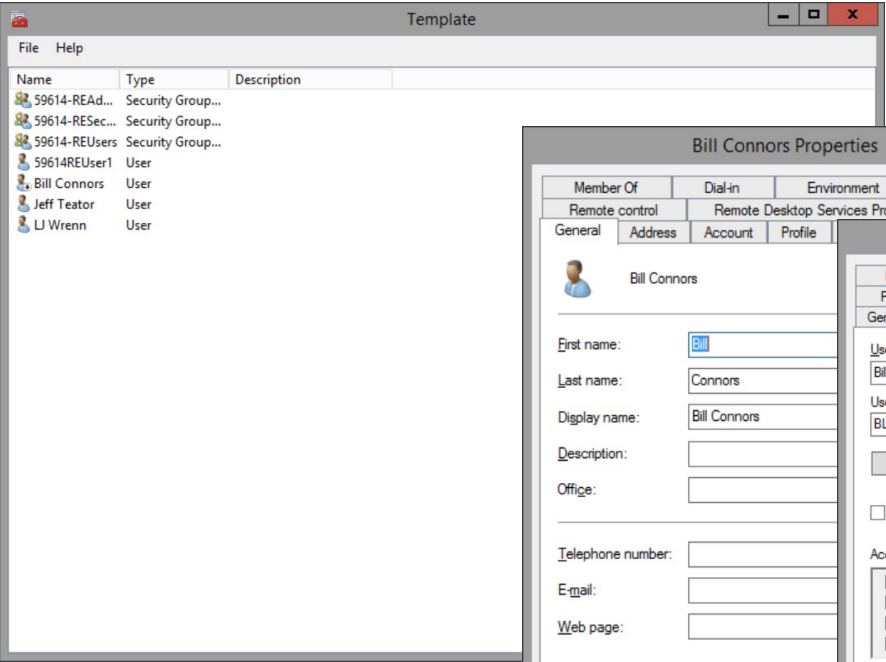
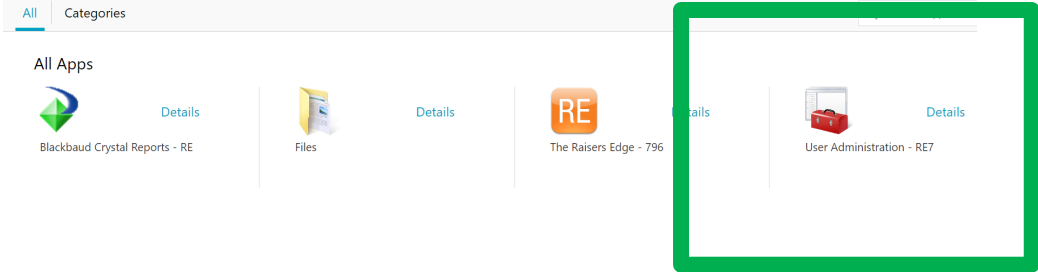
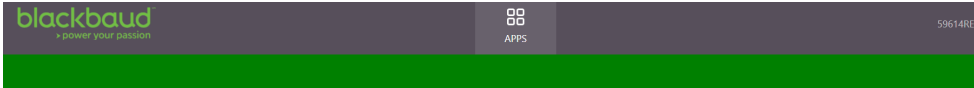
Not a member of:	Member of:
Data Entry	Fundraisers
Volunteers	

**Connection Options**

- ☒ RE7 Authentication
- ☐ User can change password
- ☐ Account is locked out
- ☐ Windows Authentication
- ☒ User can change User Options

Set This User's Options...

# Blackbaud Hosting Security

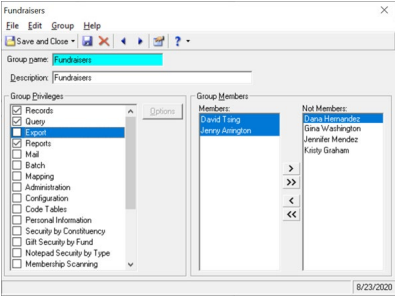
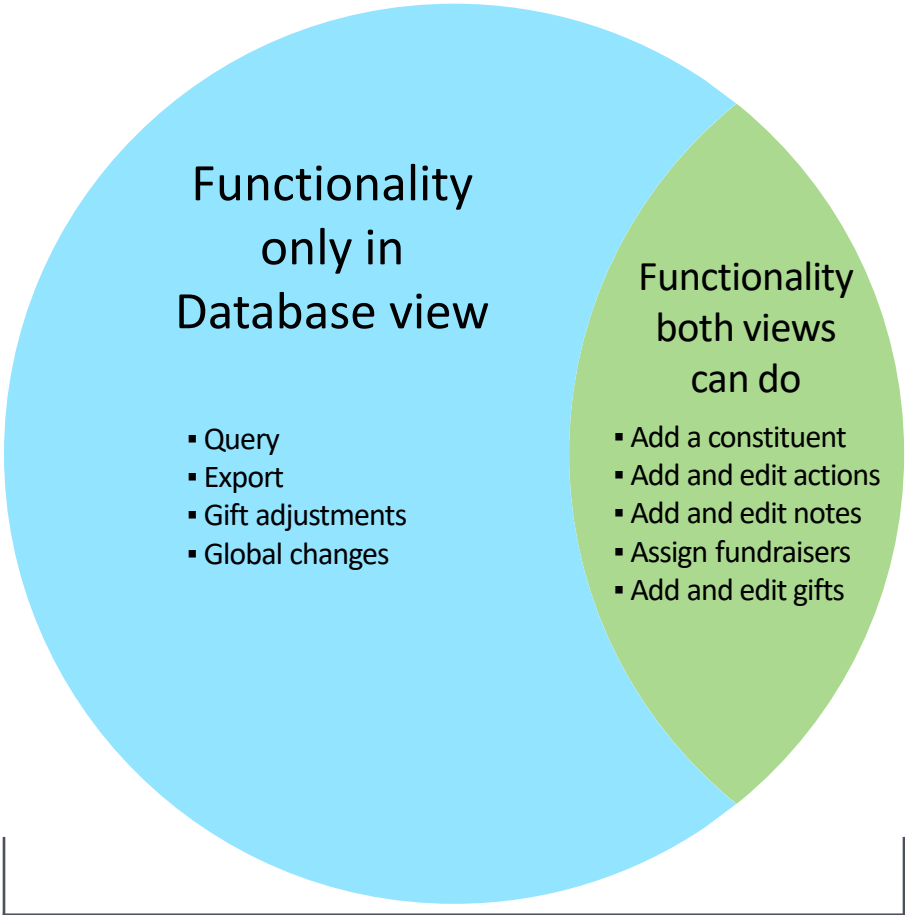




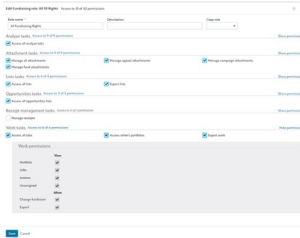
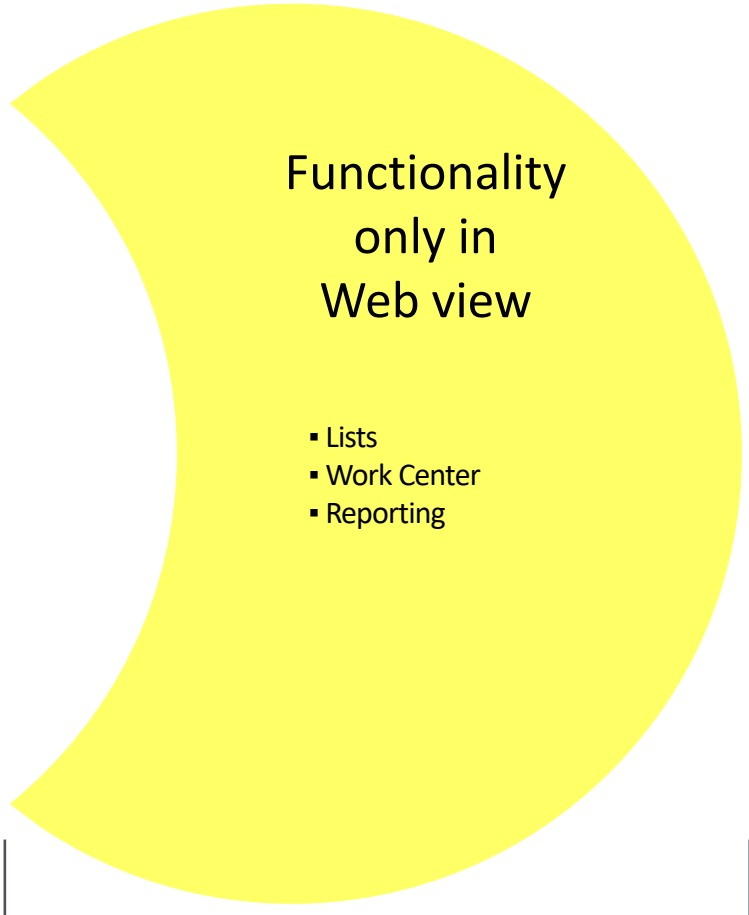
# Database View and Web View Security Interaction



# 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)

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).



# Tips for Setting Up Security

# Three Criteria for Security Rights

1. Training
2. Role
3. Aptitude

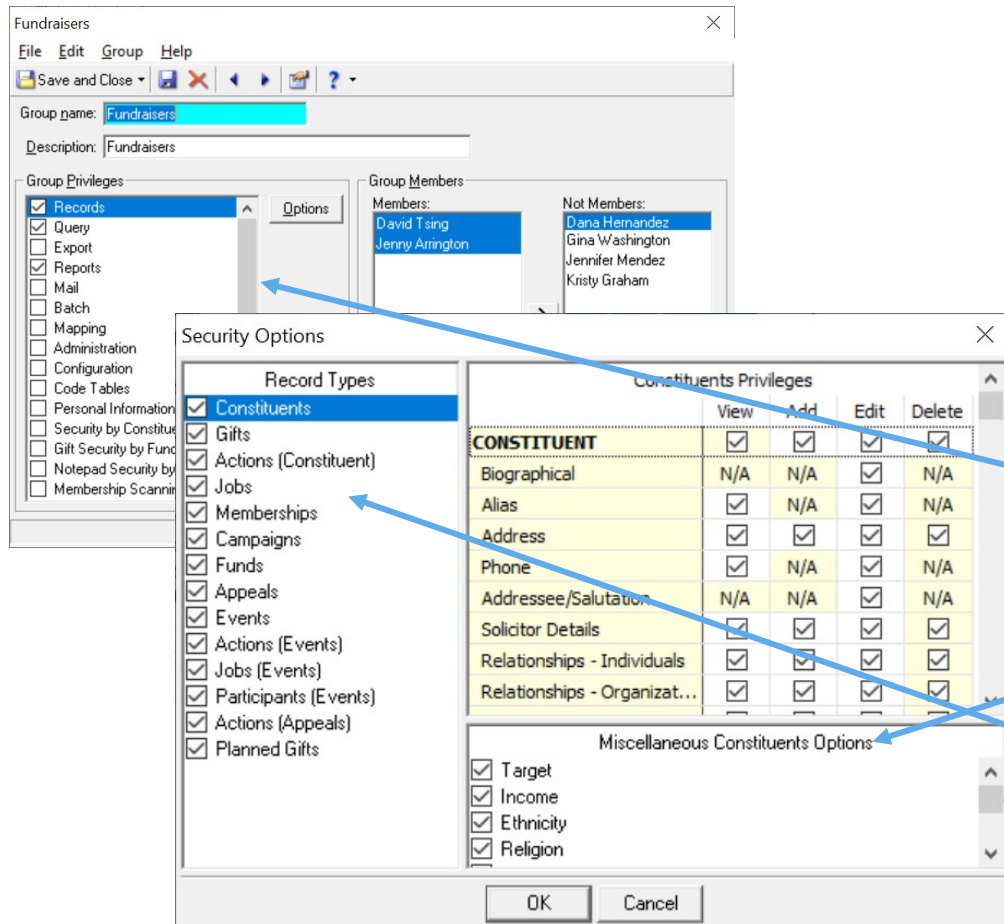
Takeaway: if you need a security group with only one user, created just for that user, that's entirely fine, even if all or most of your security groups only have one user in each of them

# My Four Rules of Thumb

1. If in doubt with data entry rights (e.g., add, edit, delete), do not give the rights
2. If in doubt with data *view* rights (e.g., lists, reports), give the rights (be more cautious with export rights)
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 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

# Tips on Database View User Accounts

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

Supervisor rights

Not a member of:

Data Entry

Volunteers

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

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

User name: xDavid Tsing

constituent name: Da

Description: Director of Development

Outlook user:

Group Assignments

Supervisor rights

Not a member of:

Data Entry

Fundraisers

Volunteers

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 security group.



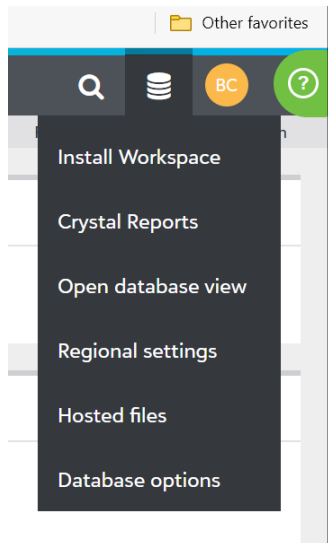
If a security group only has one user, that is okay.



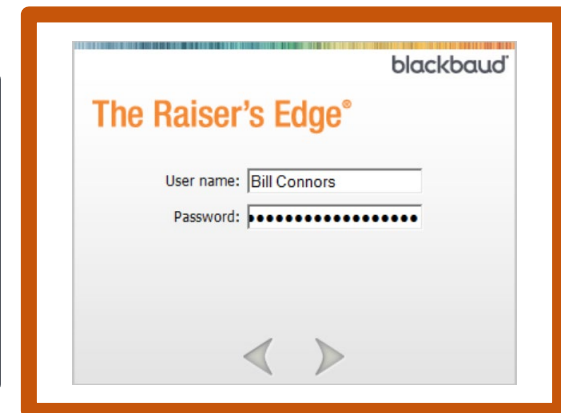
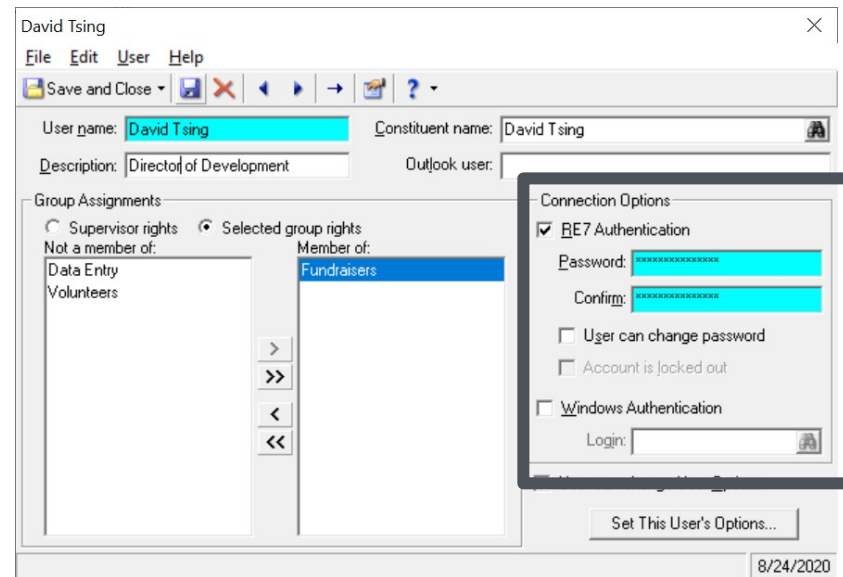
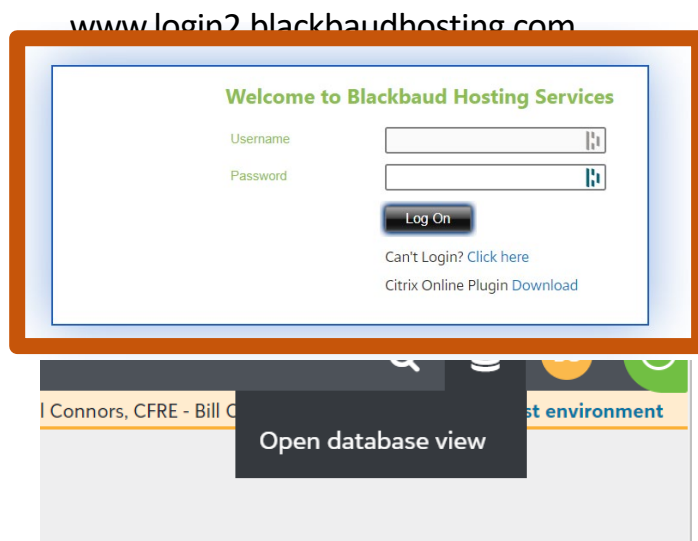
# Tips on Database View User Accounts

If you're not hosted in Azure, do not use Windows Authentication in order to force a form of multi-factor authentication

Azure:

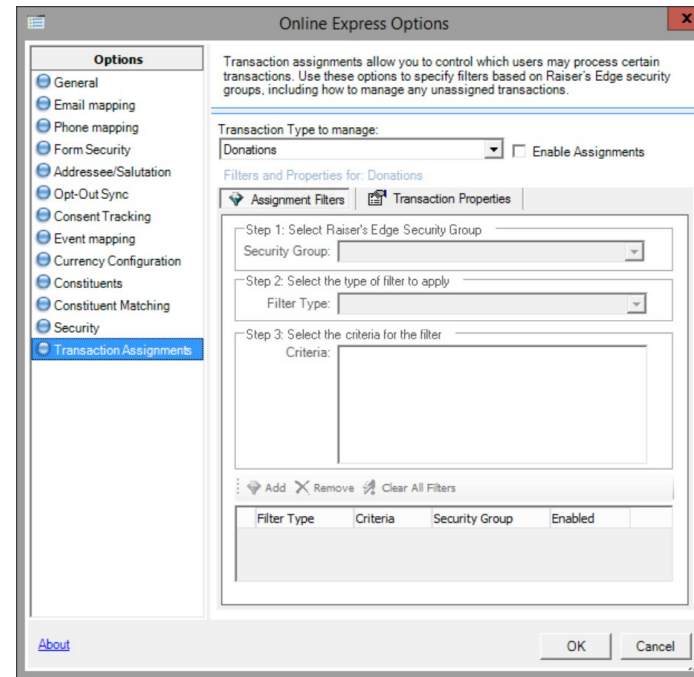
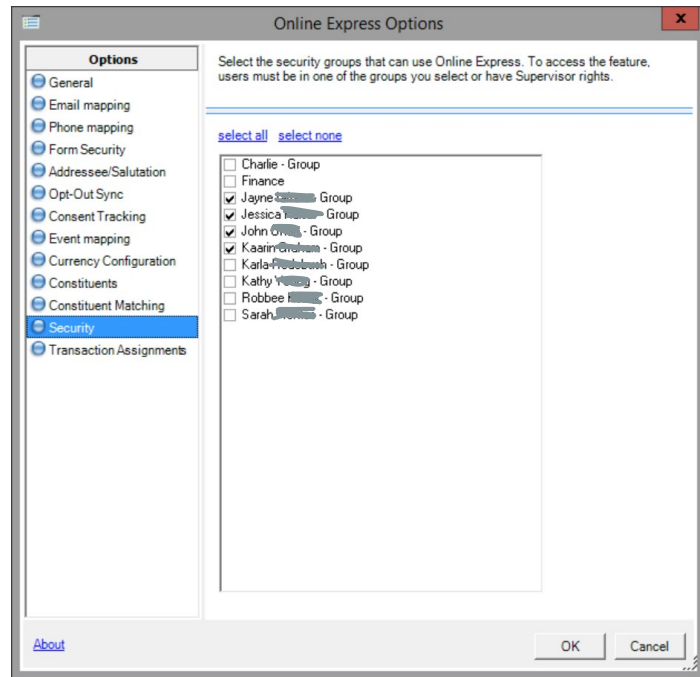


Not Azure:



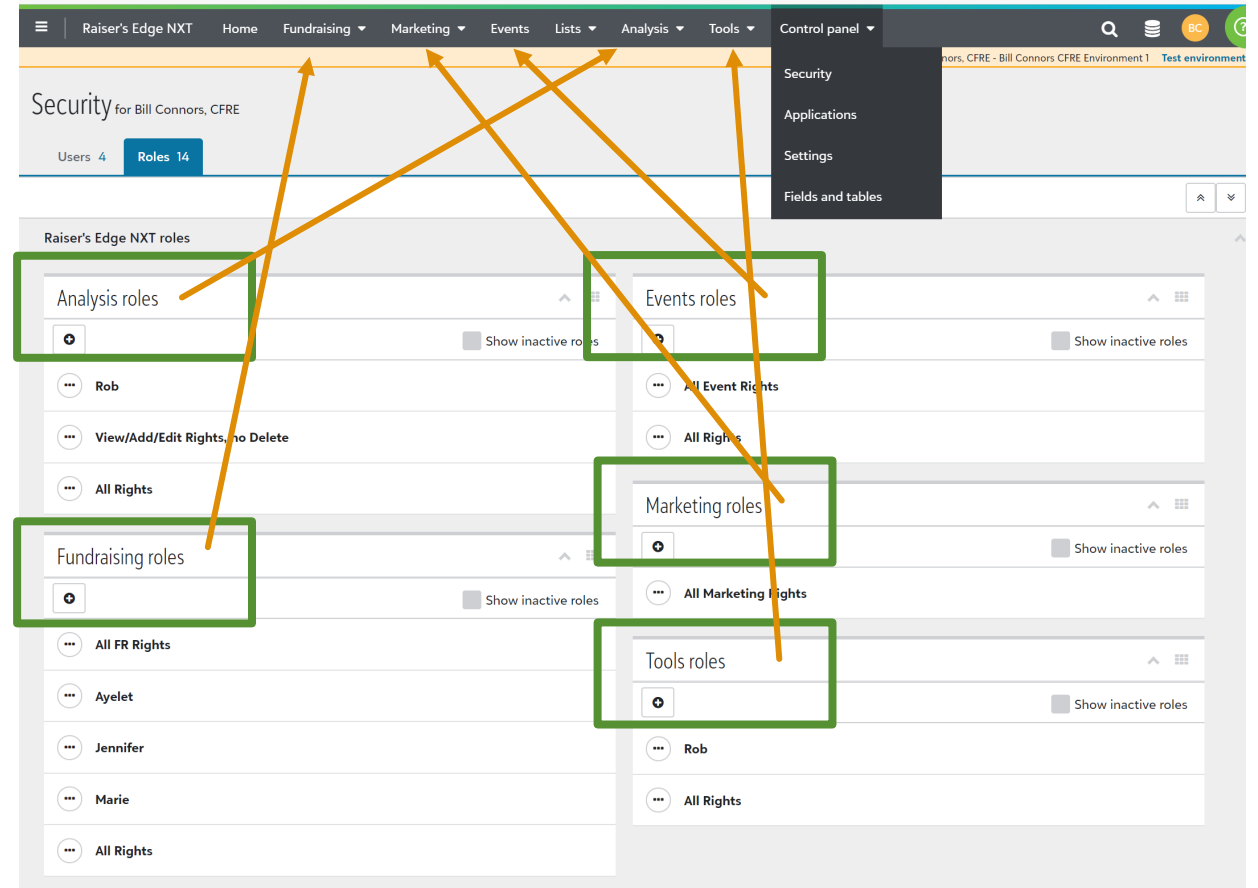
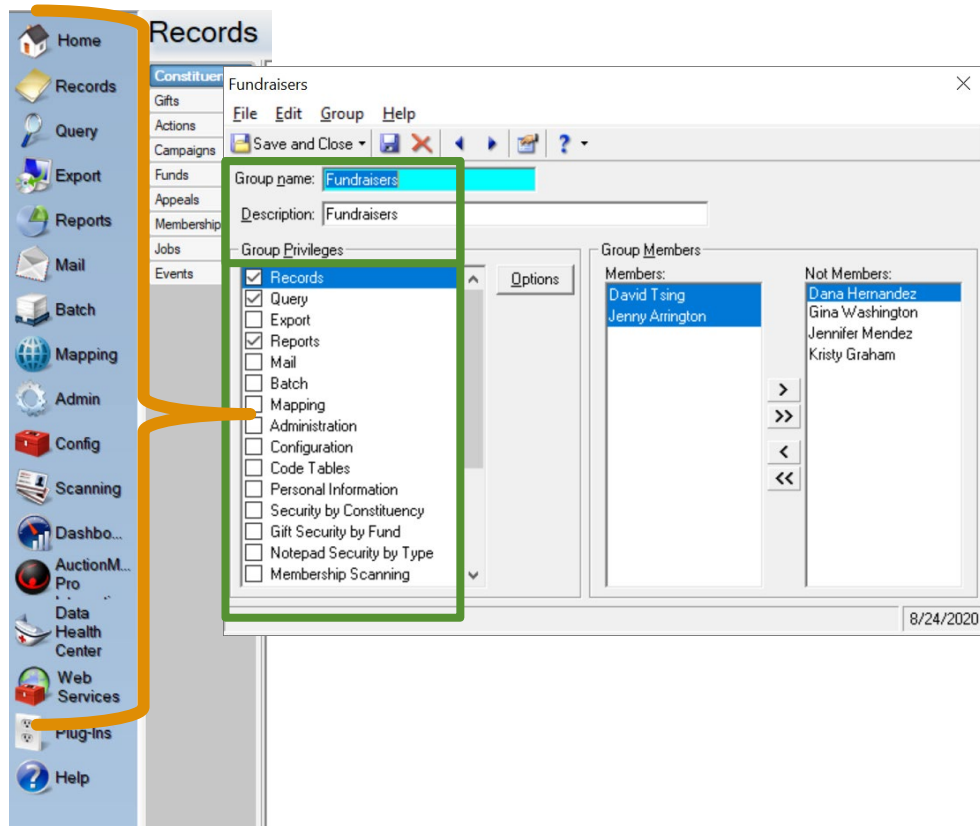
# Online Express Security

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.





# 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 security groups
2. Other roles, because they have so few permissions, might be fine to be more generic with multiple users

# 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

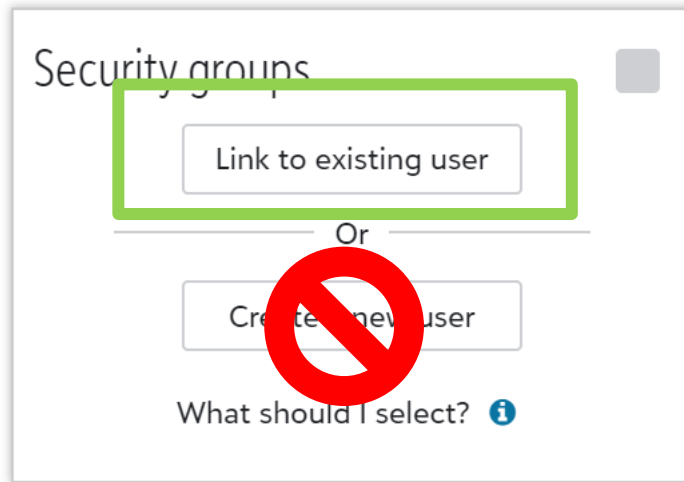
☒ Access all tabs ☒ Access other's portfolios ☐ Export work

Work permissions

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

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

# Tips on Web View Users



1. If the user already has an account in the database view Security, Link to existing user!
2. Go back and check your database view Security for duplicate accounts and fix them
3. I recommend always starting in database view and linking

# A Final Word: Admin rights

1. There should only be one active user account with Admin and Supervisor rights: the database manager
2. There should be one backup account in case of the absence of the database manager
  - With the web view, tied to a generic email account
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.

The DBM needs to learn the web view to set up web view Security correctly.



# 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](https://billconnors.com)

# Let's Connect!

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