

Prepare The Raiser's Edge

This step is required before installing the BoldTypeNews plug-in.

The protection of your data is fundamental to our business. We require security settings that prohibit adding, editing and deleting records and limit the information BoldTypeNews can access.

BoldTypeNews views only name and address information for the sole purpose of finding news about your contacts. BoldTypeNews does not, under any circumstance, access sensitive information such as giving, income levels or credit card information. BoldTypeNews does not alter your data.

In The Raiser's Edge you will:

- A. Create a view only security group for BoldTypeNews
- B. Create a "boldtype" user
- C. Set Windows file permissions

These security functions must be performed by The Raiser's Edge Supervisor or a user that has supervisory rights.

A. <u>Create a security group for BoldTypeNews</u>

Create a security group that has *view only* access. This step prohibits adding, editing and deleting records and limits the information BoldTypeNews can access.

The Naiser's Luge.	. In Admin, select Security a	nd click New Group.
🛄 The Raiser's Edge		
<u>File E</u> dit <u>V</u> iew <u>G</u> o I	F <u>a</u> vorites <u>T</u> ools <u>H</u> elp	
💠 Back 🚸 Forward Ope	n in separate window	
tome	Administration	Security
Decordo	Administration	🚯 New Group 🔗 New User
Records	System Statistics	
Query	Import	- & Groups
-	Globally Add Records	- R Admin
Export	Globally Change Records	
	Globally Delete Records	
Reports	Globally Write Off Pledges	Sers Users
(Anna	Convert Pledges To Recurring Gifts	Supervisor
Mail	Post to General Ledger	
Batch	Duplicate Constituent Management Tool	
/#	Merge Constituents	
Mapping	Drop La, and Members	
🕚 Admin	Security	
Config	Target Analytics	
Coning	GiftWrap Integration	
	Credit Card Exception Report	9

In Group <u>n</u>ame, enter "View Only" or a similarly descriptive name. In <u>D</u>escription, enter "View only for BoldTypeNews"

In the Group <u>P</u>rivileges section, uncheck all items except Records (scroll down if necessary).

Check and Highlight Records. Then click Options and to go the next step.

Troup name: View Univ						
Description: View only for BoldTy	peNews					
Group <u>P</u> rivileges			Group Members-			
	A Ont	ions	Members:		Not Membe	rs:
Batch					1	
				>	-	
				>>		
					1	
					-	
				<<		
Gift Security by Eurod						
Notenad Security by Tune						
	*		J		1	

In the Security Options window, start by unchecking all of the Record Types in the left column except Constituents, Campaigns, Funds and Appeals. *Constituents must be checked.*

Highlight the Record Type "Constituents" so the Constituents Privileges section appears. Uncheck all items in the Add, Edit and Delete columns.

Security Options					×
Record Types	Constituents	Privilege	s		^
Constituents		View	Add	Edit	Dele
Gifts	CONSTITUENT				
	Biographical	N/A	N/A		N//
Memberships	Alias	\checkmark	N/A		N//
Campaigns	Address	\checkmark			
Funds	Phone	\checkmark	N/A		N//
Appeals	Addressee/Salutation	N/A	N/A		N//
L Events	Solicitor Details				
Jobs (Events)	Relationships - Individuals				E.
Participants (Events)	<				`
Planned Gifts	Miscellaneous Co	onstituent	s Option:	s	
	Target				^
	Ethnicity Religion				~
	OK Cancel				

Uncheck all items in the Miscellaneous Constituents Options section.

For the View column, see next page. Do <u>not</u> click OK at this time.

For BoldTypeNews to work, you must check the following 5 items in View:

CONSTITUENT

Alias Address Phone Relationships - Organizations

Constituents	Privilege	es		^
	View	Add	Edit	Dele
CONSTITUENT	\checkmark			
Biographical	N/A	N/A		N//
Alias	\checkmark	N/A		N//
Address	\checkmark			
Phone	\checkmark	N/A		N//
Addressee/Salutation	N/A	N/A		N//
Solicitor Details				
Relationships - Individuals				
Relationships - Organizations	\checkmark			
Relationships - Funds				
Banks/Financial Institutions				
Education/Schools				E,
<				>

Uncheck all other items in the View column.

Campaigns, Funds and Appeals cannot be unchecked. Highlight each of these Record Types and uncheck all items.

Campaigns is shown as an example below.

Record Types	Car	npaigns Privileg	es		
🗹 Constituents		View	Add	Edit	Delete
∐ Gifts □ A d ice in in	CAMPAIGNS	N/A			
Actions (Constituent)	Solicitor Hierarchy				
	Giving Hierarchy		N/A		N/A
🗹 Funds					
🗹 Appeals					
Events					
Actions (Events)					
🔄 Jobs (Events)					
Actions (Appeals)					
		Miscellaneous Campaigns Options			
Planned Gifts	Miscellane	ous Campaign	s Options	8	
Planned Gifts	Miscellane	eous Campaign:	s Options	3	
Planned Gifts	Miscellane View Gifts View Campaign Summa	eous Campaign: ry	s Options	3	
Planned Gifts	Miscellane View Gifts View Campaign Summa	eous Campaign: ry	s Options	3	
Planned Gifts	Miscellane View Gifts View Campaign Summa	ous Campaign	s Options	3	
Planned Gifts	Miscellane View Gifts View Campaign Summa OK Cancel	ous Campaign	s Options	\$	
Planned Gifts	Miscellane	ous Campaign	s Options	\$	
Planned Gifts	Miscellane View Gifts View Campaign Summa	ous Campaign	s Options	\$	
Planned Gifts	Miscellane View Gifts View Campaign Summa	ous Campaign	s Options	8	
eneat for Funds an	Miscellane View Gifts View Campaign Summa OK Cancel	ous Campaign	s Options	\$	

Create Security Group (continued)	
In the New Group window, click 🛛 🔚 Save and Close 🔹 to complete the Security Group.	
New Group File Edit Group Help Save and Close - Jan X + Mer ? Group name: Miew Only	
Description: View only for BoldTypeNews Group Privileges Query Query	

You have now created a "view only" Security Group which limits access to your data.

The next step is to create a "boldtype" user that will be a member of this Security Group.

B. <u>Create a "boldtype" user</u>

Create a "boldtype" user that will be a member of the View Only security group and therefore will have limited access to your data.

Admin, select Secu	rity and click New User.	
ine Kaiser's Edge		
<u>File Edit View Go</u>	F <u>a</u> vorites <u>I</u> ools <u>H</u> elp	
Rack I Forward Ope	en in separate window	
💏 Home	Administration	Security
	Administration	New Group & New User
Records	System Statistics	
	Import	
1 duciy	Globally Add Records	- S Admin
Export	Globally Change Records	B Data Entry
	Globally Delete Records	
A Reports	Globally Write Off Pledges	୍କ୍ Users
Ă.	Convert Pledges To Recurring Gifts	ି ଷ୍ଟ୍ର Supervisor
Mail	Post to General Ledger	1
J Batch	Duplicate Constituent Management Tool	
100	Merge Constituents	1
Mapping	Drop Lapsed Members	
Admin	Security	
Admin	Queue	
Config	Target Analytics	
	GiftWrap Integration	
EI Canadian	Credit Card Exception Report	

Create "boldtype" User (continued)

In User <u>n</u>ame, enter "boldtype"

In <u>D</u>escription, enter "BoldTypeNews user"

In the Group Assignments section, highlight the View Only group and click

> to move View Only to the "Member of:" window.

User <u>n</u> ame: boldtype		Constituent name:	A
Description:		Outlook user:	
Group Assignments O Supervisor rights © Se Not a member of: Admin Data Entry	lected groun right Member View On >> >>	of:	Connection Options ■ BE7 Authentication Password: ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■
			Set This User's Options 7/15/2016

Create a Password.

Exit and Sign Out of The Raiser's Edge.

Tip: You will need the BoldTypeNews login credentials (your email and password) and The Raiser's Edge user credentials (the user name and password you just created). Use this form to record these credentials for later steps.

B Your BoldTy	B Your BoldTypeNews Login Information				
Email:					
Password:	Remember your password				
RE Your BoldType	eNews user in The Raiser's Edge				
User name:	[boldtype]				
Password:	Remember your password				

C. <u>Set Windows file permissions for The Raiser's Edge</u>

Blackbaud requires specific Windows file permissions for Blackbaud Technology Partners. Here is how to check these permissions and change them if necessary.

Set File Permissions	
Start Windows Explorer and find The Rais	ser's Edge program folder.
For 64-bit operating systems, the o	directory is here:
For 32-bit operating systems, the o C:\Program Files\Blackbaud\The	directory is here: Raisers Edge 7 \
I I I I I File Home Share View	
\leftarrow \rightarrow \checkmark \uparrow \square \Rightarrow This PC \Rightarrow L	ocal Disk (C:)
V 💻 This PC	
> 🔜 Desktop	Expand
> 🔮 Documents	Open in new window
> 👆 Downloads	Share with >
✓ 🏪 Local Disk (C:)	Pin to Start
> 🛃 Program File	Format
> 🛃 Program Files	Сору
✓ Program Files (x86)	Rename
V Blackbaud	
> Management Console	/
> 📙 The Raisers Edge 7	Properties

Right mouse click on The Raiser's Edge 7 folder and select Properties.

<image/>	Set File Pe	rmissions (continued)
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked, then click image in and continue below.)	In Propert	ies, select the Security tab.
General Sharing Security Previous Versions Customize Object name: C:Program Files (x86)\Blackbaud\The Raisers Ed; SYSTEM SYSTEM SYSTEM SYSTEM For change permissions, click Edt: Edt Permissions for Permissions For change permissions, click Edt: Edt Vinite Permissions for		The Raisers Edge 7 Properties
Object name: C:Program Files (x86)/Blackbaud/The Raisers Ed; SYSTEM SYSTEM With Administrations, click Edit. Edit Permissions for North For special permissions, click Edit. Edit For special permissions or advanced settings. Advanced Click Advanced. OK Vitter ender OK Click Advanced. Advanced Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click Edit and continue below.		General Sharing Security Previous Versions Customize
For power name::::::::::::::::::::::::::::::::::::		Object name: C:\Program Files (x86)\Blackbaud\The Raisers Edg
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow is not checked, then click Edit.		Group or user names:
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click is not continue below.		SYSTEM ^
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in.		Administrators
For change permissions, click Edt. Permissions for Allow Permissions for Permissions Full control Image: Deny Wite Image: Deny Bead & execute Image: Deny Ust folder contents Image: Deny For special permissions or advanced settings. Advanced OK Cancel Apply Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click Edt and continue below.		<
Permissions for Allow Deny Full control Image: Control Image: Control Wodify Read & execute Image: Control Ist folder contents Image: Control Image: Control Write Image: Control Image: Control For special permissions or advanced settings. Advanced Image: Control Image: Control Image: Control Image: Control Image: Control Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click Image: Contact Contact Plug-in.		To change permissions, click Edit.
Full control Image: Control Modify Image: Control Read & execute Image: Control List folder contents Image: Control Read Image: Control Write Image: Control For special permissions or advanced settings. Advanced Click Advanced Image: Control Image: Control OK Cancel Advanced Image: Control Advanced If the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click Edt and continue below.		Permissions for Allow Deny
Modify Y Read & execute Y List folder contents Y Read Y Write Y For special permissions or advanced settings. Advanced Cick Advanced. Y OK Cancel Apply Y Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click Edt and continue below.		Full control 🗸 ^
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click <a>Edit .		Modify Read & execute
Read Image: Constant of the computer of the comp		List folder contents
Write Image: Constraint of the computer in "Group or user names:" Select the user name of the computer in "Group or user names:" If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click Image: ContactFinder Plug-in.		Read V
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click		For special permissions or advanced settings
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is <u>not</u> checked, then click <u>Edt</u> and continue below.		click Advanced.
OK Cancel Apply Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is not checked, then click Edt		
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is <u>not</u> checked, then click Edt and continue below.		OK Cancel Apply
Select the user name of the computer in "Group or user names:" (If the user name is not shown, skip down to Add User Name section below.) If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is <u>not</u> checked, then click Edt and continue below.		
If all items under Allow are checked as shown above, click OK to exit. Return to the website to Install the BoldTypeNews ContactFinder Plug-in. If any item under Allow is <u>not</u> checked, then click Edt and continue below.	Select the (If the user r	user name of the computer in "Group or user names:" name is not shown, skip down to Add User Name section below.)
If any item under Allow is <u>not</u> checked, then click Edit and continue below.	If all items Return to t	under Allow are checked as shown above, click OK to exit. the website to Install the BoldTypeNews ContactFinder Plug-in.
	If any item	under Allow is <u>not</u> checked, then click Edit and continue below.

Set File Permissions (continued)

Select the user name in "Group or user names:"

Check Allow for all items.

Permissions for The Raisers Ed	dge 7	×
Security		
Object name: C:\Program Files (x86)\Blackbaud\1	The Raisers Edg
Group or user names:		
SCREATOR OWNER		^
SYSTEM		
[select user of the select us	ne computer]	
Administrators		
Jusers		~
<		>
	Add	Remove
Permissions for	Allow	Deny
Full control	\checkmark	□ ^
Modify		
Read & execute	\checkmark	
List folder contents	\checkmark	
Read	\checkmark	
L		
ОК	Cancel	Apply

Click OK

Click Continue for each Windows alert message. Close Windows Explorer.

You are finished with the changes required by Blackbaud.

Return to the website to Install the BoldTypeNews ContactFinder Plug-in.

Add User Name

In some cases your user name (the name you use to log in to your computer on your network) is not shown.

If you do not see your user name in the "Group or user names:" section of the Security tab, click Edit...



Continued on next page...

	Permissions for The Raisers Edge 7 ×
	Security
	Object name: C:\Program Files (x86)\Blackbaud\The Raisers Edg
	Group or user names:
	ALL APPLICATION PACKAGES
	SYSTEM Readministrators
	Add Remove
	Add Remove
Write y	Add Remove Dur user name in the box and click Check Names. Select Users or Groups × Select this object type:
Write y	Add Remove Dur user name in the box and click Check Names. Select Users or Groups × Select this object type: Verse, Groups, or Built-in security principals Object Types
Write y	Add Remove Dur user name in the box and click Check Names. Select Users or Groups × Select this object type: Vertice Users, Groups, or Built-in security principals Object Types From this location: Locations
Write y	Add Remove cour user name in the box and click Check Names. Select Users or Groups Select this object type: Users, Groups, or Built-in security principals Object Types From this location: Locations
Write y	Add Remove Dur user name in the box and click Check Names. Select Users or Groups Select this object type: Users, Groups, or Built-in security principals Object Types From this location: Locations Enter the object names to select (examples): [your user name here]
Write y	Add Remove cur user name in the box and click Check Names. Select Users or Groups × Select this object type: Users, Groups, or Built-in security principals Object Types From this location: Locations Locations Enter the object names to select (examples): Check Names
Write y	Add Remove Dur user name in the box and click Check Names. Select Users or Groups Select this object type: Users, Groups, or Built-in security principals Object Types From this location: Erter the object names to select (examples): [your user name here] OK

Install the ContactFinder Plug-In

Return to the website and complete Step 2: Install the BoldTypeNews ContactFinder. If you have left the web page, here is the address:

https://pro.boldtypenews.com/cf_download_pro.php#direct_download

If you have installed the ContactFinder Plug-In but it is not visible on your screen you may need to minimize other windows to see the ContactFinder. You can also start the plug-in by going to the tray at the bottom right of your computer screen, locating the green BoldTypeNews "B" icon and double clicking to start the ContactFinder plug in.



You will see this screen:

D Con	tactFinder		/ersion: 1
			/ersion: 1.
-			
Enter your Ra	aiser's Edge information.		
22.1			
Database:	-	~	
User name:			
Password:			
B Enter your B	oldTypeNews account information.		
Email address:			
Password:			

Add your Raiser's Edge information.



Select your database from the dropdown list.

Enter The Raiser's Edge user name you created for BoldTypeNews. (the installation instructions suggested "boldtype" as the user name)

Enter the password for the Raiser's Edge "boldtype" user.

Add your BoldTypeNews account information.



Add the email address you used when you created your BoldTypeNews account.

Enter the password for your BoldTypeNews account.

Click Finish.

The BoldTypeNews plug in will now work quietly in the background. BoldTypeNews will start to search for every one of your constituents in the news.

Starting in about 24 hours, BoldTypeNews will send an email with a list of your constituents who are in the news.

You can sign on to your account at the BoldTypeNews website at any time to see news about your constituents.

https://pro.boldtypenews.com

For assistance with any step in this process please contact BoldTypeNews Customer Support.

Support@BoldTypeNews.com