

BoldTYPE**News** PROFESSIONAL

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

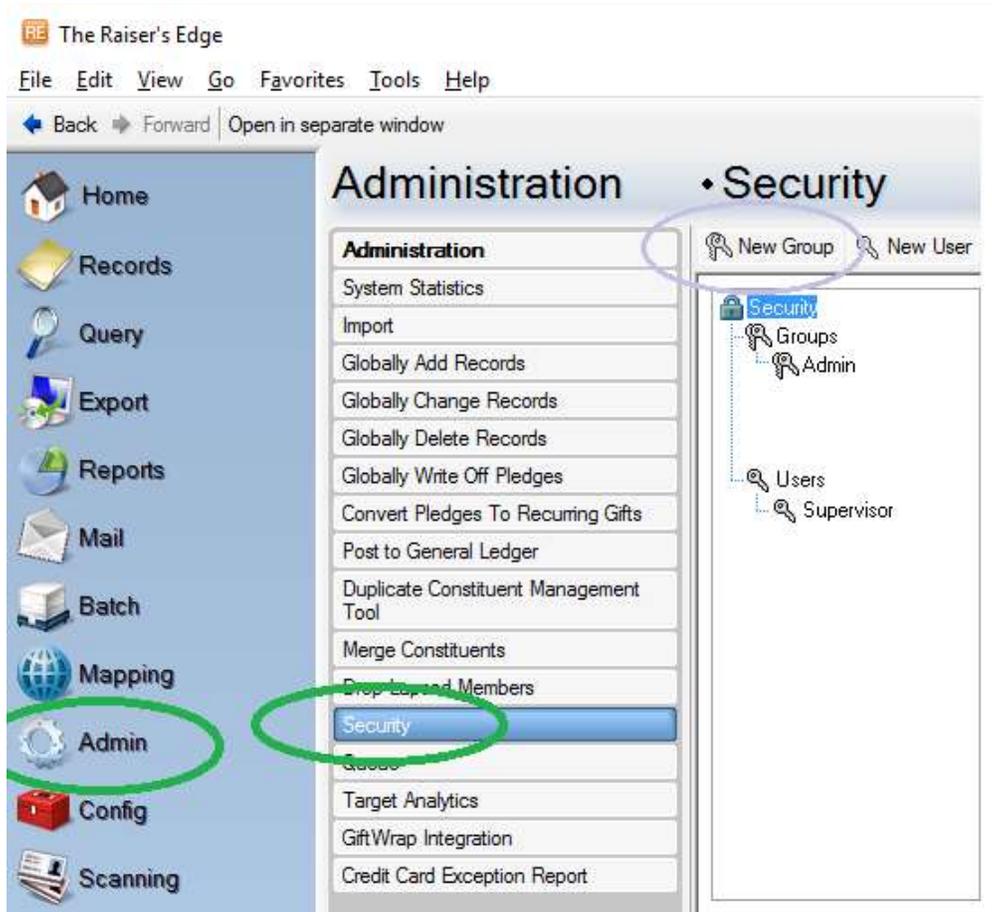
These security functions must be performed by The Raiser's Edge Supervisor or a user that has supervisory rights.

A. Create a security group for BoldTypeNews

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

Create Security Group

Start The Raiser's Edge. In Admin, select Security and click New Group.



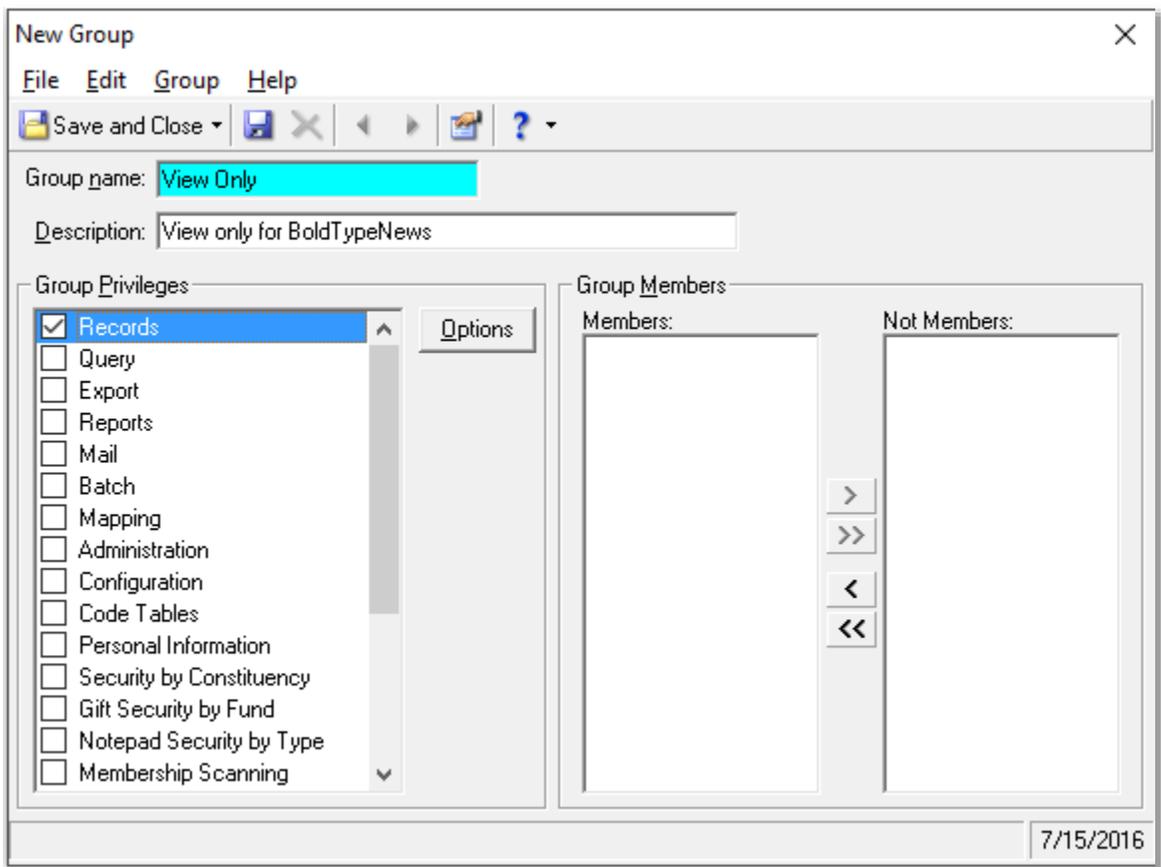
Create Security Group (continued)

In Group name, enter “View Only” or a similarly descriptive name.

In Description, enter “View only for BoldTypeNews”

In the Group Privileges section, uncheck all items except Records (scroll down if necessary).

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



Create Security Group (continued)

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.

Uncheck all items in the Miscellaneous Constituents Options section.

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

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

Miscellaneous Constituents Options
<input checked="" type="checkbox"/> Target
<input type="checkbox"/> Income
<input type="checkbox"/> Ethnicity
<input type="checkbox"/> Religion

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

Create Security Group (continued)

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

CONSTITUENT

- Alias
- Address
- Phone
- Relationships - Organizations

Constituents Privileges				
	View	Add	Edit	Dele
CONSTITUENT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Biographical	N/A	N/A	<input type="checkbox"/>	N/A
Alias	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>	N/A
Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>	N/A
Addressee/Salutation	N/A	N/A	<input type="checkbox"/>	N/A
Solicitor Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationships - Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationships - Organizations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationships - Funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Banks/Financial Institutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education/Schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Uncheck all other items in the View column.

Create Security Group (continued)

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

Campaigns is shown as an example below.

The screenshot shows a dialog box titled "Security Options" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Record Types" on the left and "Campaigns Privileges" on the right. Below the "Campaigns Privileges" section is a "Miscellaneous Campaigns Options" section.

Record Types

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

Campaigns Privileges

	View	Add	Edit	Delete
CAMPAIGNS	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solicitor Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Giving Hierarchy	<input type="checkbox"/>	N/A	<input type="checkbox"/>	N/A

Miscellaneous Campaigns Options

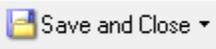
- View Gifts
- View Campaign Summary

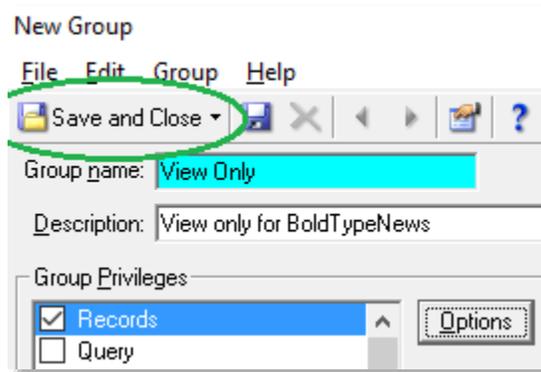
At the bottom of the dialog are "OK" and "Cancel" buttons.

Repeat for Funds and Appeals.

Click OK when finished.

Create Security Group (continued)

In the New Group window, click  to complete the Security Group.



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

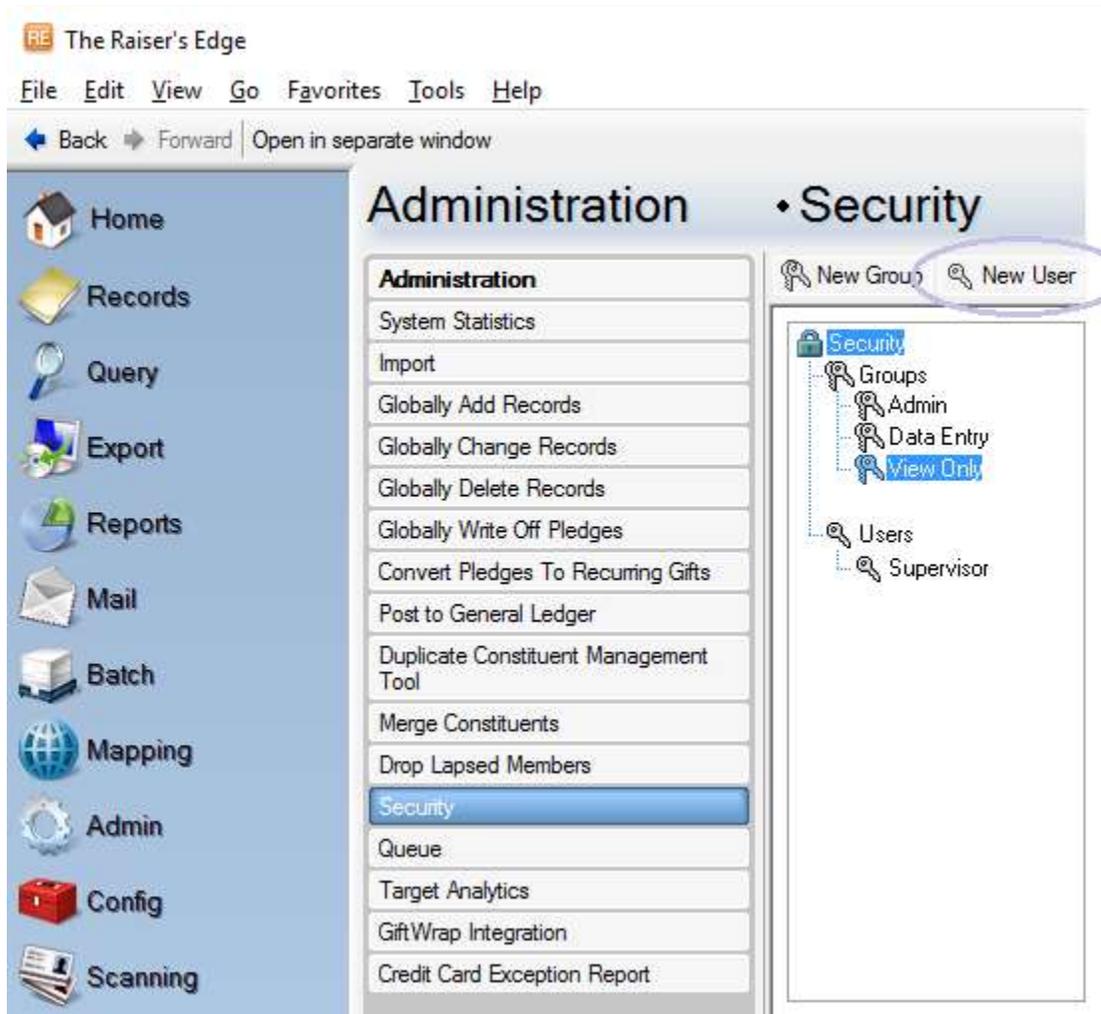
The next step is to create a “boldtype” user that will be a member of this Security Group.

B. Create a “boldtype” user

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

Create “boldtype” User

In Admin, select Security and click New User.



Create “boldtype” User (continued)

In User name, enter “boldtype”

In Description, enter “BoldTypeNews user”

In the Group Assignments section, highlight the View Only group and click
➤ to move View Only to the “Member of:” window.

Create a Password.

The screenshot shows the 'New User' dialog box with the following details:

- User name:** boldtype
- Constituent name:** (empty)
- Description:** (empty)
- Outlook user:** (empty)
- Group Assignments:**
 - Selected group rights: View Only (highlighted in blue and circled in green)
 - Not a member of: Admin, Data Entry
- Connection Options:**
 - RE7 Authentication
 - Password: [redacted]
 - Confirm: [redacted]
 - User can change password
 - Account is locked out
 - Windows Authentication
 - Login: (empty)
 - User can change User Options
- Buttons:** Save and Close, Set This User's Options...
- Date:** 7/15/2016

Click  Save and Close to complete the New User.

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.



Your BoldTypeNews Login Information

Email: _____

Password: Remember your password



Your BoldTypeNews user in The Raiser's Edge

User name: _____ [boldtype]

Password: Remember your password

C. Set Windows file permissions for The Raiser's Edge

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

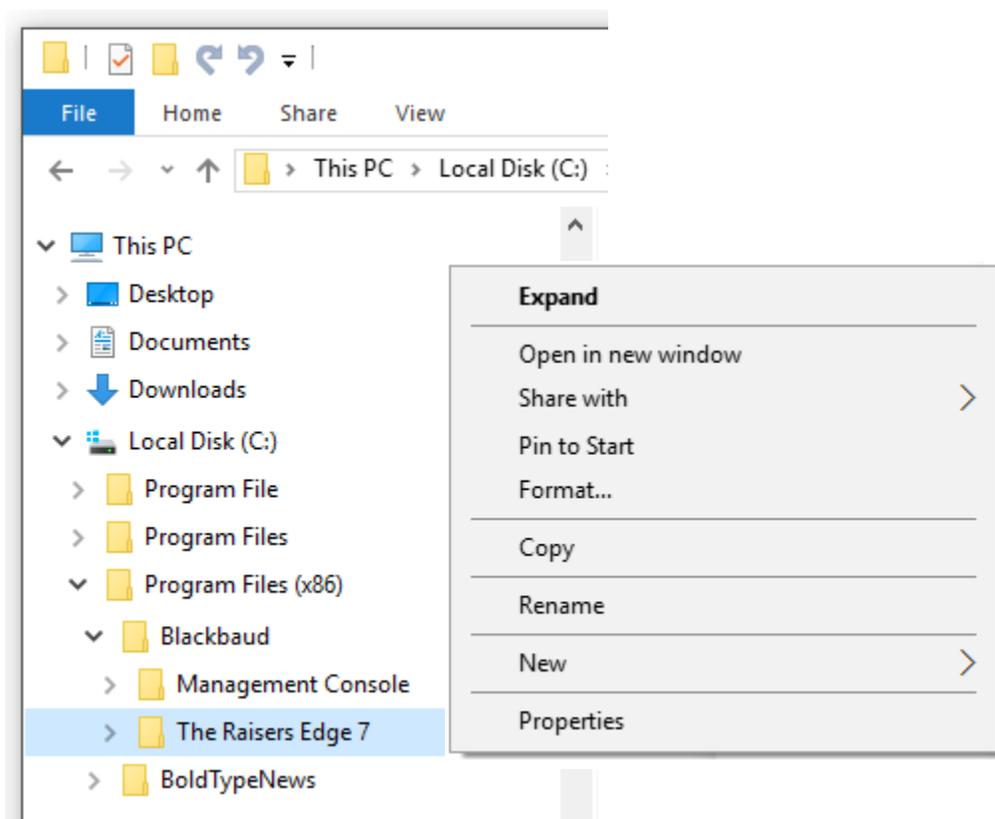
Start Windows Explorer and find The Raiser's Edge program folder.

For 64-bit operating systems, the directory is here:

C:\Program Files (x86)\Blackbaud\The Raisers Edge 7 \

For 32-bit operating systems, the directory is here:

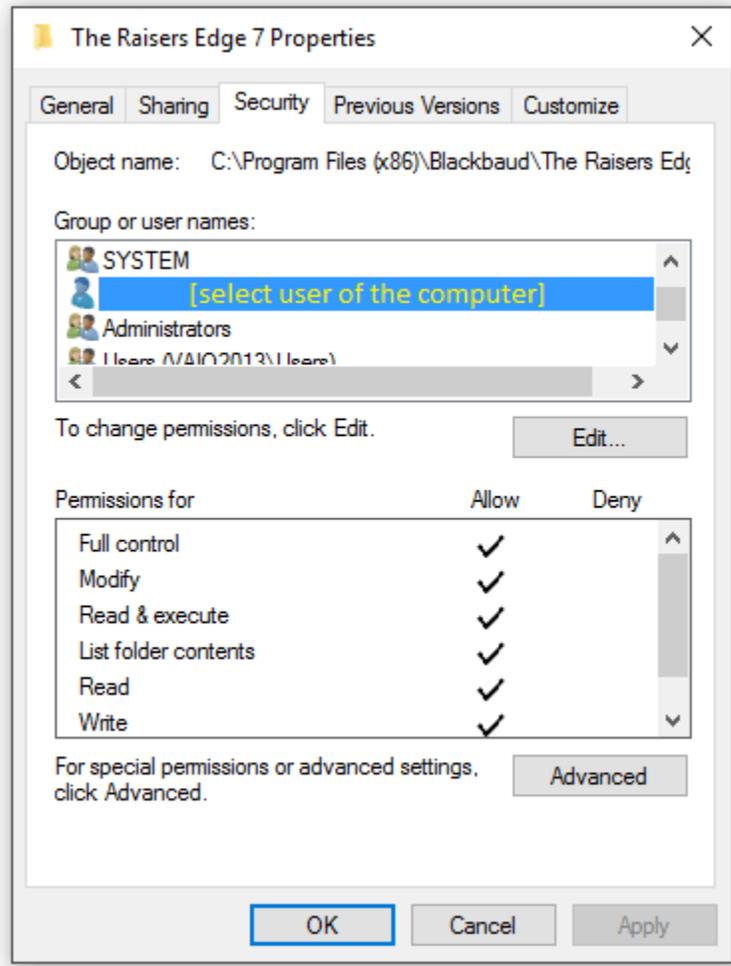
C:\Program Files\Blackbaud\The Raisers Edge 7 \



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

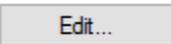
Set File Permissions (continued)

In Properties, select the Security tab.



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.)

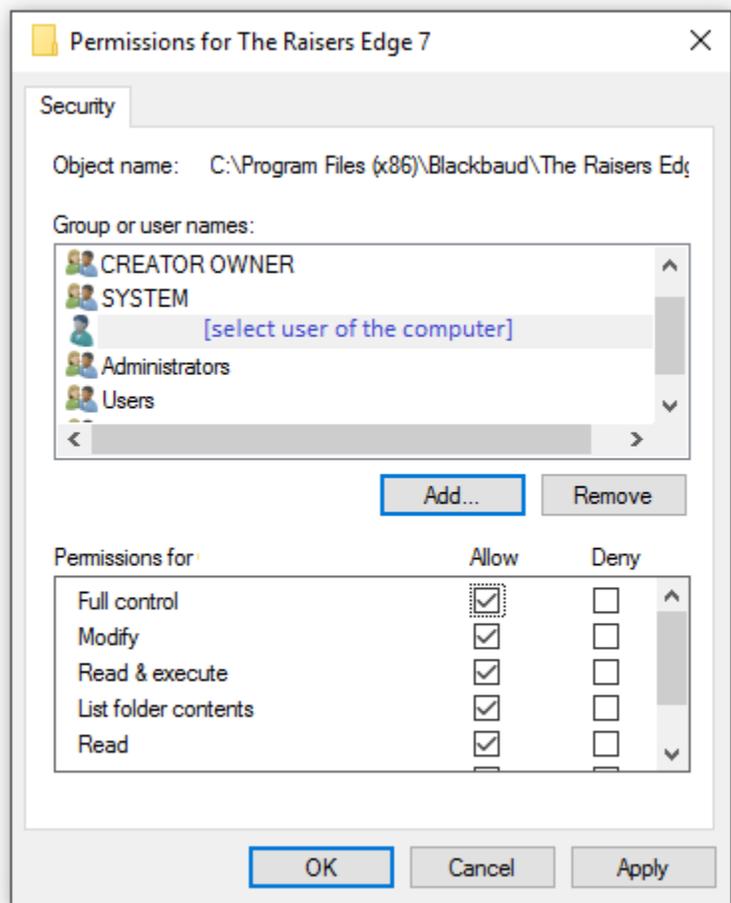
If all items under Allow are checked as shown above, click OK to exit.
Return to the website to [Install the BoldTypeNews ContactFinder Plug-in](#).

If any item under Allow is not checked, then click  and continue below.

Set File Permissions (continued)

Select the user name in “Group or user names:”

Check Allow for all items.



Click OK

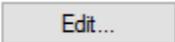
Click Continue for each Windows alert message. Close Windows Explorer.

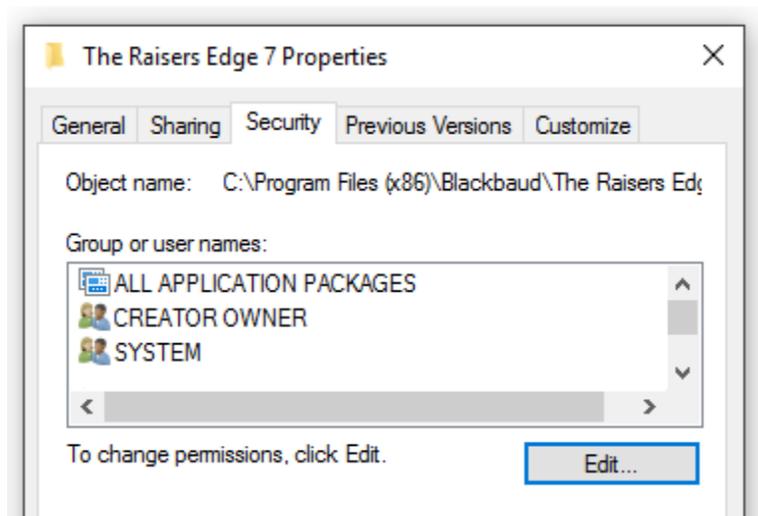
You are finished with the changes required by Blackbaud.

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.

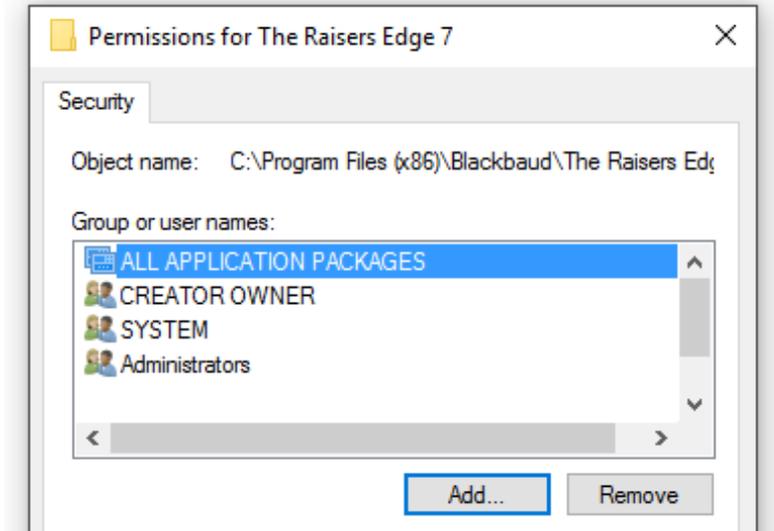
If you do not see your user name in the “Group or user names:” section of the Security tab, click 



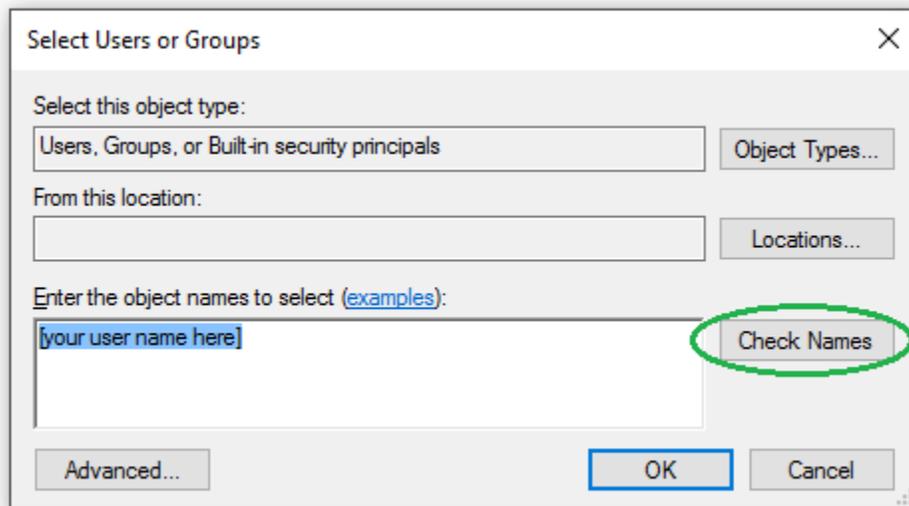
Continued on next page...

Add User Name (continued)

Click to open the “Select Users or Groups” window.



Write your user name in the box and click Check Names.



When your user name appears in the box, click OK to finish.
Return to **Create the “boldtype” User** above.

Install the ContactFinder Plug-In

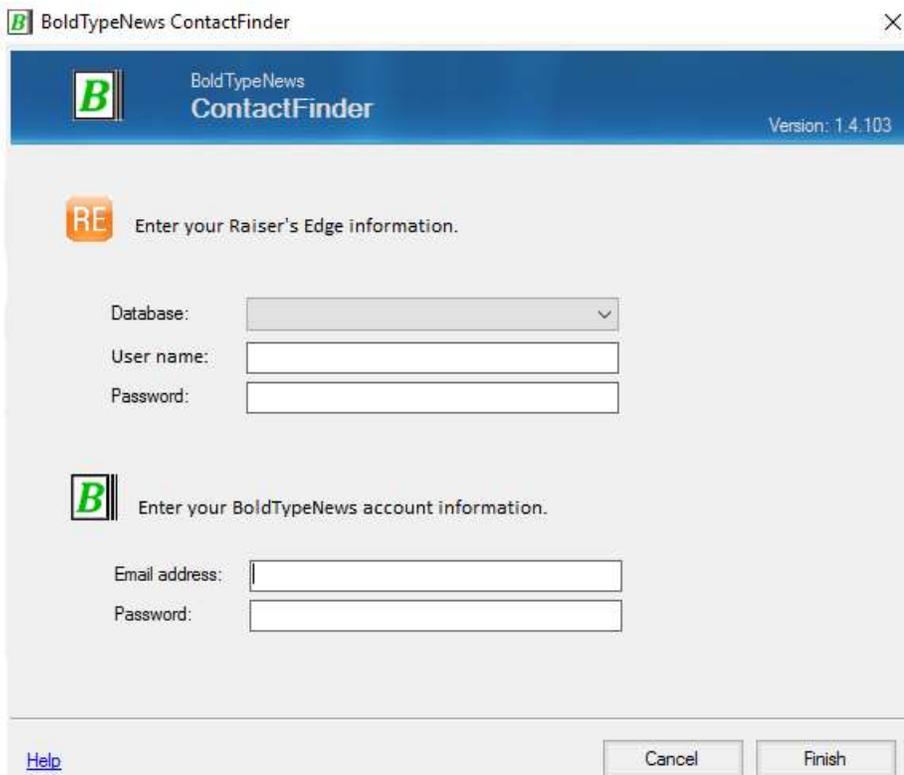
Return to the website and complete Step 2: Install the BoldTypeNews ContactFinder. If you have left the web page, here is the address:

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:



B BoldTypeNews ContactFinder ×

B BoldTypeNews
ContactFinder Version: 1.4.103

RE Enter your Raiser's Edge information.

Database:

User name:

Password:

B Enter your BoldTypeNews account information.

Email address:

Password:

[Help](#)

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