

Manage Application Users

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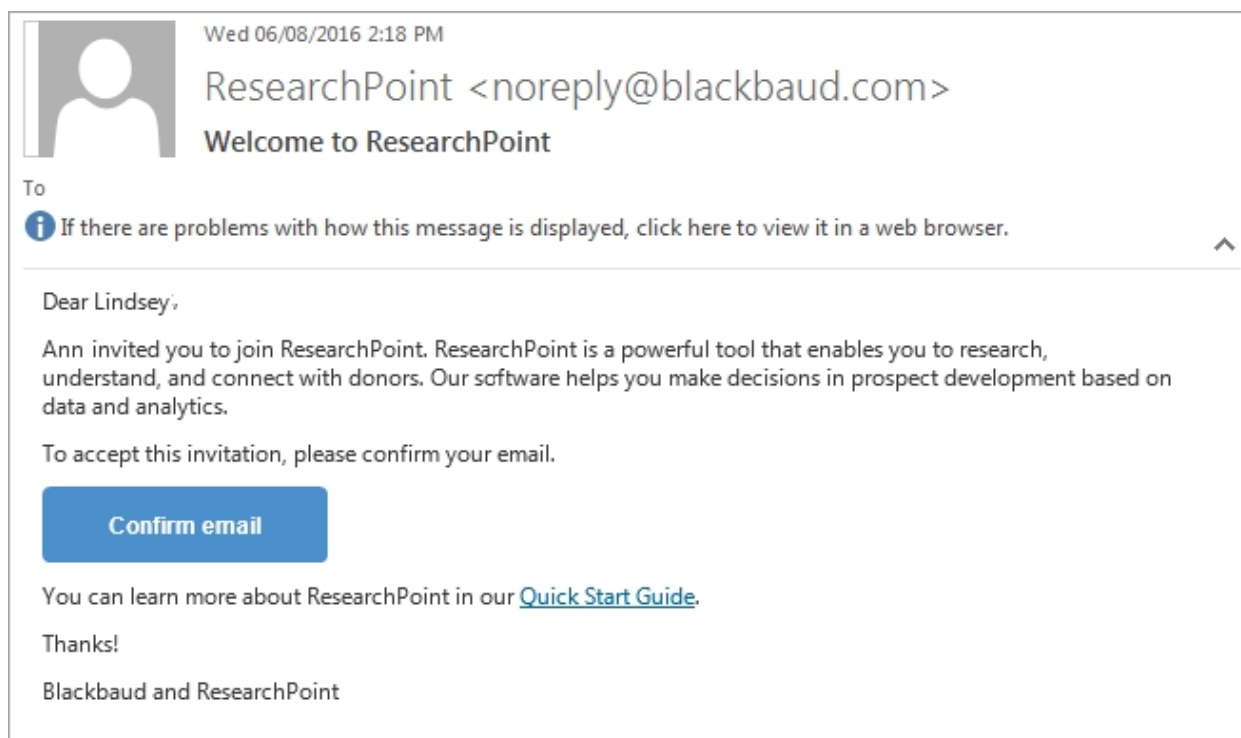
Application Users in ResearchPoint



In this guide, learn about the tasks associated with managing application users in **ResearchPoint**.

How to Log in to ResearchPoint

Your administrator contact should receive an email from Blackbaud with an invitation to join your new **ResearchPoint** hosted database.



When you log into your **ResearchPoint** database, you should do so from the latest version of your preferred Internet browser.

Your URL will be similar to the examples below, only you'll replace ##### with your organization's site ID.

Example:

<https://login.blackbaudondemand.com?SiteID=#####>

or

<https://login.blackbaudondemand.com?SiteID=#####RP>

As a prospect research manager of your **ResearchPoint** application, after you log in, you'll be responsible for inviting the rest of the users at your organization who need access.

ResearchPoint User Roles

To establish user security and limit access to only job-specific functions within the program, users are assigned to system roles. The program includes a set of standard system roles that should meet the needs of your organization.

Note: The tasks assigned to the standard system roles are pre-configured and cannot be changed. If a user needs additional privileges that a single system role alone will not provide, you can assign the user to multiple roles.

Prospect Research – This is the main role in ResearchPoint. Assign prospect research to individuals who perform prospect research tasks. For example, the most important task of a prospect researcher is to confirm and reject results from a WealthPoint screen. If you have an individual who performs part-time research, such as a development officer, assign them this role.

Prospect Research Manager – Assign this administrator role to individuals who need the greatest level of access to functionality. This role builds on the prospect research role. To assign someone prospect research manager rights, you should also give them the prospect research role. Prospect research managers can add new users to the system and control user access.

Development Officer (View Only) – As a view-only role, assign these rights to development officers who need to view ResearchPoint data. View-only enables development officers to search and review prospects and print prospect research reports. However, these users cannot add, edit, or delete content.

Development Officer (Advanced Rights) – This role builds on the Development Officer - View Only role. Assign both these roles to users who need more than view-only rights, but not as much as a prospect researcher. Advanced Rights enables development officers to screen records and access a limited amount of add and edit rights, in addition to the view-only rights.

Email Services Administrator and Email Services User – A system role that comes with the program, but not necessary for you to use.

System Role Tips

From *Administration*, you can access the System Roles page. The system roles page enables you to review and perform some helpful tasks for each user role in **ResearchPoint**.

From the System Roles page, click a system role to open the system role record.

Tip #1: In the left task bar, under **Reports**, click **System role**. The System Role report displays information about the system role, this includes the assigned users, groups, and tasks, as well as the permissions and security set for the role.

Tip #2: On the Code Tables tab, you can specify whether users in the system role can add entries to a table “on the fly,” edit existing entries, or delete entries.

Tip #3: On the Users tab, if you added a new application user record but did not assign them to a system role from their application user record, you can add users to the system role here.

Tip #4: On the Batch Types tab, you can specify whether a system role has administrative privileges for specific batch types.

When you grant administrative permissions to a system role for a batch type, you specify that users in that role can create templates and perform all other functions associated with that batch type, including reviewing and validating submitted batches, approving batches, and committing approved batches to the database.

Prospect Research Manager

This role grants administrative tasks not included in the Prospect Research role. To assign someone prospect research manager rights, you need to also give them the prospect research role. It is especially useful for larger organizations. This role enables users to add new users, manage code tables, and access additional configuration settings.

Task name	Task description	Functional area
Application user search	Search for and view application user records.	Administration
Application users	View the list of application users.	Administration
Attribute categories	Provides a user interface for managing attribute categories.	Administration
Business processes	View the list of business process runs.	Administration
Business process ownership	View and edit business process owners.	Administration
Code tables	View the list of code tables and table entries.	Administration
Constituent group types	Add, edit and delete constituent group types.	Prospects
Countries and states	Configure system countries and states.	Administration
Educational catalog	Create and manage the academic catalog and educational institutions.	Administration
Email alerts	Configure and manage email alert settings.	Administration
Enable/disable phone formatting	Enables or disables phone number formatting on add and edit forms.	Administration
First names	Modify first names table.	Prospects
Global changes	Create and manage global change instances.	Administration
Mapping	This task is used to configure mapping.	Administration
Notifications	Provides a user interface for managing notifications.	Administration
Organizational units	Manage the Active Directory organizational units associated with the system.	Administration
Queue	Allows for managing queue business processes.	Administration
The Raiser's Edge integration	Configure the settings for integration with The Raiser's Edge.	Prospects
Reason codes	Displays the page to manage reason codes.	Prospects
Relationship types	Provides an interface for managing relationship types.	Prospects
System roles	Manage system level permissions.	Administration

Task name	Task description	Functional area
Title code defaults	Modify title code defaults.	Prospects
Match settings (admin)	Set constituent match settings.	Administration
Match settings (batch/import)	Set constituent match settings.	Batch and Import

Prospect Research

The main system role, this role grants users access to features used to determine prospect qualifications. Rights include but are not limited to adding, editing, and managing constituent records; searching for Wealth Information; importing and exporting data; and using advanced features such as Mapping and Prospect Analysis dashboards.

Task name	Task description	Functional area
Add a group	Add a new group constituent.	Prospects
Add a household	Add a new household constituent.	Prospects
Add a prospect research request	Add a new prospect research request.	Prospects
Add an individual	Add a new individual constituent.	Prospects
Add an organization	Add a new organization constituent.	Prospects
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Batch entry	Manage batches through all stages of the batch workflow.	Administration
Community	Launch browser and participate in ResearchPoint Community blogs, user forums, and Idea Bank.	Prospects
Constituent density map	Create a heat map of selected constituent addresses to help determine the location of most prospects.	Mapping
Constituent search	Search for and view constituent records.	Prospects
Export	Create and manage exports of query results.	Administration
Import	Create and manage imports into batch.	Administration
Manage research groups	Create, populate and view research groups.	Prospects
Mapping	Interactively map records based on their geographical locations.	Prospects
My prospect research page	View my prospect research area.	Prospects
Organization search	Search for and view organization constituent records.	Prospects
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Prospect Quick Search	Search for new prospects using partial information.	Prospects
Query	Create and manage queries.	Analysis
Search The Raiser's Edge	Search for a Raiser's Edge constituent to add or link.	Prospects
Wealth and ratings data	Configure WealthPoint searches and ratings.	Prospects

Task name	Task description	Functional area
Wealth capacity formula management	Manage wealth capacity formulas.	Prospects
Match settings (batch/import)	Set constituent match settings.	Batch and Import

Development Officer

Generally a view-only role, this role enables users to review the data in the system but not enter any changes to the data. The Development Officer can run constituent searches, view data, print prospect profiles, and execute some general queries.

Task name	Task description	Functional area
Add a prospect research request	Add a new prospect research request.	Prospects
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Community	Launch browser and participate in ResearchPoint Community blogs, user forums, and Idea Bank.	Prospects
Constituent search	Search for and view constituent records.	Prospects
My fundraiser page	View my major giving area.	Prospects
Organization search	Search for and view organization constituent records.	Prospects
Product news	Launch browser to read about ResearchPoint product news, release notes, and The Prospector.	Prospects
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Query	Create and manage queries.	Analysis

Development Officer - Advanced Rights

Generally a view-only role, this role allows users to review the data in the system, but not enter any changes to the data. The Development Officer can run constituent searches, view data, print prospect profiles, and execute some general queries. In addition, the advanced role allows access to search and review prospects, and access research lists, research groups, and the individual screen.

Task name	Task description	Functional area
Add a prospect research request	Add a new prospect research request.	Prospects
Run prospect search	Search all existing ResearchPoint prospects; integrate the Raiser's Edge database; and the external Target Analytics database. Role does not allow user to add or modify data.	Prospects
View Research Lists	View only	Prospects
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Community	Launch browser and participate in ResearchPoint Community blogs, user forums, and Idea Bank.	Prospects
Constituent search	Search for and view constituent records.	Prospects
My fundraiser page	View my major giving area.	Prospects
Organization search	Search for and view organization constituent records.	Prospects
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Query	Create and manage queries.	Analysis

Search for Application Users

After you add new application users, if your organization has many user records, it can be far easier to search for and open an application user record than to scroll.

Note: Because your application and database exist in a hosted environment, the Application Users grid may list a number of Blackbaud users who are system administrators.

These users help customers set up and implement applications in our hosted environment.


From *Administration*, click **Application Users**. At the top of the Application users grid, use the Search box to search for your user record. You can search for anything in the **Display name**, **Email address**, **Constituent name**, **Status**, or **Domain account columns**.

What you type into the search box can be a portion or the entirety of your search keyword. Press **ENTER** on your keyboard to search the application users. Any matches in the **Application users** grid will highlight in yellow.

Access Application User Tasks

To access your application user records, from *Administration*, click **Application users**. The Application Users page appears.

Most of your application user tasks can be accessed from this page.

- [Add an Application User](#) – From the top of the Application users page, click **Add**.
- From a row in the Application users grid, click the down arrows  to access the **Edit**, **Delete**, **Mark Inactive**, and **Resend invitation** (only available for users who have not yet accepted their email invite) tasks.
- To access more view-only information about the application user, in the **Display name** column, click the application user's name.

Tip: If you don't see all the information you need for your application users, click **Columns** to add the columns you need and remove the columns you don't.

Add Users to ResearchPoint

Prospect Research Managers can add new users to **ResearchPoint** and manage users' access to the database.

As you begin to use **ResearchPoint**, it's important to review program roles and invite users in your organization who need to complete research or view research results. When you add users, if the user already has an account for the Blackbaud.com website, invite the email address associated with that account.

Tip: To determine the email address used for a Blackbaud.com website account, have the user click the **Welcome** in the upper right corner. Then, click the **Account** option. The email address used appears at the top of the page.

> How to Add Users

1. As your organization's **ResearchPoint** administrator or assigned Prospect Research Manager, log in to **ResearchPoint**.
2. From *Administration*, **Application users**. The Application Users page appears.
3. Click **Add**. Enter the full name and email address of the user to invite.
4. If the user is also a fundraiser, you need to link the user to a constituent record to see the My Fundraiser page. If a constituent record doesn't exist yet, you can still add the application user and link the records later.
5. Select which role or roles the user needs to perform tasks in **ResearchPoint**. If you assign someone as a Prospect Research Manager, you also need to select the Prospect Research role.
6. Click **Save & Invite**. the new user receives an email with a link to join **ResearchPoint**.

If you click **Save** only, the new user is created but they will not receive an invite to join until you send the invitation.

7. When the application user receives an email to join **ResearchPoint**, to accept the invitation, they must confirm click the **Confirm email** link.

Tip: Only the email address that was invited can confirm the email address. If the wrong email address was invited, edit the email address in **ResearchPoint**, do not forward the invite. You will receive an error message when you attempt to log in, if you log in with a different email address than the one invited.

8. When the application user clicks the confirm link, the Blackbaud Account Sign in page opens.
9. Sign in with your existing Blackbaud single sign-on account or click **Sign up!** to create a new account.
10. After you sign in or sign up, the **ResearchPoint** home page appears. To edit your name or email address, click **Welcome, Account** from the Omnibar at the top of the page.

When you add and invite users to have access to **ResearchPoint**, they are also linking their **ResearchPoint** credentials to their Blackbaud single sign-on account. With this account, users can switch between **ResearchPoint**, Blackbaud.com website, and other single sign-on enabled products without having to log in and log out with different credentials. You only have one login credential to remember.

Forget your Password?

When you log in to **ResearchPoint**, from time-to-time you may forget your password. Unlike in the past though, you no longer get help for passwords from within **ResearchPoint**.

> Do you sign in with Blackbaud?

If you sign in with Blackbaud, click **Forgot password?** link on the sign in page. A Recover Password box appears for you to enter your email address. Then, you'll receive an email with instructions on how to get your password recovered or reset.

> Do you sign in with Google?

If you authenticate with Google and can't remember your password, click the **Need help?** link. Google will then assist you with your password recovery or reset options.

> Need more login help?

Don't worry, we have a webpage on Blackbaud.com devoted to all questions related to logging in to your single sign-on account.

Visit <https://www.blackbaud.com/support/loginhelp.aspx>.

Remove Application Users from ResearchPoint

If a user leaves your organization, has had their password compromised, or poses some other security risk, you can disable their account. When you disable a user account, the user can no longer log into the application. If needed, you can enable their account again so they can log into the application.

Also, we recommend you disable users to remove them from **ResearchPoint** instead of deleting. When you disable, you remove the user's ability to log in to **ResearchPoint** but you maintain a history of the user's actions in the application.

➤ Disable a user account

1. From *Administration*, click **Application users**. The Application Users page appears.
2. In the **Application users** grid, click the double arrows for the user account you want to disable.
3. On the action bar, click **Mark inactive**. A confirmation screen appears.

Note: You can also click **Delete**. However, we only recommend you delete user accounts if you invited the wrong email address by accident. Once a user has accepted and started working in **ResearchPoint**, we recommend you mark the account inactive instead.

4. Enter details about why you need to disable the user account.
5. Click **Yes**. You return to the Application Users page. The user account is now disabled.

Note: To activate the user account again, click the double arrows for the user account you want to enable and click **Mark active**.

Link an Application User to a Constituent Record

If one of your prospect research users is also a fundraiser, you need to link the application user record to a constituent record in ResearchPoint.

This enables your application users to see information relevant to their fundraiser tasks. For example, in *Prospects*, under **Prospect Research**, the users can then access their **My fundraiser page**.

➤ Link an application user to a constituent record

From the add or edit an application user screen, use the **Linked constituent** field to search for and select the constituent you want to link to your application user. The constituent record needs to be created before you attempt to link the records. You cannot create a constituent from the Constituent Application User Search screen.

➤ Add fundraiser constituency to a constituent record

After you link your application user to a constituent record in **ResearchPoint**, you need to assign the fundraiser constituency to the constituent record. You need to add the fundraiser constituency before you assign prospect research tasks to fundraisers.

1. From the Home page, search your saved prospects for your constituent and open the record.
2. Select the Affiliations tab.
3. In the **Constituencies** section, click **Add** and select **Fundraiser**.

Your application user is now ready to perform research request tasks.

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