



blackbaud®  
**DEVELOPERS’  
CONFERENCE**  
June 15–17, 2021

# Getting ready for Blackbaud ID™!

BLACKBAUD CRM™ TRACK

---

**DAVID HENDERSHOT**

*Session Host: Jim Ballou*



# Safe Harbor Statement

This presentation contains forward-looking statements that involve inherent risks, uncertainties and assumptions. It outlines Blackbaud's current plans and general product direction as of the date this presentation was created. Functionality described in this presentation that is not currently available is subject to change at any time, without notice, at Blackbaud's sole discretion. It does not represent a commitment to develop or release specific features within the timeframe discussed, according to the presented design, or at all. Please make any purchase decisions based on features and functionality that are currently available.



# Customization of Blackbaud Solutions

As a Blackbaud customer, your Authorized Support Contacts retain the responsibility for providing internal support for Customizations of your Blackbaud solutions by:

- Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users



# Hello! I'm David Hendershot

*Pronouns: He/Him/His*

---

DENVER, CO

13 YEARS AT BLACKBAUD

I'm passionate about nature and get outdoors whenever I can. I also love learning new things. Most recently, it's been French and Spanish. I'm hoping to apply my Spanish on a trip to Patagonia soon!



Adam Hassler

*Pronouns: He/Him/His*

Senior Software Engineer



Darryl Eychner

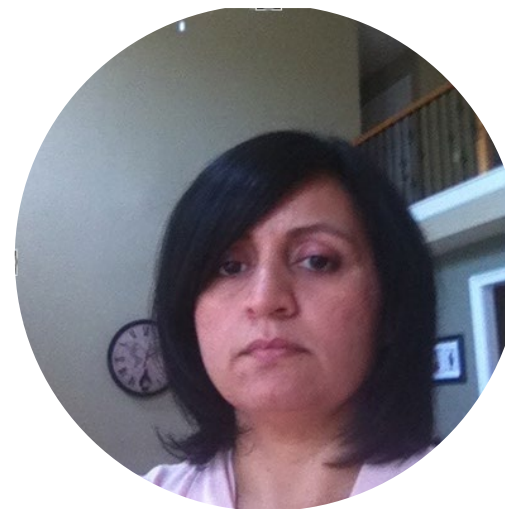
Principal Software Engineer



Patton Hilliard

*Pronouns: He/Him/His*

Principal Software Engineer



Poornima Rao

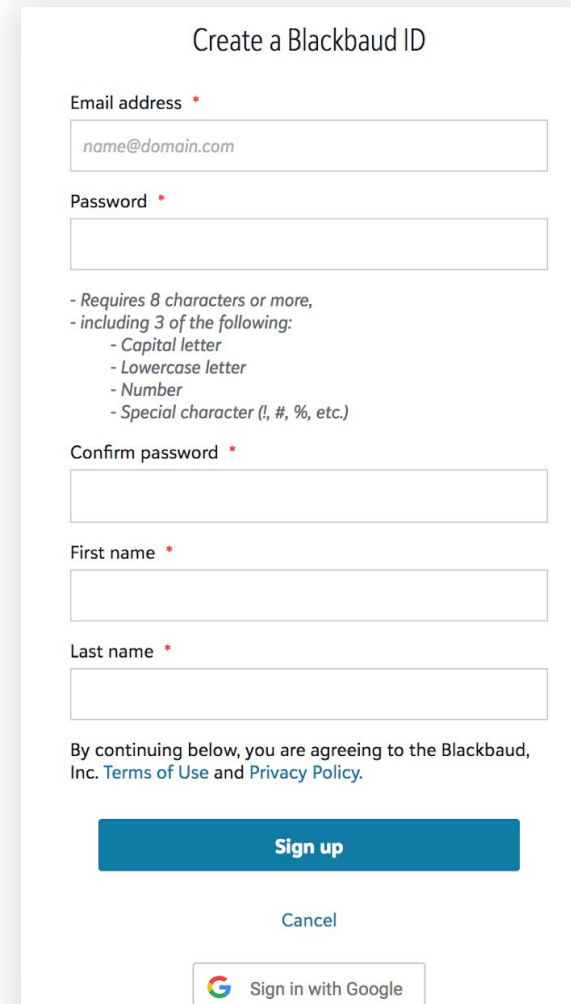
*Pronouns: She/Her/Hers*

Senior Product Manager

# What is Blackbaud ID?

- Centralized **authentication, identity** and **session management** providing users with a SSO for the Blackbaud solution ecosystem
- Self-serve **user registration** process to create their account
- **SSO** configuration for federated identity with your identity provider (ex: Azure, Okta, Google)
- Enables **MFA** or further options through an identity provider
- **Social Sign In:** Google Account

For a deeper dive, watch the recording of [Demystifying Blackbaud SKY®](#)

A screenshot of a web form titled "Create a Blackbaud ID". The form contains several input fields: "Email address" with a placeholder "name@domain.com", "Password" with a list of requirements below it (8+ characters, 3 types: capital, lowercase, number, special), "Confirm password", "First name", and "Last name". At the bottom, there is a blue "Sign up" button, a "Cancel" link, and a "Sign in with Google" button with the Google logo.

Create a Blackbaud ID

Email address \*

Password \*

- Requires 8 characters or more,  
- including 3 of the following:  
- Capital letter  
- Lowercase letter  
- Number  
- Special character (!, #, %, etc.)

Confirm password \*


First name \*

Last name \*

By continuing below, you are agreeing to the Blackbaud, Inc. [Terms of Use](#) and [Privacy Policy](#).

**Sign up**

Cancel

 Sign in with Google



# Benefits of Blackbaud ID in Blackbaud CRM

- Centralized account management for Blackbaud solutions
- Enhanced security features like MFA and integration with your IdP
- Simplified environment navigation via the environment selector



# Who Gets Blackbaud ID and When?

## Who?

- Initial release will be available for customers hosted by Blackbaud
- Taking BBID is recommended but not required
- Not supported for on premise customers

## When

- Initial release is planned for SP29 in November 2021
- Proxy User functionality will be released in a future SP



# Migration

- Instructions to enable BBID will come out before release
- Once enabled, users logging in will be redirected to the BBID login page
- Users having a BBID account matching their App User email address will be migrated automatically
- Other users will need to enter their original BBCRM credentials one last time

The image displays two screenshots of the Blackbaud login interface. The top screenshot is the standard 'Sign in' page, featuring a title 'Sign in', an 'Email address' input field, a 'Password' input field, a 'Forgot password?' link, a 'Remember my email' checkbox, a blue 'Sign in' button, an 'or' separator, a 'Sign in with Google' button with the Google logo, and links for 'Need an account? Sign up' and 'Need help?'. The bottom screenshot is a 'One last step...' dialog box, titled 'Blackbaud CRM™' in the top right corner. It contains the text: 'One last step... Please enter your **previous** user name and password one last time to finish linking your accounts.' Below this text are two input fields labeled 'User name:' and 'Password:'. A 'Link Accounts' button is located in the bottom right corner of the dialog box.



How will integrations be handled?

# Introducing Proxy Users

- Intended for integrations, API calls, and other forms of programmatic access to BBCRM
- Proxy Users are extensions of an application user
- Inherit a chosen subset of permissions from the Application User
- Use tokens for authentication, which helps avoid password reuse issues
- Do not replace system accounts

The screenshot shows the Blackbaud CRM interface. The top navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Sales', 'Events', 'Memberships', 'Prospects', 'Volunteers', 'Foundations', 'Sponsorship', 'Fundraising', and 'Treasury'. The main content area is titled 'Application Users' and shows details for a user named 'blackbaud\shailendra.sharma-Proxy - Application User'. The user's details include: Display name, Is system administrator (Yes), Linked to constituent, Can customize home page (Yes), Site, Is active (No), and Proxy owner (blackbaud\shailendra.sharma). Below the details are tabs for 'System Roles', 'Permissions', 'Tasks', 'Features', 'Code Tables', 'Batch Types', 'KPIs', and 'Personal Access Token'. The 'Personal Access Token' tab is active, showing a table with one token:

Name	Status	Created On	Expired On
first token	No	6/13/2021	6/13/2022

The dialog box is titled 'Add a personal access token'. It contains a text input field for the 'Name of service or process that uses the token:'. Below the input field, there is a message: 'This is your new personal access token. Copy and paste it to your service or process now. Remember, it cannot be viewed or changed later!'. The token itself is displayed as '0qpYXF02AgXDf0KYmx57wUPwhQHxajQxYKY8BHw8dw0SKF/qcxZ' with a 'Copy' button next to it. At the bottom, there is a checkbox labeled 'I have copied the personal access token to a consuming service.' and 'Save' and 'Cancel' buttons.



## How Does this Impact Integrations?


- Once Proxy User functionality is released, integrations can be migrated
- Current integrations will continue functioning normally
- At a future date/SP, username/password access will be disabled
  - Don't worry! We will provide time, notice, and guidance before disabling this functionality!
- We are working out details and would love any feedback


# What about Branding?


- Existing branding will be preserved in CRM
- Omnibar and BBID login branding can be managed by organization administrators from the Admin section


### Branding

Organization display name  
Satellite Stars  
*Appears on*  
Navigation bar in portal  
Emails and forms

Logo (Recommended dimension: 1080x150 px, File size: max 5 MB)  
Replace file Education-logo-360x60.png  
*Appears on*  
Authentication pages for portal  
Available in email designer and form designer

Logo icon (Recommended dimension: 500x500 px, File size: max 5 MB)  
Replace file Education-logo\_icon-152x15...  
*Appears on*  
Navigation bar in portal  
Mobile browser bookmarks saved to home screen  
Available in email designer and for designer

Favicon (Recommended dimension: 200x200 px, File size: max 5 MB)  
Replace file Education-logo\_icon-152x15...  
*Appears on*  
Browser tabs  
Browser shortcuts and bookmarks

Primary color  
*Appears on*  
Primary buttons on authentication pages for portal  
Accent color on authentication pages

Save Cancel

# Branded Authentication

Customize the sign in page in a few easy steps!

## Manage branded authentication

Provide a custom summary on authentication pages

Summary text 17/280

hi there. login!

Link to custom help content from authentication pages

URL

<https://blackbaud.com>

*This redirects the help link from Blackbaud's content to your own troubleshooting details, contact info, and other custom content.*

### Other branding elements for authentication pages:

- ✓ You uploaded a logo.
- ✓ You uploaded a favicon.
- ✓ You selected a primary color.

## Preview

**SATELLITE STARS**  
MARITIME SCHOOL

### Sign in

hi there. login!

Email

Password

[Forgot Password?](#)  Remember my email

**Sign in**

or

Sign in with Google

[Need account? Sign up](#)

[Need help?](#)

Powered by **blackbaud**

**Publish**

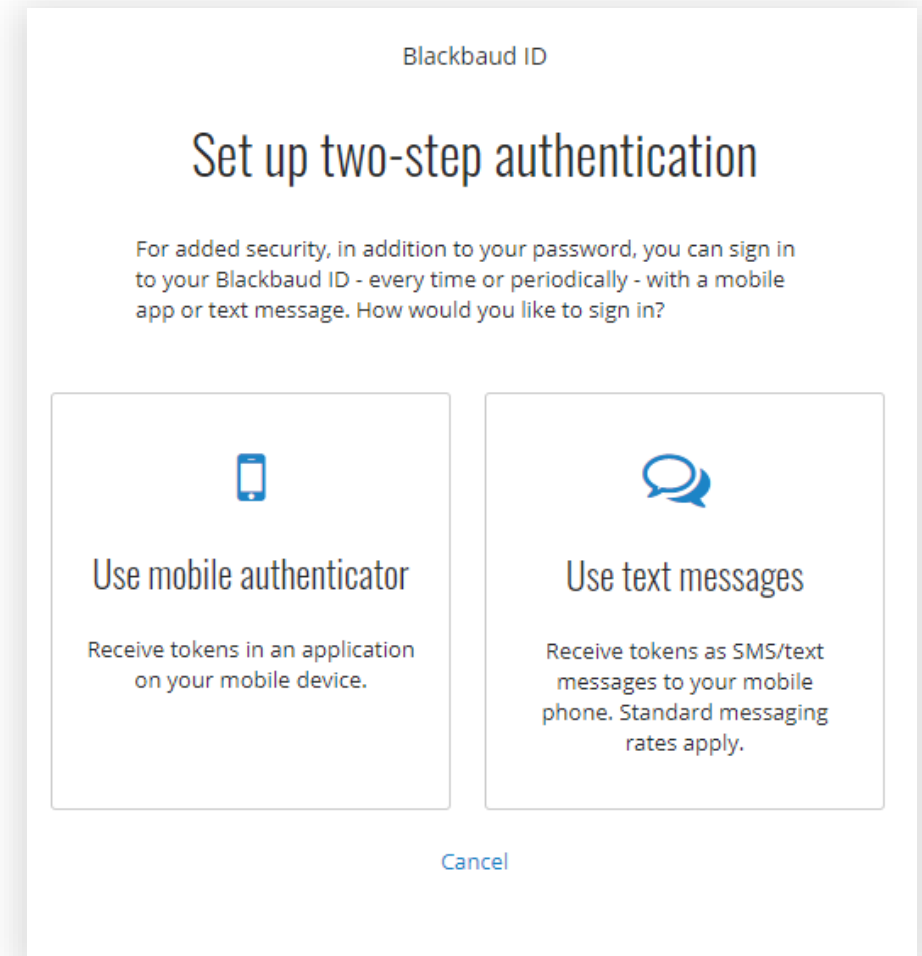
Cancel

# Blackbaud ID and MFA

**Having Multi-factor Authentication (MFA) turned on is the greatest single measure to increase the security of an account.**

Enabling MFA on a Blackbaud ID account requires verification beyond their email address and password. The verification can be achieved:

- Through a mobile authenticator with biometrics turned on such as fingerprint or facial recognition or time-based, one-time password (TOTP) application such as Google Authenticator, Microsoft Authenticator or Auth0 Guardian
- As SMS/text messages on mobile phone



For a deeper dive watch the recording of [SSO, MFA, Blackbaud ID & Your Org's Security Posture](#)

# SSO through IdP to Blackbaud ID

If your org has an Identity Provider (IdP), then your Org Admin can create a SSO connection to Blackbaud ID using the options seen below so your colleagues have a single account across applications beyond Blackbaud.



Use Azure AD

Create a connection to your  
Azure Active Directory



Use Google G Suite

Create a connection to your  
Google G Suite



Use SAML 2.0

Create a connection to your  
identity provider with  
Security Assertion Markup  
Language



Use ADFS

Create a connection to your  
Active Directory Federation  
Services



Use Okta

Create a connection to your  
Okta identity management

For a deeper dive watch the recording of [SSO, MFA, Blackbaud ID & Your Org's Security Posture](#)





# Useful Resources

- <https://docs.blackbaud.com/sso-overview-docs/>
- <https://docs.blackbaud.com/bbid-docs/>
- SSO, MFA, Blackbaud ID & Your Org's Security Posture
- Demystifying Blackbaud SKY®



#bbdevdays

Thank you!