

Release Notes: August 2016 (4.91)



To improve your experience in the product, in this release of Target Analytics **ResearchPoint** we updated how you log in to ResearchPoint to use the Blackbaud single sign-on experience with the Omnibar. We also added two new features based on ideas from the Target Analytics user community. We recommend you share this information with all **ResearchPoint** users in your organization.

Introducing the Blackbaud Omnibar

In this release of **ResearchPoint**, we will be updating all **ResearchPoint** sites in waves to the Blackbaud Omnibar with single sign-on support. This means at first you will not notice any changes to how you log in. Then, in small groups we will notify you and then update your site. This enables us to be fully available to help you upgrade, should you need us.

Learn more below about what single sign-on means for you.

One Login Credential!

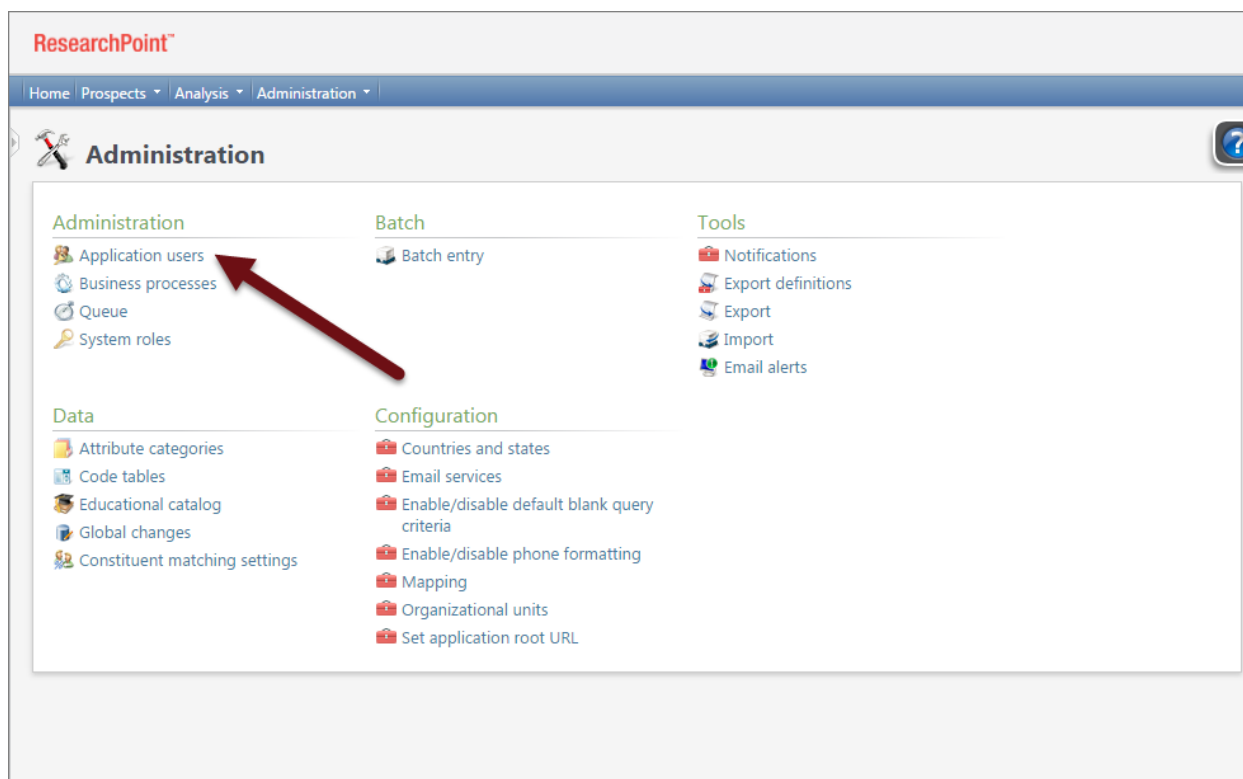
The Blackbaud Omnibar enables you to sign into **ResearchPoint**, [the Blackbaud website](#), and other single sign-on enabled products with one login credential. You no longer have to remember separate credentials.

For example, if you have **ResearchPoint** and **Raiser's Edge NXT**, when you log into **ResearchPoint** with your Blackbaud single sign-on account, you are logged into **Raiser's Edge NXT** too!

Improved Adding of New Application Users

We know there was room for improvement in how you add and manage your application users. As part of this new login experience, we also improved the way you access and update your application users.

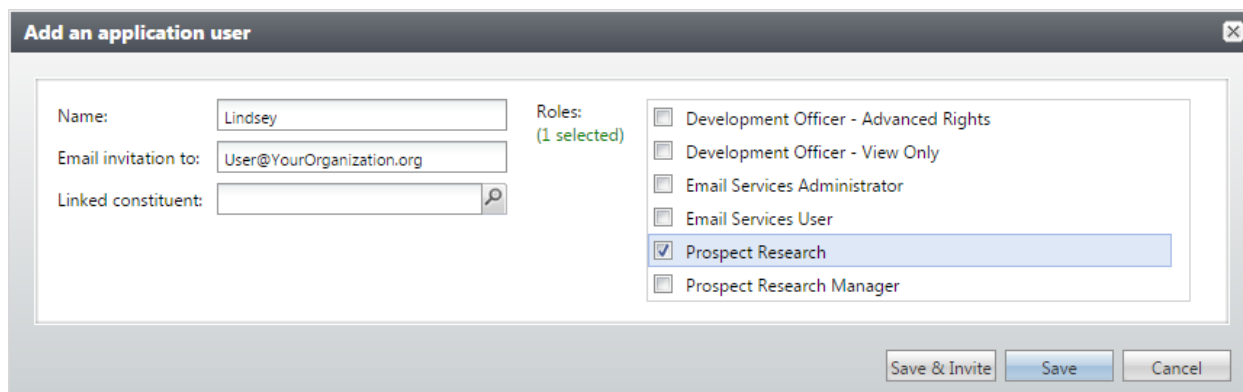
Now, from the *Administration* page, you have a quick link to the one location where you invite, link users to fundraiser constituents, assign system roles, and disable user accounts.




Every task you need to manage your users is available from **Application Users**.

Also, adding new users is easier than ever. From the Application Users page, click **Add**.



When you add a new user, you enter the person's name and email address. You can also link the user to a fundraiser constituent record and select the **ResearchPoint** roles. When ready, click **Save & Invite**.



This emails your user an invitation to **ResearchPoint**.

 Wed 06/08/2016 2:18 PM
ResearchPoint <noreply@blackbaud.com>
Welcome to ResearchPoint

To

 If there are problems with how this message is displayed, click here to view it in a web browser. 

Dear Lindsey,

Ann invited you to join ResearchPoint. ResearchPoint is a powerful tool that enables you to research, understand, and connect with donors. Our software helps you make decisions in prospect development based on data and analytics.

To accept this invitation, please confirm your email.

[Confirm email](#)

You can learn more about ResearchPoint in our [Quick Start Guide](#).

Thanks!

Blackbaud and ResearchPoint

Your user needs to confirm the email address and sign in with her Blackbaud single sign-on account or click **sign up!** to create an account.

blackbaud Sign in

Blackbaud Account sign in

One account, all your Blackbaud products.

Welcome to Blackbaud's new way to sign in with the Omnibar! We're pleased to announce this is the first step towards single sign-on, where you easily access your Blackbaud products and services with one login. For more information, or if you need help with your login, please visit our [website](#).

NEW! You can use Google to sign in!

Does your organization use Google? If you update your Blackbaud account to use Google sign-in, you can also use that email address and password to log into your Blackbaud products. (If not, just use any valid email address to create your Blackbaud account.) If you haven't yet updated your account, click **Sign up** to get started.

More to come.

Many new and exciting features are on the horizon! Details are on the way, but in the meantime we're prioritizing which products will use the new single sign-on. Stay tuned, and thanks for your patience!

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Once you log in, the home page of **ResearchPoint** appears. You're ready to start researching!

How to Add New Users to your Blackbaud Site Account

Site administrators will have one additional step for new users added to **ResearchPoint**. After users have signed up for a Blackbaud single sign-on account, the site administrator needs to add them to the official Blackbaud organization account. This gives users the ability to contact Blackbaud Support, access Training, and more!

Have your organization's site administrator follow these steps.

1. When logged into Blackbaud.com, click the drop-down arrow next to your name at the top of any Blackbaud web page and click your email address to open [your account](#).
2. Under **Organization users**, click **Invite User**. Only individuals with the site administrator role have the **Invite User** link.
3. Enter the user's first name, last name, and email address and click **Submit**. To avoid confusion, enter the email address the user used when signing up for an account.

4. Select the new user's main role and click **Submit**. You can select only one role in this step. Once the user has confirmed the invitation by creating the account on blackbaud.com, you can add additional roles.
5. When you click **Submit**, the user will receive an invitation email and you will receive a copy for your records. The user needs to click the link in the email to complete the process and activate the login.

If you run into any issues or for more information, see [Knowledgebase article 46340](#).

How to Link an Existing ResearchPoint Account to a Single Sign-On Account

If you already have a **ResearchPoint** account, all you need to do is complete a few short steps to connect your **ResearchPoint** credentials to a Blackbaud single sign-on account.

1. After your **ResearchPoint** application has been enabled for the Blackbaud Omnibar and single sign-on access, navigate to your **ResearchPoint** start page.

The screenshot shows the ResearchPoint start page with the Blackbaud logo in the top right. The page includes a 'Start ResearchPoint' button, a 'What's New' section with a photo of three people, and several utility tiles for Training, Knowledgebase, Case Central, and How-to Documentation. A central dashboard displays giving capacity and asset distribution data for John Q. Smith.


Name	Score	Maximum score	Updated on
Annual giving likelihood	765	1000	2/23/2011

2. Click **Start ResearchPoint**. The new Blackbaud authentication screen appears.

blackbaud
Sign in


Blackbaud Account sign in

One account, all your Blackbaud products.




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Sign in

Email

Password

Sign in

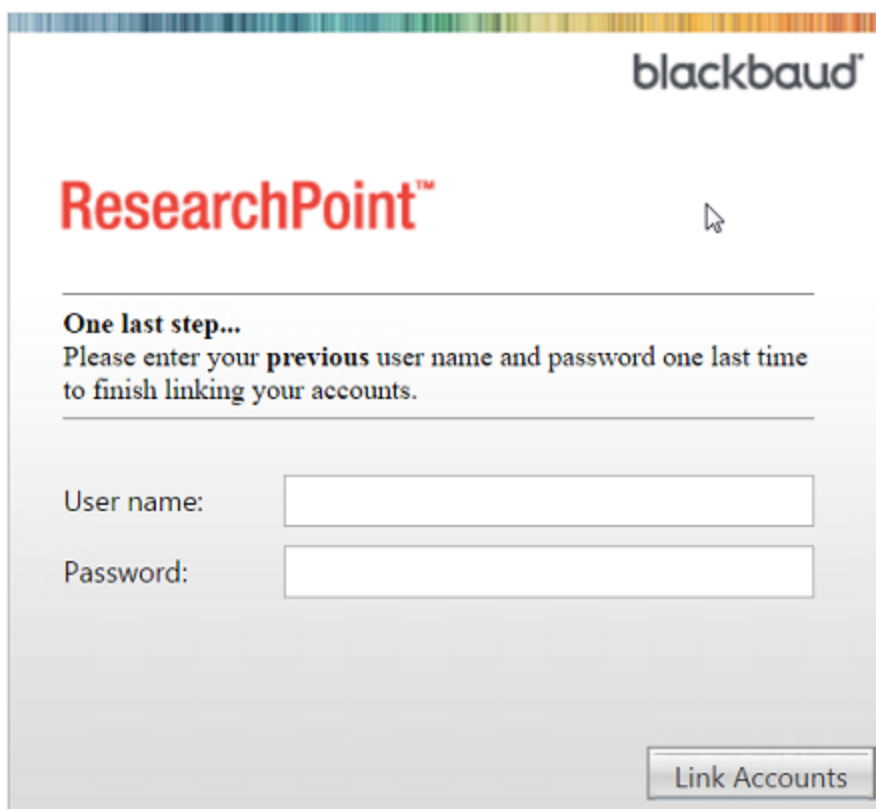
Remember my email
[Forgot password?](#)

Sign in with

Or sign up!

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3. Enter your Blackbaud single sign-on account credentials and click **Sign in**.
4. The first time you log in, you'll see one extra page before you log into the application.

The screenshot shows a web interface for linking accounts. At the top right is the 'blackbaud' logo. Below it is the 'ResearchPoint™' logo in red. A mouse cursor is positioned over the ResearchPoint logo. A horizontal line separates the header from the main content. The main content starts with the heading 'One last step...' followed by the instruction: 'Please enter your previous user name and password one last time to finish linking your accounts.' Below this is another horizontal line. There are two input fields: 'User name:' followed by a text box, and 'Password:' followed by a text box. At the bottom right of the form is a button labeled 'Link Accounts'.

Enter the login credentials you normally use to log in. Your user name is the one appended with your site ID.

5. Click **Link Accounts**. This connects your **ResearchPoint** account to your Blackbaud single sign-on account.

The **ResearchPoint** home page appears. Next time when you log in with Blackbaud authentication, you'll go directly to the application. You don't ever need to use your old **ResearchPoint** credentials again.

Additional Tips

- Are you having trouble logging in or creating an account? See the [Login Help page](#) on our Blackbaud.com website.
- Do you use OData in **ResearchPoint**?

If yes, we recommend you sign up for or use a Blackbaud account and not sign in or create a Blackbaud account with Google. When you authenticate with Google, it doesn't enable you to use OData with **ResearchPoint**.

To verify your permission to use OData in **ResearchPoint**, we require access to authentication information. When you use Google, we do not have access to their authentication information.

If you already have a single sign-on account that you authenticate with Google, we request you contact our Customer Support to help you switch your account.

Update to OData Login Credentials

As part of the switch to the Omnibar with single sign-on support, we need you to make one small change to the login credentials you use with OData.

For example, if you use OData in Microsoft *Excel*, we require you to input credentials to connect to your data in **ResearchPoint**.

Your user name now needs to include your Blackbaud domain name "blackbaudhost\." For example, your user name for the credentials would be similar to "blackbaudhost\johnsmith."

Target Analytics Data Updates

Since our 4.9 release, we have refreshed the data for NOZA, Federal Elections Commission (FEC), and Dun & Bradstreet in our Target Analytics database.

Now, when you perform WealthPoint screenings on a prospect's wealth and ratings record, or when you perform a screening on your research lists, you'll have the latest philanthropic gifts, political donations, and business information.

Community Suggested New Features

This release we added two new features based on feedback from you. If you're interested in determining what we work on for you, contribute your ideas and feedback to the [ResearchPoint Ideas](#). The ideas are located within your [Target Analytics Community](#). From the community home page, in the Navigation Menu, click **Ideas**.

New Research Status Column for Research Lists

We added the research status field as a new column in your research lists. This enables you to see at a glance if your research list members are confirmed or not.

Research Lists
Assets > \$1 Million - Confirmed - Research List

Description: Constituents who have at least \$1 million in confirmed assets.

Owner: Allow others to access: Yes

Category: Allow others to edit: Yes

List members: 5 List can be refreshed: Yes

Auto refresh nightly: Yes

Members (5) + Add member Edit Refresh Map Research list report Delete list More

Search Columns Clear all filters

Name	Primary	Research status	Confirmed assets	Total identified assets	Last screening date
Anupama K. Gambhir	Uncasville	Confirmed	\$17,492,185.71	\$282,397,825.71	5/31/2016
ARTHUR M. BLANK	ATLANTA	Confirmed	\$3,027,078,565.65	\$3,314,642,275.76	6/7/2016
ARTHUR M. BLANK	ATLANTA	Confirmed	\$24,248,839.43	\$3,055,796,193.65	5/31/2016
Michael Dell	austin	Confirmed	\$197,616,124.25	\$292,927,036.74	5/31/2016
MICHAEL DELL	AUSTIN	Confirmed	\$17,361,321.00	\$17,361,321.00	

Search: Search columns

- Real estate confirmed
- Real estate identified
- Research status
- Securities confirmed
- Securities identified
- Social media rating
- Spouse

Apply Cancel

To sort the list by status, click the **Research status** column header.

To filter the list by status, click the funnel icon in the **Research status** column. This enables you to see list members who are only confirmed or not confirmed.

Research status

- All
- Confirmed
- Not confirmed

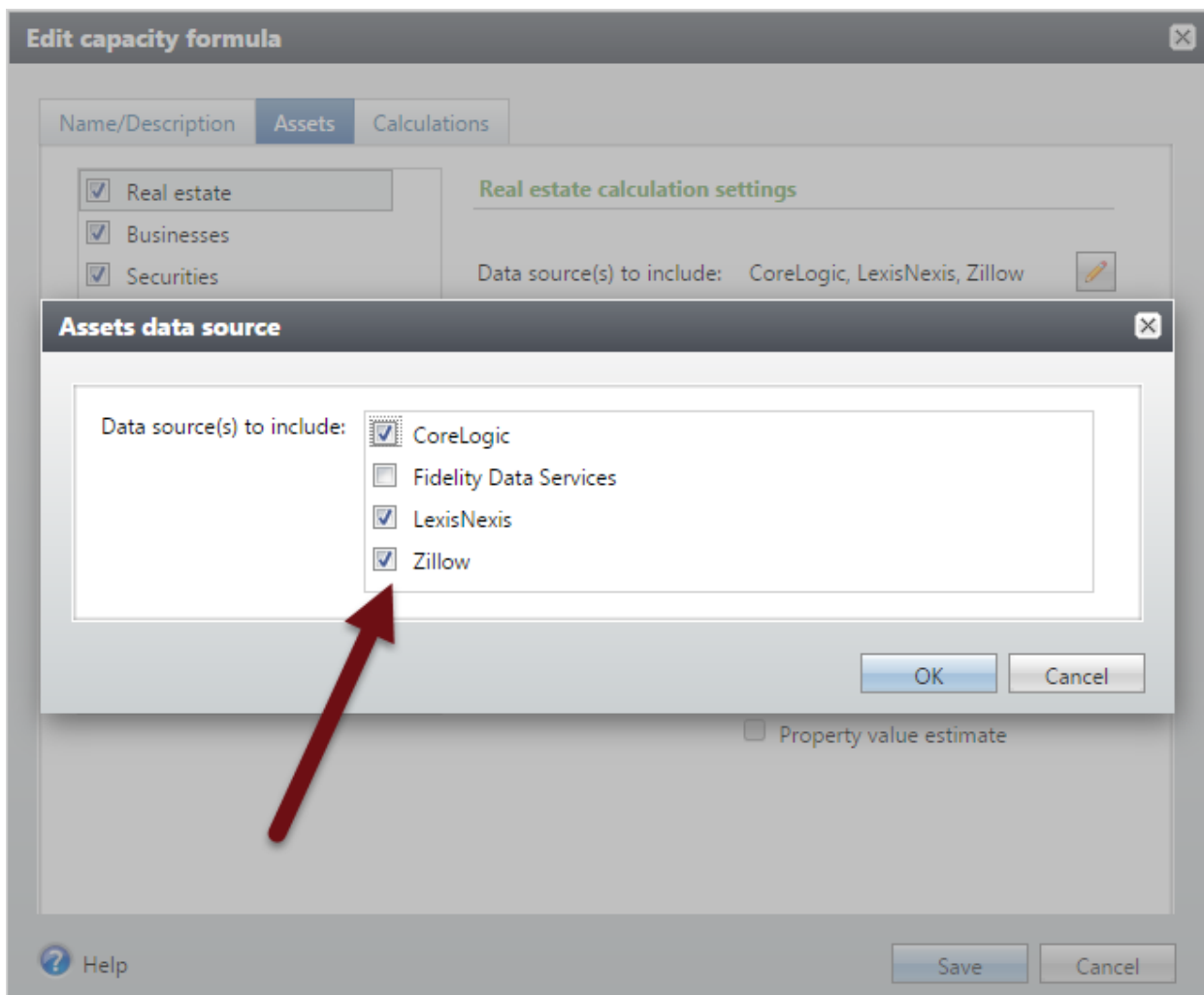
Clear filter Apply Cancel

New Sources Automatically Added to Wealth Capacity Formulas

When you add new data to a prospect and use a new source, the source is now automatically added to existing wealth capacity formulas by default. You no longer have to manually update all of your capacity formulas to account for the new sources of wealth data.

For example, if you found out that a prospect owns a property that's not in Core Logic because it doesn't match the prospect's name and mailing address, you can manually add the property information and add the new source of the information.

In *Prospects*, under **Configuration**, click **Capacity formula management**. On the Assets tab, when you edit a capacity formula you can see that for real estate, in the **Data source(s) to include** field, the new data source has been added and selected automatically. This ensures that the prospect's wealth capacity is updated based on the new information you provided.



If your wealth capacity formula doesn't include real estate in the calculation, this new source selected will not affect the formula.

Thanks to your feedback, we hope this small change can make you more efficient as you add new data to your prospect records.