

## New Features Guide

10/5/2022Blackbaud Altru 5.27 New Features US

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# New Features for Blackbaud Altru 5.27

|                                                               |    |
|---------------------------------------------------------------|----|
| Email Tickets from Daily Sales .....                          | 3  |
| Simplified Password Reset Experience for Web Form Users ..... | 4  |
| Ad-Hoc Query Enhancements .....                               | 5  |
| Authenticate Non-Interactive Accounts via Proxy Users .....   | 7  |
| Overview .....                                                | 7  |
| Data Masking for Sensitive Fields .....                       | 10 |
| Performance Improvements for Program Web Forms .....          | 10 |

Before you use the new **Blackbaud Altru** features released in October 2022, we recommend that you review the information in this guide. It will help you and any other **Altru** users in your organization get the most from the enhancements we introduced.

## Email Tickets from Daily Sales

To save time and resources, you can now email tickets from Daily Sales. Previously, this option was only available for Online and Advance Sales.

### ➤ Enable eTickets for Daily Sales

**Note:** To enable eTickets, you must have at least one delivery method — such as eTicket — configured to email tickets upon completion of order. If you sell tickets through web forms, it's likely this is already configured. Otherwise, you can add a new delivery method. For more information, see [Delivery Methods](#).

1. From *Tickets*, select **Sales methods**, then select **Daily Sales**.
2. Under **Delivery methods**, select **Add**.
3. Select the **eTicket** delivery method (or any delivery method configured to email tickets). If your organization plans to send a majority of tickets via email, you can set it as the default.
4. Choose a receipt default, then **Save**.

Sales Methods  
**Daily Sales**

Status:  Active

Delivery Methods | Fees | Payment Methods | Price Types | Itemized Receipt Options

**Delivery methods** (6)  Add  Filters   

| Delivery method                                                                           | Default                                                                           | Active | Receipt default |
|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|--------|-----------------|
|  Mail    |                                                                                   | Yes    | Print receipt   |
|  eTicket |  | Yes    | Email receipt   |

### ➤ Email Tickets from a Daily Sales Order

Similar to Advance Sales, the delivery method now appears on the Daily Sales order screen.

Order #10002468  Apply pass  Apply tickets  Edit  Delete

Delivery method - eTicket

**Note:** This won't appear on patrons' receipts.

Recipient information automatically defaults to the patron's primary email address. To add or select a different address, select the delivery method, then select **Edit**. For anonymous orders (those without a patron), you must add recipient information.

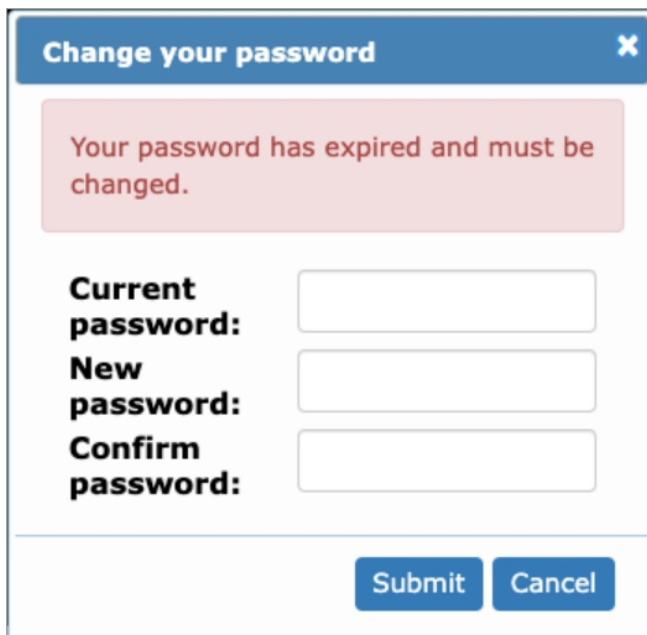
When you complete the sale, an email is sent to the patron with a link to the eTickets page. Settings for the email and eTickets page are shared between Daily Sales, Advance Sales, and Online Sales. To manage page settings, from *Web*, select **eTickets**. For more information, see [Design eTickets Page](#).

## Simplified Password Reset Experience for Web Form Users

Last release, we enforced stronger passwords for web form users. This release, we simplified the password reset experience.

As a reminder, the sign in form prompts a user to change their password if it's more than 365 days old or doesn't meet the new requirements.

The sign in form now displays fields to enter and confirm the user's new password. Previously, users had to select **Forgot your password?** and follow prompts to reset via email.



**Change your password** ✕

Your password has expired and must be changed.

**Current password:**

**New password:**

**Confirm password:**

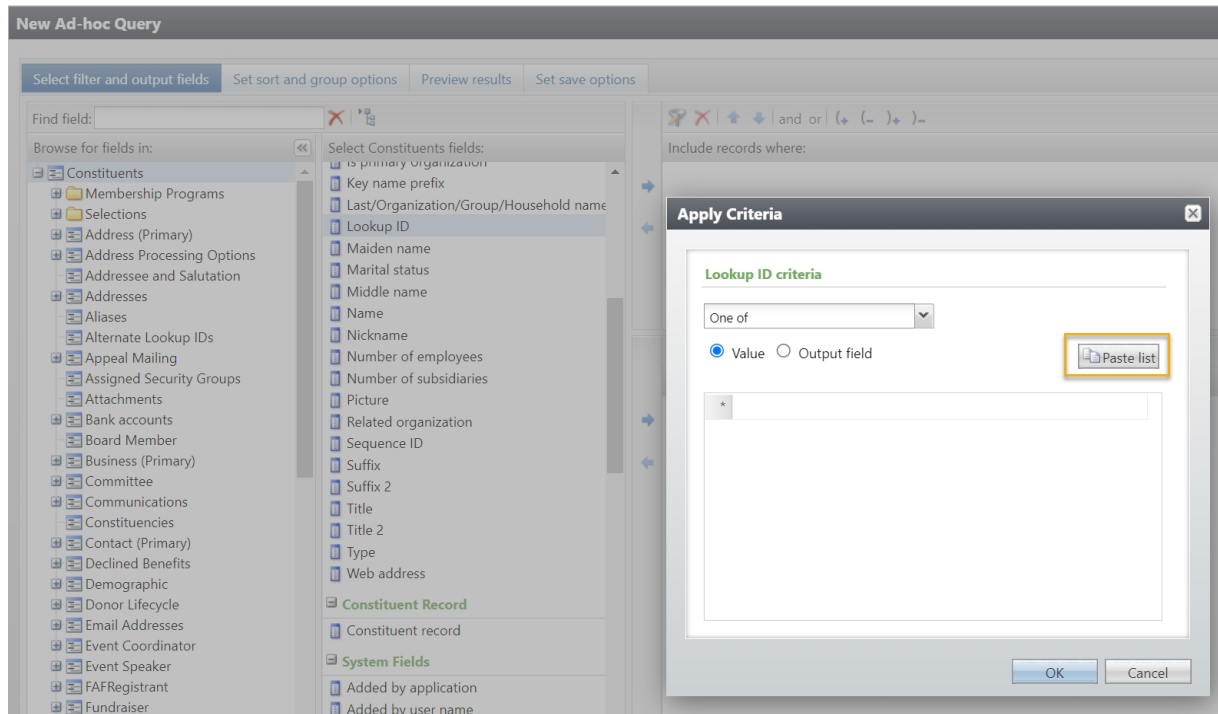
**Submit** **Cancel**

## Ad-Hoc Query Enhancements

This release includes two enhancements to ad-hoc query.

### ➤ Paste a list of values

To speed up data entry, you can now paste a list of values when you use **One of** or **Not one of** criteria in query. Previously, you needed to paste values one at a time.



**Paste list** appears for text and number fields when you select **One of** or **Not one of** criteria. For example, you can copy and paste a list of Lookup IDs from a column in a .csv file.

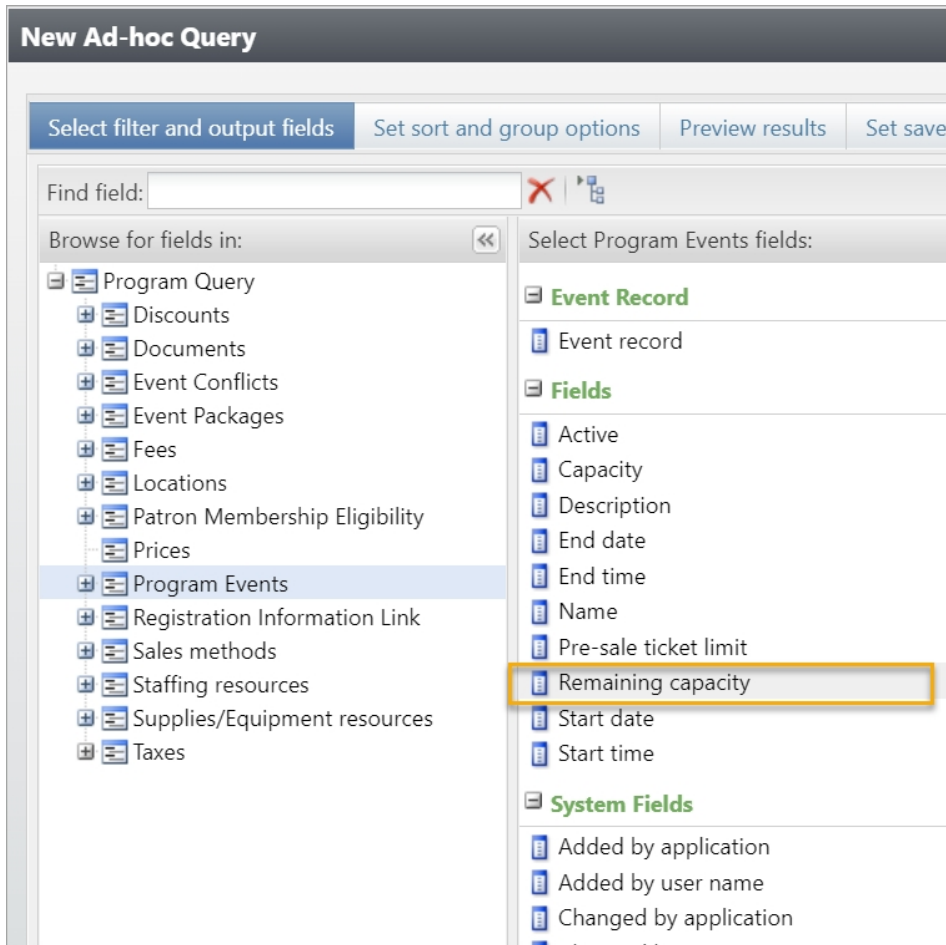
| A          |
|------------|
| 8-10000001 |
| 8-10000002 |
| 8-10000003 |
| 8-10000004 |
| 8-10000005 |

## ➤ View remaining capacity for program events

You can now filter on remaining program event capacity or view it in your query output.

From *Analysis, Information library*, add or edit a program query. From the editor, select **Program Events**, then select **Remaining capacity**.

- To query on remaining capacity, add it to **Include records where**.
- To view remaining capacity in your query output, add it to **Results to display**.



## Authenticate Non-Interactive Accounts via Proxy Users

To provide an easier, more secure way for non-interactive users to authenticate, you can now create proxy users.

### Overview

If your **Altru** database integrates with other systems — such as a custom application or automated processing task — you likely need non-interactive users. These differ from traditional **Altru** users in that they require programmatic access to your database, but don't need to sign in and perform tasks within the **Altru** application itself.

In this release, you can now create proxy users for non-interactive accounts. Proxy users:

- only need to authenticate every 365 days
- authenticate via personal access tokens (PATs) instead of passwords
- don't require an email address
- inherit the same system roles as the linked Blackbaud ID

### ➤ Add a proxy user and generate a PAT

To add a proxy user, you must have system role administrator rights. You must also be signed in with the Blackbaud ID you wish to link the proxy user to.

You can create multiple proxy users for a single Blackbaud ID, such as when you manage multiple integrations for the same **Altru** database.

1. From *Administration*, **Application Users**, select **Add proxy user**.
2. Enter a unique user name and save.

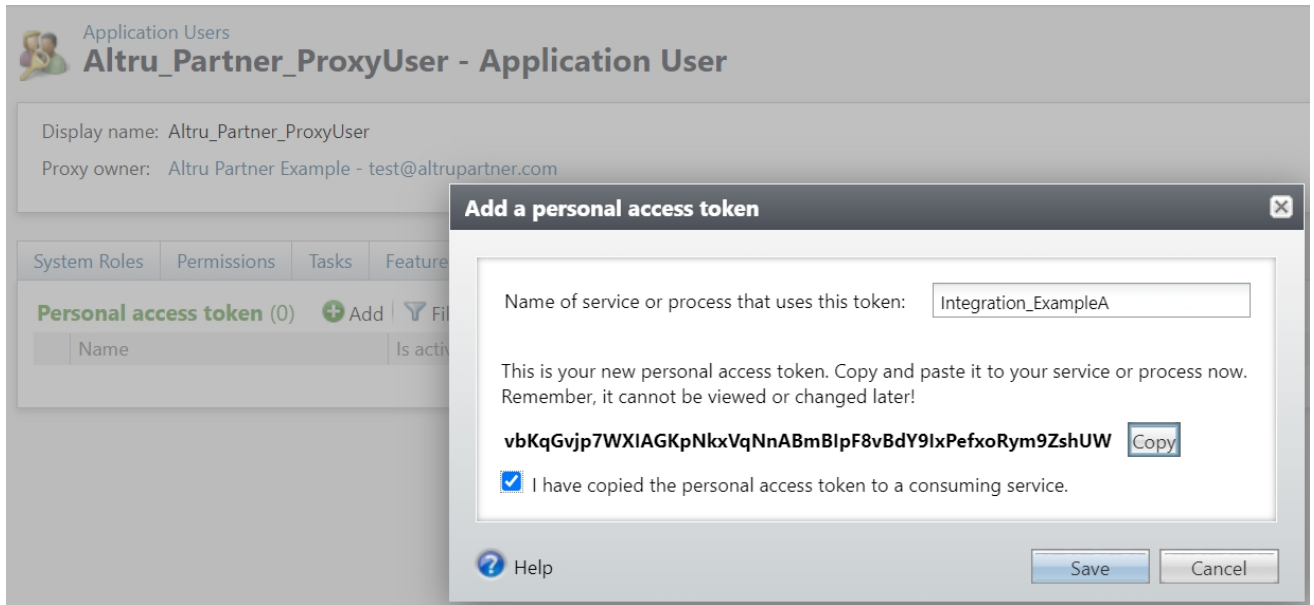
3. From the list of application users — or from the **Proxy Users** tab of your Blackbaud ID record — open the proxy user record.

4. Select the **Personal Access Token** tab, then select **Add**.

You can return to the proxy user and add a PAT at any time.

5. Enter the name of the service or process that uses the token.

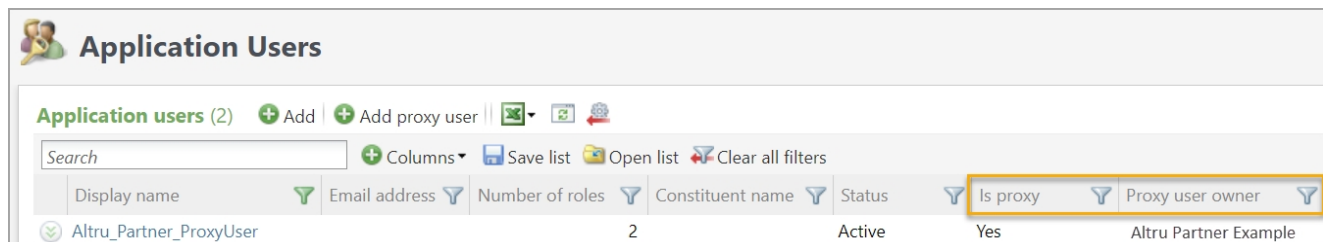




6. Copy the token and sign in to your service or process, or store it in a secure location. For your security, you won't be able to view it again.
7. Confirm that you copied the PAT, then **Save**.

## > Manage proxy users

Proxy users appear under *Administration, Application Users*. To easily identify them, select **Columns**, then add the **Is proxy** and **Proxy user owner** columns.



To delete, inactivate, or reactivate a proxy user, expand its row.

- Proxy users are automatically marked inactive after five consecutive failed attempts to authenticate.
- When a proxy user becomes inactive, this revokes all associated PATs.
- Any time you reactivate a proxy user, you must add a new PAT.

To manage a proxy user's roles or PATs, open its record.

- You can add or remove roles at any time.
- You can only add a role if the linked Blackbaud ID user also has it.

If you mark a Blackbaud ID user inactive, all linked proxy users are also marked inactive. If you reactivate the Blackbaud ID, you must reactivate proxy users separately. If you delete a role from a Blackbaud ID, it's also deleted from its proxy users.

### ➤ Revoke a PAT

You can revoke a PAT for any reason, such as when the token is expired.

1. From the Application Users page, open the proxy user record.
2. Select the **Personal Access Token** tab.
3. Expand the row of the PAT and select **Revoke PAT**.
4. Select a reason. If you have rights to add code table entries, you can enter a custom reason.
5. **Save**.

### ➤ Globally revoke expired PATs

PATs expire after 365 days. You can schedule a process to automatically revoke expired PATs that are no longer in use.

1. From *Administration*, select **Global changes**.
2. Select **Add**.
3. Select the **Manage personal access tokens** global change process, enter a name, and save.

The process automatically runs and displays the number of records processed.

From the global change process record, you can create a schedule to automatically run the process on a regular basis. For more information, see [Create a job schedule](#).

## Data Masking for Sensitive Fields

To ensure your data remains secure, **Altru** now masks Social Security Numbers and financial account numbers (on constituent records) and bank account numbers (on bank records).

## Performance Improvements for Program Web Forms

To provide your patrons with quicker response times when purchasing tickets online, web forms now cache data for page loads, program event calendars, and time selectors.

As part of these improvements, **Altru** now limits scheduling program events to no more than 365 days in the future.