Troubleshoot Guide

Contents

Troubleshoot

This chapter includes information about scenarios that could affect the performance of the program. Additional topics will be added to the chapter as areas are identified where documentation can assist in troubleshooting.

Test Environment Considerations

A test environment may be necessary for your organization to evaluate the impact of a new release, patch, or new functionality against current business practices before going "live". To properly prepare for this endeavor, it is important to plan appropriately.

Review the following questions as an organization before you move forward with a test environment.

Why

What does your organization want to achieve with the test environment?

For example, do you want to evaluate new functionality, review setup or upgrade procedures, or confirm changes to business processes?

Who

Do you have the right technical staff to implement the applications and support the organization through this process? Are they familiar with the software, environment (systems), and installation procedures?

☐ Consider all integrated Blackbaud applications and any third-party applications that your organization uses.

☐ Before implementation, review the program's New Features Guide to become familiar with the new functionality you will implement.

Where

Are the appropriate systems available, and do you have access within those systems to set up, configure, and connect to required systems as defined in the Blackbaud Internet Solutions System Requirements and Blackbaud Internet Solutions Configuration Overview documents?

☐ We recommend you review your current configuration to determine where the test environment will fit and whether it needs to be on a separate system.

☐ Review the Blackbaud Internet Solutions Configuration Overview to evaluate the scenarios to set up if the entire test environment is "on premise."

- Please consult Blackbaud Services if you require a test environment in our Blackbaud Application Hosting environment.
- The Configuration Overview provides recommendations for server and network configurations in a live environment. If it fits within your organization's goals for the test environment, it is reasonable to apply a more consolidated approach to the test environment and have Blackbaud Internet Solutions components on the same system.

Warning: Do not set up a test environment web server or web service server on the same system as your live web server or web service server.

How

Have you reviewed the following important information to make sure the test environment implementation is successful?

- For each version of a Blackbaud product that you plan to implement in your test environment, make sure you review the product's system requirements document and installation guide. For example, if only SQL Server 2005 is supported on a new version but you have SQL Server 2000, you must prepare a SQL Server 2005 system.
- Do not set up a test environment web server or web service server on the same system as your live web server or web service server.
- To use your current Blackbaud data in the test environment, back up each program's database and restore it to a new named database. When you install the test systems, point the programs to these copies of the databases.
- After you set up a Blackbaud Internet Solutions test environment, change the plug-in options to point to the test plug-in service. If you do not, you will download transactions from your live environment.
- Blackbaud Services: When you back up your production environment's database and restore it in a test environment, the production environment's configuration is used by the test environment if you do not update it. For example, you can inadvertently charge credit cards and send unwanted or duplicate emails if you do not update the environment's configuration. Refer to Knowledgebase for more information.

  Note: Your System Administrator can use the BlockAllEmails and BlockScheduledEmails settings to prevent inadvertently sending email messages and scheduled email from a test environment. To do this, you must add <add key="BlockAllEmails" value="True" /> and <add key="BlockScheduledEmails" value="True" /> to the appSetting node in both web.config files for Blackbaud Internet Solutions and Blackbaud CRM. By default these settings do not appear in the file, and the default behavior is False.

- Within the system itself, the test environment does not support porting or migrating changes from the test environment to the live environment.

Support

What is and is not supported by Blackbaud Internet Solutions Support?

- We do not support test environments that an organization creates or manages on their own. However, we do support test environments when the organization engages Blackbaud Services to build them.

- We do not support issues caused by customizations not developed by or installed by Blackbaud Services.

- We do not support performance issues encountered or caused by a test environment, whether installed by Blackbaud Services or not. If there is a strong case that the performance issues exist in a "live" environment, Blackbaud Internet Solutions Support can review the problem.

Tip: Support resources are available from Blackbaud's website.