The Raiser's Edge™

7.92 Installation Guide

012218

©2018 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

RE7Enterprise-SQLInstallationGuide-012218

Contents

WHAT IS IN THIS GUIDE? III

INSTALL THE RAISER'S EDGE 1

System Requirements 2
Work with Sample Data 2
Steps to Install The Raiser's Edge 2
Requirements for The Raiser's Edge Installation 3
Install The Raiser's Edge on a Standalone Workstation 6
Install The Raiser's Edge on a Network of Workstations 13
Create a Database 21
Install The Raiser's Edge on Multiple Workstations 25
Silently Install The Raiser's Edge 31
Deploy The Raiser's Edge as an MSI Package 31

POST INSTALLATION 33

Log into The Raiser's Edge 34
Checklist to Get Started on The Raiser's Edge 37
Other Helpful Information 38

INSTALL CRYSTAL REPORTS XI 39

Crystal Reports XI Installation 39

INSTALL OFFICE XP WEB COMPONENTS 51

Microsoft Office XP Web Components Installation 51

GLOSSARY 55

A 56

B **56**
C **56**
D **56**
I **57**
L **57**
N **57**
O **57**
P **57**
R **58**
S **58**
T **58**
U **59**
V **59**
W **59**

INDEX 61

What Is In This Guide?

In the *Installation Guide*, we take new ***Raiser's Edge*** users step-by-step through the installation process. This guide includes the following information and more.

- "Requirements for The Raiser's Edge Installation" on page 3
- "Install The Raiser's Edge on a Standalone Workstation" on page 6
- "Install The Raiser's Edge on a Network of Workstations" on page 13
- "Post Installation" on page 33
- "Crystal Reports XI Installation" on page 39
- "Microsoft Office XP Web Components Installation" on page 51

How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access ***The Raiser's Edge*** documentation from several places.

User Guides. To access PDF versions of the guides, select **Help**, **User Guides** from the shell menu bar or click **Help** on the Raiser's Edge bar in the program. You can also access the guides on our website at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, to learn about ***The Raiser's Edge***, access the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Install The Raiser's Edge

System Requirements **2**
Work with Sample Data **2**
Steps to Install The Raiser's Edge **2**
Requirements for The Raiser's Edge Installation **3**
SQL Server Requirements 5
Required NTFS Rights 5
.NET Framework 2.0 Customizations & Product Compatibility 6
Install The Raiser's Edge on a Standalone Workstation **6**
Install The Raiser's Edge on a Network of Workstations **13**
Create a Database **21**
Install The Raiser's Edge on Multiple Workstations **25**
Silently Install The Raiser's Edge **31**
Deploy The Raiser's Edge as an MSI Package **31**

Procedures

Install The Raiser's Edge on a standalone machine 6
Install The Raiser's Edge for use on a network 13
Create a database 21
Install The Raiser's Edge on each workstation on a network 25

This chapter includes detailed information and procedures for new users of ***The Raiser's Edge***. This chapter provides information about how to install your new software and create a database. To install ***The Raiser's Edge*** on a server, you must be an administrator.

System Requirements

The Raiser's Edge includes Microsoft's *SQL Server 2005 Express Edition*. This version of *SQL Server* works for databases smaller than 3.7 GB. If your database exceeds this limit, you must purchase Microsoft's *SQL Server 2005 Standard, Enterprise*, or *Workgroup* editions, or *SQL Server 2008*.

Before you install ***The Raiser's Edge***, we strongly recommend you familiarize yourself with system requirements for ***The Raiser's Edge***. You can access the system requirements from the Blackbaud website at www.blackbaud.com. From the website, click **Products**, **System Requirements**.

Work with Sample Data

Sample data is installed with ***The Raiser's Edge***. This enables you to practice with the program before you create your database. As the sample data contains examples of the many features available in the program, we recommend you use it as a training tool.

Steps to Install The Raiser's Edge

You can install ***The Raiser's Edge*** on a standalone workstation or on a network of workstations. Regardless of the installation, you should follow these steps to install ***The Raiser's Edge***.

- ❑ To ensure the installation of ***The Raiser's Edge*** goes smoothly, make sure you meet the requirements of the installation. For more information about the installation requirements, see "Requirements for The Raiser's Edge Installation" on page 3.
- ❑ Check the Blackbaud website at www.blackbaud.com for any updates. From the menu bar, select **Support**, **Downloads**.
- ❑ Install the program.
  - To install ***The Raiser's Edge*** on a standalone workstation, see "Install The Raiser's Edge on a Standalone Workstation" on page 6. A standalone machine is set up for one user, and data is accessed from only the one workstation.
  - To install ***The Raiser's Edge*** on a network, see "Install The Raiser's Edge on a Network of Workstations" on page 13. A network installation configures the software for multiple users who work on multiple workstations.
- ❑ Create a database. For detailed instructions, see "Create a Database" on page 21.
- ❑ If you install ***The Raiser's Edge*** on a network, install the program on the workstations on the network.
  - To access the software deployment kit from each workstation to install ***The Raiser's Edge***, see "Install The Raiser's Edge on Multiple Workstations" on page 25.
  - To silently install ***The Raiser's Edge*** in the background of the workstation, without input or interaction from the user, see "Silently Install The Raiser's Edge" on page 31.
  - To use *System Management Server* (SMS), *Group Policy Object* (GPO), or another management and deployment service capable of deploying *Microsoft Installer* (MSI) packages to install ***The Raiser's Edge***, see "Deploy The Raiser's Edge as an MSI Package" on page 31.

Requirements for The Raiser's Edge Installation

To ensure the installation of ***The Raiser's Edge*** goes smoothly, make sure you meet these requirements before you install the program.

- If you use ***The Financial Edge***, you must have ***The Financial Edge 7.2*** or higher installed to work with ***The Raiser's Edge 7.92***.
- If you use ***Blackbaud NetCommunity***, you must have a version that complies with the Payment Application Data Security Standards (PA DSS) to work with ***The Raiser's Edge 7.92***.

Blackbaud does not support Microsoft *SQL Server Express* or ***The Raiser's Edge*** on Domain controllers, Small Business Servers, *NT 4.0 Server*, or peer-to-peer networks.

- You need a CD-ROM drive or the downloaded installer.
- Exit all *Windows* applications on the server where ***The Raiser's Edge*** will be installed.
- Each workstation that runs ***The Raiser's Edge*** must have Microsoft's *Internet Explorer 6.0* or higher installed to complete the installation. Visit Microsoft's website at www.microsoft.com/ie to download the latest version.
- To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), ***The Raiser's Edge*** does not store credit card numbers in your database. To securely store sensitive credit card and merchant account information, the program uses the Blackbaud *Payment Service* web service. Before you can download the installation utility for ***The Raiser's Edge 7.92***, your organization must have an account with the Blackbaud *Payment Service* or select to truncate all credit card numbers in your database. If you attempt to download the utility before your organization has done either, the Blackbaud *Payment Service* web page appears.

  After you install ***The Raiser's Edge***, you must enter a user name and password for the web service. If your organization uses *ICVerify* to process credit card transactions through the program, you also enter the security token to identify your organization when *ICVerify* requests credit card information from the Blackbaud *Payment Service*.
- To use the Blackbaud *Payment Service* to store your credit card information, you must have an Internet connection. If you cannot access the Internet to connect to the web service, you must either delete the credit card information from your database or cancel the installation process.

Note: Microsoft offers three licensing models for *SQL Server*, each designed to meet specific customer needs. For web applications, Microsoft recommends a separate Processor license for each processor the *SQL Server* instance uses. It includes access for an unlimited number of users or devices to connect to the *SQL Server* instance from either inside or outside the firewall. When licensed under the per processor model, additional Server Licenses or client access licenses (CALs) are not required. We recommend you review your Microsoft *SQL* licenses and ensure you have the required licensing. Visit www.microsoft.com/sql/howtobuy/sqlserverlicensing.mspx for information about Microsoft's *SQL Server* licensing requirements.

- If you use Microsoft *SQL Server 2000 Standard* or *Enterprise* editions, Service Pack 4 or higher is required. The patch keeps your system current with Microsoft's security recommendations. If Service Pack 4 or higher is not installed, visit Microsoft's website at http://technet.microsoft.com/en-us/sqlserver/bb331729.aspx to download it.
- If you use Microsoft *SQL Server 2005 Standard*, *Workgroup*, or *Enterprise* editions, Service Pack 2 is required and Service Pack 3 is supported. The patch keeps your system current with Microsoft's security recommendations. If Service Pack 2 is not installed, visit Microsoft's website at http://technet.microsoft.com/en-us/sqlserver/bb331754.aspx to download it.
- If you use Microsoft *SQL Server 2005 Express*, Service Pack 2 is required and Service Pack 3 is supported. The patch keeps your system current with Microsoft's security recommendations. If Service Pack 2 is not installed, visit Microsoft's website at http://technet.microsoft.com/en-us/sqlserver/bb426877.aspx to download it.

- If you use Microsoft *SQL Server 2008*, Service Pack 1 is supported. We recommend that you monitor patches to keep your system current with Microsoft's security recommendations. To monitor patches for *SQL Server 2008*, visit Microsoft's website at http://technet.microsoft.com/en-us/sqlserver/bb671408.aspx.
- Each workstation that runs Microsoft *Windows 2000* must have Service Pack 4 or higher installed; workstations that run Microsoft *Windows XP* must have Service Pack 2 or higher installed. If the required service pack is not installed, visit Microsoft's website at www.microsoft.com/downloads/ to download the latest version.
- To view online documentation for ***The Raiser's Edge***, Adobe *Acrobat Reader* is required. If *Acrobat Reader* is not installed, visit Adobe's website at http://www.adobe.com/products/reader/ to download the latest version for free.
- Close any virus scan programs on the server and workstations. These programs can sometimes mistakenly interpret the installation process of a new program as a contamination of existing files on the disk.
- Close the Microsoft *Office* toolbar, if present. It can interfere with the installation of some files.
- Due to the integration between ***The Raiser's Edge*** and Microsoft *Outlook*, if your workstation runs *Outlook*, exit and log out of *Outlook* before you install ***The Raiser's Edge***. If you fail to exit and log out of *Outlook*, the update may not install properly.
- Before you can install ***The Raiser's Edge***, these prerequisites must be installed:
  - Microsoft *Windows Installer 3.1*
  - Microsoft *Data Access Components (MDAC) 2.8*
  - Microsoft *.NET Framework 2.0*
  - *Visual Basic for Applications* (VBA) components
  - *Crystal Report XI* runtime components
  - Microsoft XML components/XML parser

Note: If your organization has many users and you experience performance issues using ***The Raiser's Edge*** with *SQL Server Express*, we recommend you purchase Microsoft *SQL Server 2005 Standard*, *Workgroup*, or *Enterprise* editions, or *SQL Server 2008*.

  - Microsoft *SQL Server 2005* or *SQL Server 2008*
  - Microsoft *SQL Server 2005 Express* backward compatibility components
  - Blackbaud *SQL Server* verification, to ensure Service Pack 2 is installed for Microsoft *SQL Server 2005.* Service Pack 3 is also supported.

  The *SQL Server 2005 Express*, *SQL Server 2005 Express* backward compatibility components, and *SQL Server* verification are only applicable to the server that hosts your ***The Raiser's Edge*** database.

  If you do not have administrator rights, your system administrator must install the prerequisites before you can successfully install and use ***The Raiser's Edge.*** If you are an administrator, the prerequisites your system requires are installed prior to the installation of ***The Raiser's Edge.***

- *Dashboard* in ***The Raiser's Edge*** requires certain web components installed with Microsoft *Office XP* to work. Microsoft's *Office* Setup automatically installs these web components. If you do not have Microsoft *Office XP* installed, see "Microsoft Office XP Web Components Installation" on page 51.
- After you complete the installation, perform the backups and maintenance items outlined in the *Database Administration Guide*.

SQL Server Requirements

Note: Microsoft offers three licensing models for *SQL Server*, each designed to meet specific customer needs. For web applications, Microsoft recommends a separate Processor license for each processor the *SQL Server* instance uses. It includes access for an unlimited number of users or devices to connect to the *SQL Server* instance from either inside or outside the firewall. When licensed under the per processor model, additional Server Licenses or client access licenses (CALs) are not required. We recommend you review your Microsoft *SQL* licenses and ensure you have the required licensing. Visit www.microsoft.com/sql/howtobuy/sqlserverlicensing.mspx for information about Microsoft's *SQL Server* licensing requirements.

If you install ***The Raiser's Edge*** on a network, make sure you meet these requirements to ensure Microsoft *SQL Server* works properly with the ***The Raiser's Edge*** database.

- *SQL Server* administrators who use **Windows Only Authentication** must apply the "View Server State" permission to each Microsoft *Windows* user or user group that accesses ***The Raiser's Edge***.
- Grant public role access to ***The Raiser's Edge*** databases.
- On the machine that runs the Blackbaud Management Console, install *SQL Server* client tools.
- In the *SQL Server Configuration Manager*, enable Named Pipes and TCP/IP.
- In the *SQL Server Area Configuration*, enable xp_cmdshell.
- If you use Microsoft *SQL Server 2000 Standard* or *Enterprise Edition*, Service Pack 4 or higher is required. The patch keeps your system current with Microsoft's security recommendations. If Service Pack 4 or higher is not installed, visit Microsoft's website at http://technet.microsoft.com/en-us/sqlserver/bb331729.aspx to download it.
- If you use Microsoft *SQL Server 2005 Standard*, *Workgroup*, or *Enterprise* editions, Service Pack 2 is required and Service Pack 3 is supported. The patch keeps your system current with Microsoft's security recommendations. If Service Pack 2 is not installed, visit Microsoft's website at http://technet.microsoft.com/en-us/sqlserver/bb331754.aspx to download it.
- If you use Microsoft *SQL Server 2005 Express*, Service Pack 2 is required and Service Pack 3 is supported. The patch keeps your system current with Microsoft's security recommendations. If Service Pack 2 is not installed, visit Microsoft's website at http://technet.microsoft.com/en-us/sqlserver/bb426877.aspx to download it.
- If you use Microsoft *SQL Server 2008*, Service Pack 1 is supported. We recommend that you monitor patches to keep your system current with Microsoft's security recommendations. To monitor patches for *SQL Server 2008*, visit Microsoft's website at http://technet.microsoft.com/en-us/sqlserver/bb671408.aspx.

For more information about how to prepare Microsoft *SQL Server 2005* for use with ***The Raiser's Edge*** databases, see Knowledgebase Solution BB245576.

For more information about how to prepare Microsoft *SQL Server 2008* for use with databases in ***The Raiser's Edge***, see Knowledgebase Solution BB541928.

Required NTFS Rights

The installation process does not affect workstation or network security. If necessary, you must manually change the NT File System (NTFS) rights on the server and workstations.

Note: The directories listed are system defaults only. Your directory locations and names may be different if they were changed from the original default settings.

To use ***The Raiser's Edge*** on a workstation, users need NTFS rights to these directories, including subdirectories:

Directory	Permissions

Deploy folder on server	RX
C:\Program Files\Blackbaud\The Raiser's Edge	FULL
C:\Program Files\Common Files\Blackbaud	FULL
C:\System Temp Folder	FULL
C:\WINNT\SYSTEM32	RX

- When you add these NTFS folder permissions, click **Advanced** on the NTFS Properties tab and mark **Reset permissions on all child objects and enable propagation of inheritable permissions**. This step propagates the permissions to all files and folders within the parent folder.
- For information about how to edit NTFS permissions, see Blackbaud Knowledgebase Solution BB3124.
- If these rights are insufficient, we recommend you use *FileMon* to determine where additional rights are required. *FileMon* is a third-party utility that is useful for troubleshooting permission issues. For more information about *FileMon*, see Blackbaud Knowledgebase Solution BB50451.

.NET Framework 2.0 Customizations & Product Compatibility

The Raiser's Edge requires the Microsoft .NET Framework 2.0. If not already installed, it is installed during the installation process.

After you upgrade, any customizations in ***The Raiser's Edge*** compiled with the .NET 1.1 Framework may experience issues. This also applies to any ***The Raiser's Edge*** PIAs referenced in your code. Before you upgrade in a production environment, we recommend you test all applications in a development environment.

Install The Raiser's Edge on a Standalone Workstation

This procedure explains how to install the standalone version of ***The Raiser's Edge***. Blackbaud does not support installing Microsoft *SQL Server Express* or ***The Raiser's Edge*** on domain controllers, small business servers, *NT 4.0 Server*, or peer-to-peer networks.

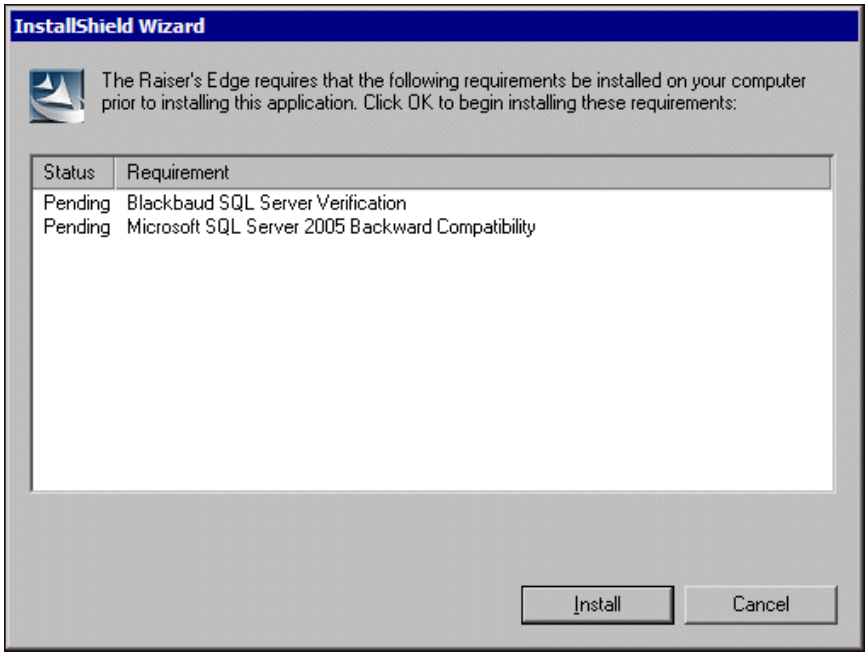
Install The Raiser's Edge on a standalone machine

To access ***The Raiser's Edge*** online documentation, you must have Adobe *Acrobat Reader* installed. The CD contains an installer for this program, or you can visit Adobe's website at www.adobe.com to download it.

1. Launch the setup utility:
   - If you have ***The Raiser's Edge*** installation on a CD, put the CD in the CD-ROM drive. The setup begins automatically.
   - If you download ***The Raiser's Edge*** installation, extract the installation files to a directory on your computer. After you extract the files, browse to the directory and double-click the setup.exe file.

To install the prerequisites, you must have administrator rights. If you are not at least a Power User, your system administrator must install the prerequisites before you can use ***The Raiser's Edge.***

2. The InstallShield Wizard screen appears and lists the prerequisites. At a minimum, "Blackbaud SQL Server Verification" appears as a prerequisite. To install the prerequisites, click **Install**.

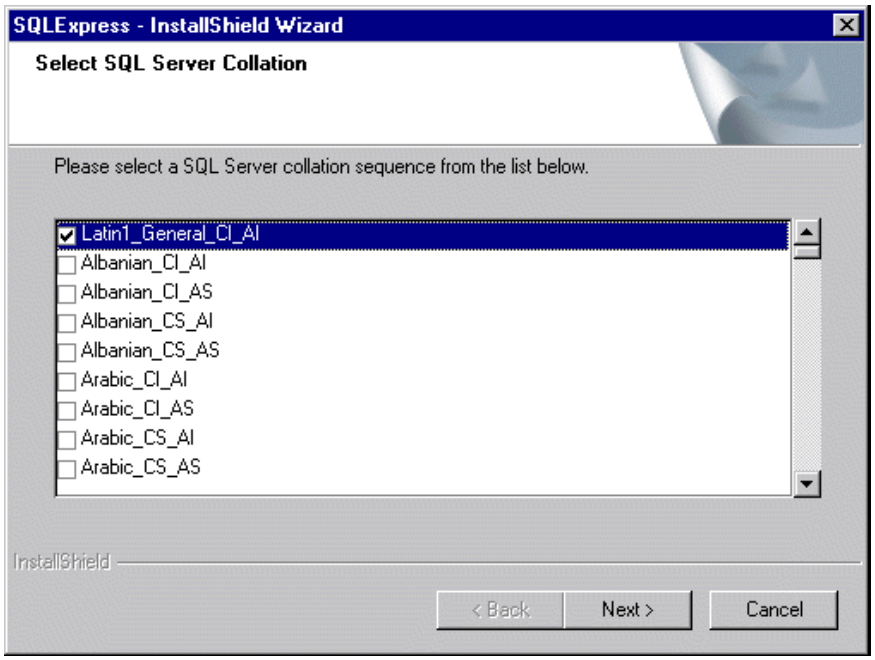


Note: To manually install Service Pack 2 or higher for *SQL Server 2005*, click **No**. The setup utility installs any remaining prerequisites and then cancels the installation. You can download and install the service pack from Microsoft's website.

For Microsoft *SQL Server 2005 Express* or *SQL Server 2005 Standard, Workgroup,* or *Enterprise* editions, the installation of ***The Raiser's Edge*** requires Service Pack 2. Service Pack 3 is also supported. If the *SQL Server* verification tool detects that your version does not meet this service pack requirement, a message appears. To automatically install the required service pack, click **Yes**.

3. If *SQL Server Express* is required and the **Language for non-Unicode programs** in your computer's **Regional Options** settings is set to a country other than those listed below, the Select SQL Server Collation screen appears.
   - ENGLISH_UNITED_STATES
   - ENGLISH_BRITAIN
   - ENGLISH_CANADA
   - ENGLISH_NEW_ZEALAND
   - ENGLISH_AUSTRALIA
   - ENGLISH_IRELAND
   - ENGLISH_SOUTH_AFRICA
   - ENGLISH_CARRIBEAN

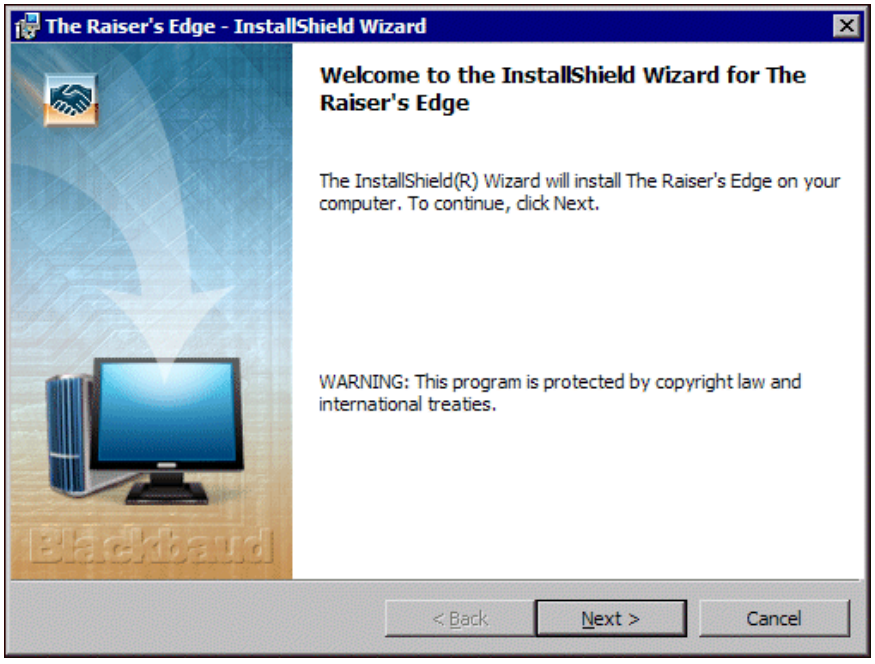
- ENGLISH_JAMAICAN



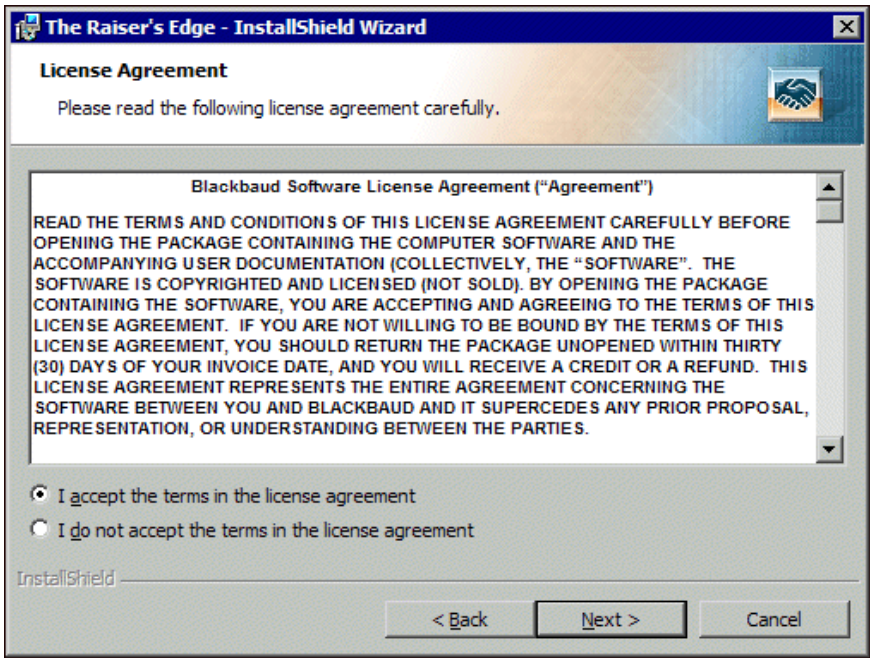
Mark the SQL server collation sequence required for your regional setting and click **Next**. For the regions listed above, **Latin1_General_CI_AI** is the default.

If prerequisites fail to load, you can manually install them from the ISSetupPrerequisites folder. If *.NET Framework 2.0* fails to install, the installation will not continue. If *SQL Server Express* fails to install, please see Knowledgebase Solution BB302042.

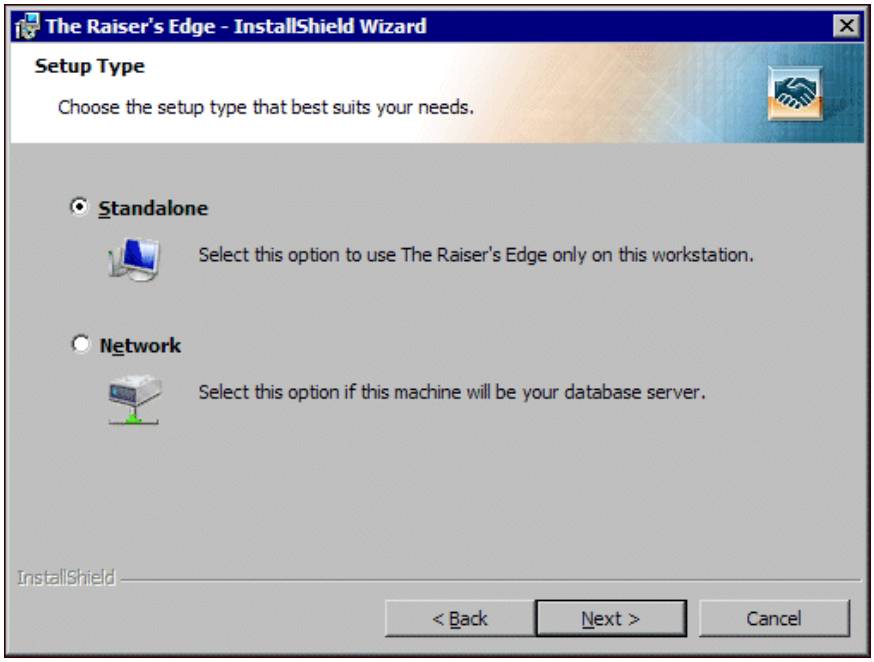
4. Depending on the prerequisites to load, the setup utility may take some time. When the setup utility is ready, a welcome screen appears.



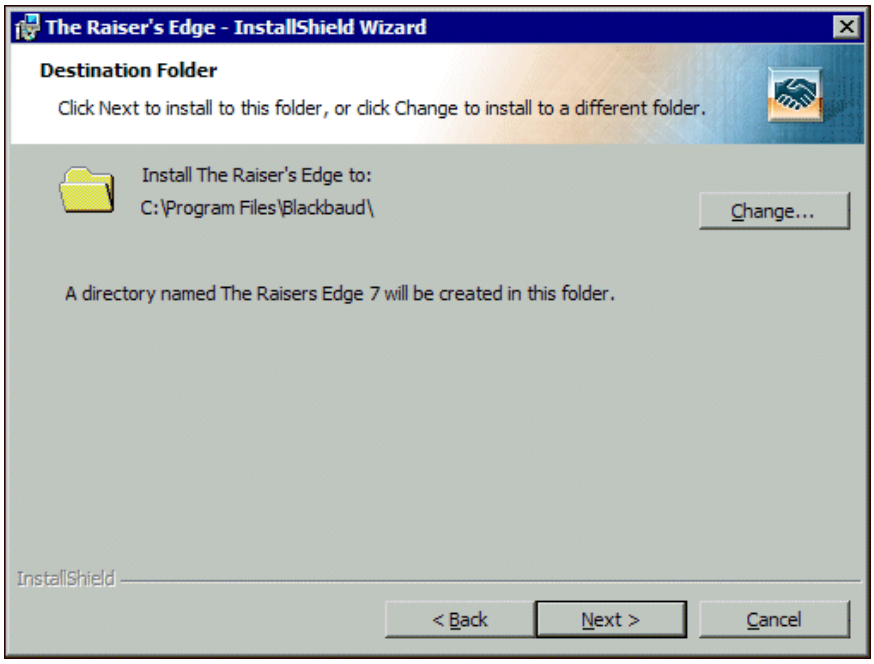
Click **Next**. The License Agreement screen appears.



5. Review the terms of the license agreement. To print the license agreement, click **Print**.
6. If you accept the terms of the license agreement, select **I accept the terms in the** license **agreement**.
7. Click **Next**. The Setup Type screen appears.



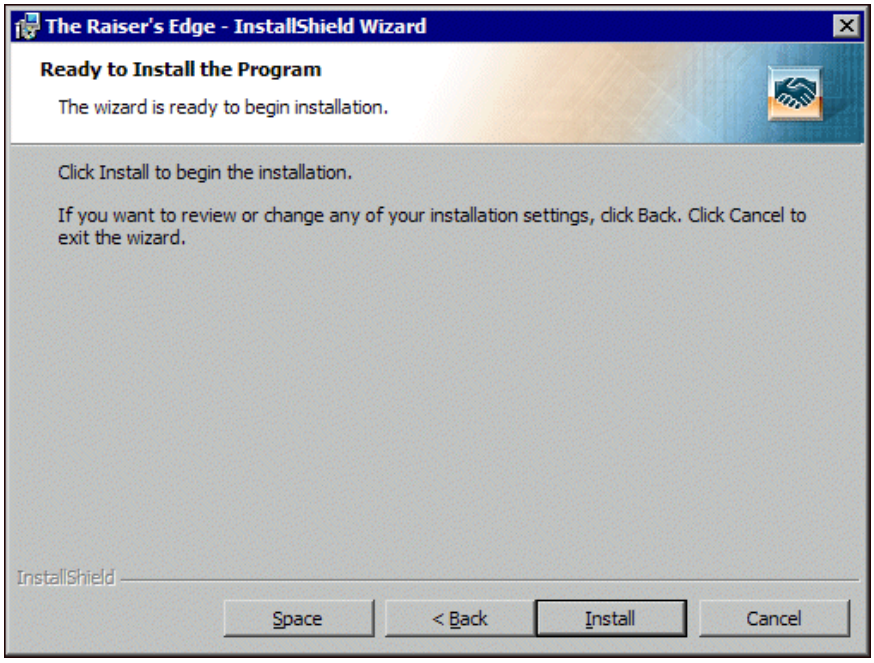
8. Select **Standalone** and click **Next**. The Destination Folder screen appears.



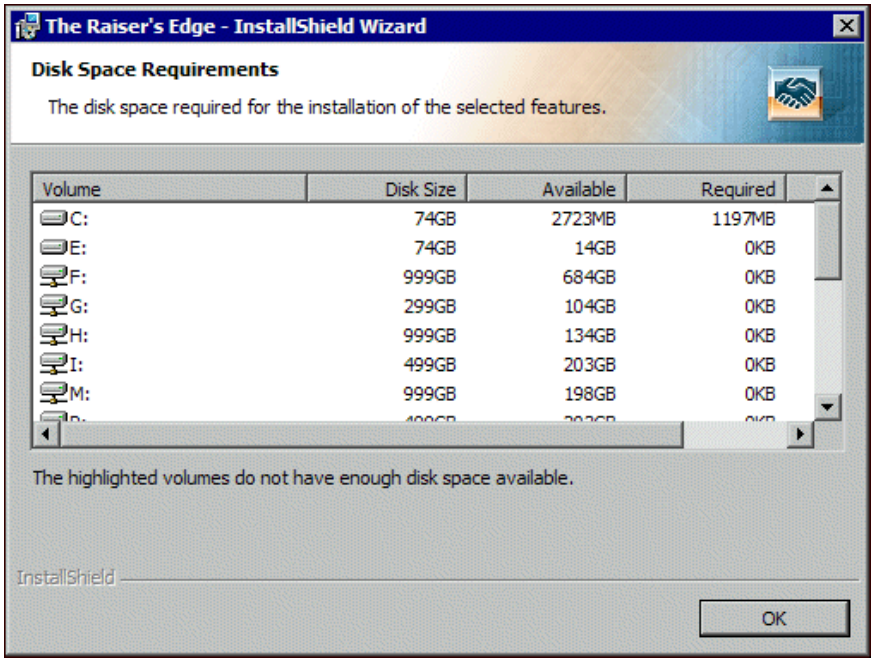
9. The location where the installation wizard will install ***The Raiser's Edge*** appears. By default, the destination location is C:\Program Files\Blackbaud. We recommend you accept the default destination folder.

   To select a different installation location, click **Change**. On the Change Current Destination Folder screen, browse to the directory in which to install the program and click **OK**. You return to the Destination Folder screen.

10. Click **Next**. The Ready to Install the Program screen appears.



11. To check the amount of hard drive space available on all the drives currently connected to your computer, click **Space**. The Disk Space Requirements screen appears.

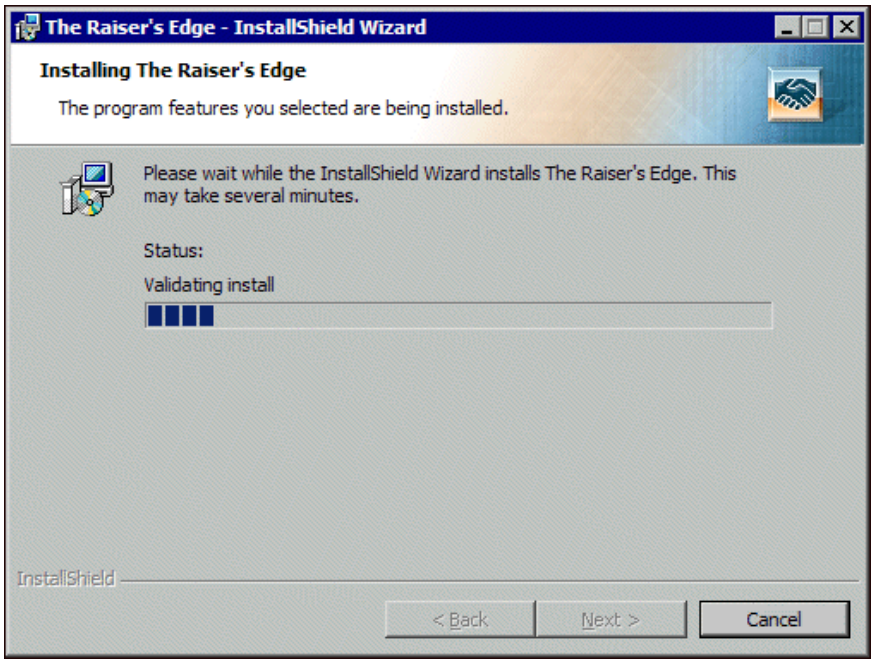


12. For each volume on your workstation, view the disk size, available disk space, and required disk space.

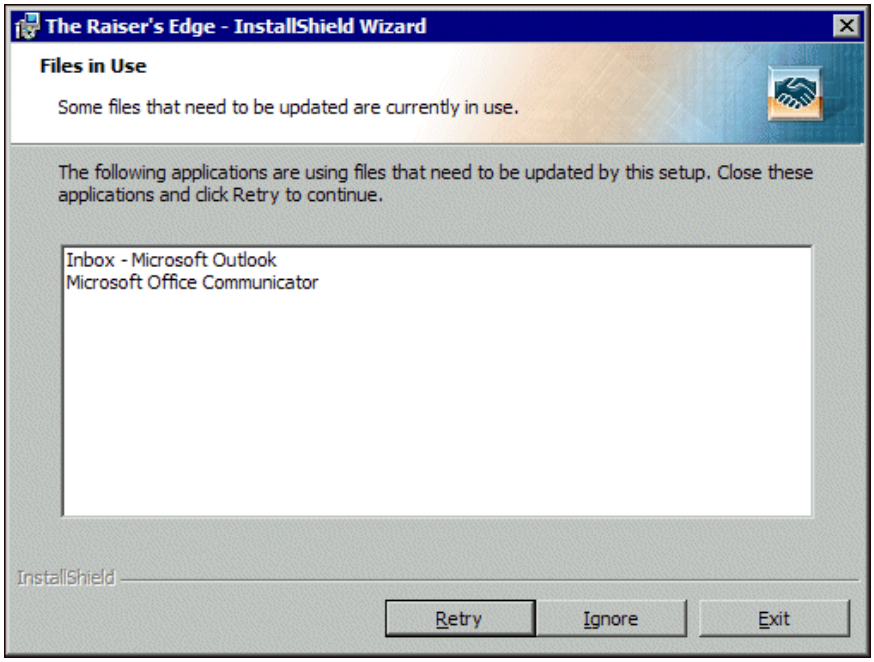
    If a volume does not have the required disk space, it is highlighted. If any volumes do not meet the disk space requirements, we recommend you cancel the installation and free up the required disk space.

13. Click **OK**. You return to the Ready to Install the Program screen.

14. Click **Install**. The installation begins. The Installing the Raiser's Edge screen appears and displays the setup status.



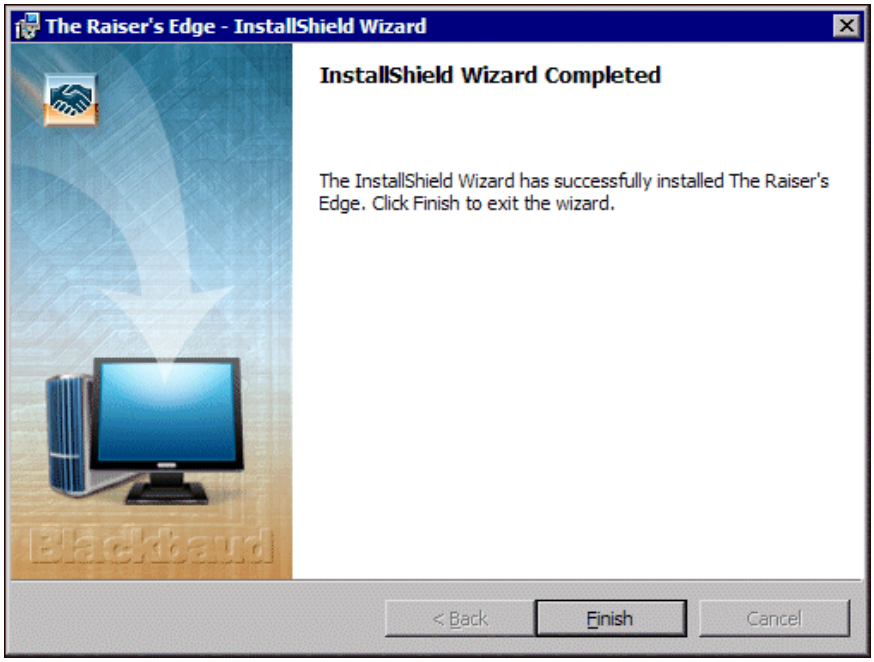
15. When ***The Raiser's Edge*** detects programs in use that must be closed during the installation, the Files in Use screen appears.



To continue the installation, close the listed programs and click **Retry**.

- To continue the installation with the listed programs still in use, click **Ignore**.
- To exit the update and install ***The Raiser's Edge*** later, click **Exit**.

16. When the installation is complete, the InstallShield Wizard Completed screen appears.



- The first time you install ***The Raiser's Edge***, you may be asked to restart your computer. To restart your computer, remove all disks and click **Finish**.
- If you are not asked to restart, click **Finish** to exit the installation wizard.

The Raiser's Edge and Blackbaud Management Console icons automatically appear on your desktop.

Note: You can open ***The Raiser's Edge*** using the sample database included with the program. At some point, you must create a database.

17. To use ***The Raiser's Edge*** to manage your organization's data, create or migrate a database.
    - If your organization is new to ***The Raiser's Edge***, create a database. For more information, see "Create a Database" on page 21.
    - If you update from a previous version of ***The Raiser's Edge***, see the *Conversion Guide*. Please start with the Pre-Conversion Checklist section in that guide.

Install The Raiser's Edge on a Network of Workstations

The following procedure explains how to install the network version of ***The Raiser's Edge*** on your server.

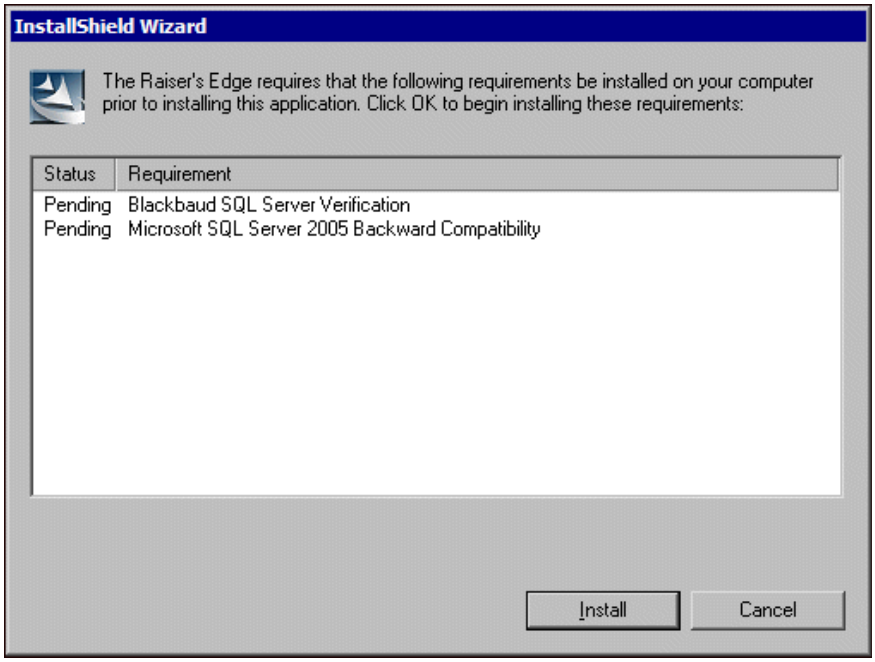
To access ***The Raiser's Edge*** online documentation, Adobe *Acrobat Reader* is required. The CD contains an installer for this program, or you can visit Adobe's website at www.adobe.com to download it.

▸ **Install The Raiser's Edge for use on a network**

1. Start the setup utility:
   - If you have ***The Raiser's Edge*** installation on a CD, put the CD in the CD-ROM drive. The setup begins automatically.
   - If you download ***The Raiser's Edge*** installation, extract the installation files to a directory on your computer. After you extract the files, browse to the directory and double-click the setup.exe file.

To install the prerequisites, you must have administrator rights. If you are not at least a Power User, your system administrator must install the prerequisites before you can use ***The Raiser's Edge.***

2. The InstallShield Wizard screen appears and lists the prerequisites. At a minimum, “Blackbaud SQL Server Verification” appears as a prerequisite. To install the prerequisites, click **Install**.

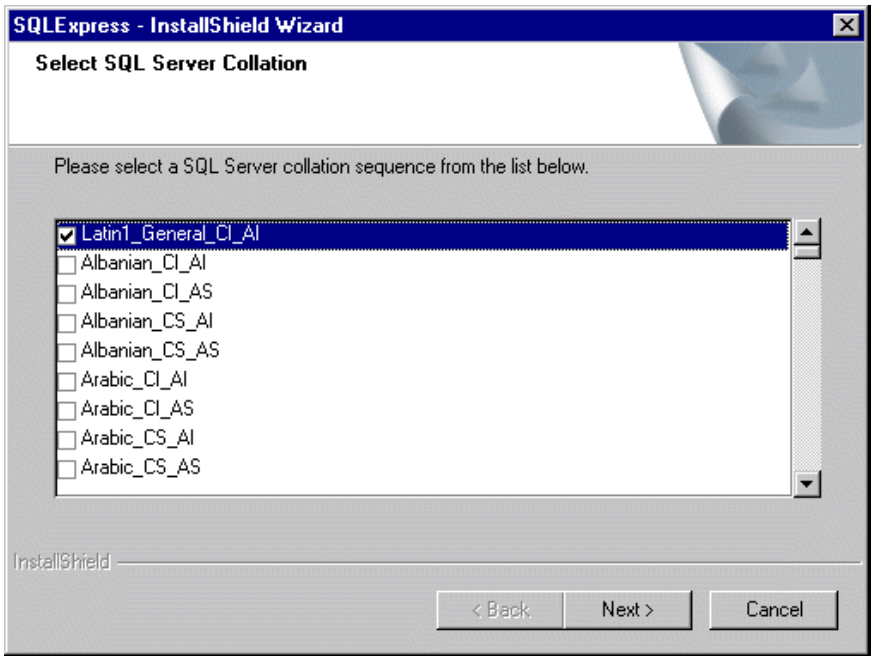


Note: To manually install *SQL Server 2005 Express* Service Pack 2, click **No**. The setup utility installs any remaining prerequisites and then cancels the installation. To install Service Pack 2, visit Microsoft’s website at http://technet.microsoft.com/en-us/sqlserver/bb426877.aspx to download it.

The installation of ***The Raiser’s Edge*** requires Microsoft *SQL Server 2005 Express* Service Pack 2. Service Pack 3 is also supported. If the *SQL Server* verification tool detects that your version does not meet this service pack requirement, a message appears. To automatically install the required service pack, click **Yes**.

3. If *SQL Server Express* is required and the **Language for non-Unicode programs** in your computer’s **Regional Options** settings is set to a country other than those listed below, the Select SQL Server Collation screen appears:
   - ENGLISH_UNITED_STATES
   - ENGLISH_BRITAIN
   - ENGLISH_CANADA
   - ENGLISH_NEW_ZEALAND
   - ENGLISH_AUSTRALIA
   - ENGLISH_IRELAND
   - ENGLISH_SOUTH_AFRICA
   - ENGLISH_CARRIBEAN

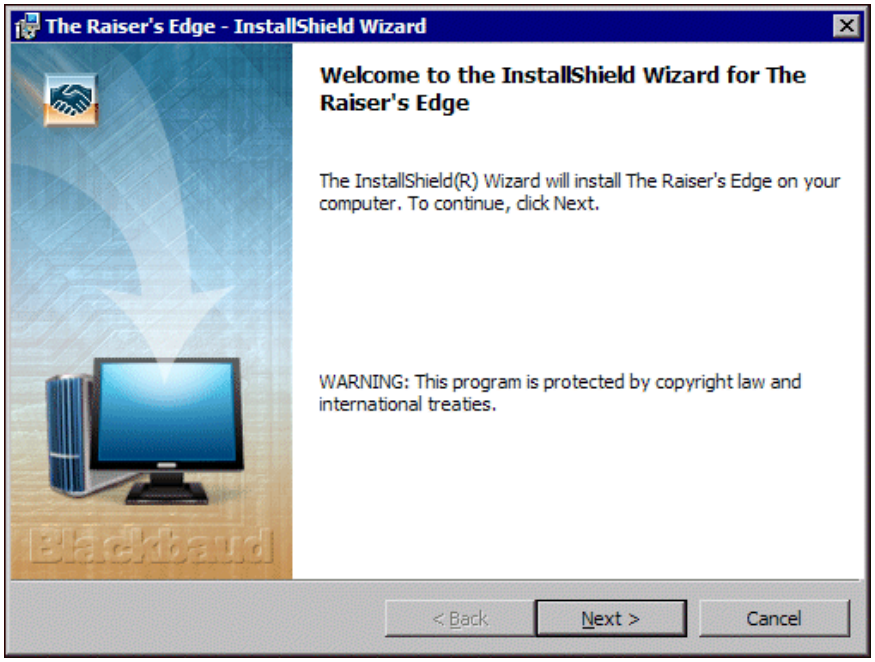
- ENGLISH_JAMAICAN



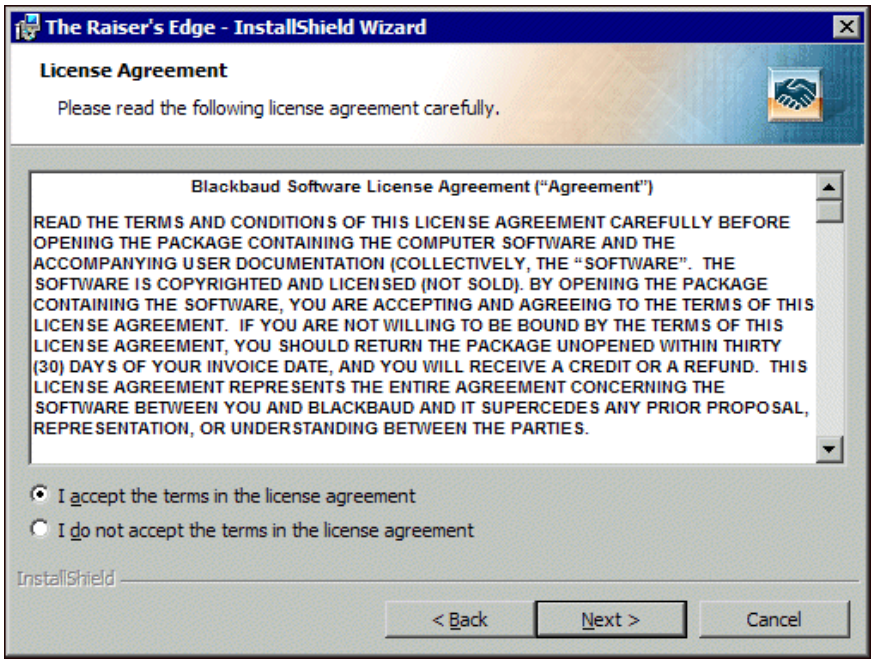
Mark the SQL server collation sequence required for your regional setting and click **Next**. For the regions listed previously, **Latin1_General_CI_AI** is the default.

If prerequisites fail to load, you can manually install them from the ISSetupPrerequisites folder. If *.NET Framework 2.0* fails to install, the installation will not continue.

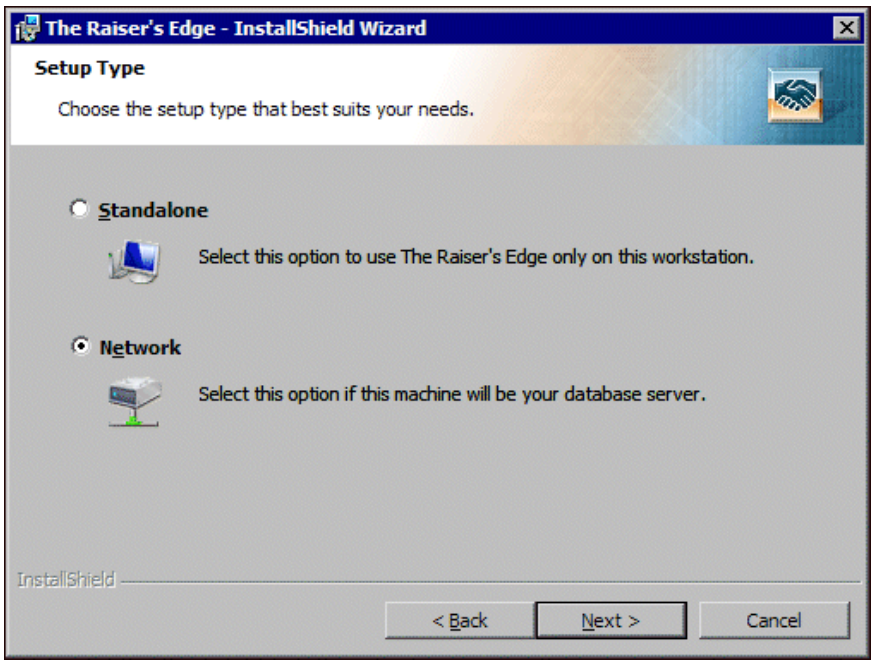
4. When the setup utility is ready, a welcome screen appears.



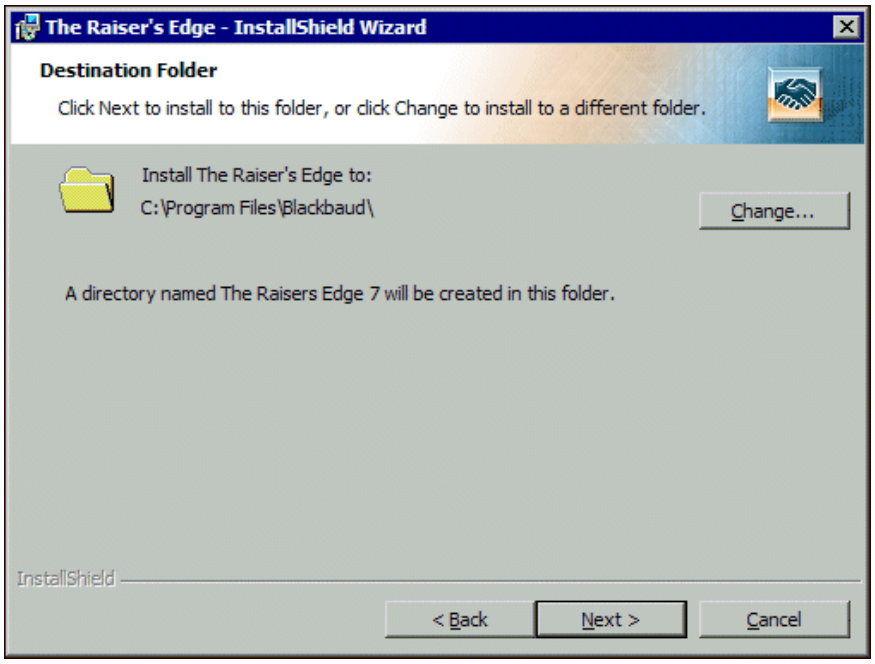
Click **Next**. The License Agreement screen appears.



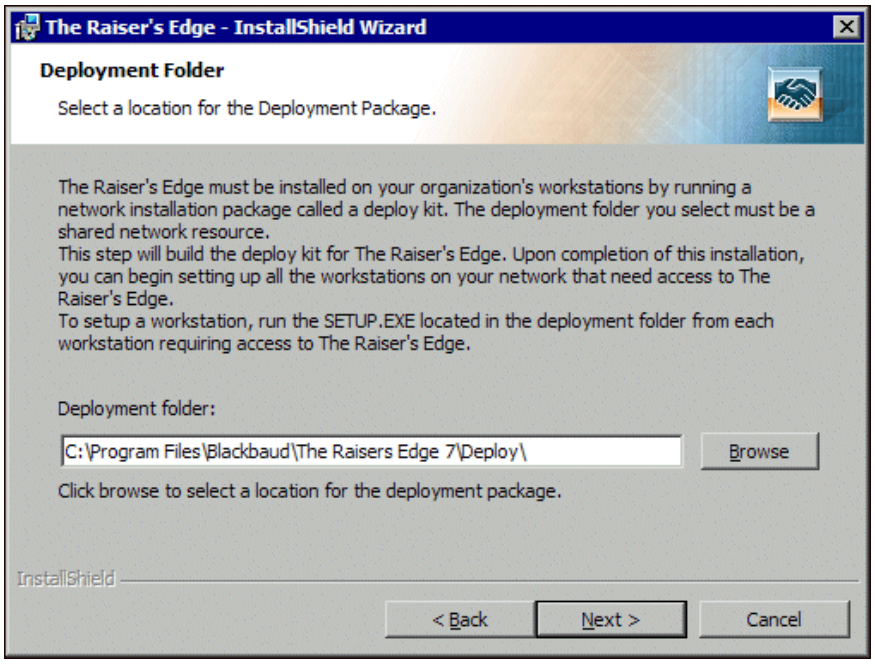
5. Review the terms of the license agreement. To print the license agreement, click **Print**.
6. If you accept the terms of the license agreement, select **I accept the terms in the** license **agreement**.
7. Click **Next**. The Setup Type screen appears.



8. Select **Network** and click **Next**. The Choose Destination Folder screen appears.



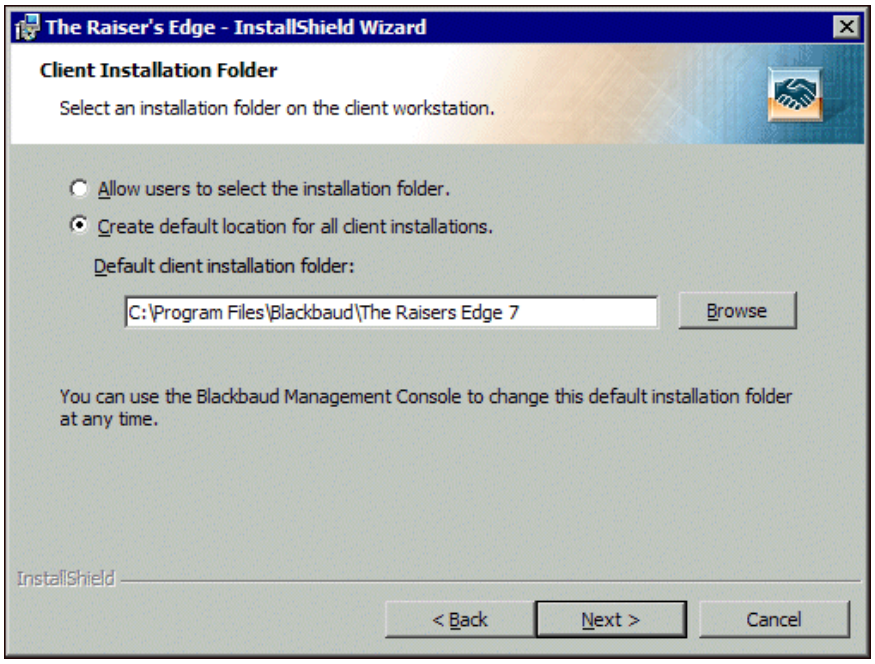
9. The location where the installation wizard will install ***The Raiser's Edge*** appears. To select a different installation location, click **Change**. On the Change Current Destination Folder screen, browse to the directory in which to install the program and click **OK**. You return to the Destination Folder screen.
10. Click **Next**. The Deployment Folder screen appears.



In the **Deployment folder** field, the location where the installation wizard will install the deployment folder appears. To allow your users to use the deployment folder, you must share it on your server where all workstations have access. Users can map to the deployment folder from their workstations and run the setup.

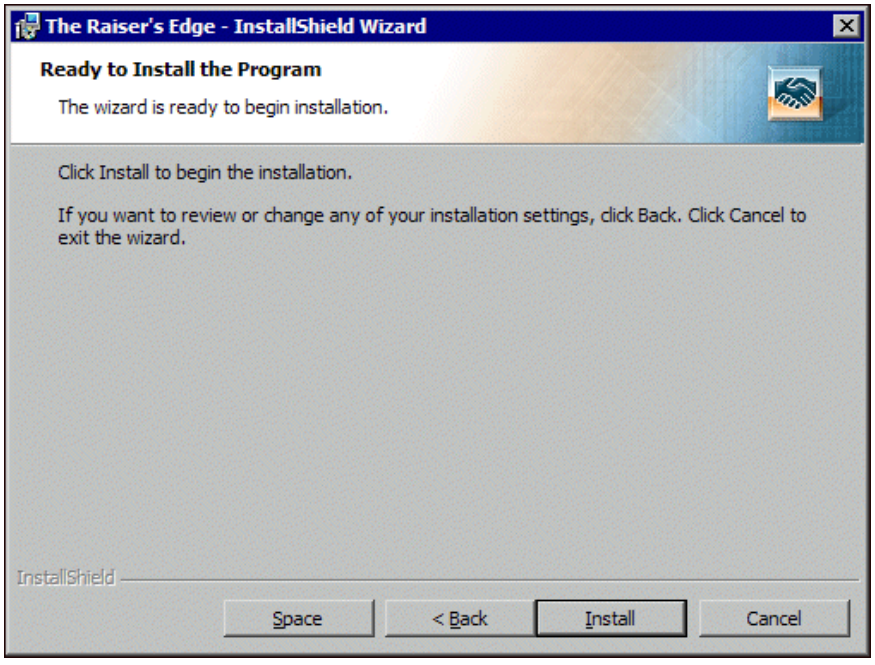
To install the deployment folder at a different location, click **Browse** and use the Change Current Destination Folder screen to map to the new location.

11. Click **Next**. The Client Installation Folder screen appears.



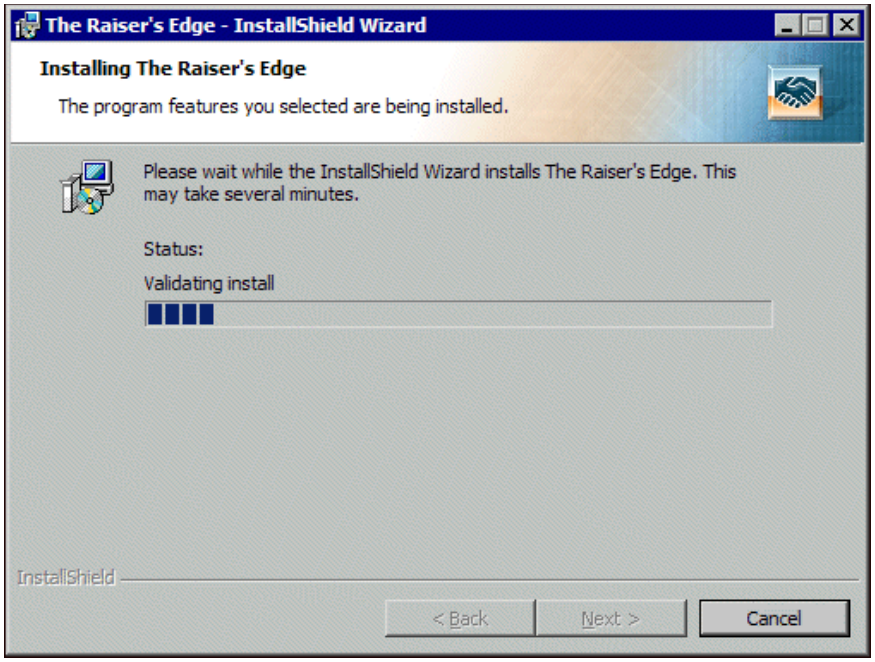
- To enable your users to select where on their machine the program installs, select **Allow users to select the installation folder**.
- To install the program files in the same location on all workstations, select **Create default location for all client installations**. In the **Default client installation folder** field, enter the location to install the program files. To map to the location, click **Browse**.

12. Click **Next**. The Ready to Install the Program screen appears.

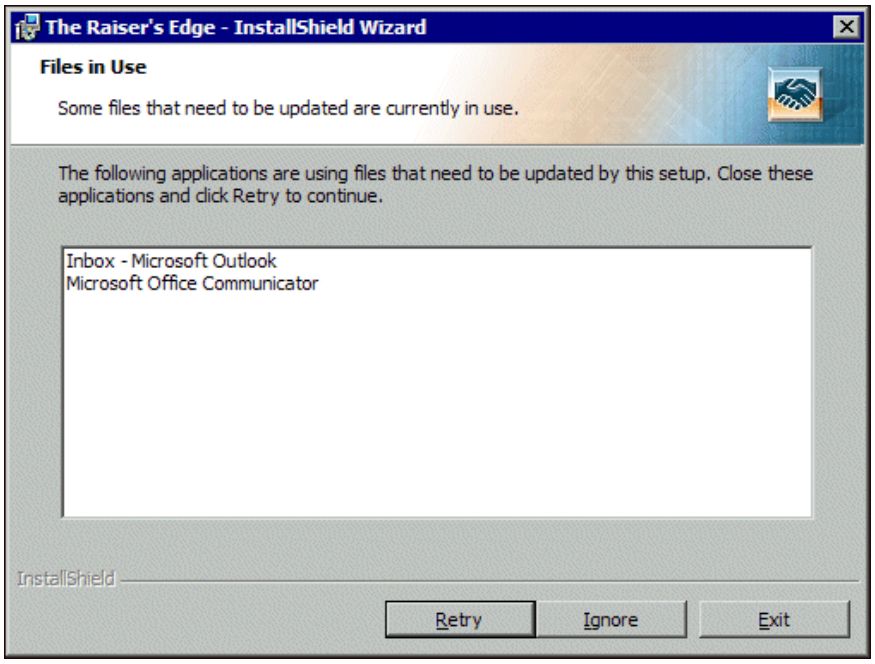


13. To check the amount of hard drive space available on all the drives currently connected to your computer, click **Space**. The Disk Space Requirements screen appears.
14. For each volume on your workstation, view the disk size, available disk space, and required disk space.

    If a volume does not have the required disk space, it is highlighted. If a volume does not meet the disk space requirements, we recommend you cancel the installation and free up the required disk space.
15. Click **OK**. You return to the Ready to Install the Program screen.
16. Click **Install**. The installation begins. The Installing The Raiser's Edge screen appears and displays the setup status.



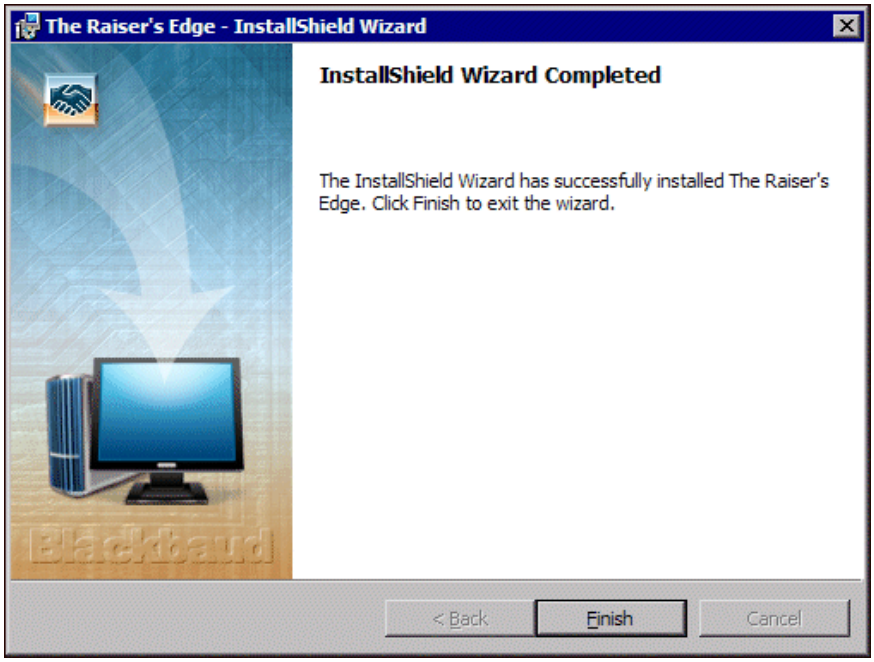
17. When ***The Raiser's Edge*** detects programs in use that must be closed during the installation, the Files in Use screen appears.



To continue the installation, close the listed programs and click **Retry**.

- To continue the installation with the listed programs still in use, click **Ignore**.
- To exit the update and install ***The Raiser's Edge*** later, click **Exit**.

18. When the installation is complete, the InstallShield Wizard Completed screen appears.



- The first time you install ***The Raiser's Edge***, you may be asked to restart your computer. To restart your computer, remove all disks and click **Finish**.
- If you are not asked to restart, click **Finish** to exit the installation wizard.

The Raiser's Edge and Blackbaud Management Console icons automatically appear on your desktop.

Note: You can open ***The Raiser's Edge*** using the sample database included with the program. At some point, you must create a database.

19. To use ***The Raiser's Edge*** to manage your organization's data, create or migrate a database.
    - If your organization is new to ***The Raiser's Edge***, create a database. For more information, see "Create a Database" on page 21.
    - If you update from a previous version of ***The Raiser's Edge***, see the *Conversion Guide*. Please start with the Pre-Conversion Checklist section in that guide.
20. Install the program on all workstations on the network to use the program.
    - To access the software deployment kit from each workstation to install ***The Raiser's Edge***, see "Install The Raiser's Edge on Multiple Workstations" on page 25.
    - To silently install ***The Raiser's Edge*** in the background of the workstation, without input or interaction from the user, see "Silently Install The Raiser's Edge" on page 31.
    - To use *System Management Server* (SMS), *Group Policy Object* (GPO), or another management and deployment service capable of deploying *Microsoft Installer* (MSI) packages to install ***The Raiser's Edge***, see "Deploy The Raiser's Edge as an MSI Package" on page 31.

Create a Database

Note: You should perform database backups on a regular basis, as well as before updates. For instructions on how to update your database, see the *Update Guide*.

If you are a new ***The Raiser's Edge*** user, you must create a database. You can do this through the Blackbaud Management Console or ***The Raiser's Edge***. This procedure explains how to create a database through ***The Raiser's Edge***. For instructions on how to create a database using the Blackbaud Management Console, see the *Database Administration Guide*.

- **Create a database**

You can access the Create New Database Wizard only if you have a license to create a database.

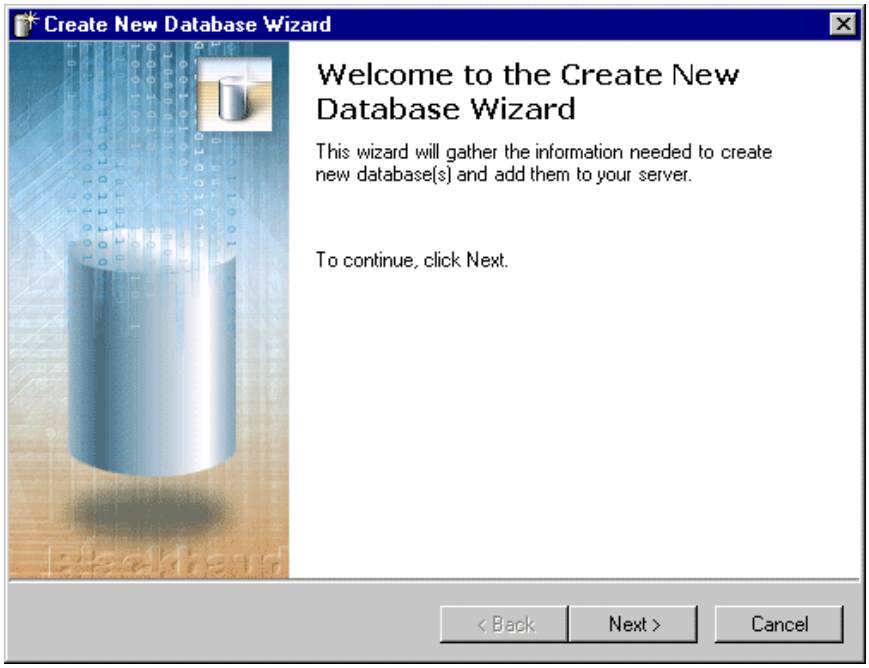
1. To open the ***The Raiser's Edge***, double-click the shortcut added to your desktop during the installation.

Note: For information about all wizards and utilities available in the Blackbaud Management Console, see the *Database Administration Guide*.

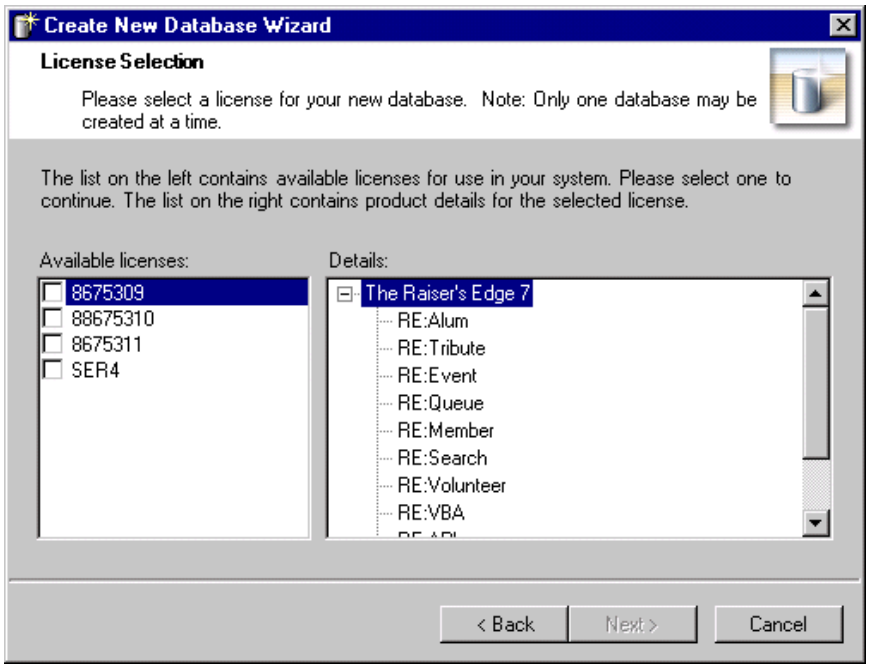
A screen appears so you can **Create New Database** or open ***The Raiser's Edge*** using **The Raiser's Edge 7 Sample Database**.

2. Select **Create New Database**. A message appears to tell you the Blackbaud Management Console will launch.

   Click **OK**. The welcome screen for the Create New Database Wizard appears.

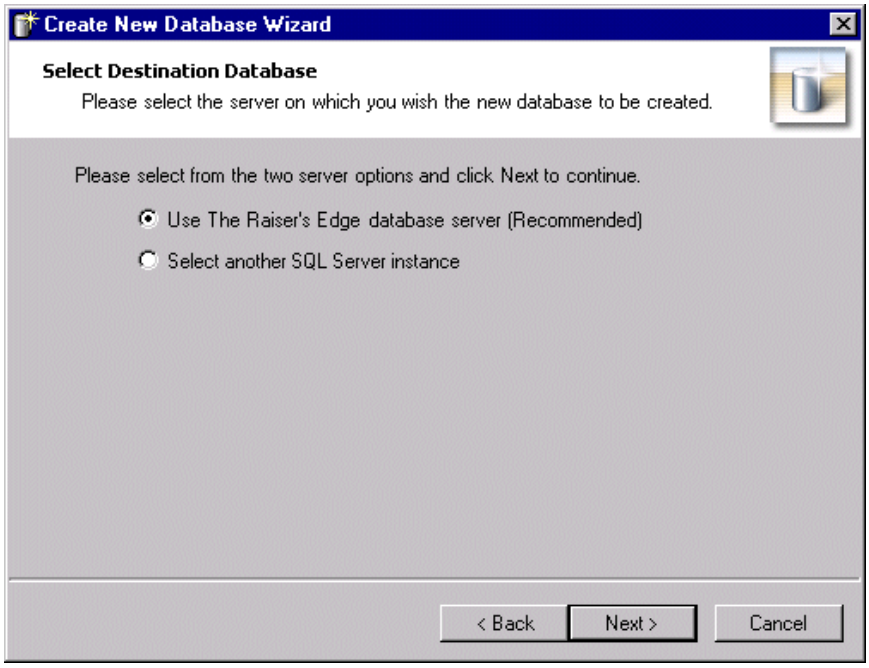


3. Click **Next**. The License Selection screen appears.



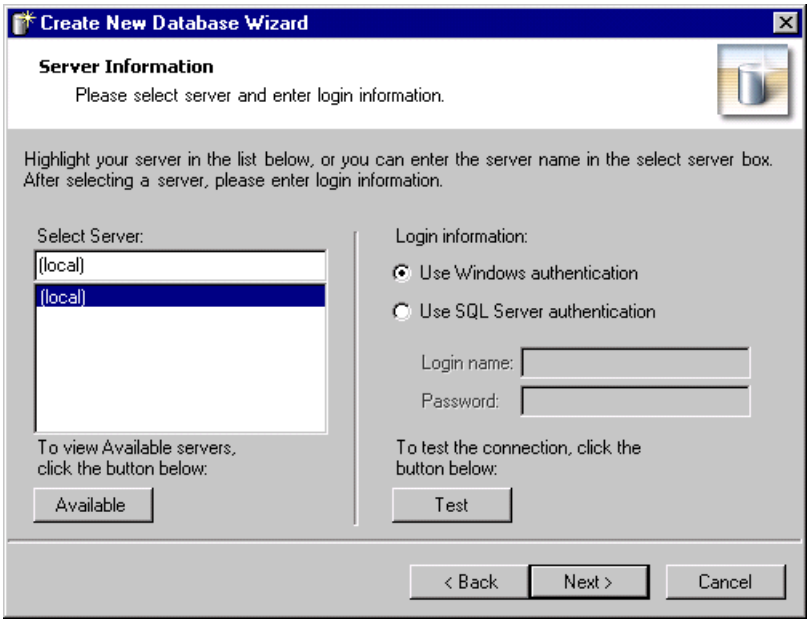
In the **Available licenses** box, all ***Raiser's Edge*** licenses appear. When you mark a license, the **Details** box displays ***The Raiser's Edge*** functions available with the selected license.

4. In the **Available licenses** box, mark the license to use to create a database.
5. Click **Next**. The Select Destination Database screen appears.



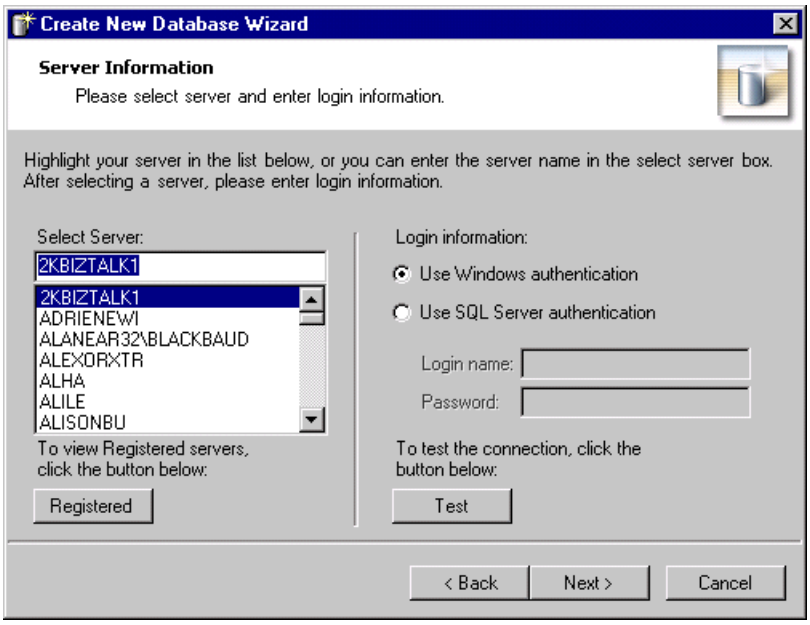
- To use the ***Raiser's Edge*** database server installed with the program, select **Use The Raiser's Edge database server**.
- To use a separate instance of Microsoft *SQL Server*:

a. Select the **Select another SQL Server instance** option and click **Next**. The Server Information screen appears.



In the **Select Server** box, all registered servers appear. A registered server is a server on your system that is controlled by SQL Management tools.

b. To access a list of all SQL servers available on your network, click **Available**. All available servers appear, and the button changes to **Registered**.



c. In the **Select Server** frame, select the server on which to create a new database.

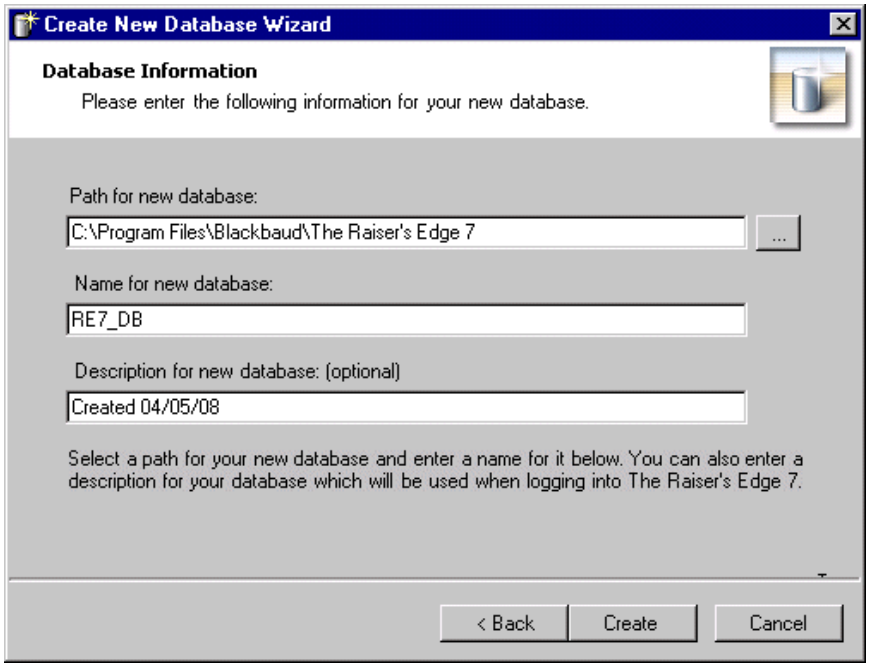
d. In the **Login information** frame, select the type of authentication to use.

If *SQL Server Standard/Enterprise Edition* is configured to work with Windows authentication, select **Use Windows authentication**. This allows you to use the same **Login name** and **Password** you use to log into your system to log into the server.

To use SQL Server authentication to establish a **Login name** and **Password** in *SQL Server Standard/Enterprise Edition*, select **Use SQL Server authentication** and enter a **Login name** and **Password** for the server.

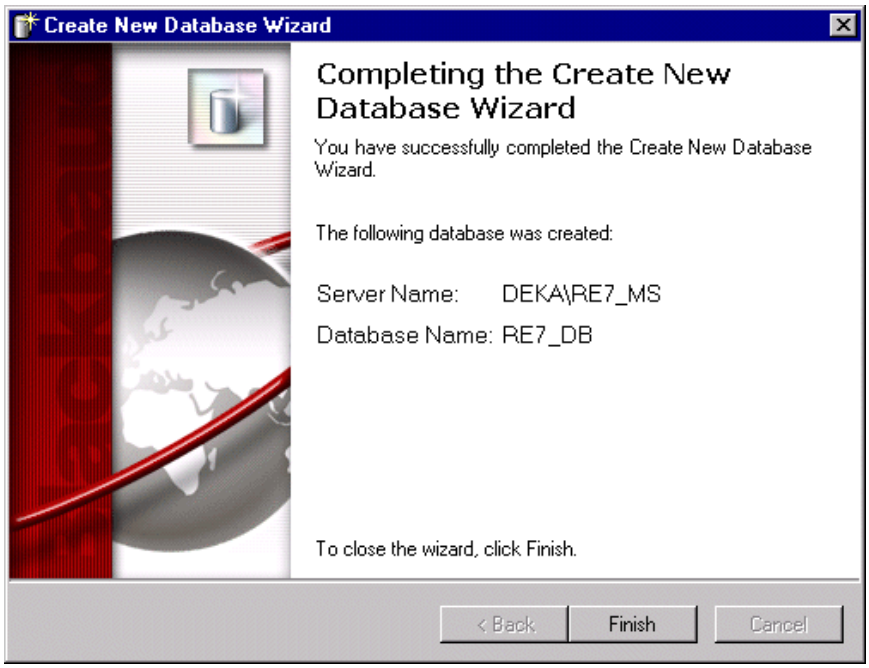
e. To check the server connection, click **Test**. If the connection fails, check the login information and verify you selected the correct server.

6. Click **Next**. The Database Information screen appears.



7. In the **Path for new database** field, enter a location for the new database. To browse to an existing location, click the ellipsis.
8. In the **Name for new database** field, enter a name for the new database. The name you enter identifies the database on the Blackbaud Management Console.
9. In the **Description for new database** field, enter a description of your database to help users identify the databases available when they log into ***The Raiser's Edge***.
10. Click **Create**. While the database is created, a processing screen appears.

When the process is finished, a confirmation screen appears.



11. Click **Finish**. You return to the Blackbaud Management Console. In the list on the left side of the Blackbaud Management Console, the new database appears under **Databases**.

Install The Raiser's Edge on Multiple Workstations

After you install ***The Raiser's Edge*** on your server and create or migrate your database, you must install the software on all workstations. To do this, workstations must access the software deployment kit created during installation. Using this kit, each workstation can download the software.

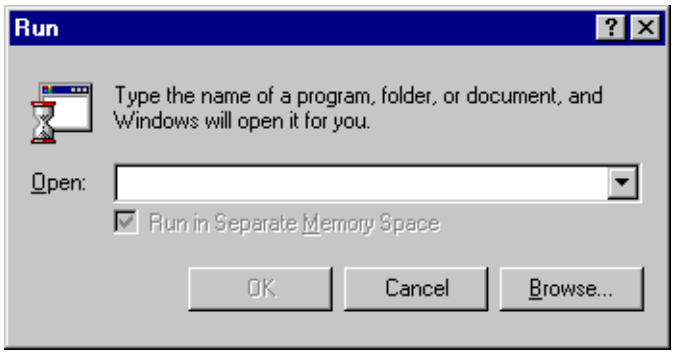
Warning: You cannot install ***The Raiser's Edge*** to workstations manually using the software CDs. You must use the deployment kit.

- **Install The Raiser's Edge on each workstation on a network**

  To install ***The Raiser's Edge***, each workstation user must perform this procedure.

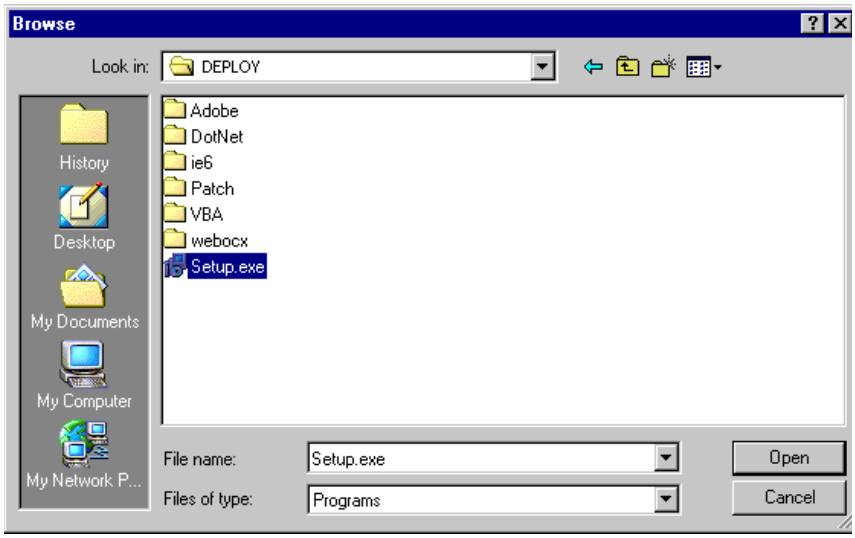
  1. Close all applications, virus scanning software, and the Microsoft *Office* shortcut toolbar.
  2. Disable any screen savers.

3. From your *Windows* **Start** menu, select **Run**. The Run screen appears.



Note: You can access the shared folder by s mapped drive or an UNC path such as \\RE_SERVER\DEPLOY. Blackbaud recommends you use the UNC path.

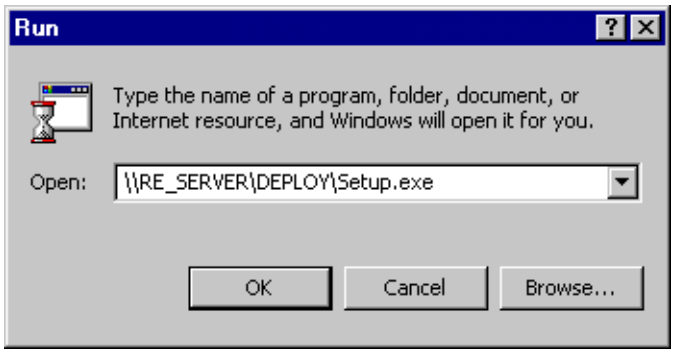
4. Click **Browse**. The Browse screen appears.



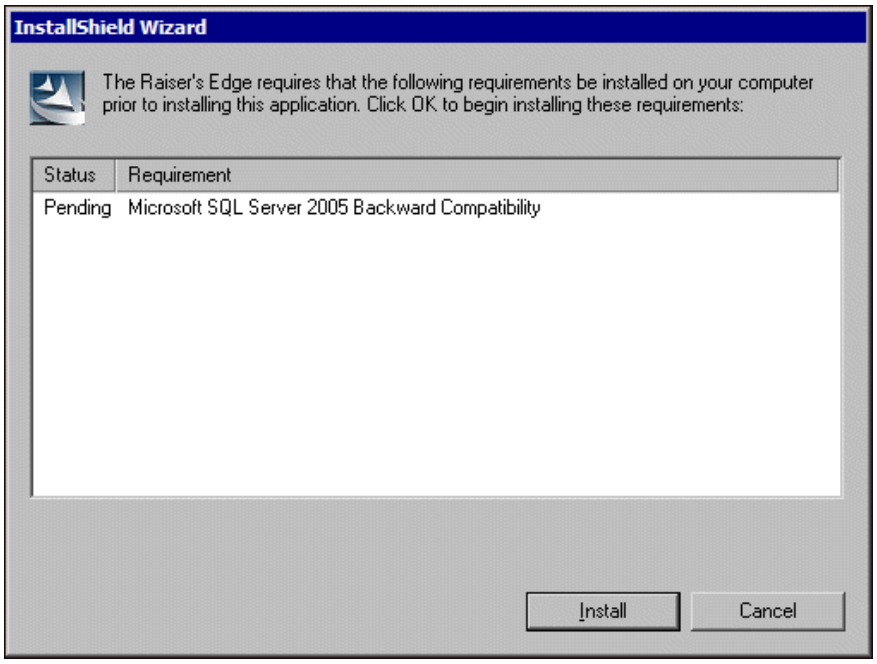
5. In the **Look in** field, map to the shared directory in which you created the deploy kit.
6. Select the "Setup.exe" file.

Note: For more information about how to locate the deploy kit, see Blackbaud Knowledgebase Solution BB120314.

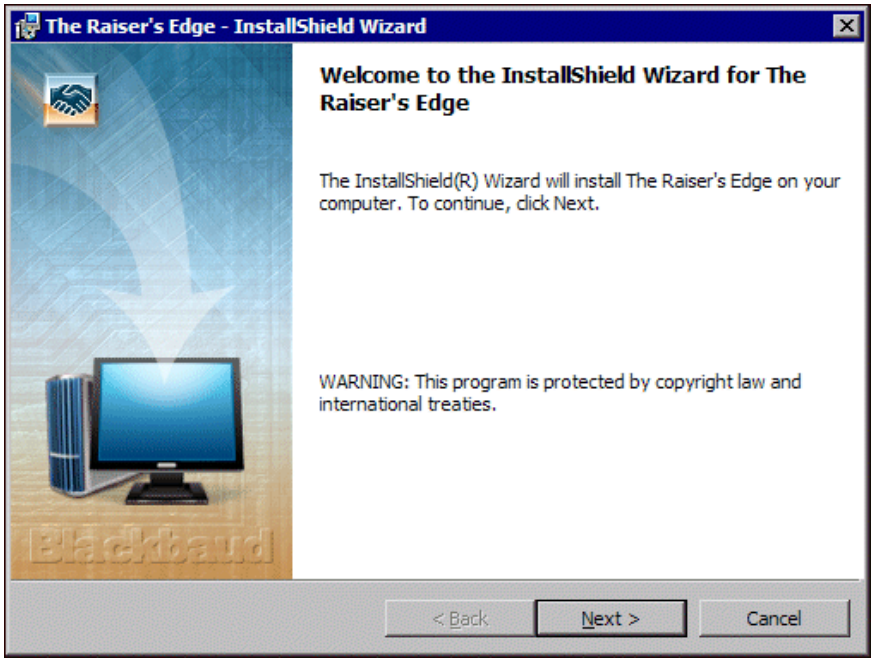
7. Click **Open**. You return to the Run screen.



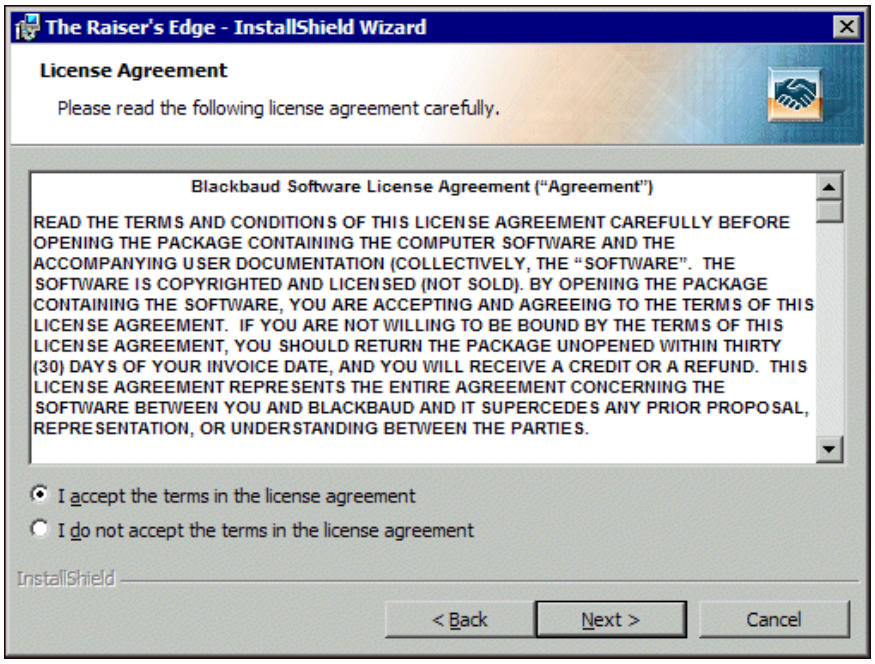
8. Click **OK**. The installation begins.
9. The InstallShield Wizard screen appears and lists the prerequisites. To install the prerequisites, click **Install**.



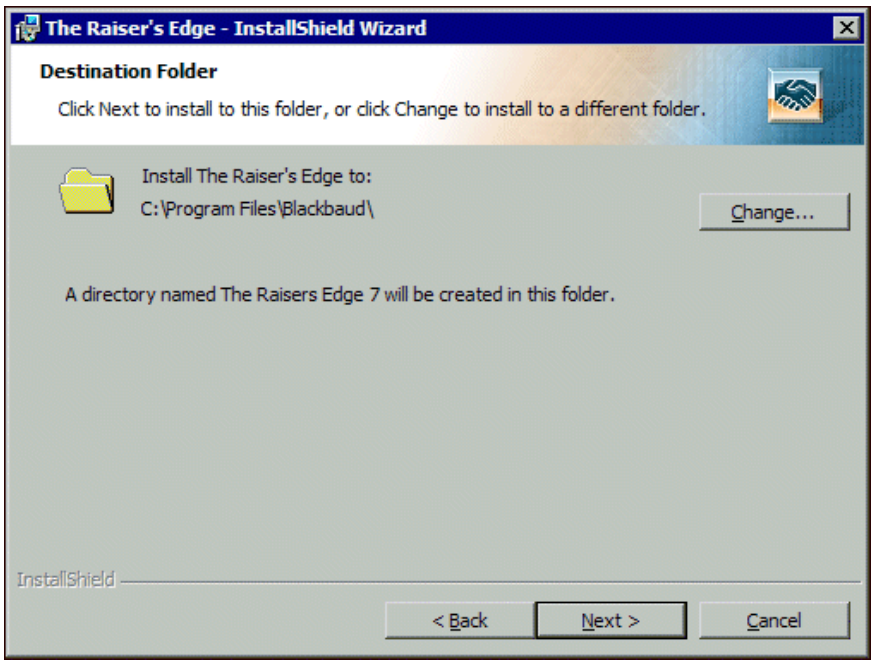
10. When the setup utility is ready, a welcome screen appears.



Click **Next**. The License Agreement screen appears.



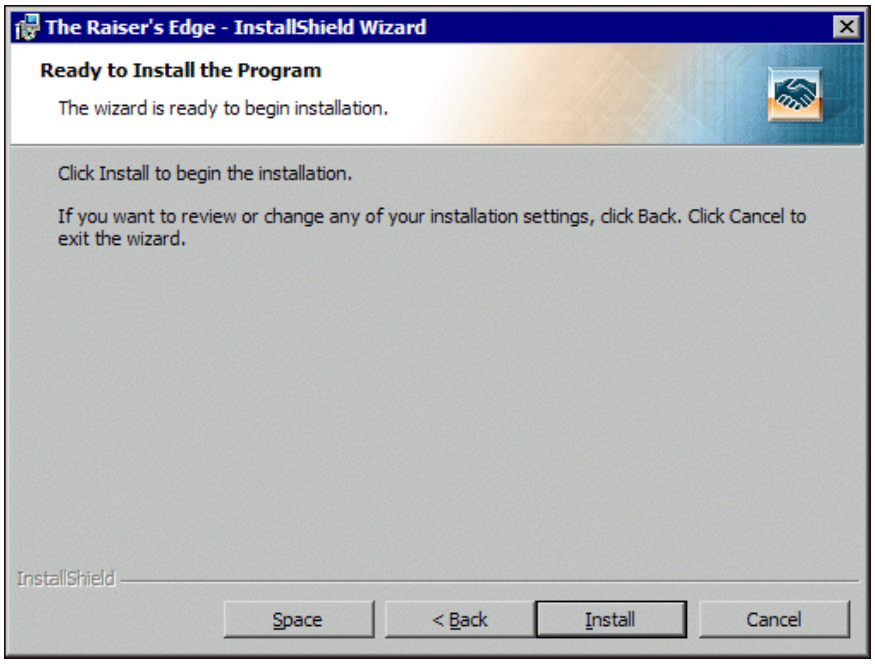
11. Review the terms of the license agreement. To print the license agreement, click **Print**.
12. If you accept the terms of the license agreement, select **I accept the terms in the license agreement**.
13. Click **Next**. The Destination Folder screen appears.



14. The location where the installation wizard will install ***The Raiser's Edge*** appears. If, when you established the deployment kit, you selected a default installation directory, that location defaults.

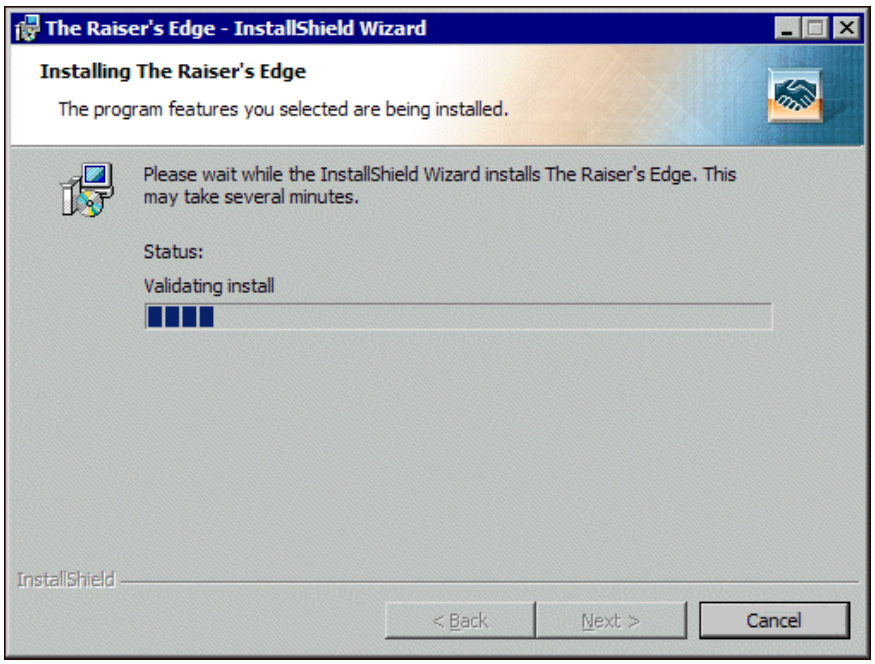
    To select a different installation location, click **Change**. On the Change Current Destination Folder screen, browse to the directory in which to install the program and click **OK**. You return to the Destination Folder screen.

15. Click **Next**. The Ready to Install the Program screen appears.

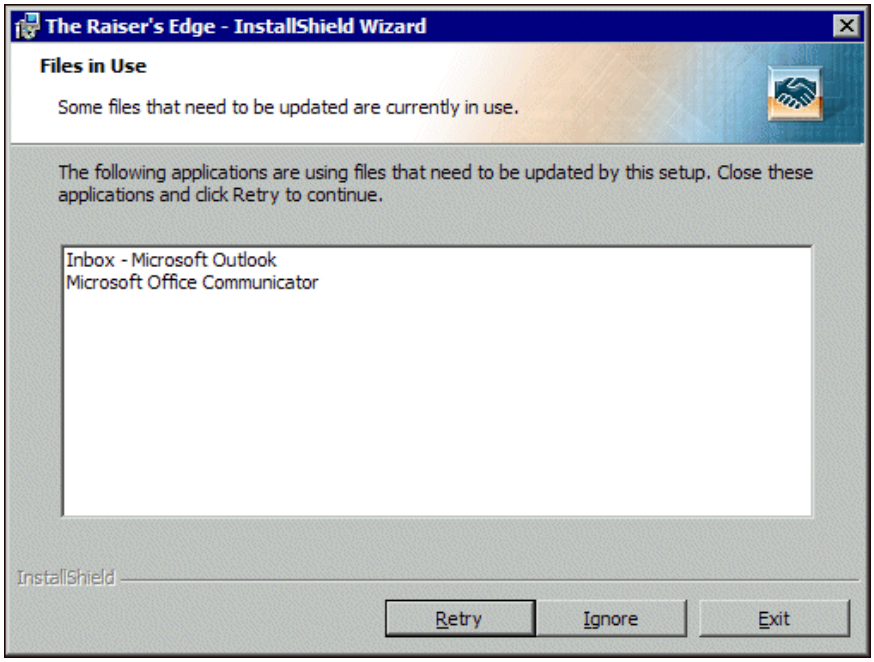


16. To check the amount of hard drive space available on all the drives currently connected to the workstation, click **Space**. The Disk Space Requirements screen appears.
17. For each volume on the workstation, view the disk size, available disk space, and required disk space.

    If a volume does not have the required disk space, it is highlighted. If any volumes do not meet the disk space requirements, we recommend you cancel the installation and free up the required disk space.
18. Click **OK**. You return to the Ready to Install the Program screen.
19. Click **Install**. The installation begins. The Installing The Raiser's Edge screen appears and displays the setup status.



20. When ***The Raiser's Edge*** detects programs in use that must be closed during the installation, the Files in Use screen appears.

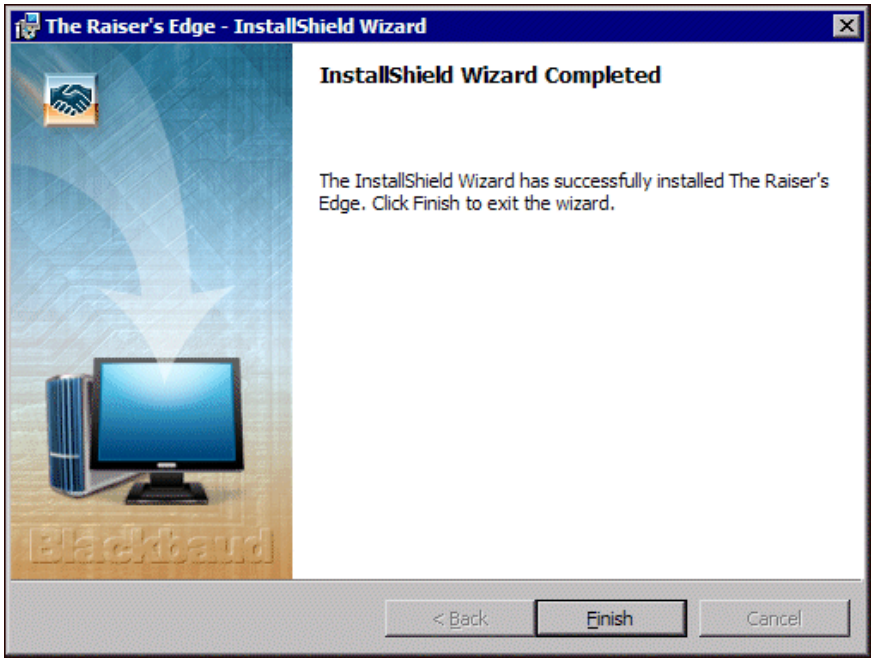


To continue the installation, close the listed programs and click **Retry**.

- To continue the installation with the listed programs still in use, click **Ignore**.
- To exit the update and install ***The Raiser's Edge*** later, click **Exit**.

Note: In some cases, the program may ask you to reboot your computer after the installation is complete.

21. When the installation is complete, the InstallShield Wizard Completed screen appears. Click **Finish**.



Silently Install The Raiser's Edge

If prerequisites must be installed and the user is not an administrator, the system administrator must install the prerequisites to successfully complete a silent installation of ***The Raiser's Edge***.

When you install ***The Raiser's Edge*** on a network, you may install ***The Raiser's Edge*** on a workstation silently. A silent installation requires minimal input or interaction from the user and runs in the background without the wizard. You can silently install ***The Raiser's Edge*** and all the required prerequisites — except Microsoft .NET 4 and SAP *Crystal Reports* — or ***The Raiser's Edge*** only.

- To silently install ***The Raiser's Edge*** and its prerequisites, enter this command string into your script or command line: `setup.exe" /S/v/qn /V"/qn INSTALLLEVEL=60 REINSTALLMODE=veums"`. To install ***The Raiser's Edge*** without the sample database, remove `INSTALLLEVEL=60` from the command.

If you select to install ***The Raiser's Edge*** only, verify the workstation already has the necessary prerequisites installed.

- To silently install ***The Raiser's Edge*** only, enter this command string into your script or command line to begin a silent installation: `The Raisers Edge.msi" /qn/I" INSTALLLEVEL=60 REINSTALLMODE=veums"`. To install ***The Raiser's Edge*** without the sample database, remove `INSTALLLEVEL=60` from the command.

Note: Blackbaud recommends you use the UNC path.

The command must be preceded by the path where the setup files are located. This can be the UNC path, a mapped drive letter to your deployment folder, or a shared folder on your network that contains the installation files.

- To use the UNC path for the shared folder **DEPLOY** on the server **RE_SERVER**, enter this path when you install ***The Raiser's Edge*** and its prerequisites: `"\\RE_SERVER\DEPLOY\setup.exe" /S/v/qn /V"/qn INSTALLLEVEL=60 REINSTALLMODE=veums"`.
- To use the UNC path for the shared folder **DEPLOY** on the server **RE_SERVER**, enter this path when you install only ***The Raiser's Edge***: `"\\RE_SERVER\DEPLOY\The Raisers Edge.msi" /qn/I" INSTALLLEVEL=60 REINSTALLMODE=veums"`.
- To install without the sample database, from a folder mapped to drive letter "**Z:**", enter this path when you install ***The Raiser's Edge*** and its prerequisites: `"Z:\setup.exe" /S/v/qn /V"/qn REINSTALLMODE=veums"`.
- To install without the sample database, from a folder mapped to drive letter "**Z:**", enter this path when you install only ***The Raiser's Edge***:`"Z:\The Raisers Edge.msi" /qn/I" REINSTALLMODE=veums"`.

If prerequisites fail to load, you can manually install them from the ISSetupPrerequisites folder. If *.NET Framework 2.0* fails to install or is not already installed, the installation will not continue.

When the installation is complete, there is no notification. Icons for ***The Raiser's Edge*** automatically appear on the desktop. If the installation encounters problems, you can use the *Event Viewer* to check the Application Log for the workstation. You access the *Event Viewer* from the Administrative Tools folder in the workstation's Control Panel.

Deploy The Raiser's Edge as an MSI Package

When you deploy ***The Raiser's Edge*** as an MSI package, it does not install any prerequisites required to run ***The Raiser's Edge***. Verify the workstation already has the prerequisites installed.

When you install ***The Raiser's Edge*** on a network, you can deploy ***The Raiser's Edge*** using *System Management Server* (SMS), *Group Policy Object* (GPO), or another management and deployment service capable of deploying *Microsoft Installer* (MSI) packages. To ensure the deployment of ***The Raiser's Edge*** as an MSI package goes smoothly, verify you meet these requirements:

- The user on the target workstation of an MSI package installation does not have to be an administrator or Power User.
- You can push out all prerequisites via your management and deployment service with the exception of Microsoft *Data Access Components (MDAC) 2.8*.

For more information about the deployment of ***The Raiser's Edge***, see the documentation supplied for your specific management software.

Post Installation

Log into The Raiser's Edge 34
Change a Password 36
Checklist to Get Started on The Raiser's Edge 37
Other Helpful Information 38

Procedures

Log into The Raiser's Edge 34
Change your password 36

After you install ***The Raiser's Edge***, review this chapter to confirm your installation was successful. After you log in to ***The Raiser's Edge***, you can change your user name and password and unlock any optional modules purchased with ***The Raiser's Edge***.

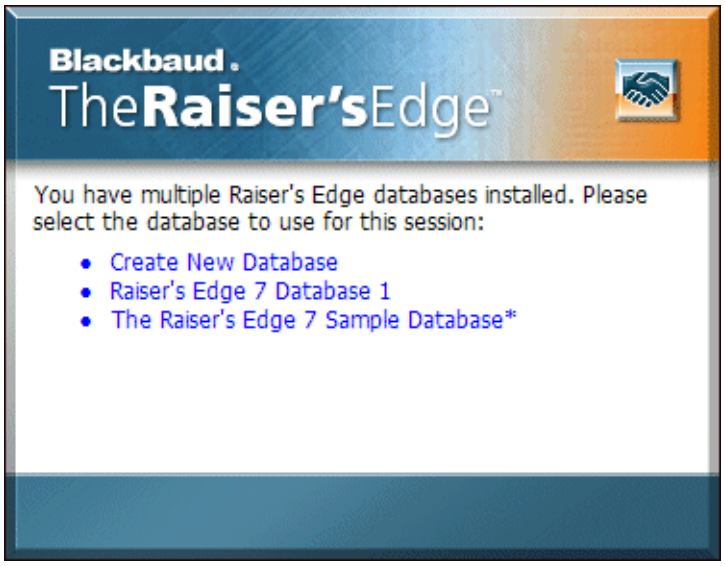
To receive the maximum benefit from the program, we recommend you also complete the items on the “Checklist to Get Started on The Raiser’s Edge” on page 37.

Log into The Raiser’s Edge

After you install ***The Raiser’s Edge***, you can use the default user name and password — “Supervisor” and “ADMIN”, respectively— to log into the program. However, we strongly recommend you immediately change these defaults, as they are standard for all users in ***The Raiser’s Edge***.

- **Log into The Raiser’s Edge**

1. On your desktop, double-click ***The Raiser’s Edge*** shortcut. A screen appears for you to select a database.



2. Click a database link. The login screen appears.

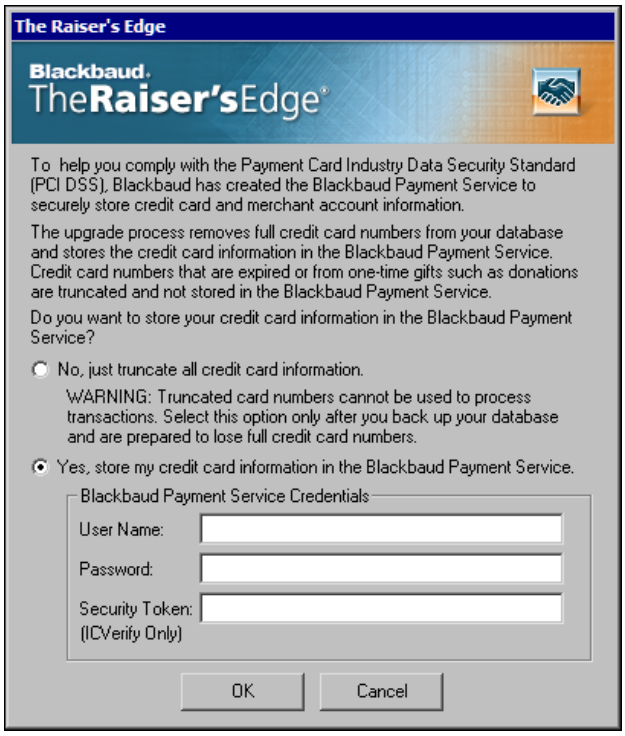
3. In the **User name** and **Password** fields, enter your credentials. By default, enter “Supervisor” and “ADMIN”.
4. Press **ENTER**. If the database requires an update, a message appears.

Note: If you use ***Blackbaud NetCommunity***, you must have a version that complies with the Payment Application Data Security Standards (PA DSS). If your version is not compliant, a message appears to explain that you cannot install ***The Raiser's Edge***.

Click **Yes**. A screen tracks the update progress. Depending on the size of your database, this process may take several minutes.

Note: To access the Blackbaud *Payment Service*, you must have an Internet connection.

5. To help you comply with Payment Card Industry Data Security Standards (PCI DSS), ***The Raiser's Edge*** uses the Blackbaud *Payment Service* to store your credit card and merchant account information. If your organization does not use ***Blackbaud NetCommunity*** and you are the first person to log into the new installation of ***The Raiser's Edge***, a message appears to ask whether to store your credit card information in the Blackbaud *Payment Service*.



Select how to handle existing credit card information and click **OK**.

Warning: Before you select to truncate credit card information, we recommend you back up your database and are prepared to lose the full numbers from your database.

- If you select **No, just truncate all credit card information**, a message appears to ask whether to truncate all credit card information. Click **Yes**. ***The Raiser's Edge*** replaces each credit card number from your database with a series of question marks and the last four digits of the number.

If ***The Raiser's Edge*** cannot connect to the Blackbaud *Payment Service,* a warning message appears. Click **OK** and check your Blackbaud *Payment Service* credentials or Internet connection.

- If you select **Yes, store my credit card information in the Blackbaud Payment Service**, enter your organization's user name and password to use the Blackbaud *Payment Service*.

If your organization uses *ICVerify* to process credit card transactions through ***The Raiser's Edge***, in the **Security Token** field, enter the security token used to identify your organization when *ICVerify* requests credit card information from the Blackbaud *Payment Service*. Your organization receives this token with the credentials for its Blackbaud *Payment Service* account.

If you select **Yes**, a message appears to ask whether the installation is a test conversion. Click **Yes** or **No** as applicable. For a test conversion, be aware that the Blackbaud *Payment Service* routinely deletes credit card numbers uploaded as part of a test conversion to comply with PCI DSS.

The Raiser's Edge sends valid credit card numbers from constituent records, batches, recurring gifts, and pledges to the Blackbaud *Payment Service* to secure storage. In your database, ***The Raiser's Edge*** replaces these credit card numbers with reference numbers to identify each card number in the Blackbaud *Payment Service*. On records and in batches, these credit card numbers appear as a series of asterisks and the last four digits of the number.

For credit card numbers from one-time gifts such as donations and numbers with no expiration date, ***The Raiser's Edge*** replaces each with a series of question marks and the last four digits of the number.

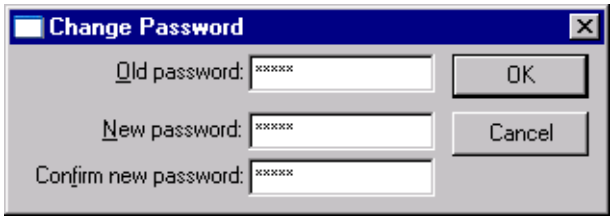
When the database update process finishes, ***The Raiser's Edge*** opens. Before you start to work, we recommend you review the release notes for updates to this version.

Change a Password

If you have security rights, you can change your password from most areas of the program. To maintain security, your system administrator can configure ***The Raiser's Edge*** to require you change your password periodically. If you forget your password, your supervisor can look it up for you.

- **Change your password**

1. From any main page in ***The Raiser's Edge***, select **Edit**, **Change Password** from the menu bar. The Change Password screen appears.



Note: For privacy, only asterisks appear in the **Old password**, **New password**, and **Confirm new password** fields.

2. In the **Old password** field, enter your current password.
3. In the **New password** field, enter the new password to use. The new password cannot match one of the last four passwords used. The new password is case-sensitive and must include an alphabetic and a numeric character. The new password can be up to 50 characters but must have a minimum of eight characters.
4. In the **Confirm new password** field, enter the new password again. Your entry must exactly match the entry in the **New password** field.
5. To save the new password, click **OK**.

Checklist to Get Started on The Raiser's Edge

Use this checklist to get started on ***The Raiser's Edge*** after you convert from an earlier version or another software, or if you are a brand new user. This list is for users with Supervisor rights in the program, database administrators, IT departments, or anyone who sets up the program.

- ❑ Attend training! You can purchase on-site customized training or come to training at Blackbaud's headquarters. If you cannot get classroom or on-site training immediately, visit training.blackbaud.com to check out our online eLearning Library and other training options.
- ❑ Determine the information you need to get out of ***The Raiser's Edge***. For example, think about what reports you run and mailings you send. Base this determination on what you did before, anything you would like to change about previous processes, and what ***The Raiser's Edge*** can do for you that you could not do before. By first determining what you want to get out of the program, you can decide how to enter information properly, which is vital to get accurate results and use the program efficiently. To experiment with different options, use the sample database that comes with the program.
- ❑ Decide on data entry protocols for your organization's workflow. This helps ensure accuracy and consistency in the data you put in, and in turn, get out of ***The Raiser's Edge***. Create your own *Data Entry Protocol* or *Policies and Procedures* manual and use it as a training guide for employees and volunteers or as a resource for handling infrequent tasks. For more information, see the Data Entry Protocol chapter of the *Program Basics Guide*. To access the user guides, visit userguides.blackbaud.com or select **Help**, **User Guides** from the menu bar in ***The Raiser's Edge***. To see examples of other organizations' policies and procedures manuals, visit www.blackbaud.com and select **Support**, **Forums** from the menu bar. On the Discussions page, select the Shared Client Documents: Policies and Procedures subforum for ***The Raiser's Edge***.
- ❑ In *Configuration*, set up **Tables** for items such as **Phone Types** and **Actions** as part of your data entry protocol. Tables enable users to select entries in fields with drop-down lists instead of create a new entry each time. Having everyone follow this procedure cuts down on data inaccuracy and ensures users enter, access, use, and report on your data consistently. For more information, see the Configuration chapter of the *Configuration & Security Guide.*
- ❑ Set up **Business Rules** for each area of the program. For example, you can set a warning to appear when you add gifts from constituents who have outstanding balances. Business rules affect all workstations that use ***The Raiser's Edge*** and help ensure users work in the program the same way. On the Raiser's Edge bar, click **Config**, **Business Rules**. For more information, see the Configuration chapter of the *Configuration & Security Guide*.
- ❑ Set up **User Options** for each area of the ***The Raiser's Edge***. From anywhere in the program, select **Tools**, **User Options** from the menu bar. User options are defined for each user. If you do not define your own business rules, default settings are used. For more information, see the *Program Basics Guide* and the User Options section of most user guides.
- ❑ Set up **Security** for your system and change your password from "ADMIN". On the Raiser's Edge bar, click **Admin** and then **Security**. To read the Security help file, click the link at the bottom of the page.
- ❑ Set up Campaigns, Funds, and Appeals. On the Raiser's Edge bar, click **Records** and then **Campaigns**, **Funds**, or **Appeals**. For more information, see the *Campaigns, Funds, & Appeals Data Entry Guide.* If your conversion created the basic records, take time to complete the other fields in these important records.
- ❑ Set up a plan/schedule to back up your data. We recommend you back up your data every evening. For more information about backing up your system, see Knowledgebase Solution BB52243 at kb.blackbaud.com. For instructions on how to use the Blackbaud Management Console to back up your data, see the *Database Administration Guide*. Test the backups immediately, then monthly for three months, then quarterly thereafter.
- ❑ Create and save *Reports* and *Mail* parameter files to use for similar reports and mailings you run often. Also create queries, exports, and batch templates. This saves you time and effort. If you convert from ***The Raiser's Edge for Windows version 6.x***, use the control reports you printed out to recreate these settings. For more information about each area of the program, see the *Reports Guide*, *Sample Reports Guide*, *Mail Guide*, *Query & Export Guide*, *Creating Custom Crystal Reports Tutorial*, *The Raiser's Edge & Microsoft Office Integration Guide*, and the *Batch Guide*.

- ❑ Each user should set up the **Home Page** and **Favorites** to easily access the tasks and areas of the program he or she uses most frequently. For more information, see the *Program Basics Guide*.
- ❑ To make ***The Raiser's Edge*** perform as efficiently as possible for your unique needs, consider these additional setup options for all users of the system: **Constituent Letters, Action Tracks, Default Sets, Custom Views,** and **Profiles**. For more information, see the *Configuration & Security Guide, Constituent Data Entry Guide, Program Basics Guide, Custom View Guide, and Reports Guide*. Each user can also set up Open screen **Options**, columns in grids, and **Summaries**. See the *Program Basics Guide* and the *Summaries Guide*. If you have the modules, set up *Queues* under **Admin** and set up *NetSolutions*. See the *Queue Guide* and *Netsolutions Guide*.

Other Helpful Information

♦ If, at any point, you have a question, press **F1** on your keyboard to access the help file.
♦ If you want more in-depth information and are not sure which user guide to read, see the *Which Guide Should I Read?* document. In ***The Raiser's Edge***, select **Help**, **User Guides** from the menu bar. On the Users Guide page, go to ***The Raiser's Edge*** documentation.
♦ You can access the latest user guides, technical bulletins, and Frequently Asked Questions (FAQs) at the Blackbaud website. Visit www.blackbaud.com/support/support.aspx, or from www.blackbaud.com, select **Support**.
♦ To enter a question and search for a possible answer, use Knowledgebase. To access Knowledgebase, visit www.blackbaud.com/support/knowledgebase/kb.aspx or visit www.blackbaud.com and select **Support**, **Knowledgebase** from the menu bar.
♦ The first time you enter the Support area of Blackbaud's website to access user guides or Knowledgebase, you are asked to enter your user name and password. To have this information sent to you, click **I forgot my User Name or Password** on the Login page.

Install Crystal Reports XI

Crystal Reports XI Installation **39**

Procedures

Uninstall Crystal Reports 39
Install Crystal Reports XI 40

The Raiser's Edge supports *Crystal Reports XI*. Your installation package of ***The Raiser's Edge*** includes the *Crystal Reports* CD. Before you install *Crystal Reports XI*, you can select to remove earlier versions of the software from your computer; however, it is not required.

Note: ***The Raiser's Edge*** is still compatible with *Crystal Reports 8.5*. However, we recommend you update to *Crystal Reports XI* to take advantage of this version's new features.

Your installation package of ***The Raiser's Edge*** includes one *Crystal Reports Standard* license. Users who use *Export* to create custom reports with *Crystal Reports* need a license. Each license is associated with a particular product, such as ***The Raiser's Edge*** or ***The Financial Edge***. Therefore, we recommend you purchase enough licenses to cover the number of people who create reports for ***The Raiser's Edge*** and the number of people who create reports for ***The Financial Edge***. For example, if one person reports off both ***The Raiser's Edge*** and ***The Financial Edge***, that individual requires two *Crystal Reports* licenses.

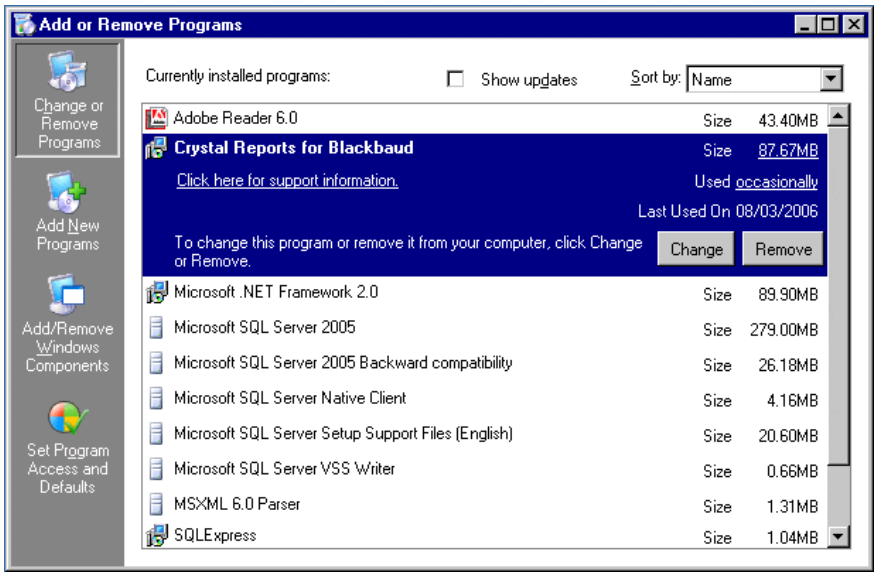
Crystal Reports Professional is also available for purchase with ***The Information Edge***.

Crystal Reports XI Installation

These procedures take you through the process to uninstall and install *Crystal Reports XI*.

- **Uninstall Crystal Reports**
  1. From the **Start** menu, select **Settings**, **Control Panel**.
  2. At the Control Panel, open **Add or Remove Programs**. The Add or Remove Programs screen appears.

3. Select the version of *Crystal Reports* to uninstall.



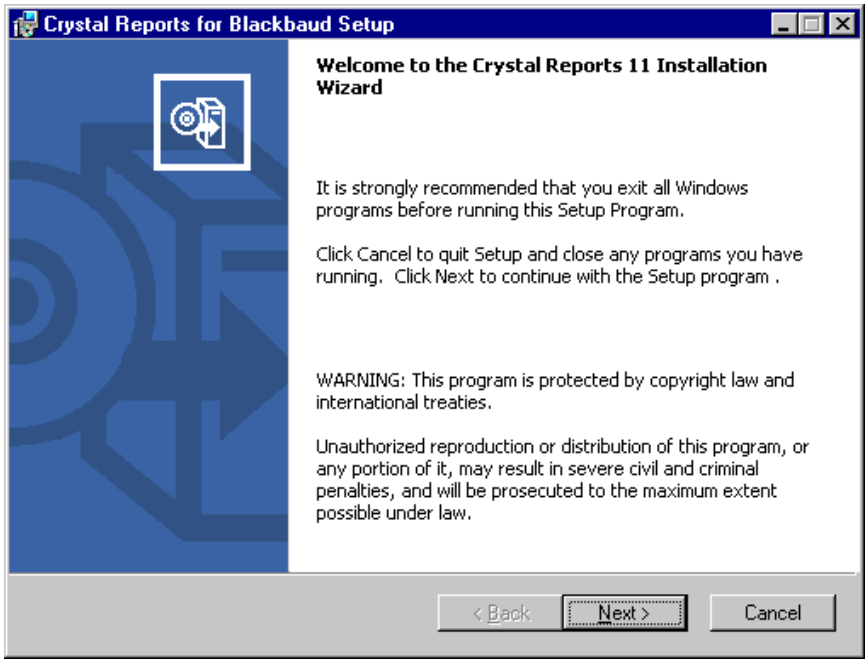
4. Click **Remove**. A message appears to ask whether to remove the selected program.
5. Click **Yes**. The uninstallation process begins.
6. During the uninstallation process, you may receive messages that ask whether to remove shared files. Even if the message suggests the file is no longer required, we recommend you click **No to All** and not uninstall any shared files.

   When the uninstall is complete, you return to the Add or Remove Programs screen.
7. Click **Close**.

Install Crystal Reports XI

1. Put the installation CD in your CD-ROM drive.
2. If the installation wizard does not appear, use Microsoft *Windows Explorer* to browse to your CD-ROM drive and double-click the `setup.exe` file.

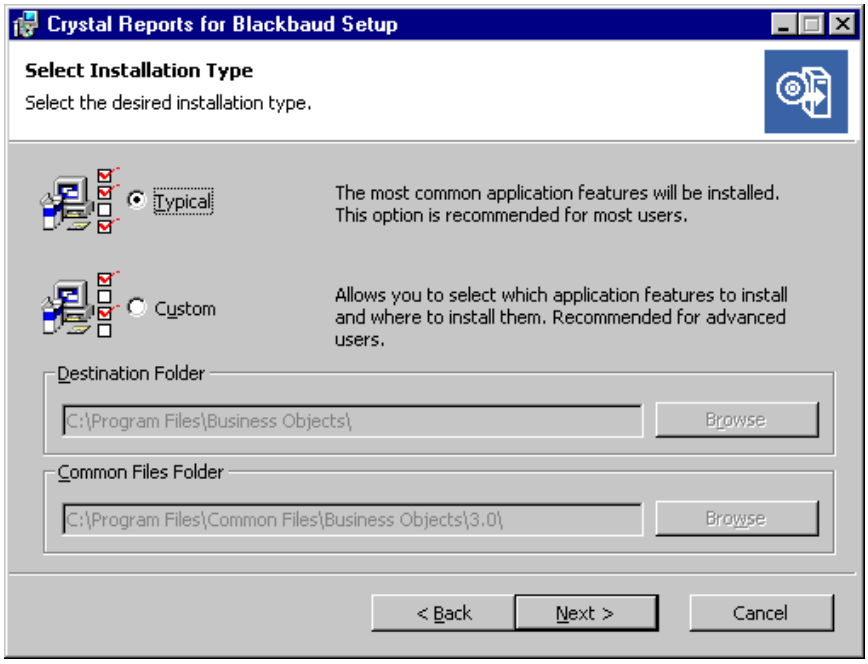
3. When the program completes some preliminary setup operations, the Welcome screen of the Crystal Reports 11 Installation Wizard appears.



Click **Next**. The License Agreement screen appears.

4. Review the terms of the license agreement.

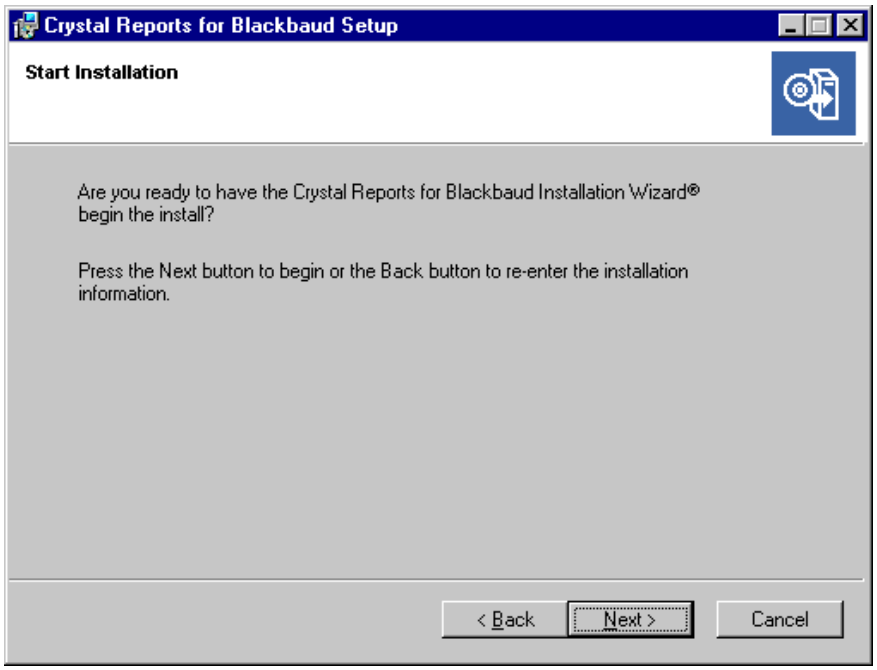
5. If you accept the terms of the license agreement, select **I accept the** license **agreement** and click **Next**. The Select Installation Type screen appears.



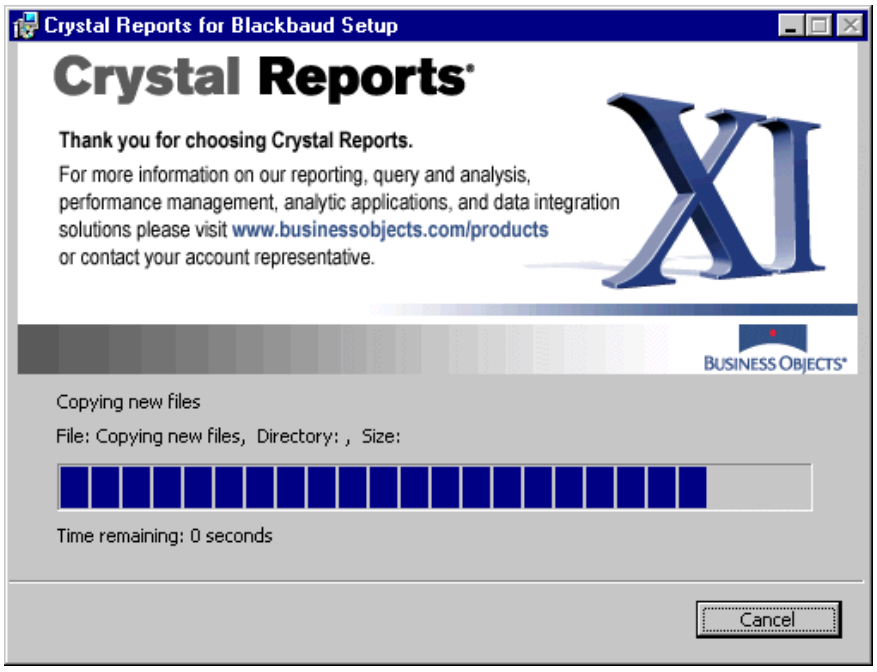
Note: The Typical installation is the easiest and most common installation. For a detailed explanation of each installation type, visit the Crystal Decisions website at www.crystaldecisions.com and refer to the *Crystal Reports* documentation.

6. Select **Typical**.
7. In the **Destination Folder** frame, enter where to install *Crystal Reports*. Accept the default location, or, click **Browse** to select a new location.
8. In the **Common Files Folder** frame, enter where to install *Crystal Reports'* common files. Accept the default location, or, click **Browse** to select a new location.

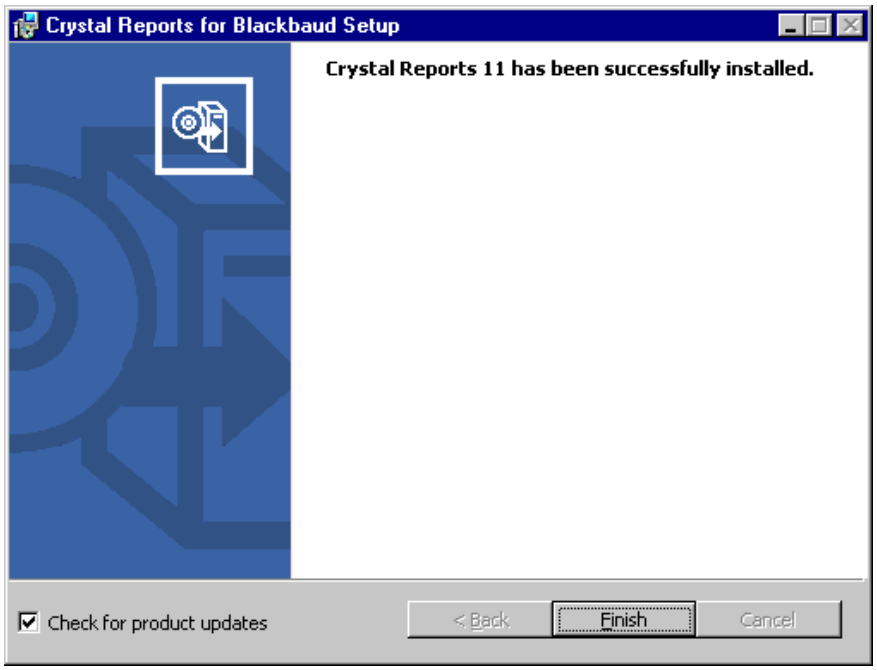
9. Click **Next**. The Start Installation screen appears and asks whether to install *Crystal Reports*.



10. Click **Next**. The installation process begins. A screen tracks the installation progress.



When the installation process is complete, a confirmation screen appears.



11. To have *Crystal Reports* check for updates to the application, mark **Check for product updates**.
12. Click **Finish**.
13. To open *Crystal Reports*, from the **Start** menu, select **Programs**, **Crystal Reports for Blackbaud**.

Install Office XP Web Components

Microsoft Office XP Web Components Installation **51**

Procedures

Install Office XP Web Components 51

Dashboard in ***The Raiser's Edge Enterprise*** requires that certain web components be installed with Microsoft *Office XP* to work. The Microsoft *Office* setup automatically installs *Office* web components. If you do not have Microsoft *Office XP*, visit http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=22276 to download the web components from the Download Center.

Office Web Components is a collection of Component Object Model (COM) controls to publish spreadsheets, charts, and databases to the web and to view the published components on the web.

Microsoft Office XP Web Components Installation

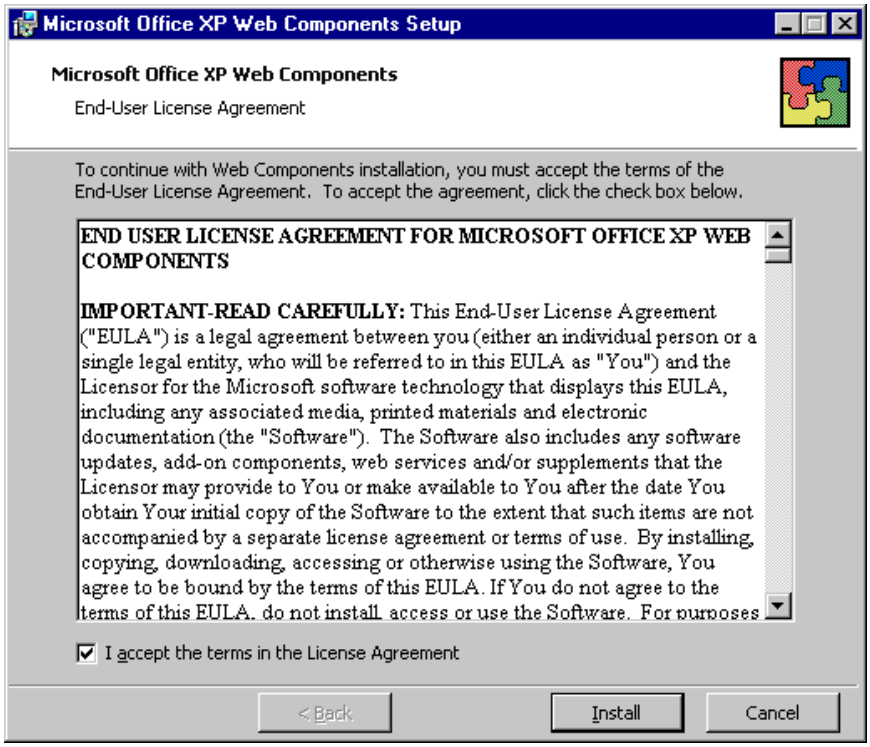
To install the *Office Web Components*, you must have local administrative rights.

After you install Microsoft *Office XP Web Components*, you can make full use of *Dashboard* in ***The Raiser's Edge Enterprise***. For more information about *Dashboard* features, see the *Dashboard Guide*.

- **Install Office XP Web Components**
  1. Visit http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=22276.
  2. Download the *Web Components* installer and save it to a folder on your computer.
  3. Navigate to the location where you saved the *Web Components* installer.

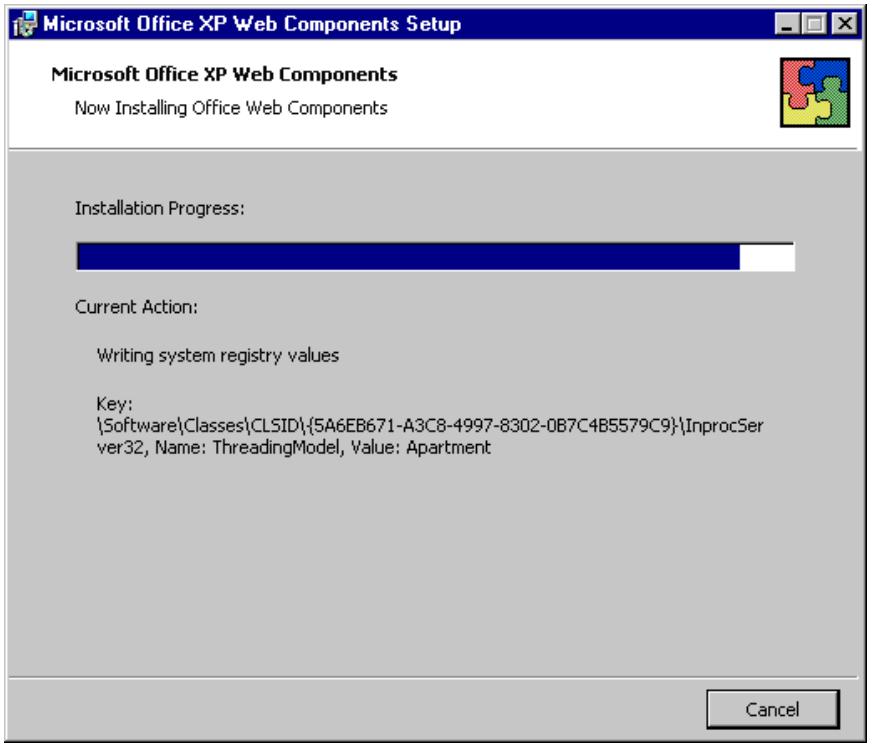
4. Double-click the installer. The Open File – Security Warning screen appears.

5. Click **Run**. The Microsoft Office XP Web Components End-User License Agreement screen appears.



6. Review the terms of the license agreement.

7. To accept the terms of the license agreement, mark **I accept the terms in the** License **Agreement** and click **Install**. The Microsoft Office XP Web Components screen appears and displays the progress of the installation.



When the installation is complete, a confirmation message appears.

8. Click **OK**. *Dashboard* is now accessible in ***The Raiser's Edge***.

Glossary

A 56
B 56
C 56
D 56
I 57
L 57
N 57
O 57
P 57
R 58
S 58
T 58
U 59
V 59
W 59

This section defines words and phrases you need to know as you install ***The Raiser's Edge***. If you come across an unfamiliar term when you read this or any other section in Blackbaud documentation, check the online glossary in the help file.

A

Action bar. An action bar is a screen element that contains buttons, such as **New**, **Open**, and **Delete**, you can use to perform quick actions.

Adobe® Acrobat® Reader. *Adobe® Acrobat® Reader* is a third-party software application that enables electronic distribution of formatted documents. *Adobe® Acrobat® Reader* can be downloaded free from the Adobe website.

API for Advanced Application Development. *API for Advanced Application Development* is an optional module experienced programmers can use with Blackbaud's programming object models to create applications that interface with ***The Raiser's Edge*** applications.

Alias. An alternative name for a server. An alias can also be a name for a table or column in expressions. It is usually used to shorten the name for subsequent reference in code, prevent possible ambiguous references, or provide a more descriptive name in the query output.

B

Backup. A copy of a database, transaction log, file, or filegroup used to recover data after a system failure.

Backup device. Usually the tape or disk on which you copy your database backup files. It can be used to restore your database.

Backup file. The file in which you store a full or partial database, transaction log, or file and/or filegroup backup.

Backup media. The tape, disk, or named pipe used to store a backup set.

Backup set. The output of a single backup operation.

Business rule. A business rule is a system-wide preference you set in *Configuration* to customize standard procedures and requirements. With business rules, you can control functions and displays affecting all users in the program.

C

Cache. Cache is computer memory with a very short access time. A computer uses it to store frequently used instructions or data.

Carriage Return/Line Feed (CR/LF). A CR/LF indicates a hard break. To insert a CR/LF in your document, press the **ENTER** key on your keyboard. In *Import*, each record in the import file in a delimited format must end with a CR/LF.

Configuration. *Configuration* is a shared area of ***The Raiser's Edge*** you use to set up your system and define settings to customize the program for individual users.

D

Database. A database is a collection of information organized in such a way that a computer program can quickly select desired pieces of data. It works much like an electronic filing system. Traditional databases are organized by fields, records, and files. A field is a single piece of information; a record is a set of fields; and a file is a collection of records.

I

IPX. IPX is an acronym for Internetwork Packet Exchange. This protocol in *Novell NetWare* governs the addressing and routing of packets within and between LANs.

IPX/SPX. IPX/SPX is the network and transport level protocol used by *Novell NetWare*, which together correspond to the combination of TCP and IP in the TCP/IP protocol suite.

L

LAN. LAN is an acronym for local area network, a group of computers and other devices dispersed over a relatively limited area and connected by a communications link. This link enables any device to interact with any other device on the network. LANs commonly include workstations and shared resources, such as laser printers and large hard disks.

Local Area Network (LAN). A Local Area Network (LAN) is a group of computers and other devices dispersed over a relatively limited area and connected by a communications link. This link enables any device to interact with any other device on the network. LANs commonly include workstations and shared resources such as laser printers and large hard disks.

N

NetBios. NetBios is an application programming interface (API). Short for Network Basic Input Output System, it augments the DOS BIOS by adding special functions for LANs. Almost all LANs for PCs are based on the NetBIOS.

Network installation. A network installation configures the system for multiple users on multiple workstations. Data and the database engine are installed on a server. To access data from a workstation, you must start the database engine.

O

Option. See “User Option’ on page 59.

P

Password. A password is a series of typed characters required to access a computer program. This prevents unauthorized users from entering the program.

PDF (Portable Document Format). A PDF is a type of document viewed with *Adobe® Acrobat® Reader* that maintains its formatting and displays correctly on any output device. For example, ***The Raiser’s Edge*** user guides are saved as PDFs and can be printed or accessed from the Help file, User Guides page, or the installation CD. PDF files contain hyperlinks so you can jump from topic to topic.

Plug-in. A plug-in is a program designed to run as extensions of the programs in ***The Raiser’s Edge***.

Preferences. See “User Option” on page 59.

Protocol. Protocols handle data routing and addressing. If the network protocol fails, the workstations cannot connect to your database. ***The Raiser’s Edge*** supports TCP/IP, IPX/SPX, and NetBIOS.

R

Record. A record is a page in ***The Raiser's Edge*** from which you add, edit, and delete information such as names, addresses, relationships, gifts, memberships, events. *Records* is also an area in ***The Raiser's Edge*** where you can manage records.

Root directory. In a computer file system organized as a hierarchy or tree (Microsoft *Explorer*), the root directory is the directory that includes all other directories.The root directory has no name. It is simply represented by the special character (C, D, E) that separates directories in a file system.

S

Security. *Security* is a shared area in ***The Raiser's Edge*** in which you establish access rights for users. With *Security* you can control what specific groups of users are allowed to view, add, edit, or delete information.

Security group. A Security group is a group of users you define in *Administration*. You control security in ***The Raiser's Edge*** by creating groups with specific rights and assigning users to groups based on how much system access you want them to have. You can edit the rights of existing groups.

Server. A server is a powerful computer or processor dedicated to managing disk drives, printers, or network traffic. Servers are often dedicated, meaning they perform no tasks other than server tasks. For example, a dedicated database server for processing database queries has no other functions besides processing the queries.

Shared component. A shared component is a feature shared by all ***The Raiser's Edge*** programs and modules.

Shared table. A shared tables is a table common throughout ***The Raiser's Edge***.

Shell. The shell is a central area from which you can access all areas of ***The Raiser's Edge***. When you click a link to access an area, it appears as a page in the shell.

Shortcut menu. A shortcut menu is a list of commonly used commands you can select to quickly perform actions or to display properties. **Open**, **Delete**, **Print**, and **Properties** are common shortcut menu items. To access shortcut menus, place your cursor in a field or grid and click the right mouse button.

SPX. SPX is an acronym for Sequenced Packet Exchange. This is a transport-level protocol used by *Novell NetWare*. SPX uses IPX to transfer the packets, but SPX ensures messages are complete.

Standalone. A standalone system (also referred to as a single-user system) is set up for one user; data is accessed from one workstation. To access data, you can open any program module. You do not need to start the database engine independently.

Standalone system. A standalone system (also referred to as a single-user system) is set up for one user. The workstation can access data directly. To access data, you can open any program area. You do not need to start the database engine independently.

Status bar. The status bar is a horizontal strip at the bottom of a screen that displays important messages to assist you in the program. For example, when the cursor is in a field with a table lookup available, "Press F7 for Table Lookup" appears in the status bar.

T

TCP/IP. TCP/IP is an acronym for Transmission Control Protocol/Internet Protocol. The Department of Defense developed this protocol for communications between computers. TCP/IP is built into the UNIX system and has become the standard for data transmission over networks, including the Internet.

Title bar. A title bar is a horizontal strip at the top of a screen that identifies a program or file.

Toolbar. A toolbar is a horizontal strip with buttons that, when clicked, perform specific tasks. It is located under the title bar at the top of a screen. Common toolbar buttons include **New**, **Open**, **Save**, and **Print**.

Transaction Log. Also called a "Change File," this file records transactional changes occurring in the database, providing a basis for updating a master file and establishing an audit trail.

Tree view. A treeview is a hierarchical list used throughout ***The Raiser's Edge***. Tree views differ from standard lists in that items in a treeview contain branches represented by dotted lines. Some tree views automatically display all branches; for others you must click a plus sign to view the branches.

U

UNC. UNC is an acronym for Uniform Naming Convention, the system of naming files among computers on a network. UNC ensures a file on one computer has the same path name when accessed from any other computer on the network.

User Option. An option is a preference you select that specifies defaults in ***The Raiser's Edge***. Options are password-specific and follow the user, regardless of the workstation he logs into.

V

Validate database. Validate database is a process you can run from *Administration* to analyze your database and determine data corruption or any inconsistencies.

VBA for Advanced Customization. *VBA for Advanced Customization* is an industry standard macro/scripting programming language widely used in software products, including all Microsoft *Office* applications. With the optional module *VBA for Advanced Customization,* you can customize ***The Raiser's Edge*** to interface more directly with other Windows applications.

W

WAN. WAN stands for wide area network, a geographically dispersed telecommunications network. The term distinguishes a broader telecommunication structure from a local area network (LAN).

Index

A

authentication 23

C

change password 36
compatibility 6
create new database wizard
    authentication 23
    database information 24
    license selection 22
    select destination database 22
    server information 23
Crystal Reports, installing 39
customizations 6

D

description for new database 24

I

install

    Office Web Components 51
install *Crystal Reports* 39
installation instructions
    MSI Package 31
    server 13
    silent 31

K

knowledgebase 38
knowledgebase solutions 38

L

license selection 22
log into ***The Raiser's Edge*** 34

M

MSI Package installation 31

N

name for new database 24

P

password
    changing 36
    default 34
path for new database 24
PIAs 6

S

sample data
    standalone installation 2
select another SQL Server instance 22
select destination database 22
sever installation
    installation procedure 13
    workstation installation 25
silent installation 31
single user installation, *see also* standalone installation 2
SMS Installation 31
solutions
    knowledgebase 38
standalone installation
    sample data 2
    system recommendations 2
system recommendations
    standalone systems 2

U

use local RE7 database server 22
use windows NT authentication 23
user name, default 34
user SQL server authentication 23

W

workstation installation 25