The Raiser's Edge®

7.91.50 Update Guide

111209

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RE7-Update-111209

7.91.50 Update Guide

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In the *Update Guide*, you learn about the enhancements in *The Raiser's Edge* and how to update your current installation to *The Raiser's Edge 7.91.50*. You also learn about the following:

- "Pre-Update Recommendations" on page 3
- "Installation Requirements" on page 24
- "Install the Update" on page 33
- "Post Update and Troubleshooting" on page 89
- "Install the Update from The Raiser's Edge 7.5" on page 68
- "New Features and Enhancements" on page 97

🕜 How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. 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 <u>www.blackbaud.com</u>. 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.

To narrow your search in the help file, enclose your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.



lcons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.



The notepad symbol designates a note or tip related to the information in the main text column.



The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.



The clock symbol designates a shortcut or timesaving action.



The dictionary symbol designates the definition of a frequently used term.

Update The Raiser's Edge

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This guide provides information and procedures about how to update your server and workstations to **The Raiser's Edge 7.91.50**. We also provide instructions on to use the Blackbaud Management Console to attach and back up your databases and how to work with sample data. Additionally, the New Features and Enhancements chapter provides information about new features and functionality available in this version of **The Raiser's Edge**.

Before you install the update, review the pre-update recommendations and installation requirements.

Pre-Update Recommendations

Before you update the *The Raiser's Edge*, we recommend you review the information in this section.

To install *The Raiser's Edge* for the first time, see the *Installation Guide*.

- □ *The Raiser's Edge* integrates with Microsoft's *MapPoint 2006*. With *MapPoint*, you can generate maps and geographically locate constituents in your database. Your installation of *The Raiser's Edge* includes a single *MapPoint* user license. For more information about how to install *MapPoint*, see the *Installation Guide*.
- Before you update *The Raiser's Edge*, we recommend you familiarize yourself with the new features and enhancements available in version 7.91.50. For more information on the new features available in *The Raiser's Edge 7.91.50*, see "New Features and Enhancements" on page 97.
- Review the "System Requirements" on page 4.
- Review the "Installation Requirements" on page 24.
- Review the "Prerequisites Installation" on page 31.
- Review the ".NET Framework 2.0 Customizations and Product Compatibility" on page 31.
- Review the "SQL Server Requirements" on page 32.
- Review the "Required NTFS Rights" on page 32.
- □ Before you update *The Raiser's Edge*, we strongly recommend you back up your database. For more information and instructions, see "Back Up Your Network Database" on page 4.
- ☐ If you update from *The Raiser's Edge 7.5*, review the "Migrate an ASA Database" on page 14.
- Learn about "Work with Sample Data" on page 23.
- □ If you integrate *The Raiser's Edge* with *The Patron Edge*, stop the integration SQL job before you create the pre-update backups of *The Raiser's Edge*. For more information, contact *Patron Edge* Support.

[□] *The Raiser's Edge* includes support for several web services, including *WealthPoint for The Raiser's Edge, PhoneFinder*, and *PeopleFinder*. For more information about how to install and update web services, see the *Web Services Installation and Set Up Guide*.

This backup applies to SQL Sever users only. Oracle users, see the Oracle Installation and Database Administrator's Guide for backup information.

When you back up your database, the Blackbaud Management Console copies your database to the hard drive of the server that runs the database. To ensure a secure backup strategy, we recommend you also create proper backups to removable media.

System Requirements

Before you update *The Raiser's Edge*, we strongly recommend you familiarize yourself with system requirements for *The Raiser's Edge*. Visit the Blackbaud website at <u>www.blackbaud.com</u> to view the system requirements. From the website, select **Products**, **System Requirements** from the menu bar.

Back Up Your Network Database

Before you update *The Raiser's Edge*, we strongly recommend you back up your database with a proper tape backup system. If you do not have such a system in place, the **Backup Database** link available through the Blackbaud Management Console allows you to run a full or compressed backup of your database while users continue to work in the program. The full backup saves a complete copy of your database in a directory you specify. The compressed backup option copies your data files, compresses the copies into a single *WinZip* file, and deletes the copies. However, if your database contains a single file larger than 4GB, you cannot run the compressed backup.

Back Up Your Database from The Raiser's Edge 7.6 or Higher

Although this utility conveniently backs up your database while allowing users to continue to work in the program, we recommend you also create a proper tape backup of your data.

- Back up your database from The Raiser's Edge 7.6 or higher
 - 1. Before you update *The Raiser's Edge*, from the main screen of the Blackbaud Management Console, select **Backup** in the Installed products tree view. On the right, the Backup History screen appears.





2. In the **Perform Backup** frame, click **Backup**. The Backup Database screen appears.

📴 Backup Database	×
Backup RE7_SAMPLE Database Select a path where you want to store the database backup.	J
Backup path: C:\backup	
Compress files after backup	
 Net Send notification when backup is finished: DENISEKA Output File: C:\output_file 	
Backup	Cancel

- 3. In the **Backup path** field, select a location for the backup. To specify the location, click the ellipsis.
- 4. To have the Blackbaud Management Console zip the files after the backup, mark **Compress files after backup**.

When you mark this checkbox, the **Send data to Blackbaud** checkbox is enabled. Unless directed to do so by Blackbaud Customer Support, do not mark **Send data to Blackbaud**.

- 5. To send a notification to a specified workstation when the backup is created, mark **Net Send notification when backup is finished**. You must enter the name of the workstation or user to receive the notification, if it differs from the default.
- 6. To generate a text file that details the backup process, mark **Output File**. In the **Output File** field, enter the location at which to save the output file. To map to the location, click the ellipsis.
- 7. To backup the database, click **Backup**. You return to the main screen of the Blackbaud Management Console.

Back Up Your Database from The Raiser's Edge 7.5

Although this utility conveniently backs up your database while allowing users to continue to work in the program, we recommend you also create a proper tape backup of your data.

Do not mark **Send data to Blackbaud** unless directed to do so by Blackbaud Customer Support.



1. Before you update *The Raiser's Edge*, click the Blackbaud Management Console shortcut on your desktop. The Blackbaud Management Console Welcome screen appears.



2. Click Administration. The Administration screen appears.





3. Click **Backup Database**. The database backup wizard appears.

🥔 Blackba	aud Management Console		
	Blackbaud Management Console		
Welcome to the database backup wizard. As an online backup utility, there is no need to shutdown the database during this process. Your users can continue to add, edit and delete records during the backup. This wizard needs to know where you would like to create the backup files. Please enter the directory you wish to use, or click "Browse" to search for a directory. Once you have selected a directory, press "Next" to continue. Backup root directory C:\Backup A new directory will be created under the backup root directory for each database. The backup files will be placed in a directory named for the current date using the format mmddyy. For example, if your backup root directory is C:\BACKUP, your database name is DB_1, and your backup is being performed on September Sth, 2000, then the backup files will be placed into			
	Cancel << Back Next >>		

- 4. In the **Backup root directory** field, enter the directory in which to save the backup.
- 5. Click Next. All databases available to back up appear.

🥙 Blackbaud Management Console 📃 🔲 🗙					
Blackbaud Management Console					
5	The following databases are available for backup.				
	Name Database path Do not Full backup Compressed backup				
	DB_1 C:\Ms\SampleData\ C C				
2	Disk space available: 33,295.99 mb				
ŬŨ	Disk space required: 139,48 mb If you choose a Full Backup , the management console will perform a full backup of your database. This will result in a copy of your database (the *.DB and *.LOG files) being placed in the directory you specified. If you choose Compressed Backup the backup files will be compressed into a single file. Use Compressed Backup if you need to conserve disk space.				
	Connect C / Ready Marit XX				
	Cancel << <u>B</u> ack <u>N</u> ext >>				

6. Next to the database to back up, select the type of backup to run. It may take a few minutes before the program accepts your selection.

Although the Blackbaud Management Console conveniently backs up your database while allowing your users to continue to work in the program, we recommend you also create proper backups to removable media. If the backup fails, a message appears to warn you that one or multiple backups failed.

- To save a complete copy of your database in a directory you specify, select **Full backup**.
- To copy your data files, compress the copies into a single WinZip file, and delete the copies, select **Compressed backup**. If your database contains a single file larger than 4GB, you cannot run the compressed backup and the option is marked "N/A".
- To not back up your database, select **Do not backup**.
- 7. Click **Next**. A screen appears to confirm the backup settings.

🤗 Blackba	Blackbaud Management Console					
	Blackbaud Management Console					
E	You have selected the following databases for backup. Press finish to complete the backup process.					
	Name	Backup output path		Status		
	DB_1	C:\Backup\DB_1\081302	Ready			
		Cancel << <u>B</u>	ack <u>F</u> inish			

8. Click **Finish**. The program runs the backup. When the backup is complete, a confirmation screen appears.



9. Click OK. You return to the Administration screen.

Blackbaud Management Console		
Administration		
 <u>Backup Database</u> Perform a standard or compressed backup of selected databases. 	<u>Restore from Backup</u> Restore from a previously created backup.	
 <u>Move Database</u> Allows you to move selected database files to another drive or directory. 	 <u>Rebuild Database</u> Rebuild your database to reclaim disk space after deleting large amounts of data or to improve performance by altering the database page size. 	
 <u>Truncate Transaction Logs</u> Update a database by committing all transactions currently in the transaction log. 	 <u>Update software</u> Update your deploy kits from a CD or a Service Revision. 	
Database Connections View connected users or disconnect a user.	<u>Schedule Backup</u> Schedule automatic backups of your database at a specific time on selected days. Next backup: No schedule defined	
<u>Help</u>	Return to main menu	

10. To return to the Blackbaud Management Console Welcome screen, click **Return to main menu**. You are ready to update *The Raiser's Edge*.

Attach Database Wizard

If you have an existing *The Raiser's Edge 7.6* or higher database in *SQL Server* format, you can use the Blackbaud Management Console to attach the database to your computer. For example, if you update your *Raiser's Edge* database and want to move the database to a different server, use this wizard to do so in a few simple steps.

Attach a database

1. On the Getting Started screen, select **Attach a database**. The Attach Database Wizard appears.



2. From the Attach Database Wizard screen, click **Next**. The Select Server screen appears.

🚺 Attach Database Wizard	×
Select Server Please select the server to which you wish to attach the database.	5
Please select from the two server options and click Next to continue.	
 Use the local Raiser's Edge database server (Recommended) 	
Select another SQL Server instance	
< Back Next >	Cancel

• To use *The Raiser's Edge 7* server installed with the program, select **Use the local Raiser's Edge database server** and go to step 3.

Even if you run a full version of SQL Server Standard or Enterprise, you must use the Blackbaud Management Console to attach databases to The Raiser's Edge. If you do not use the Blackbaud Management Console, you cannot access the databases from The Raiser's Edge.



- To use a separate installed instance of Microsoft *SQL Server*, select **Select another SQL Server instance** and select the *SQL Server* instance to use.
 - a. Click Next. The Server Information screen appears.

🚺 Attach Database Wizard	×
Server Information Please select a server and enter log	in information.
Highlight your server in the list below, or yo You can use the button below the list to to selecting a server, please enter login inform	ou can enter the server name in the select server box. ggle between registered and available servers. After nation.
Select Server:	Login information:
(local)	Use Windows authentication
(local)	C Use SQL Server authentication
	Login name:
	Password:
To view Available servers, click the button below:	To test the connection, click the button below:
Available	Test
	< Back Next > Cancel

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

b. If the required server does not appear in the **Select Server** box, click **Available**. A list of all *SQL Servers* available on your network appears. The button changes to **Registered**.

🔋 Attach Database Wizard	×			
Server Information Please select a server and enter login information.				
Highlight your server in the list below, or you can enter the server name in the select server box. After selecting a server, please enter login information.				
Select Server:	Login information:			
2KBIZTALK1	Use Windows authentication			
2KBIZTALK1 ADRIENEWI ADRIENLUS ALANEAR32\BLACKBAUD ALHA ALILE ALISONBU	Use SQL Server authentication Login name: Password:			
To view Registered servers, click the button below:	To test the connection, click the button below:			
Registered	Test			
	< Back Next > Cancel			

If you use your own *SQL Server* instance and run it in the *Windows*-only authentication mode, you must add any users who access *The Raiser's Edge* to the *SQL Server* network and grant them public role access.

- c. In the **Select Server** box, select the server in which to create a database.
- d. In the **Login information** frame, select the type of authentication to use.

If you have *SQL Server Standard* or *Enterprise* editions configured to work with *Windows* authentication, select **Use Windows authentication**. This allows you to log into the *SQL Server* instance with the same login name and password as your network.

To establish a login name and password in *SQL Server Standard/Enterprise Edition* using SQL Server authentication, 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.
- 3. Click **Next**. The Database Information screen appears.

🚺 Attach Database Wizard 🛛 🗙
Database Information Select from the two options.
Select from the options below and enter any required information. You can also enter a description which will be used when logging into The Raiser's Edge.
Attach: 💿 Existing database (MDF file) 💿 From backup file (BAK or ZIP file)
Parameters
Path to existing database: <u>To adjust file location(s), click here</u>
C:\Program Files\Blackbaud\The Raisers Edge 7\SampleData\RE7.mdf
Name for existing database:
RE7
Description for existing database: (optional)
RE7 Network Database 1
< Back Next > Cancel

- 4. In the Attach field, select the type of *Raiser's Edge* database to attach:
 - To attach an existing database, select Existing database (MDF file).
 - To attach a backup of a database, select **From backup file (BAK or ZIP file)**.
- 5. In the **Path to existing database** field, enter the location of the database to attach. To map to the location, click the ellipsis.
- 6. In the Name for existing database field, enter a name for the database.



- 7. In the **Description for existing database** field, enter a description of the database to help users identify the data it contains. For example, if the database contains sample data used for in-house training, enter "In-house Training Sample Data".
- 8. To change the default location of your existing database:
 - a. Above the **Path to existing database** field, click **To adjust file location(s)**. The Database Information screen appears.

	🚺 Attach Database Wizard 🛛 🗙				
	Database Information Select from the two options.				
	If you changed the default locat must specify the current location the file below.	ion of the file(s) before the database was detached, you for the attach to be successful. This is done by clicking on <u>To return to the previous screen, click here</u>			
	Original File Name(s)	Current File(s) Location			
	✓ RE7.mdf	C:\Program Files\Blackbaud\The Raisers Edge 7\SampleD			
	✓ RE7_bio.mdf	C:\Program Files\Blackbaud\The Raisers Edge 7\SampleD			
	✓ RE7_gift.mdf	C:\Program Files\Blackbaud\The Raisers Edge 7\SampleD			
	RE7_index.mdf	C:\Program Files\Blackbaud\The Raisers Edge 7\SampleD			
	RE7_temp.mdf	C:\Program Files\Blackbaud\The Raisers Edge 7\SampleD			
	✓ RE7_log.ldf	C:\Program Files\Blackbaud\The Raisers Edge 7\SampleD			
_	1				
		< Back Next > Cancel			

- b. To specify the current location of the database, double-click the file in the grid.
- c. To return to the Database Information screen, click **To return to the previous screen**.



Wizard.

Server Name:

Database Name: RE7

To close the wizard, click Finish.

You have successfully completed the Attach Database

VM-LMR-XP

You have specified the following settings:

9. Click Next. The selected database is attached, and a confirmation screen



You can now open *The Raiser's Edge* and start to work in the database.

Migrate an ASA Database

The Raiser's Edge includes Microsoft SQL Server Express. If you update from *The Raiser's Edge 7.5*, you must use the Blackbaud Management Console to migrate your existing ASA databases to Microsoft SQL Server Express before you can start to work with the program.

Migrate an ASA Database into SQL Server

The Raiser's Edge includes the Microsoft SQL Server Express. Before you can start to work in the program, you must migrate your existing ASA database into SQL Server Express.



After you restart your computer, the new Blackbaud Management Console shortcut appears on your desktop. However, if you also use Blackbaud's accounting software, *The Financial Edge*, or education software, *The Education Edge*, a new management console shortcut does not appear. All programs use the same management console.

1. On your desktop, double-click the Blackbaud Management Console shortcut. The Getting Started screen appears.



The Getting Started screen displays multiple options. The options you receive depend on whether your system satisfies these conditions:

- You have a valid deploy kit from *The Raiser's Edge 7.5*.
- You have an existing *Raiser's Edge 7.5 ASA* database that is not sample data. You must be able to log into this database from *The Raiser's Edge 7.5*. This ensures the registry keys exist and the database can be found during the default update.
- No Microsoft *SQL Server* database named RE7.mdf exists in any of *The Raiser's Edge 7.5* database locations.
- For all databases that exist in *Raiser's Edge 7.5*, none are more than 3.7GB in size.
- Enough free disk space exists where the *Raiser's Edge 7.5* or higher database is located in order to convert it. Updating from *The Raiser's Edge 7.5* or higher to *The Raiser's Edge 7.91.50* requires two times the disk space of your current database.

If you update from The Raiser's Edge 7.5 and, when you installed The Raiser's Edge 7.5, you selected **Automatically** Start the database when the system starts, the ASA database restarts when you restart your computer at the end of the update procedure. Before you migrate your ASA database into SQL Server, you must shut down the ASA database. If the ASA database runs on your server when you start to migrate your database, an error message appears and you cannot continue. To shut down the service, go to Service Manager. For detailed instructions about how to shut down the ASA database service, see "Shut down the Blackbaud Database Service" on page 93.





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Even if you run a full version of SQL Server 2000 Standard or Enterprise, you must use the Blackbaud Management Console to attach databases to **The Raiser's Edge**. If you do not use the Blackbaud Management Console, you cannot access the databases from **The Raiser's Edge**. If your system satisfies these conditions, you receive three options.



If your system does not satisfy these conditions, you receive two options.



2. Select the type of update to perform.

On a Getting Started screen with three options:



- To keep the database settings from your previous installation of *The Raiser's Edge*, select **Automatic Database Migration** and click **Begin**. The program migrates your Sybase *ASA* database for use with Microsoft *SQL Server*. We recommend this option for most installations of *The Raiser's Edge*.
- To use a server other than the *SQL Server Express* installed with *The Raiser's Edge*, or to manually migrate the database, click **Custom Database Migration** and click **Begin**. The Database Migration Wizard appears. For detailed information about this wizard, go to "Update from The Raiser's Edge 7.5 on Workstations" on page 73.
- To connect an existing *Raiser's Edge SQL Server* database to the Blackbaud Management Console for use in *The Raiser's Edge*, select **Attach a database** and click **Begin**. The Attach Database Wizard appears. For detailed information about this wizard, go to the "Attach Database Wizard" on page 9.

On a Getting Started screen with two options:

- To manually migrate an ASA database into SQL Server Express, select **Migrate a Database** and click **Begin**. The Database Migration Wizard appears. For detailed instructions about this wizard, go to "Migrate an ASA Database" on page 14.
- To connect an existing *Raiser's Edge SQL Server* database to the management console for use in *The Raiser's Edge*, select Attach a **Database** and click **Begin**. The Attach Database Wizard appears. For detailed instructions about this wizard, go to "Attach Database Wizard" on page 9.

Migrate Database Wizard

Use the Migrate Database Wizard

After you restart your computer, the Blackbaud Management Console shortcut appears on your desktop. However, if you use Blackbaud's accounting software, *The Financial Edge*, or education software, *The Education Edge*, a new management console shortcut does not appear. All programs use the same management console.

1. On your desktop, double-click the Blackbaud Management Console shortcut.



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2. Select **Migrate a Database** and click **Begin**. The Welcome to the Migrate Database Wizard screen appears.





3. Click **Next**. The Select Source Database screen appears.

💱 SQL Server Migration Wizard 🛛 🗙				
Select Source Database Please specify the Sybase database file you wish to migrate.				
You may select any database from The Raiser's Edge 6.x or The Raiser's Edge 7.5.				
Note: It is recommended that you back up your database before proceeding.				
Select ASA database to migrate:				
C:\Ms\MS\Data7\re7.db				
< Back Next > Cancel				

- 4. In the **Select ASA database to migrate** field, enter the location of the *ASA* database to migrate. To locate the database, click the ellipsis.
- 5. Click Next. The Select Destination Database screen appears.

醇 SQL Server Migration Wizard	×
Select Destination Database Please select the server on which you wish the new database to be created.	
Please select from the two server options and click Next to continue.	
O Use The Raiser's Edge 7 database server (Recommended)	
O Select another SQL Server instance	
< Back Next >	Cancel

• To use the database server installed with *The Raiser's Edge*, select Use **The Raiser's Edge 7 database server (Recommended)** and go to step 6.

Before you migrate a database, we recommend you run a database validation and check your database for problems. For information about how to validate a database, see the *Database Administration Guide*.

- To use a separate installed instance of Microsoft *SQL Server*, select **Select another SQL Server instance** and select the *SQL Server* instance to use.
 - a. Click **Next**. The SQL Server Information screen appears.

SOL Server Information				
Please select SQL Server instance	and enter login information.			
Highlight your server in the list below, or y After selecting a server, please enter login	ou can enter the server name in the select serv information.			
Select Server:	Login information:			
(local) © Use Windows authenticat				
(local)	C Use SQL Server authentication			
	Login name:			
	Password:			
To view Available servers, click the button below:	To test the connection, click the button below:			
Available	Test			
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- b. In the **Select Server** box, select the server in which to migrate your database.
- c. In the **Login information** frame, select the type of authentication to use.

If you have *SQL Server Standard* or *Enterprise* editions configured to work with *Windows* authentication, select **Use Windows authentication**. This allows you to log into the *SQL Server* instance with the same login name and password as your network.

To establish a login name or password in *SQL Server Standard/Enterprise Edition* with *SQL Server* authentication, select **Use SQL Server authentication** and enter a login name and password for the server.

- d. 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.

🖶 SQL Server Migration Wizard
Database Information Please enter the following information for your migrated database.
Path for migrated database:
C:\Ms\MS\ Data7
Name for migrated database:
RE7
Description for migrated database: (optional)
Created 04/05/04
The Database Name is the name that will be used within BMC. The Database Description is the label that will be shown on users' database selection screens.
< Back Migrate Cancel

- 7. In the **Path for migrated database** field, enter a location for the database. To map to the location, click the ellipsis.
- 8. In the **Name for migrated database** field, enter a name to identify the database in the Blackbaud Management Console.
- 9. In the **Description for migrated database** field, enter a description of the database. This description appears on your workstations' database selection screens to help users identify the database.

If you use your own instance of SQL Server and run it in the Windows-only authentication mode, you must add any users who access **The Raiser's Edge** to the SQL Server network and grant them public role access to the **Raiser's Edge** database.



SQL Server Migration Wizard		
Your data is being migrated from Sybase to SG	L Server.	G
		_
Step 1 of 6: Initializing components		
L		
Migrating ASA database to SQL Server		
	< Back N	lext > Cancel

Once the migration is complete, the Completing the Migrate Database Wizard screen appears.



11. Click Finish. You return to the Blackbaud Management Console screen.



Copy ASA Database Files to New Server

Although you do not need *The Raiser's Edge* installed on the new server before you update, you must copy the *ASA* database files from the old server to the new server if you update from *The Raiser's Edge 7.5*. Before you move the data, you must shut down the ASA database engine.

Copy ASA database files to a new server

1. Using Microsoft *Windows Explorer*, locate your *ASA* database files: re_bio.db, re_gift.db, re_index.db, re_temp.db, re7.db, and re7.log.

🔍 C:\ASA_db_files 📃 🗗 🗙						
File Edit View Favorites Tools	Help					-
🗢 Back 🔹 🤿 👻 🔯 Search	Polders	③ 皆 生 × の				
Address 🔂 C.\ASA_db_files 🗹 🧭 Go Links '						∂Go Links≫
Folders	×	Name 🔺	Size	Туре	Modified	
esktop		💌 re_gift.db	1,588 KB	DB File	02/05/2003 5:13 Pl	м
My Documents		📄 re_index.db	1,324 KB	DB File	04/25/2003 2:58 PI	м
My Computer		🔊 re_temp.db	8,188 KB	DB File	04/25/2003 2:58 Pl	м
- 🚽 3½ Floppy (A:)		📄 re7.db	28,264 KB	DB File	04/25/2003 2:58 Pl	м
🖅 💷 Local Disk (C:)		🗒 re7.log	12,864 KB	Text Document	04/25/2003 2:58 PI	м
😟 🧰 76_update						
- 🗀 Adobe						
🔁 ASA_db_files						
- 🗀 Backup						
BBDEPLOYDIR						
E ClfyCint.60						
E ClfyCint.80						
CRYSTAL						
🕀 🛄 Dell						
E Deploy						
Documents and Settings						
Administrator						
🖽 🛄 davidow						
E Default User						
Deniseka						
Application Data						
	-					
5 object(s) (Disk free space: 28.3 GB)					51.0 MB 📃 My Co	mputer

When you copy the *ASA* database files from the existing *ASA* server to the new server, the copied files *must* be in the same directory structure and path. For example, if the files from \apps\fundraising\re7 on server A, use \apps\fundraising\re7 as the *ASA* source on Server B.

Copy all the database files and add them to your new server. To add the database files to the new server, you can use the Edit, Copy and Edit, Paste menu options in *Windows Explorer*.

After you have the ASA database files copied to the new server, you can install *The Raiser's Edge*.

Work with Sample Data

Your installation of *The Raiser's Edge* provides sample data. You can practice with the program before you migrate your database. We recommend you use the sample data as a training tool. It contains examples of the many features available in the program.

If you use *The Raiser's Edge* on a server, all workstations share the sample data, and all users can see all changes. When you update to *The Raiser's Edge 7.91.50* on a workstation, you can no longer access the sample data that previously existed on the workstation.

If you currently use *The Raiser's Edge*, before you update to *The Raiser's Edge 7.91.50*, you must have at least *The Raiser's Edge 7.5* installed. You cannot update from *The Raiser's Edge 7.0*, *7.01*, *7.02*, or *7.03*.

Installation Requirements

Before you update *The Raiser's Edge*, we strongly recommend you meet these installation requirements.

Installation Requirements for a Standalone Machine

A standalone machine, or single workstation, is set up for one user, and only one workstation accesses the data. To use a standalone system, perform these requirements.

- Before you update *The Raiser's Edge*, make a complete backup of your database in *The Raiser's Edge*. We strongly recommend you use a proper tape backup system. If you do not have such a system in place, use the Blackbaud Management Console. When you run a backup, make sure all *The Raiser's Edge* database files are included: RE7.mdf, RE7_bio.mdf, RE7_gift.mdf, RE7_index.mdf, RE7_log.ldf, and RE7_temp.mdf. For detailed instructions, see "Back Up Your Network Database" on page 4.
- □ If you use an MSDE database, you receive a warning during installation. Before you update *The Raiser's Edge*, back up your database. After the database is attached to *SQL Server Express 2005*, it cannot attach to any instance of *SQL Server 2000*. For more information about database migration, see the *Quick Tips for Installing The Raiser's Edge*.

🖶 The Raiser's Edge - InstallShield Wizard				
Database Migration Warning Please read the following warning carefully before continuing.				
<u>MSDE to SQL 2005 Express Database Migration Warning</u> Setup has determined that you have Microsoft SQL Server MSDE installed from a previous version of this software. Your database(s) will automatically be migrated to SQL Server 2005 Express during this install. SQL Server 2005 Express databases are not backwards compatible with MSDE, and once converted cannot be used with pre- SQL Server 2005 database servers. <u>YOU MUST BACK UP YOUR MSDE DATABASE(S)</u> <u>BEFORE PROCEEDING.</u> If you have already backed up your database(s), check the box below to continue. Otherwise, please cancel this install and back up your database (s). You may re-run this setup at any time.				
All MSDE databases have been backed up				
InstallShield Back Next > Cancel				

Exit all *Windows* applications.

Close any virus scan programs. These programs can sometimes mistakenly interpret the setup/update process of a new program as a contamination of existing files on the disk.



Close the Microsoft *Office* toolbar, when present. It may interfere with the installation of some files.

□ Due to the integration between *The Raiser's Edge* and Microsoft *Outlook*, if your workstation users use *Outlook*, they must exit and log out of *Outlook* before you update *The Raiser's Edge* on their computers. If they fail to exit and log out of *Outlook*, the update may not install properly.

■ Every 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 <u>www.microsoft.com/ie</u> 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 update utility for *The Raiser's Edge*, 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*. After you enter these credentials, you can log in to the program.

□ 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 cannot update to *The Raiser's Edge 7.91.50*. You must either remove the credit card information from your database or cancel the upgrade process.

□ If you use Microsoft *SQL Server 2000 Standard* or *Enterprise* editions, Service Pack 4 or higher is required. This 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.

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, purchase Microsoft *SQL Server 2005 Standard*, *Enterprise*, or *Workgroup* editions, or *SQL Server* 2008.



■ Every workstation that runs Microsoft *Windows 2000* must have Service Pack 4 or higher installed; workstations that run Microsoft *XP* must have Service Pack 2 or higher installed. If the required service pack is not installed, visit <u>www.microsoft.com/downloads/</u> to download the latest version.

- □ If you use *The Financial Edge*, you must have *The Financial Edge 7.2* or higher installed to work with *The Raiser's Edge 7.91.50*.
- □ If you use *Blackbaud NetCommunity*, you must have a version that complies with PCI DSS to work with *The Raiser's Edge 7.91.50*.
- Before you use *Dashboard*, install Microsoft *Office Web Components*. For more information, see the *Installation Guide*.
- Before you update *The Raiser's Edge*, you do *not* have to uninstall previous versions of the program.
- Before you update *The Raiser's Edge*, you must have *The Raiser's Edge 7.5* or higher installed. Updating from *The Raiser's Edge 7.5* or higher to *The Raiser's Edge 7.91.50* requires two times the disk space of your current database.

Installation Requirements for a Server

A network installation configures the software for multiple users who work on multiple workstations. To use a network system, perform these requirements.

■ Before you update *The Raiser's Edge*, make a complete backup of your database in *The Raiser's Edge*. We strongly recommend you use a proper tape backup system. If you do not have such a system in place, use the Blackbaud Management Console. When you run a backup, make sure all *The Raiser's Edge* database files are included: RE7.mdf, RE7_bio.mdf, RE7_gift.mdf, RE7_index.mdf, RE7_log.ldf, and RE7_temp.mdf. For detailed instructions, see "Back Up Your Network Database" on page 4.

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, purchase Microsoft SQL Server 2005 Standard, Enterprise, or Workgroup editions, or SQL Server 2008.



□ If you use an MSDE database, you receive a warning during installation. Before you update *The Raiser's Edge*, back up your database. Once the database is attached to *SQL Server Express 2005*, it cannot attach to any instance of *SQL Server 2000*. For more information about database migration, see the *Quick Tips for Installing The Raiser's Edge*.

🙀 The Raiser's Edge - InstallShield Wizard	×				
Database Migration Warning					
Please read the following warning carefully before continuing.	1000				
MSDE to SQL 2005 Express Database Migration Warning					
Setup has determined that you have Microsoft SQL Server MSDE installed from a previous version of this software. Your database(s) will automatically be migrated to SQL Server 2005 Express during this install. SQL Server 2005 Express databases are not backwards compatible with MSDE, and once converted cannot be used with pre-SQL Server 2005 database servers. <u>YOU MUST BACK UP YOUR MSDE DATABASE(S)</u> <u>BEFORE PROCEEDING.</u> If you have already backed up your database(s), check the box below to continue. Otherwise, please cancel this install and back up your database (s). You may re-run this setup at any time.					
All MSDE databases have been backed up					
InstallShield					
InstallShield	Cancel				

☐ You need a CD-ROM drive or website download at the server. The update process copies all update files and integrates the settings configured when the Blackbaud Management Console was originally set up to facilitate a deploy package. The deploy package updates a workstation when a user with local administrative rights and rights to the deploy package logs into the workstation.

Exit all *Windows* applications.

□ To complete the installation, every workstation that runs *The Raiser's Edge* needs Microsoft's *Internet Explorer 6.0* or higher installed. Visit Microsoft's website at <u>www.microsoft.com/ie</u> 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 update utility for *The Raiser's Edge*, 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*. After you enter these credentials, you can log in to the program.

□ 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 cannot update to *The Raiser's Edge 7.91.50*. You must either remove the credit card information from your database or cancel the upgrade process.

□ 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/selserver/bb671408.acpv

http://technet.microsoft.com/en-us/sqlserver/bb671408.aspx.

□ Every workstation that runs Microsoft *Windows 2000* must have Service Pack 4 or higher installed; workstations that run Microsoft *XP* must have Service Pack 2 or higher installed. If the required service pack is not installed, visit <u>www.microsoft.com/downloads/</u> to download the latest version.

Close any virus scan programs on the server and workstations. These programs can sometimes mistakenly interpret the setup/update process of a new program as a contamination of existing files on the disk.

Close the Microsoft *Office* toolbar, if present. It may interfere with the installation of some files.

Domain controllers, small business servers, NT 4.0 Server, and peer-to-peer networks are not supported.



Before you use *Dashboard*, install Microsoft *Office Web Components*. For more information, see the *Installation Guide*.

□ For the deployment package to update *The Raiser's Edge* on a workstation, a user must have local administrative rights to add software to that computer.

□ Due to the integration between *The Raiser's Edge* and Microsoft *Outlook*, if your workstation users use *Outlook*, they must exit and log out of *Outlook* before you update *The Raiser's Edge* on their computers. If they fail to exit and log out of *Outlook*, the update may not install properly.

☐ If you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, your organization must update all instances of *The Raiser's Edge*, including those on the *Blackbaud NetCommunity* web server. Running inconsistent versions of *The Raiser's Edge* may cause errors in *Blackbaud NetCommunity*.

☐ If you use *The Financial Edge*, you must have *The Financial Edge 7.2* or higher installed to work with *The Raiser's Edge 7.91.50*.

□ If you use *Blackbaud NetCommunity*, you must have a version that complies with PCI DSS to work with *The Raiser's Edge 7.91.50*.

■ Before you update *The Raiser's Edge*, you must have *The Raiser's Edge 7.5* or higher installed. Updating from *The Raiser's Edge 7.5* or higher to *The Raiser's Edge 7.91.50* requires two times the disk space of your current database.

- Before you update *The Raiser's Edge*, you do *not* have to uninstall previous versions of the program.
- □ If you update from *The Raiser's Edge 7.5*, shut down the database engine.

□ *The Raiser's Edge* (*SQL Server*) does not support *Novell* databases. If you convert from *Novell*, before you update *The Raiser's Edge*, convert to *Windows* and install the Blackbaud Management Console on only your server.

☐ If you use *Read-Only Database Assistance*, ensure you can access the most up-to-date user guides and unlock *Read-Only Database Assistance* from *The Raiser's Edge* shell.

After you complete the upgrade, perform the backups and maintenance items outlined in the *Database Administration Guide*.

Installation Requirements for Oracle

To use an Oracle database, perform these requirements.

- When you update *The Raiser's Edge*, you can skip builds. You do not have to update builds consecutively.
- ☐ Before you update *The Raiser's Edge*, create a complete backup of your *Raiser's Edge* database.

Check the Blackbaud website at www.blackbaud.com for any updates. Select **Support**, **Downloads** from the menu bar.

☐ Make sure clients of *The Raiser's Edge* are logged out of the system.

If you use **RE:Anywhere**, you must install the latest version of the software along with your update of **The Raiser's Edge**. You can install the newest version of **RE:Anywhere** from your update CD, from the update files you downloaded, or from our website at www.blackbaud.com/suppor t/downloads/downloads.asp X.



The update includes a NoDBAForRewin.s ql file. With this file, you can revoke database administration rights from all connections to the database made through *The Raiser's Edge*. You must run this script file while connected as SysDba.

If you currently map *Raiser's Edge* users to database users, after you update *The Raiser's Edge*, you must again map your *Raiser's Edge* users to the database users. ☐ You need a CD-ROM drive or website download at the server. The update process copies all update files and integrates the settings configured when the Blackbaud Management Console was originally set up to facilitate a deploy package. The deploy package updates a workstation when a user with local administrative rights and rights to the deploy package logs into the workstation.

Exit all *Windows* applications.

- Close the Microsoft *Office* toolbar, if present. It may interfere with the installation of some files.
- □ Due to the integration between *The Raiser's Edge* and Microsoft *Outlook*, if your workstation users use *Outlook*, they must exit and log out of *Outlook* before you update *The Raiser's Edge* on their computers. If they fail to exit and log out of *Outlook*, the update may not install properly.
- □ To complete the installation, every workstation that runs *The Raiser's Edge* needs Microsoft's *Internet Explorer 6.0* or higher installed. Visit Microsoft's website at <u>www.microsoft.com/ie</u> 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 update utility for *The Raiser's Edge*, 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*. After you enter these credentials, you can log in to the program.
- □ 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 cannot update to *The Raiser's Edge 7.91.50*. You must either remove the credit card information from your database or cancel the upgrade process.
- Close any virus scan programs on the server and on the workstations. These programs can sometimes mistakenly interpret the setup/update process of a new program as a contamination of existing files on the disk.
- For the deployment package to update *The Raiser's Edge* on a workstation, a user must have administrative rights to add software to that computer.
- After you complete the upgrade, perform the backups and maintenance items outlined in the *Oracle Installation and Administrator's Guide*.
Prerequisites Installation

When you update *The Raiser's Edge*, the update utility verifies you have all the required prerequisites. If you do not have all the prerequisites, your administrator must install the prerequisites before you can successfully update *The Raiser's Edge*. The prerequisites are in the ISSetupPrerequisites folder included on both the CD-ROM and with the downloadable version of the *The Raiser's Edge* installation program.

SQL Server Prerequisites

Before you can update *The Raiser's Edge* for *SQL Server*, 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
- Microsoft SQL Server 2005 or SQL Server 2008
- Microsoft SQL Server 2005 Express backward compatibility components

Oracle Prerequisites

Before you can update *The Raiser's Edge* for *Oracle*, 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 Office XP components

.NET Framework 2.0 Customizations and Product Compatibility

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

Any customizations in *The Raiser's Edge* compiled using the .NET 1.1 Framework may experience issues after you update *The Raiser's Edge*. This also applies to any *Raiser's Edge* PIAs referenced in your code. We strongly recommend you test all applications in a development environment before you upgrade in a production environment. If your organization has many users and experiences performance issues using *The Raiser's Edge* with *SQL Server Express*, we recommend you purchase Microsoft *SQL Server 2005 Standard*, *Enterprise*, or *Workgroup* editions, or *SQL Server* 2008.



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

SQL Server Requirements

- 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.
- Install *SQL Server* client tools on the machine that runs the Blackbaud Management Console.
- Enable Named Pipes and TCP/IP in the SQL Server Configuration Manager.
- Enable xp_cmdshell in the SQL Server Area Configuration.
- 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/Enterprise Edition*, 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 <u>http://technet.microsoft.com/en-us/sqlserver/bb331754.aspx</u> 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 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/bb6671408.aspx.

For more information about how to prepare Microsoft SQL Server 2005 for use with databases in *The Raiser's Edge*, 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

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\Blackbaud\The Raiser's Edge	FULL
C:\System Temp Folder	FULL
C:\WINNT\SYSTEM32	RX



- To propagate the permissions to all files and folders within the parent folder, 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**.
- For information about how to edit NTFS permissions, see Knowledgebase Solution BB3124.
- If these rights are insufficient, we recommend you use *FileMon* to determine where additional rights are required. *FileMon* is a useful third-party utility that troubleshoots permission issues. For more information about *FileMon*, see Knowledgebase Solution BB50451.

Install the Update

After you review the requirements, recommendations, and instructions in this chapter, you can update *The Raiser's Edge*.

- If you have *The Raiser's Edge 7.85* or higher installed and want to update on a standalone machine, see "Install The Raiser's Edge Update on a Standalone Machine" on page 34.
- If you have *The Raiser's Edge 7.85* or higher installed and want to update on a server, see "Install The Raiser's Edge Update on a Server" on page 37.
- If you have *The Raiser's Edge 7.82* or earlier installed, you must first upgrade to *The Raiser's Edge 7.85* and then upgrade to *The Raiser's Edge 7.91.50*. To update on a standalone machine, see "Install The Raiser's Edge Update on a Standalone Machine" on page 34.
- If you have *The Raiser's Edge 7.82* or earlier installed, you must first upgrade to *The Raiser's Edge 7.85* and then upgrade to *The Raiser's Edge 7.91.50*. To update on a server, see "Install The Raiser's Edge Update on a Server" on page 37.
- If you have *The Raiser's Edge* for *Oracle*, see "Install The Raiser's Edge Update for Oracle" on page 42.
- If you have *The Raiser's Edge* and use *Terminal Services* or *Citrix*, see "Install The Raiser's Edge Update Using a Terminal or Citrix Server" on page 50.
- To update *RE: Anywhere for Remote Access*, see "Install the RE:Anywhere for Remote Access Update" on page 63.
- If you have *The Raiser's Edge 7.5* installed and want to update on a server, see "Update from The Raiser's Edge 7.5 on a Server Requirements" on page 69.
- If you have *The Raiser's Edge 7.5* installed and want to install the update on a new server, see "Update from The Raiser's Edge 7.5 on a New Server Requirements" on page 75.
- If you have *The Raiser's Edge 7.5* installed and want to update on a standalone machine, see "Update from The Raiser's Edge 7.5 on a Standalone Machine Requirements" on page 85.

The directories listed are system defaults only. Your directory locations and names may be different if they were changed from the original default settings. If the installation options screen fails to appear, you can use Microsoft *Windows Explorer* to access setup.exe on your CD-ROM drive.

If you use **RE:Anywhere**, you must install the latest version of the software along with your update of **The Raiser's Edge**. You can install the newest version of **RE:Anywhere** from your update CD or update files downloaded from www.blackbaud.com/suppor t/downloads/downloads.asp X.

Install The Raiser's Edge Update on a Standalone Machine

A standalone machine, or single workstation, is set up for one user, and only one workstation accesses the data. To use a standalone system, perform these update instructions.

Update The Raiser's Edge on a standalone computer

1. Access the update files.

- Insert the update CD in your CD-ROM drive. A screen appears and displays the installation options.
- If you downloaded the update, extract the update files to a directory on your workstation and then double-click the setup.exe file.
- 2. To verify you have the correct version of *SQL Server* installed, the InstallShield Wizard screen appears.

If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.

In	InstallShield Wizard			
		he Raiser's Edge requires that the following requirements be installed on your computer ior to installing this application. Click OK to begin installing these requirements:		
	Status	Requirement		
	Pending	Blackbaud SQL Server Verification		
	Pending	Microsoft SQL Server 2005 Express		
	Pending	Microsoft SQL Server 2005 Backward Compatibility		

Install

Cancel



If the *SQL Server 2005* verification tool detects that your version does not meet the minimum service pack requirement, a message appears to inform you of this. To automatically install the required service pack, click **Yes**.

A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.

👘 The Raiser's Edge - Instal	Shield Wizard
	Welcome to the InstallShield Wizard for The Raiser's Edge
	The Raiser's Edge Setup is preparing the InstallShield Wizard which will guide you through the program setup process. Please wait.
	< Back Next > Cancel

- 3. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access *The Raiser's Edge* documentation. Click **OK** and visit Adobe's website at <u>www.adobe.com/products/acrobat/readermain.html</u> to download the latest version of Adobe *Acrobat Reader*.
- 4. When the InstallShield Wizard preparations are finished, the Upgrading The Raiser's Edge screen appears.

To review the disk space requirements for installation:

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



Volume	Disk Size	Available	Required
⊒C:	15GB	7232MB	23MB
₹F:	999GB	694GB	OKB
⊋ G:	299GB	111GB	OKB
_ Н:	999GB	145GB	OKB
⊒ I:	499GB	204GB	OKB
⊋ M:	999GB	259GB	OKB
⊒ P:	499GB	204GB	OKB
d	240CD	1500	0VD
ne highlighted volumes tallShield	do not have enough disk space o	available.	

b. 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.

- c. Click OK. You return to the Upgrading The Raiser's Edge screen.
- 5. Click **Next**. The Installing The Raiser's Edge screen appears and displays the installation progress. During the installation, *The Raiser's Edge* removes files that are no longer needed.

👘 The Rais	er's Edge - InstallShield Wizard	. 🗆 X	
Installing The proc	Installing The Raiser's Edge The program features you selected are being installed.		
12	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.		
	Status:		
	Removing backup files		
InstallShield -			
	< Back Next >		





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

🚏 The Raiser's Edge - InstallShield Wizard 🛛 🗙
Files in Use
Some files that need to be updated are currently in use.
The following applications are using files that need to be updated by this setup. Close these applications and click Retry to continue.
Blackbaud Management Console Inbox - Microsoft Outlook
Instal Shield Retry Ignore Exit

- To exit and update *The Raiser's Edge* later, click Exit.
- To continue to update *The Raiser's Edge* with the applications open, click **Ignore**.
- To continue to update *The Raiser's Edge* with the applications closed, close the applications and click **Retry**.
- 7. When the update is complete, the InstallShield Wizard Completed screen appears.
 - The Raiser's Edge Installer Information message may appear to ask whether to restart your system for the configuration changes to take effect. Click **Yes**.
 - If The Raiser's Edge Installer Information message does not appear, click **Finish**.
- 8. To update the database, log into *The Raiser's Edge*. For information about how to log in, see "Log into the updated The Raiser's Edge for the first time" on page 90.

Install The Raiser's Edge Update on a Server

This section includes detailed information about how to update your server to *The Raiser's Edge 7.91.50*. A network installation configures the software for multiple users who work on multiple workstations. To use a network system, perform these update instructions.

If you click **Ignore**, you may need to restart your computer at the end of the installation.

The program may ask you to install your Microsoft *Office* discs to complete the update.

The Raiser's Edge does not support domain controllers, small business servers, *NT 4.0 Server*, and peer-to-peer networks. If you use **RE:Anywhere**, you must install the latest version of the software along with your update of **The Raiser's Edge**. You can install the newest version of **RE:Anywhere** from your update CD or update files downloaded from www.blackbaud.com/suppor t/downloads/downloads.asp X.

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

Update The Raiser's Edge on a server

- 1. Access the update files.
 - Insert the update CD in your CD-ROM drive. A screen appears and displays the installation options.
 - If you downloaded the update, extract the update files to a directory on your server and then double-click the setup.exe file.
- 2. To verify you have the correct version of *SQL Server* installed, the InstallShield Wizard screen appears.

If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.

In	InstallShield Wizard				
		ne Raiser's Edge requires that the following requirements be installed on your computer ior to installing this application. Click OK to begin installing these requirements:			
	Status	Requirement			
	Pending	Blackbaud SQL Server Verification			
	Pending	Microsoft SQL Server 2005 Express			
	Pending	Microsoft SQL Server 2005 Backward Compatibility			
		Install Cancel			

If the *SQL Server 2005* verification tool detects that your version does not meet the minimum service pack requirement, a message appears to inform you of this. To automatically install the required service pack, click **Yes**.



A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



- 3. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access *The Raiser's Edge* documentation. Click **OK** and visit Adobe's website at <u>www.adobe.com/products/acrobat/readermain.html</u> to download the latest version of Adobe *Acrobat Reader*.
- 4. When the InstallShield Wizard preparations are finished, the Upgrading The Raiser's Edge screen appears.
- 5. To review the disk space requirements for installation:



🖁 The Raiser's Edge - InstallShield Wizard 🛛 🔀					
Disk Space Requirements					
The disk space required for the installation of th <mark>e selected features.</mark>					
			Second Stiller S	a de la constante de la consta	
Volume	Disk Size	Available	Required		
	15GB	7232MB	23MB		
l ⊋F:	999GB	694GB	OKB		
G:	299GB	111GB	OKB		
₽ H:	999GB	145GB	OKB	_	
₽ 1:	499GB	204GB	OKB		
	999GB	259GB	OKB		
l ₽P:	499GB	204GB	OKB		
<u>a</u> ~	240/70	45-CD	020	_ _	
				<u> </u>	
The highlighted volumes do not ha	ave enough disk spa	ce available.			
OK					
			_		

b. 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.

c. Click **OK**. You return to the Upgrading The Raiser's Edge screen.



6. Click **Next**. The Installing The Raiser's Edge screen appears and displays the update progress. During the installation, *The Raiser's Edge* removes files that are no longer needed.

👘 The Raise	er's Edge - InstallShield Wizard
Installing The prog	The Raiser's Edge pram features you selected are being installed.
13	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.
	Status:
	Removing backup files
InstallShield –	
	< Back Next >

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

🚏 The Raiser's Edge - InstallShield Wizard
Files in Use
Some files that need to be updated are currently in use.
The following applications are using files that need to be updated by this setup. Close these applications and click Retry to continue.
Blackbaud Management Console Inbox - Microsoft Outlook
Instalishield Retry Ignore Exit

If the deploy kit fails to automatically update, a message appears to warn you of the failure. After you migrate your database, you must manually update the deploy kit from the management console. For information about how to manually update your deploy kit, see the *Database Administration Guide*.

- To exit and update *The Raiser's Edge* later, click Exit.
- To continue to update *The Raiser's Edge* update with the applications open, click **Ignore**.

The program may ask you to install your Microsoft *Office* discs to complete the update.

- To continue to update *The Raiser's Edge* with the applications closed, close the applications and click **Retry**.
- 8. When the update is complete, the InstallShield Wizard Completed screen appears.
 - The Raiser's Edge Installer Information message may appear to ask whether to restart your system for the configuration changes to take effect. Click **Yes**.
 - If The Raiser's Edge Installer Information message does not appear, click **Finish**.
- 9. To update the database, log into *The Raiser's Edge*. For information about how to log in, see "Log into the updated The Raiser's Edge for the first time" on page 90.

The first time your workstation users log in after the update, a message appears to inform them of the new software. A wizard takes them through the update process.

Before your users use *The Raiser's Edge*, we recommend they review the release notes for updates to this version.

- 10. If you use *Blackbaud NetCommunity*, update the integration configuration.
 - Update all instances of *The Raiser's Edge*, including those on the *Blackbaud NetCommunity* web server. Inconsistent versions of *The Raiser's Edge* may cause in errors in *Blackbaud NetCommunity*.
 - Reassign the Raiser's Edge web service file and folder permissions established when you installed *Blackbaud NetCommunity*.

For more information, see the *Blackbaud NetCommunity Installation Guide*.

Install The Raiser's Edge Update for Oracle

To update *The Raiser's Edge* for *Oracle*, use this procedure. For more information about the screens or functions encountered during the update, see the *Oracle Installation & Administrator's Guide*. To access this guide, visit the Blackbaud website at <u>www.blackbaud.com</u> and select **Support**, **User Guides** from the menu bar.

After you update *The Raiser's Edge*, a message appears on all workstations to inform your users of the update when they log in. Before users can continue to work on their workstation, they must install the update.

The Raiser's Edge supports Oracle 10g Standard and Enterprise Edition. Oracle 9i Standard and Enterprise Edition are still compatible. Visit Oracle's website at www.oracle.com for more information about Oracle products and installation instructions

Update The Raiser's Edge and Automatically Update the Deployment Package

With the Blackbaud 7.x generation of software, you receive regular program updates. When you update the Blackbaud Management Console on your server, the deployment package accessed by your workstations automatically updates as well. You do not need to open the management console and update the deployment package separately. To work in the Blackbaud Management Console, you must have administrative rights.

Update The Raiser's Edge for Oracle

- 1. Access the update files.
 - Insert the update CD in your CD-ROM drive. A screen appears and displays the installation options.
 - If you downloaded the update, extract the update files to a directory on your server and then double-click the setup.exe file.
- 2. If additional prerequisites must be installed, a screen appears to list them. To install the prerequisites, click **OK**. The prerequisites install before the update continues.

InstallShield Wizard		
The Raiser's Edge requires that the following requirements be installed on your computer prior to installing this application. Click OK to begin installing these requirements:		
Status Requirement		
Pending Microsoft .NET Framework Version 2.0.50727		
UK Cancel		

If the installation options screen fails to appear, use Microsoft Windows Explorer to access setup.exe on your CD-ROM drive.



A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



- 3. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access *The Raiser's Edge* documentation. Click **OK** and visit Adobe's website at <u>www.adobe.com/products/acrobat/readermain.html</u> to download the latest version of Adobe *Acrobat Reader*.
- 4. When the InstallShield Wizard preparations are finished, the Upgrading The Raiser's Edge screen appears.



5. Click **Next**. The Installing The Raiser's Edge screen appears and displays the installation progress. During installation, *The Raiser's Edge* removes files that are no longer needed.

🙀 The Raise	er's Edge - InstallShield Wizard	
Installing The prog	r The Raiser's Edge gram features you selected are being installed.	
12	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.	
	Status:	
	Removing backup files	
TestallShield		
unscanorriela –	< Back Next >	

- 6. When the update is complete, the InstallShield Wizard Completed screen appears.
 - The Raiser's Edge Installer Information message may appear to ask whether to restart your system for the configuration changes to take effect. Click **Yes**.
 - If The Raiser's Edge Installer Information message does not appear, click **Finish**.
- 7. To update the database, log into *The Raiser's Edge*. For information about how to log in, see "Log into the updated The Raiser's Edge for the first time" on page 90.

The first time your workstation users log in after the update, a message appears to inform them of the new installation. A wizard takes them through the update process.

Before your users use *The Raiser's Edge*, we recommend they review the release notes for updates to this version.

Use the Blackbaud Management Console to Update Only the Deployment Package

When you run the software update on your server, your deployment package automatically updates. However, if you must update just the deployment package, you can use the Blackbaud Management Console. To move the deployment package to a different location on your server, you must contact Blackbaud's Customer Support.

The program may ask you to install your Microsoft *Office* discs to complete the update.

If you currently map Raiser's Edge users to database users, after you update The Raiser's Edge, you must map your Raiser's Edge users to the database users again. 46

Update your deployment package

1. On your desktop, click the Blackbaud Management Console shortcut. The Blackbaud Management Console Welcome screen appears.



2. Click **Update software**. The Update Software screen appears and displays all Blackbaud software available for update.

Blackbaud Management Console	
Update Software	
The Following Blackbaud products are available to be updated. Plea	se select a product below.
The Raiser's Edge 7	
	<u>Return to main me</u>



3. Click the link to the software to update. The Welcome to the Deployment Wizard screen appears.



4. Click **Next**. The Install Databases screen appears and displays all databases detected by the program.

🥙 Blackba	And Management Console
E	Install Databases
E	The following Raiser's Edge 7 database(s) were detected, and will be automatically available to all network client machines.
	(1). Raiser's Edge 7 - 6 user Database (s/n: RE7731371) This database is initialized and ready for use.
	Cancel << Back





- 6. In the **Install Directory** field, enter an install directory for *The Raiser's Edge*. This is where the program files are installed on your workstations. If you leave this field blank, each workstation user must enter the install directory when he installs the program.
- 7. Click Next. The Installation Package Paths screen appears.



To install *The Raiser's Edge* in the same directory in all workstations, we recommend you enter an install directory.

Once the installation is complete, you cannot change or enter a deployment path.



8. Under CD Rom Path, click Click here to browse to the RE7 installation CD. The Browse for Folder screen appears so you can map to the location of *The Raiser's Edge* CD.

Browse for Folder	? ×
Locate Raiser's Edge 7 CD	
⊕ -	•
⊕ ☐ Drafts of Manuals ⊕ ⊡ NetSolutionsDEM0 ⊕ ⊡ New Folder	•
OK Can	cel

- 9. In the **Output Directory** field, enter the directory in which to put the software on the network for your workstations. We recommend you enter "RE7\deploy". Make sure all workstation users have full rights to this directory.
- 10. Click **Next**. The Summary screen appears and displays all the data you entered in the Deployment Wizard.

🥙 Blackbaud Management Console	
	Blackbaud Management Console
E	The wizard has collected enough information to build your Raiser's Edge 7 network installation package. Click "finished" to begin the build process.
12	 Build a Raiser's Edge 7 network installation.
	 When this package is accessed from a client workstation, RE7 will automatically be installed to the directory.
	 Installation files will be copied from the RE7 CD Rom located on E:\Build228 \Server
	Installation package will be generated in the D:\RE7\Deploy directory
	Cancel << Back [Finished]





When the update is complete, a message appears to inform you of the new *The Raiser's Edge* shortcut on your desktop.

- 12. Click OK. A confirmation message appears.
- 13. Click OK.

The first time your workstation users log into *The Raiser's Edge* after the update, a message appears to tell them of the update. A wizard then takes them through the update process.

Install The Raiser's Edge Update Using a Terminal or Citrix Server

Use these procedures to update *The Raiser's Edge* using a *Terminal* or *Citrix* server that runs *Terminal Services* in "Application Mode". To use the Microsoft *Office* Integration features in *The Raiser's Edge* through a terminal session, *Office* must be installed on the *Terminal* or *Citrix* server and published out to users.

Server Does Not Host Blackbaud Management Console

If the *Terminal* server does not host the Blackbaud Management Console and database, perform this procedure.

- Update The Raiser's Edge using Terminal Services or Citrix when the server *does not* host the Blackbaud Management Console and database
 - 1. End all *Terminal* sessions and exit all applications.
 - 2. Restart the *Terminal* server.
 - 3. Log into the server.
 - 4. To prevent clients from opening a new session when you run the update, at a command prompt, enter CHANGE LOGON /DISABLE.

You must maintain an up-to-date backup of your database. For information about establishing a reliable back-up system, see the Oracle Installation & Administrator's Guide.

We recommend only a qualified network professional update *The Raiser's Edge* using a *Terminal* or *Citrix* server.

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5. From the Control Panel, click **Add or Remove Programs**. The Add/Remove Programs screen appears.

🖬 Add/Remov	re Programs		
	Currently installed programs:	Sort by: Name	в 💌
Change or	🔑 Adobe Acrobat 5.0	Size	78.2MB
Remove Programs	Click here for support information.		frequently 10/16/2003
2	To change this program or remove it from your computer, click Change or Remove.	Change	Remove
Add New Programs	Adobe FrameMaker+SGML v6.0	Size	74.3MB
rrograms	ARCserveIT Client Agent for Windows 2000	Size	5.69MB
te state sta	🛃 Autodesk WHIP! (Release 4.0-102)	Size	4.00KB
Add/Demove	BroadJump Client Foundation	Size	10.1MB
Windows	💋 Bullfighter 1.1	Size	4.40MB
Components	🗱 Check Point SecuRemote 4.1 SP-5	Size	4.74MB
<u> </u>	Clarify 6.0		
1	Clarify eFrontOffice Client for MSSQL		
Set Program Access and	💫 EnterNet 300	Size	4.34MB
Defaults	👺 HTML Help Workshop	Size	3.87MB
	iATS Authorization Service	Size	124KB
	🛃 Intel Ultra ATA Storage Driver	Size	1.89MB
	Internet Explorer 0822925	Size	19 3MB 💌

6. Click Add New Programs. The Add/Remove Programs screen appears.



- 7. Click **CD or Floppy**. The Install Program From Floppy Disk or CD ROM screen appears.
- 8. Click **Next**. The program automatically attempts to locate the shared deploy directory.

If it cannot locate the directory, a screen appears so you can map to the location.

Before you update, we recommend you use a third party software such as *Norton Ghost* to create an image of the server.

Customer Support cannot assist with the installation or configuration of a *Terminal* or *Citrix* server. However, we can provide consulting services to assist in areas outside the scope of support. 52

- a. Click **Browse**.
- b. Locate the shared deploy directory.
- c. Double-click setup.exe. You return to the Run Installation Program screen. In the **Open** field, the program location appears.
- 9. Click Finish.

If additional prerequisites must be installed, a screen appears to list them. To install the prerequisites, click **Install**. The prerequisites install before the update continues.

TestallChield Wizzyd	
The Raiser's Edge requires that the following requirements be installed on your comput prior to installing this application. Click OK to begin installing these requirements:	er
Status Requirement	
Pending Blackbaud SQL Server Verification Pending Microsoft SQL Server 2005 Express Pending Microsoft SQL Server 2005 Backward Compatibility	
Install Cancel	



A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



- 10. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access *The Raiser's Edge* documentation. Click **OK** and visit Adobe's website at <u>www.adobe.com/products/acrobat/readermain.html</u> to download the latest version of Adobe *Acrobat Reader*.
- 11. When the InstallShield Wizard preparations are finished, the Upgrading The Raiser's Edge screen appears.

12. Click **Next**. The Installing The Raiser's Edge screen appears and displays the installation progress. During installation, *The Raiser's Edge* removes files that are no longer needed.

🙀 The Rais	er's Edge - InstallShield Wizard	_ 🗆 🗙
Installing The prog	y The Raiser's Edge gram features you selected are being ins <mark>talled.</mark>	S
12	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.	
	Status:	
	Removing backup files	
InstallShield -		
	< Back Next >	

When the update is complete, the InstallShield Wizard Completed screen appears.

- 13. Click Finish. You return to the Add/Remove Programs screen.
- 14. To close the Add/Remove Programs screen, click **OK**.
- 15. If prompted, restart the server.
- 16. To allow users to create new sessions to the server, at a command prompt, enter CHANGE LOGON /ENABLE.

Server Hosts the Blackbaud Management Console

If the *Terminal* server hosts the Blackbaud Management Console and database, perform this procedure.

Update The Raiser's Edge using Terminal Services or Citrix when the Terminal server hosts the Blackbaud Management Console and database

- 1. End all *Terminal* sessions and exit all applications.
- 2. Restart the Terminal server.
- 3. Log into the server.
- 4. To prevent clients from opening a new session when you run the update, at a command prompt, enter CHANGE LOGON /DISABLE.

To complete the update, the utility may ask you to install your Microsoft *Office* discs.

Customer Support cannot assist with the installation or configuration of the *Terminal/Citrix* server. However, we can provide consulting services to assist in areas outside the scope of support.



5. Insert the *The Raiser's Edge* update CD into your server's CD-ROM. The Setup Type screen appears.



- 6. To close this screen, click the "X" in the upper right corner.
- 7. From the Control Panel, click **Add or Remove Programs**. The Add/Remove Programs screen appears.

🚡 Add/Remov	e Programs		_ 🗆 ×
1 1	Currently installed programs:	Sort by: Name	
Change or	🝌 Adobe Acrobat 5.0	Size	<u>78.2MB</u>
Programs	Click here for support information.		frequently 10/16/2003
2	To change this program or remove it from your computer, click Change or Remove.	Change	Remove
Add New Programs	Adobe FrameMaker+SGML v6.0	Size	74.3MB
rrograms	🔔 ARCserveIT Client Agent for Windows 2000	Size	5.69MB
10 E	🛃 Autodesk WHIP! (Release 4.0-102)	Size	4.00KB
Add/Remove	BroadJump Client Foundation	Size	10.1MB
Windows	Bullfighter 1.1	Size	4.40MB
Components	🗱 Check Point SecuRemote 4.1 SP-5	Size	4.74MB
<u>6</u>	Clarify 6.0		
	Clarify eFrontOffice Client for MSSQL		
Access and	🔉 EnterNet 300	Size	4.34MB
Defaults	👺 HTML Help Workshop	Size	3.87MB
	IATS Authorization Service	Size	124KB
	🛃 Intel Ultra ATA Storage Driver	Size	1.89MB
	Internet Explorer 0822925	Size	19 3MB

Before you update, we recommend you use a third party software such as *Norton Ghost* to create an image of the server.

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- 9. Click **CD ROM or Floppy**. The Install Program From Floppy Disk or CD ROM screen appears.
- 10. Click **Next**. The program attempts to locate the network folder automatically.

If it cannot locate the folder, a screen appears to enable you to map to the location.

- a. Click Browse.
- b. Locate the Network folder on the CD.
- c. Double-click setup.exe.
- 11. To verify you have the correct version of *SQL Server* installed, the InstallShield Wizard screen appears.

If you use **RE:Anywhere for Remove Access**, you must install the latest version of the software along with your update of **The Raiser's Edge**. You can install the newest version of **RE:Anywhere** from your update CD or update files downloaded from www.blackbaud.com/suppor t/downloads/downloads.asp X.

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If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.

Status Requirement Pending Blackbaud SQL Server Verification Pending Microsoft SQL Server 2005 Express Pending Microsoft SQL Server 2005 Backward Compatibility
Pending Blackbaud SQL Server Verification Pending Microsoft SQL Server 2005 Express Pending Microsoft SQL Server 2005 Backward Compatibility

If the *SQL Server 2005* verification tool detects that your version does not meet the minimum service pack requirement, a message appears to inform you of this. To automatically install the required service pack, click **Yes**.

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. A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



12. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access *The Raiser's Edge* documentation. Click **OK** and visit Adobe's website at <u>www.adobe.com/products/acrobat/readermain.html</u> to download the latest version of Adobe *Acrobat Reader*.

When the InstallShield Wizard preparations are finished, the Upgrading The Raiser's Edge screen appears.



13. Click **Next**. The Installing The Raiser's Edge screen appears and displays the installation progress. During installation, *The Raiser's Edge* removes files no longer needed.

🙀 The Raise	er's Edge - InstallShield Wizard	
Installing The prog	The Raiser's Edge ram features you selected are being installed.	
12	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.	5
	Status:	
	Removing backup files	
InstallShield –		
	< Back Next >	

When the update is complete, the InstallShield Wizard Completed screen appears.

- 14. Click **Finish**. You return to the Add/Remove Programs screen.
- 15. To close the Add/Remove Programs screen, click **OK**.
- 16. If prompted, restart the server.
- 17. To allow users to create new sessions to the server, at a command prompt, enter CHANGE LOGON /ENABLE.

Manually update your software deployment kit

1. On your desktop, double-click the Blackbaud Management Console shortcut. The Blackbaud Management Console screen appears.

The deployment kit your workstations use may update automatically. If the deployment kit fails to update automatically, a message appears to tell you to manually update the deployment kit. For information about how to manually update the deployment kit, see "Manually update your software deployment kit" on page 59. 60

2. From the Installed Products tree view, select **The Raiser's Edge**. In the pane on the right of the screen, the program wizards appear .



3. In the **Manage Deploy Kit** frame, click **Run Now**. The Welcome to the Deploy Kit Wizard screen appears.





4. Click Next. The Select Deploy Kit Action screen appears.

🔂 Deploy Kit Wizard 🛛 🔀
Select Deploy Kit Action Please select one of the following deploy kit actions.
Repair Update your deploy kit with the latest version of The Raiser's Edge along with updating your default workstation install path.
Move Move your deploy kit to a new location on the network.
Modify Update the default workstation install path.
< Back Next > Cancel

- 5. Select Repair.
- 6. Click Next. The Select Install Location on Client Systems screen appears.

🔁 Deploy Kit Wizard 🛛 🔀
Select Install Location on Client Systems Please indicate where to install the software on network client systems.
When installing The Raiser's Edge on client machines prompt user for an install path. automatically install the software to this path:
< Back Next > Cancel

- 7. Select where to install the installation folder on the workstations.
 - To allow each workstation user to name the installation folder and choose its location, select **prompt user for an install path**.
 - To use the same installation folder name and location for all workstations, select **automatically install the software to this path** and enter the location at which to install the workstation components on a client machine.

8. Click Next. The Specify Paths screen appears.

Deploy Kit Wizard			×
Please enter the appropriate path(s).			
Current Deploy Kit Location:			
C:\Program Files\Blackbaud\The Raise	rs Edge 7\		
Install CD Location:			
C:\Files\RE7			
	< Back	Repair	Cancel

- 9. In the **Install CD Location** field, enter the location of the CD. To browse to the location, click the ellipsis.
- 10. Click **Repair**. The Completing the Deploy Kit Wizard screen appears.



11. Click Finish. You return to the Blackbaud Management Console.



Install the RE:Anywhere for Remote Access Update

Before you install this update, see "Important Notes Before You Update" on page 63. To run the update, see "Update RE:Anywhere for Remote Access" on page 64.

Additional Security Settings for Oracle Databases

In addition to the security settings for the directories in the previous section, with *Oracle* databases, you must establish additional security settings to enable functions, such as to preview and print reports and view query results.

Specify additional security settings for Oracle databases

- 1. Stop and start the *Oracle* MTS Recovery service. For more information about this service, see the Oracle documentation at <u>www.oracle.com</u>.
- 2. Reset your installation of Internet Information Server (IIS).

To reset IIS from the command line, enter *isreset*. For information about resetting IIS, see your IIS documentation.

- 3. Use Microsoft Windows Explorer to locate your Ora92 directory.
- 4. Right-click on the Ora92 directory and select **Properties**. The Properties screen appears.
- 5. Select the Security tab.
- 6. In the Name box, select BBReweb7Group.
- 7. In the Allow column, mark Full Control.
- 8. To save your changes, click **OK**.

Important Notes Before You Update

Before you install the *RE:Anywhere for Remote Access* update, perform these requirements.

□ If you run *SQL Server* using Windows Authentication only, *RE:Anywhere for Remote Access* users can connect to the database only if the web server runs under an NT account that is granted access to the database in *The Raiser's Edge*. For information about how to set up *RE:Anywhere for Remote Access*, see "Set up RE:Anywhere for Remote Access to run under an NT account that has database permissions" on page 64.

□ Visit Blackbaud's website at <u>www.blackbaud.com</u> and check the latest hardware requirements.

□ If you use Microsoft *Office XP*, to use the *RE:Anywhere for Remote Access* communication tools, Service Pack 3 or higher must be installed.

□ Before you update *RE:Anywhere for Remote Access*, log into the database through *The Raiser's Edge* client, accessible from the *The Raiser's Edge* shortcut on the desktop of the web server, and update the *The Raiser's Edge* workstation components on the web server.



- □ Verify all *RE:Anywhere for Remote Access* users are logged out of the system.
- Uverify you can access a CD-ROM drive from your web server.
- Exit all *Windows* applications.
- Before you update *RE:Anywhere for Remote Access*, stop your web server and ftp service. If you do not stop these services, the setup program asks you to do so during the upgrade.
- Close any virus scan programs on the server. These programs can mistakenly interpret the setup/update process of a new program as a contamination of existing files on the disk.
- Set up RE:Anywhere for Remote Access to run under an NT account that has database permissions
 - 1. In Internet Information Server (IIS), access the properties for the website used.
 - 2. Select the Directory Security tab.
 - 3. Under Anonymous Access and Authentication Control, select Edit.
 - 4. Change the user name and password to an account that has permissions to the *Raiser's Edge* database.
 - 5. Save the information.
 - 6. Stop and restart IIS. You can now log into *RE:Anywhere for Remote Access*.
- Update RE:Anywhere for Remote Access

Both *The Raiser's Edge* and *RE:Anywhere for Remote Access* must run on the same versions. Use this procedure to update *RE:Anywhere for Remote Access* and the web server.

- 1. From your web server, insert the Blackbaud CD into your CD-ROM drive.
- 2. From Microsoft Windows taskbar, click Start and select Run.



3. Enter *D:\REWEB\SETUP.EXE*, where D is the location of or complete path to the CD-ROM drive. The Welcome screen appears.

The Raiser's Edge for the Web 7			
Welcome Update, repair or remove The Raiser's Edge for the Web 7			
Welcome to The Raiser's Edge for the Web 7 Setup Maintenance program. This program lets you modify the current installation. Click one of the options below.			
Update/Repair The Raiser's Edge for the Web 7			
C <u>R</u> emove Remove The Raiser's Edge for the Web 7			
InstallShield			
< Back Next > Cancel			

- 4. Select Update/Repair and click Next.
- 5. If you have not stopped your web server and FTP service, a message appears. To stop the web server and FTP service, click **Yes**. When the upgrade is complete, both restart automatically.
- 6. A status screen appears to verify you have the proper Internet Server components installed on your web server. When the verification is complete, the upgrade begins. A status screen tracks the upgrade progress.

InstallShield Wizard	×
Setup Status	
The Raiser's Edge for the Web 7 Setup is performing the requested operations.	
Installing: Raiser's Edge 7 Report Files	
D:\Program Files\RE7\Rpt\Profile_Mem_History.rpt	
55%	
InstallSheld-	
	Cancel

If the InstallShield Wizard screen appears instead of the Welcome screen, see *RE:Anywhere for Remote Access Installation Guide* for information about how to complete the upgrade procedure.



When the upgrade is finished, the InstallShield Wizard Complete screen appears.



7. Click **Finish**. You can now log into your updated version of *RE:Anywhere for Remote Access*.

Browser Settings to Create Letters and Email from Constituent Records

To create letters and email directly from constituent records in **RE:Anywhere for Remote Access**, you must specify several settings in *Internet Explorer* on client workstations. Unless you use the server as a client, you do not need to establish these settings on the server. Additionally, if you have *Office XP*, you must install Service Pack 3 or later.

- Set browser settings for RE: Anywhere for Remote Access
 - 1. Include the *RE:Anywhere for Remote Access* server in an *Internet Explorer* Security Zone for which you feel safe manipulating the settings. For information about security zones and how to configure them, see the *Internet Explorer* help file.
 - 2. From the *Internet Explorer* Tools menu, select Internet Options. The Internet Options screen appears.


3. Select the Security tab.



4. Select the zone in which you put the *RE:Anywhere for Remote Access* server.



Security Settings	? ×
Settings:	
 NET Framework-reliant components Run components not signed with Authenticode Disable Enable Prompt Run components signed with Authenticode Disable 	
Enable Prompt ActiveX controls and plug-ins Download signed ActiveX controls Disable Enable Enable Recompt	T
Reset custom settings	
OK Cancel	_

- 6. Under ActiveX controls and plug-ins, Download signed ActiveX controls, select Enable or Prompt.
- 7. Under ActiveX controls and plug-ins, Run ActiveX controls and plug-ins, select Enable or Prompt.
- 8. Under ActiveX controls and plug-ins, Script ActiveX controls marked safe for scripting, select Enable or Prompt.
- 9. Under Miscellaneous, Access data sources across domains, select Enable or Prompt.
- 10. Click OK.
- 11. If you have Microsoft *Office XP* installed, Service Pack 3 or later must be installed. To install, visit <u>www.office.microsoft.com</u>, locate the **Office Update** link, and follow the instructions.

Install the Update from The Raiser's Edge 7.5

This section includes detailed instructions about how to update your server or standalone system to *The Raiser's Edge 7.91.50* from *The Raiser's Edge 7.5*. If you update from *The Raiser's Edge 7.6* or higher, see "Install the Update" on page 33.

If you select **Prompt**, when you save a document or email as an action from *Office*, you must first return to your browser and click **Yes** on a message that states "This page is accessing a data source on another domain. Do you want to allow this?" before you can save the item.



A network installation configures the software for multiple users who work on multiple workstations. If your organization uses a network system, perform these actions.

Read "Pre-Update Recommendations" on page 3.

└ Visit the Blackbaud website at <u>www.blackbaud.com</u> and check for any updates. From the menu bar, select **Support**, **Downloads**.

Use the installation CD to install the program update. For detailed instructions, see "Update from The Raiser's Edge 7.5 on a server" on page 69.

☐ Migrate your ASA database or attach an existing SQL Server database. For detailed instructions, see "Update from The Raiser's Edge 7.5 on Workstations" on page 73 or "Attach Database Wizard" on page 9.

Update *The Raiser's Edge* on your workstations. After your deployment kit updates, the workstation users receive a message when they next open *The Raiser's Edge* to inform them to update the software. For detailed instructions, see "Update from The Raiser's Edge 7.5 on Workstations" on page 73.

➡ Because you update from *The Raiser's Edge 7.5*, the database migration process leaves your existing ASA database intact. After the migration is complete and your system runs correctly on *SQL Server*, we recommend you back up the old ASA database files (re_bio.db, re_gift.db, re_index.db, re_temp.db, re7.db, and re7.log) and then delete them from the server to free up space on your hard drive.

Update from The Raiser's Edge 7.5 on a Server

This procedure explains how to update the network version of *The Raiser's Edge*.

Update from The Raiser's Edge 7.5 on a server

The Raiser's Edge 7.91.50 includes Microsoft's *SQL Server 2005 Express Edition*. This version of *SQL Server* works for databases smaller than 3.7 GB. The installation process confirms your database size before the software installation begins. If your database exceeds this limit, the installation process terminates. Before you can install the update, you must purchase and install Microsoft *SQL Server 2005 Standard, Enterprise*, or *Workgroup* editions, or *SQL Server 2008*.

1. Access the update files.

- Insert the update CD in your CD-ROM drive. A screen appears and displays the installation options.
- If you downloaded the update, extract the update files to a directory on your server and then double-click the setup.exe file.

If you install *The Raiser's Edge* on a new server, see "Update from The Raiser's Edge 7.5 on a New Server Requirements" on page 75.

The Raiser's Edge does not support domain controllers, small business servers, NT 4.0 Server, and peer-to-peer networks.

If you install *The Raiser's Edge* on a new server, see "Update from The Raiser's Edge 7.5 on a New Server Requirements" on page 75.





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. 2. To verify that you have the correct version of *SQL Server* installed, the InstallShield Wizard screen appears.

If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.

InstallShield Wizard							
	The Raiser's Edge requires that the following requirements be installed on your computer prior to installing this application. Click OK to begin installing these requirements:						
	Status	Requirement					
	Pending	Blackbaud SQL Server Verification					
	Pending	Microsoft SQL Server 2005 Express					
	Pending	Microsoft SQL Server 2005 Backward Compatibility					
		Install Cancel					

If the *SQL Server 2005* verification tool detects that your version does not meet the minimum service pack requirement, a message appears to inform you of this. To automatically install the required service pack, click **Yes**.



A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



- 3. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access *The Raiser's Edge* documentation. Click **OK** and visit Adobe's website at <u>www.adobe.com/products/acrobat/readermain.html</u> to download the latest version of Adobe *Acrobat Reader*.
- 4. When the InstallShield Wizard preparations are complete, the Upgrading The Raiser's Edge screen appears.

5. Click **Next**. The Installing The Raiser's Edge screen appears and displays the installation progress. During installation, *The Raiser's Edge* removes files no longer needed.

🚏 The Raiser's Edge - InstallShield Wizard					
Installing The prog	Installing The Raiser's Edge The program features you selected are being installed.				
17	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.				
	Status:				
	Removing backup files				
InstallShield -	< Back Next >				

- 6. When the update is complete, the InstallShield Wizard Completed screen appears.
 - The Raiser's Edge Installer Information message may appear to ask whether to restart your system for the configuration changes to take effect. Click **Yes**.
 - If The Raiser's Edge Installer Information message does not appear, click **Finish**.
- 7. To update the database, log into *The Raiser's Edge*. For information about how to log in, see "Log into the updated The Raiser's Edge for the first time" on page 90.

The first time workstation users log in after the update, a message appears to inform them of the new software. A wizard takes them through the update process.

If the deploy kit fails to automatically update, a message appears to warn you of the failure. After you migrate your database, you must manually update the deploy kit from the management console. For information about how to manually update your deploy kit, see the *Database Administration Guide*.

The program may ask you to install your Microsoft *Office* discs to complete the update.

Update from The Raiser's Edge 7.5 on Workstations

After you update *The Raiser's Edge* on your server, you must update the software on all workstations. To do this, workstations must have access to the software deployment kit. Using this kit, each workstation can install the software.

Update from The Raiser's Edge 7.5 on each workstation

To update to *The Raiser's Edge 7.91.50*, each workstation must complete this procedure.

1. Close all applications, virus scanning software, and the Microsoft *Office* shortcut toolbar.

Due to the integration between *The Raiser's Edge* and Microsoft *Outlook*, if your workstations users use *Outlook*, they must exit and log out of *Outlook* before you update *The Raiser's Edge* on their computers. If they fail to exit and log out of *Outlook*, the update does not install properly.

- 2. Disable any screen savers.
- 3. To open *The Raiser's Edge*, double-click the shortcut on your desktop. A message appears to inform you that the server configuration has changed and the workstation settings will update.
- 4. Click **OK**. A message appears to inform you that a software update is available and will be installed.
- 5. Click **OK**. To verify you have the correct version of *SQL Server* installed, the InstallShield Wizard screen appears.

If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.

InstallShield Wizard					
	he Raiser's Edge requires that the following requirements be installed on your computer rior to installing this application. Click OK to begin installing these requirements:				
Status	Requirement				
Pending	Blackbaud SQL Server Verification				
Pending	Microsoft SQL Server 2005 Express				
Pending	Microsoft SQL Server 2005 Backward Compatibility				
-					
	Install Cancel				



You cannot use the software CDs to manually install the update to *The Raiser's Edge 7.91.50* on workstations. You must use the deployment kit.

If you use **RE:Anywhere for Remove Access**, you must install the latest version of the software along with your update of **The Raiser's Edge**. You can install the newest version of **RE:Anywhere** from your update CD or update files downloaded from www.blackbaud.com/suppor t/downloads/downloads.asp X.





If the *SQL Server 2005* verification tool detects that your version does not meet the minimum service pack requirement, a message appears to inform you of this. To automatically install the required service pack, click **Yes**.

A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.

🖶 The Raiser's Edge - InstallShield Wizard						
	Welcome to the InstallShield Wizard for The Raiser's Edge					
	The Raiser's Edge Setup is preparing the InstallShield Wizard which will guide you through the program setup process. Please wait.					
	< Back Next > Cancel					

- 6. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access *The Raiser's Edge* documentation. Click **OK** and visit Adobe's website at <u>www.adobe.com/products/acrobat/readermain.html</u> to download the latest version of Adobe *Acrobat Reader*.
- 7. When the InstallShield Wizard preparations are finished, the Upgrading The Raiser's Edge screen appears.



8. Click **Next**. The Installing The Raiser's Edge screen appears and displays the installation progress. During installation, *The Raiser's Edge* removes files no longer needed.

🚰 The Raiser's Edge - InstallShield Wizard						
Installing The Raiser's Edge The program features you selected are being installed.						
B	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.					
	Status:					
	Removing backup files					
InstallShield -						
	< Back Next >					

- 9. When the update is complete, the InstallShield Wizard Completed screen appears.
 - The Raiser's Edge Installer Information message may appear to ask whether to restart your system for the configuration changes to take effect. Click **Yes**.
 - If The Raiser's Edge Installer Information message does not appear, click **Finish**.
- 10. To update the database, log into *The Raiser's Edge*. For information about how to log in, see "Log into the updated The Raiser's Edge for the first time" on page 90.

Update from The Raiser's Edge 7.5 on a New Server Requirements

If you use a Sybase ASA database and purchase a new server before you update to Microsoft SQL Server version of **The Raiser's Edge 7.91.50**, you must perform the procedures in this section. Before you update **The Raiser's Edge**, you must copy your ASA database files to the new server; however, a previous version of **The Raiser's Edge** is not required.

This chapter includes detailed instructions to install *The Raiser's Edge 7.91.50* update on your new server.

A network installation configures the software for multiple users who work on multiple workstations. To use a network system, perform these actions.

Read "Pre-Update Recommendations" on page 3.

The program may ask you to install your Microsoft *Office* discs to complete the update.

The Raiser's Edge does not support Novell databases. If you convert from Novell, before you update The Raiser's Edge, you must convert to Windows and install the Blackbaud Management Console on only your server.



- □ Visit the Blackbaud website at <u>www.blackbaud.com</u> and check for any updates. Select **Support**, **Downloads** from the menu bar.
- Copy your *ASA* database files onto your new server. For detailed instructions, see "Copy ASA database files to a new server" on page 23.
- Use the installation update CD or downloaded files to install the program update. For detailed instructions, see "Update from The Raiser's Edge 7.5 on a new server" on page 76.
- ☐ Migrate your *ASA* database. For detailed instructions, see "Migrate an ASA Database" on page 14.
- Update *The Raiser's Edge* on your workstations. For detailed instructions, see "Update Workstations from a New Server" on page 81.
- □ Because you update from *The Raiser's Edge 7.5*, the database migration process leaves your existing *ASA* database intact. After the migration is complete and your system runs correctly on *SQL Server*, we recommend you back up the old *ASA* database files (re_bio.db, re_gift.db, re_index.db, re_temp.db, re7.db, and re7.log) and then delete them from the server to free up space on your hard drive.

Update from The Raiser's Edge 7.5 on a New Server

Because this is a new server, this procedure assumes no previous version of *The Raiser's Edge* is installed on the server. You must, however, first copy your *ASA* database files to the server. For more information, see "Copy ASA database files to a new server" on page 23.

Update from The Raiser's Edge 7.5 on a new server

- 1. Before you begin the update, verify your server is running. We recommend that you also close the Blackbaud Management Console.
- 2. Access the update files.
 - Insert the update CD in your CD-ROM drive. A screen appears and displays the installation options.
 - If you downloaded the update, extract the update files to a directory on your server and then double-click the setup.exe file.

The Raiser's Edge does not support domain controllers, small business servers, NT 4.0 Server, and peer-to-peer networks are not supported.



The InstallShield Wizard welcome screen appears.



3. Click Next. The License Agreement screen appears.

🚏 The Raiser's Edge - InstallShield Wizard 🛛 🔀						
License Agreement Please read the following license agreement carefully.						
Blackbaud Software License Agreement ("Agreement")						
READ THE TERMS AND CONDITIONS OF THIS LICENSE AGREEMENT CAREFULLY BEFORE OPENING THE PACKAGE CONTAINING THE COMPUTER SOFTWARE AND THE ACCOMPANYING USER DOCUMENTATION (COLLECTIVELY, THE "SOFTWARE". THE SOFTWARE IS COPYRIGHTED AND LICENSED (NOT SOLD). BY OPENING THE PACKAGE CONTAINING THE SOFTWARE, YOU ARE ACCEPTING AND AGREEING TO THE TERMS OF THIS LICENSE AGREEMENT. IF YOU ARE NOT WILLING TO BE BOUND BY THE TERMS OF THIS LICENSE AGREEMENT. IF YOU SHOULD RETURN THE PACKAGE UNOPENED WITHIN THIRTY (30) DAYS OF YOUR INVOICE DATE, AND YOU WILL RECEIVE A CREDIT OR A REFUND. THIS LICENSE AGREEMENT REPRESENTS THE ENTIRE AGREEMENT CONCERNING THE SOFTWARE BETWEEN YOU AND BLACKBAUD AND IT SUPERCEDES ANY PRIOR PROPOSAL, REPRESENTATION, OR UNDERSTANDING BETWEEN THE PARTIES.						
I accept the terms in the license agreement						
C I do not accept the terms in the license agreement						
InstaliShield						
< Back Next > Cancel						

- 4. Review the terms of the license agreement. To print the license agreement, click **Print**.
- 5. If you accept the terms of the license agreement, select **I accept the terms in the license agreement**.

If *The Raiser's Edge* detects that you do not have Adobe *Acrobat Reader* installed on your workstation, a screen appears to inform you that Adobe *Acrobat Reader* must be installed to access *The Raiser's Edge* documentation. Visit Adobe's website at www.adobe.com/products/a crobat/readermain.html to download the latest version.





- 7. Select Network.
- 8. Click Next. The Destination Folder screen appears.

🙀 The Raiser's Edge - InstallShield Wizard	×
Destination Folder Click Next to install to this folder, or click Change to install to a different folder.	1
Install The Raiser's Edge to: C:\Program Files\Blackbaud\	Change
A directory named The Raisers Edge 7 will be created in this folder.	
InstellShield < Back	Cancel

9. Specify where on your system to install the program. We recommend you accept the default destination folder.

To change the default location:

a. Click **Change.** The Change Current Destination Folder screen appears.



- b. Browse to the directory on which to install the program.
- c. Click **OK**. You return to the Destination Folder screen.
- 10. Click Next. The Deployment Folder screen appears.

👹 The Raiser's Edge - InstallShield Wi	zard		×		
Deployment Folder					
Select a location for the Deployment Pa	ckage.				
The Raiser's Edge must be installed on your organization's workstations by running a network installation package called a deploy kit. The deployment folder you select must be a shared network resource. This step will build the deploy kit for The Raiser's Edge. Upon completion of this installation, you can begin setting up all the workstations on your network that need access to The Raiser's Edge. To setup a workstation, run the SETUP.EXE located in the deployment folder from each workstation requiring access to The Raiser's Edge.					
Deployment folder:					
C:\Program Files\Blackbaud\The Raiser	s Edge 7\Deploy\		Browse		
Click browse to select a location for the deployment package.					
InstallShield					
	< Back	Next >	Cancel		

By default, your workstations use the deployment kit created during the installation to install *The Raiser's Edge*. You must share the deployment kit on your server where all workstations have access.

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

🚏 The Raiser's Edge - InstallShield Wizard 🛛 🗙
Client Installation Folder
Select an installation folder on the client workstation.
Allow users to select the installation folder.
C Create default location for all client installations.
Default client installation folder:
C:\Program Files\Blackbaud\The Raisers Edge 7 Browse
You can use the Blackbaud Management Console to change this default installation folder at any time.
InstallShield < Back Next > Cancel

12. Select where to install the installation folder on the workstations.



- To install the program files in the same location on all your workstations, select **Create default location for all client installations.** In the **Default client installation folder** field, enter the location where you want the program installed. To map to the location, click the ellipsis.
- 13. Click **Next**. The Ready to Install the Program screen appears.

🖟 The Raiser's Edge - Installs	ihield Wiza	ard		
Ready to Install the Progra	m			
The wizard is ready to begin i	stallation.			
Click Install to begin the instal	ation.			
If you want to review or chan exit the wizard.	ge any of yo	our installation s	ettings, click Back.	Click Cancel to
nstaliShield				

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14. Click **Install**. The Installing The Raiser's Edge screen appears and displays the installation progress. During installation, *The Raiser's Edge* removes files no longer needed.

👘 The Rais	er's Edge - InstallShield Wizard	_ 🗆 🗙				
Installing The Raiser's Edge						
The program features you selected are being installed.						
P	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.					
	Status:					
	Removing backup files					
]				
To all all the lat						
Instanonielo –	< Back Next >					

- 15. When the update is complete, the InstallShield Wizard Completed screen appears.
 - The Raiser's Edge Installer Information message may appear to ask whether to restart your system for the configuration changes to take effect. Click **Yes**.
 - If The Raiser's Edge Installer Information message does not appear, click **Finish**.
- 16. To update the database, log into *The Raiser's Edge*. For information about how to log in, see "Log into the updated The Raiser's Edge for the first time" on page 90.

The first time your workstation users log in after the update, a message appears to inform them of the new software. A wizard takes them through the update process.

Update Workstations from a New Server

After you install *The Raiser's Edge* on your server and migrate your *ASA* 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 install the software. This procedure must be completed on each workstation.

If the deploy kit fails to automatically update, a message appears to warn you of the failure. After you migrate your database, you must manually update the deploy kit from the management console. For information about how to manually update your deploy kit, see the *Database Administration Guide*.

The program may ask you to install your Microsoft *Office* discs to complete the update.

You cannot use the software CDs to manually install *The Raiser's Edge* on workstations. You must use the deployment kit. If you use your own instance of SQL Server and run it in the Windows-only authentication mode, you must add any users who access **The Raiser's Edge** to the SQL Server network and grant them public role access to the database in **The Raiser's Edge**.

Update workstations from a new server

1. Close all applications, virus scanning software, and the Microsoft *Office* shortcut toolbar.

Due to the integration between *The Raiser's Edge* and Microsoft *Outlook*, if your workstations users use *Outlook*, they must exit and log out of *Outlook* before they update *The Raiser's Edge* on their computers. If they fail to exit and log out of *Outlook*, the update does not install properly.

- 2. Disable any screen savers.
- 3. From your *Windows* Start menu, select Run. The Run screen appears.

Run	?×
5	Type the name of a program, folder, or document, and Windows will open it for you.
<u>O</u> pen:	
	Run in Separate Memory Space
	OK Cancel <u>B</u> rowse

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

Browse					? ×
Look in:	🔁 Deploy		•	🗢 🗈 💣 🎟•	
History Desktop My Documents	Adobe DotNet ie6 Patch VBA webocx				
	File name:	Setup.exe		-	Open
My Network P	Files of type:	Programs		•	Cancel

5. Locate the shared directory in which you created the deploy kit and select setup.exe.



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



7. Click **OK**. The Destination Folder screen appears.

🙀 The Raiser's Edge - InstallShield Wizard	×
Destination Folder Click Next to install to this folder, or click Change to install to a different folder	
Install The Raiser's Edge to: C:\Program Files\Blackbaud\	Change
A directory named The Raisers Edge 7 will be created in this folder.	
InstellShield	Cancel

8. If, when you established the deployment kit, you selected a default installation directory, the default location appears. If not, the workstation user can enter a location in the Destination Folder screen. Accept the program default, or click **Change** to map to another location.

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



10. Click **Install**. The Installing The Raiser's Edge screen appears and displays the installation progress. During the installation, *The Raiser's Edge* removes files that are no longer needed.

11. When the update is complete, the InstallShield Wizard Completed screen appears. Click **Finish**.

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



12. To update the database, log into *The Raiser's Edge*. For information about how to log in, see "Log into the updated The Raiser's Edge for the first time" on page 90.

Update from The Raiser's Edge 7.5 on a Standalone Machine Requirements

This section provides detailed instructions to update your computer to *The Raiser's Edge 7.91.50* from *The Raiser's Edge 7.5*. If you update from *The Raiser's Edge 7.6* or higher, see "Install the Update" on page 33.

A standalone machine, or single workstation, is set up for one user, and only one workstation accesses the data. To use a standalone system, perform these actions.

Read "Pre-Update Recommendations" on page 3.

□ Visit the Blackbaud website at <u>www.blackbaud.com</u> and check for any updates. Select **Support**, **Downloads** from the menu bar.

Use the update CD to install the program update. For detailed instructions, see "Update from The Raiser's Edge 7.5 on a standalone machine" on page 85.

☐ Migrate your *ASA* database into *SQL Server*. For detailed instructions, see "Migrate an ASA Database" on page 14.

Update from The Raiser's Edge 7.5 on a Standalone Machine

This procedure explains how to update the standalone version of *The Raiser's Edge*.

Update from The Raiser's Edge 7.5 on a standalone machine

The Raiser's Edge 7.91.50 includes the Microsoft *SQL Server Express*. This version of *SQL Server* works for databases smaller than 3.7GB. During the software installation, the installation process confirms your database size.

If your database exceeds 3.7GB, the installation process terminates. Before you continue the installation process, you must purchase and install Microsoft *SQL Server 2005 Standard, Enterprise*, or *Workgroup* editions, or *SQL Server 2008*.

- 1. Access the update files.
 - Insert the update CD in your CD-ROM drive. A screen appears and displays the installation options.
 - If you downloaded the update, extract the update files to a directory on your server and then double-click setup.exe.
- 2. To verify you have the correct version of *SQL Server* installed, the InstallShield Wizard screen appears.

The program may ask you to install your Microsoft *Office* discs to complete the update.

If the installation options screen fails to appear, you can access setup.exe on your CD-ROM drive using Microsoft *Windows Explorer*. If you use **RE:Anywhere**, you must install the latest version of the software along with your **Raiser's Edge** update. You can install the newest version of **RE:Anywhere** from your update CD, from the update files you downloaded, or from our website at www.blackbaud.com/suppor t/downloads/downloads.asp X.

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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. If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.

In	InstallShield Wizard		
		he Raiser's Edge requires that the following requirements be installed on your computer ior to installing this application. Click OK to begin installing these requirements:	
	Status	Requirement	
	Pending	Blackbaud SQL Server Verification	
	Pending	Microsoft SUL Server 2005 Express Microsoft SUL Server 2005 Packward Compatibility	
	Fending	Microsoft SQL Server 2003 Backward Compatibility	
		Install Cancel	

If the *SQL Server 2005* verification tool detects that your version does not meet the minimum service pack requirement, a message appears to inform you of this. To automatically install the required service pack, click **Yes**.



3. A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



- 4. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access *The Raiser's Edge* documentation. Click **OK** and visit Adobe's website at <u>www.adobe.com/products/acrobat/readermain.html</u> to download the latest version of Adobe *Acrobat Reader*.
- 5. When the InstallShield Wizard preparations are finished, the Upgrading The Raiser's Edge screen appears.

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6. Click **Next**. The Installing The Raiser's Edge screen appears and displays the installation progress. During installation, *The Raiser's Edge* removes files no longer needed.

👘 The Rais	er's Edge - InstallShield Wizard	
Installing The prog	The Raiser's Edge gram features you selected are being installed.	
12	Please wait while the InstallShield Wizard installs The Raiser's Edge. This may take several minutes.	
	Status:	
	Removing backup files	
InstallShield –		
	< Back Next >	

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

🙀 The Raiser's Edge - InstallShield Wizard	×
Files in Use	
Some files that need to be updated are currently in use.	
The following applications are using files that need to be updated by this setup. Close these applications and click Retry to continue.	
Blackbaud Management Console Inbox - Microsoft Outlook	
InstallShield	_
Retry Ignore Exit	

• To exit and update *The Raiser' Edge* later, click Exit.



- To continue to update *The Raiser's Edge* with the applications open, click **Ignore**.
- To continue to update *The Raiser's Edge* with the applications closed, close the applications and click **Retry**.
- 8. When the update is complete, the InstallShield Wizard Completed screen appears.
 - The Raiser's Edge Installer Information message may appear to ask whether to restart your system for the configuration changes to take effect. Click **Yes**.
 - If The Raiser's Edge Installer Information message does not appear, click **Finish**.
- 9. Using the Blackbaud Management Console, migrate your ASA database to work with Microsoft SQL Server Express. For information about the Blackbaud Management Console, see the Database Administration Guide. For information on how to migrate your ASA database for use in **The Raiser's Edge**, see "Migrate an ASA Database" on page 14.
- 10. To update the database, log into *The Raiser's Edge*. For information about how to log in, see "Log into the updated The Raiser's Edge for the first time" on page 90.

Post Update and Troubleshooting

After you install *The Raiser's Edge*, review this chapter to confirm your installation was successful. To receive the maximum benefit from the program, we recommend you also complete the items on the "Post Update Checklist" on page 89.

When you install *The Raiser' Edge* on an existing *Raiser's Edge* server machine, the setup program connects to the server and checks the size of each *Raiser's Edge* database in your server. If the setup program encounters a problem, see "Troubleshooting Issues When You Update Your Server" on page 94 to resolve the problem.

Post Update Checklist

After you update your server to *The Raiser's Edge* 7.91.50, consider these suggestions.

□ To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), *The Raiser's Edge* requires strong passwords with case-sensitivity. In earlier versions, passwords were not case-sensitive and saved as all capital letters. If you update from a version earlier than 7.91, to avoid locked users accounts, we strongly recommend users press CAPS LOCK on the keyboard to ensure they enter passwords in all capital letters when they first log into *The Raiser's Edge 7.91.50*. For information about how to log into *The Raiser's Edge*, see "Log into the updated The Raiser's Edge for the first time" on page 90.

If you click **Ignore**, at the end of installation, you may need to restart your computer.

The program may ask you to install your Microsoft *Office* discs to complete the update.



- □ To help you comply with PCI DSS, *The Raiser's Edge* uses the Blackbaud *Payment Service* to securely store sensitive credit card and merchant account information. If you update from a version earlier than 7.91 and your organization runs *The Raiser's Edge* locally on a server or workstation and does not use *NetSolutions*, the first user to log into *The Raiser's Edge* 7.91.50 must enter your organization's account credentials for the Blackbaud *Payment Service*. For information about how to log into *The Raiser's Edge*, see "Log into the updated The Raiser's Edge for the first time" on page 90.
- ☐ If you update from *The Raiser's Edge 7.5* and, when you installed *The Raiser's Edge 7.5*, you selected Automatically Start the database when the system starts, the ASA database starts when you restart your computer at the end of the update procedure. Before you migrate your ASA database into *SQL Server*, shut the ASA database down. If the ASA database runs on your server when you start to migrate your database, an error message appears and you cannot continue. For information about how to shut down the database, see "Shut down the Blackbaud Database Service" on page 93.
- □ If you update from *The Raiser's Edge 7.5*, the database migration process leaves your existing *ASA* database intact. After the migration is complete and your system runs correctly on *SQL Server*, we recommend you back up the old *ASA* database files (re_bio.db, re_gift.db, re_index.db, re_temp.db, re7.db, and re7.log) and then delete them from the service to free up space on your hard drive.
- Log into the updated The Raiser's Edge for the first time
 - 1. On your desktop, double-click **The Raiser's Edge**, or select **All Programs**, **The Raiser's Edge** from the **Start** menu. The login screen appears.





- 2. Enter your user name and password.
- 3. Press **ENTER** on your keyboard. A message appears to ask whether to update your database.
- 4. Click Yes. A screen appears and displays the update progress.



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 updated *The Raiser's Edge*, a message appears to ask whether to store your credit card information in the Blackbaud *Payment Service*.

The Raiser's Edge
Blackbaud. The Raiser's Edge [®]
To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), Blackbaud has created the Blackbaud Payment Service to securely store credit card and merchant account information.
The upgrade process removes full credit card numbers from your database and stores the credit card information in the Blackbaud Payment Service. Credit card numbers that are expired or from one-time gifts such as donations are truncated and not stored in the Blackbaud Payment Service. Do you want to store your credit card information in the Blackbaud Payment
Service?
 No, just truncate all credit card information. WARNING: Truncated card numbers cannot be used to process transactions. Select this option only after you back up your database and are prepared to lose full credit card numbers.
• Yes, store my credit card information in the Blackbaud Payment Service.
Blackbaud Payment Service Credentials
User Name:
Password:
Security Token: (ICVerify Only)
OK Cancel

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

To help you comply with PCI DSS, The Raiser's Edge requires strong passwords with case-sensitivity. In versions earlier than 7.91, passwords were not case-sensitive and saved as all capital letters. To avoid locked user accounts, if you update from a version earlier than 7.91, we strongly recommend users press CAPS LOCK on the keyboard to ensure they enter passwords in all capital letters when they first log into The Raiser's Edge 7.91.50.

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



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 **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 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.



Shut down the Blackbaud Database Service

1. Go to the service manager. The Services screen appears.

Services	and the second se			-	
Action View) 🖿 🖬 🖬 🕄 🕨 =	■>			
Tree	Name 🛆	Description	Status	Startup Type	L
Services (Local)	👋 Alerter	Notifies sel	Started	Automatic	L
	Application Management	Provides s		Manual	L
	SP.NET State Service	Provides s		Manual	
	Automatic Updates	Enables th	Started	Automatic	L
	Background Intelligent Transfer Service	Transfers f		Manual	_L_
	Blackbaud Database Service7		Started	Automatic	L
	🖓 ClipBook	Supports C		Manual	L
	COM+ Event System	Provides a	Started	Manual	L
	🖏 Computer Browser	Maintains a	Started	Automatic	L
	BHCP Client	Manages n	Started	Automatic	L
	System 2015	Manages lo	Started	Automatic	L
	🖏 Distributed Link Tracking Client	Sends notif	Started	Automatic	L
	Bistributed Link Tracking Server	Stores info		Manual	L
	Bistributed Transaction Coordinator	Coordinate	Started	Automatic	L
	Client Scient	Resolves a	Started	Automatic	L
	Event Log	Logs event	Started	Automatic	L
	Fax Service	Helps you		Manual	L
	Sile Replication	Maintains fi		Manual	L
	FTP Publishing Service	Provides F	Started	Automatic	L
	Gateway Service for NetWare	Provides a	Started	Automatic	L.
	1				

- 2. Select Blackbaud Database Service7.
- 3. Right-click on **Blackbaud Database Service7** and select **Properties**. The Blackbaud Database Service7 Properties screen appears.

Blackbaud Databa	se Service7 Properties (Local Computer) 💦 💡	х
General Log On	Recovery Dependencies	_
Service name:	Blackbaud_Service7	
Display name:	Blackbaud Database Service7	
Description:		
Path to executable C:\WINNT\System	e: m32\dbsrv7.exe -hvBlackbaud_Service7	
Startup type:	Automatic	
Service status:	Stopped	
Start	Stop Pause Resume	
You can specify th from here.	ne start parameters that apply when you start the service	
Start parameters:		
	OK Cancel Apply	



To keep the database service from restarting, you can permanently disable it. The service is not needed for *The Raiser's Edge*. To disable the service, in the **Startup type** field, select **Disabled**.

- 4. On the General tab, click **Stop**. Verify the **Service status** field displays "Stopped".
- 5. To close the screen and save your changes, click OK.

Troubleshooting Issues When You Update Your Server

When you install *The Raiser' Edge* on an existing *Raiser's Edge* server machine, the setup program connects to the server and checks the size of each *Raiser's Edge* database in your server. This check may result in one of these situations.

Database Too Big

If a database exceeds 3.7 GB, you cannot proceed with the installation unless you have Microsoft *SQL Server 2005 Standard*, *Enterprise*, or *Workgroup* editions, or *SQL Server 2008*. If you have one of these editions, enter the name of your database. If not, you must purchase it before you can use *The Raiser's Edge*. If you cancel the installation, you can continue to use your current version of *The Raiser's Edge* until you purchase and install *SQL Server 2005 Standard*, *Enterprise*, or *Workgroup* editions, or *SQL Server 2005 Standard*, *Enterprise*, or *Workgroup* editions, or *SQL Server 2008*.

Setup Unable to Verify Size of Database

If you have a disabled *Raiser's Edge* database in the Blackbaud Management Console, or if the setup program cannot find your *Raiser's Edge* databases to determine the size, this message appears.



ASA Database Cannot Be Accessed for Migration

If you select **Automatic Database Migration** from the Getting Started screen to start the migration process, you may receive this message.





Exit the Blackbaud Management Console and shut down *The Raiser's Edge ASA* database, which still runs on your server. This happens if, when you install *The Raiser's Edge*, you selected **Automatically Start the database when the** *system starts*. To shut down the service, go to the Service Manager and stop the service. For detailed instructions about how to stop your *ASA* database service, see "Shut down the Blackbaud Database Service" on page 93.

Database File is in Use

If you select **Custom Database Migration** (**Advanced**) to start the migration process, you may receive this message.



Exit the Blackbaud Management Console and shut down *The Raiser's Edge ASA* database, which still runs on your server. This happens if, when you install *The Raiser's Edge 7.5*, you select **Automatically Start the database when the system starts**. To shut down the service, go to service manager and stop the service. For detailed instructions about how to stop your *ASA* database service, see "Shut down the Blackbaud Database Service" on page 93.

Invalid Database Version

When you attempt to access a database that has not migrated, this message appears.



Migration Freezes On Dual Processor Machines

If you run your ASA database migration on dual processor Athlon machines, the migration process may freeze. You must disable one of the processors during the migration and enable it again after the migration is complete. To use only one processor of a multi-processor machine, use the numproc boot.ini switch.

- Use the numproc boot.ini switch to use only one processor of a multi-processor machine
 - 1. From a command session, go to the root of the C drive.
 - 2. To modify the boot.ini file so it is not a system file, hidden, or read-only, enter C:\> attrib boot.ini -r -s -h.



- 4. Locate the entry that starts the operating system and add /numproc=1 to the end, such as multi(0)disk(0)rdisk(0)partition(1)\WINNT="Microsoft Windows 2000 Professional" /fastdetect /numproc=1.
- 5. Save the change, and exit *Notepad*.
- 6. To reset the boot.ini attributes, at a command prompt, enter C:\> attrib boot.ini +r +s +h.
- 7. Restart the computer. The operating system detects and uses the first processor.

Uninstallation Has Not Completed

If you receive this message after you install Adobe Acrobat, click Yes.

Question	X
?	Setup has determined that an unInstallation has not completed. You should restart the system in order to complete this process. If you decide to continue the installation before finishing the previous unInstallation, the application may not work correctly.
	Do you wish to continue with this installation?
	Yes No

The installation completes, and both *The Raiser's Edge* and Adobe *Acrobat* install correctly.

Read-Only Database Access Guide Not Current

To ensure you can access to the most up-to-date user's guide, unlock *Read-Only Database Access* from *The Raiser's Edge* shell.

New Features and Enhancements

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Gift Records
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The Raiser's Edge 7.91.50 includes enhancements to help you comply with the Payment Card Industry Data Security Standards (PCI DSS). This chapter includes an overview of all the PCI DSS enhancements to *The Raiser's Edge*.

Blackbaud Payment Service

To help you comply with the PCI DSS, *The Raiser's Edge* now uses the Blackbaud *Payment Service* to securely store your recurring credit card and merchant account information. In your database, *The Raiser's Edge* stores reference tokens generated by the Blackbaud *Payment Service* to identify your credit card numbers. For information about how to manage the credentials your organization uses to communicate with the Blackbaud *Payment Service*, see "Blackbaud Payment Service Credentials" on page 106.

The Raiser's Edge requires Internet access to connect to the Blackbaud *Payment Service* for the secure storage of recurring credit card or merchant account information.

For one-time credit card transactions, *The Raiser's Edge* sends no information to the Blackbaud *Payment Service*. Instead, in the **Credit Card No.** field, *The Raiser's Edge* displays a masked credit card number, with only the last four digits visible, and stores only the last four digits in the database.

If your organization chooses to not use the Blackbaud *Payment Service*, you cannot store credit card or merchant account information in *The Raiser's Edge*. For information about other steps your organization can take to comply with PCI DSS, see the *Payment Application Data Security Standards Implementation Guide*.

User Account Security Enhancements

To help you comply with PCI DSS, *The Raiser's Edge* now requires strong and complex passwords. Passwords are case-sensitive and require both alphabetic and numeric characters. Passwords can be up to 50 characters in length, but must have a minimum of eight characters. You can also set business rules to require users to change their passwords on a routine basis. For example, to comply with PCI DSS, users must change their password at least every 90 days. For information about how to configure password expiration, see "System Access Options" on page 109.

To secure your database, *The Raiser's Edge* automatically locks out a user account after a specified number of failed login attempts. To prevent further attempts, a locked user account remains locked for a specified time period. For information about how to configure user account lockout, see "System Access Options" on page 109.

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For additional security, *The Raiser's Edge* automatically logs out a user when the session is idle for 15 minutes. To activate the workstation, the user must enter the password again. You can select whether to enable this inactivity timeout for all users or only Supervisor users, which are users who log in as the default Supervisor login, have Supervisor rights, or belong to a user group with Admin/Security access. For information about how to configure the inactivity timeout, see "System Access Options" on page 109.

Constituent Records

On the Bio 2 or Org 2 tab of a constituent record, *The Raiser's Edge* no longer displays unmasked credit card numbers. In the credit card grid, the **Credit Card No.** column now displays masked credit card numbers, with only the last four digits visible. The credit card grid also now includes a **Cardholder Name** column. The Blackbaud *Payment Service* requires the card holder name when it receives new or edited credit card information from *The Raiser's Edge*.

File Edit View Constituent Favorites Tools Help Save and Close ▼ Image: Tools Tools Tools Tool	A HILBOTT C. HILUT CWS					
Save and Close ▼ Image: Save and Close ∧ Close	File Edit View Constituent	Favorites Tools Help				
Attributes Media Actions Honor/Memorial Volunteer Appeals Notes Membership Events Bio 1 Bio 2 Addresses Addressees/Salutations Appeals Notes Gifts Target \$0 - \$499						
Target \$0 - \$499	Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events Bio 1 Bio 2 Addresses Addresses/Salutations Relationships Appeals Notes Gitts					
Target: \$0 - \$499 🛛 👻 Birthplace: Memphis. TN						
	Target: \$0 - \$499		Birthplace:	Memphis, TN		
Income: \$20,000 - \$29,999 💌 Religion: Lutheran 💌	Income: \$20,000 - \$29,9	399	▼ Religion:	Lutheran	-	
Receipt type: One receipt per gift Ethnicity: White (not Hispanic origin)	Receipt type: One receipt pe	r gift	Ethnicity:	White (not Hispanic origin)	•	
Card Type Cardholder Name Credit Card No. Expiration Reference	Card Type	Cardholder Name	Credit Card No.	Expiration	Reference	
Discover ************************************	Discover	:	***************1111	04/2015		
Constituent Codes						
Description Code Date From Date To	Descript	ion	Code	Date From D	ate To	
Alumnus AL 05/1982	Alumnus	AL	05/19	82	Down	

When you save a constituent record that contains new or edited credit card information, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage. However, if the credit card number or expiration date is blank, *The Raiser's Edge* does not send the information to the Blackbaud *Payment Service* but instead stores only the last four digits of the account number. For more information, see the *Constituent Data Entry Guide*.

Gift Records

On the gift record, *The Raiser's Edge* no longer displays unmasked credit card numbers. The **Card no.** field now displays masked credit card numbers, with only the last four digits visible. The Blackbaud *Payment Service* requires the card holder name when it receives new or edited credit card information from *The Raiser's Edge*.

🐺 Gift for Alliso	E. Andrews
File Edit View	Gift Favorites Tools Help
bave and Lios	
✓ Gift ✓ Misce	laneous Soft <u>C</u> redit M <u>a</u> tching Gifts Tribute Attrib <u>u</u> tes Split Gift
Constituent:	Allison Andrews 🕅 ID: 4
Gift type:	Cash Reference:
Gift subtype:	Acknowledge: Acknowledged
Gift date:	02/01/2007 🔄 🖌 Letter Capital Campaign Tha 💌 Benefits
Amount:	\$10,000.00 🖬 Receipted 💌 🔝
Campaign:	Capital Campaign 🔹 🙈 Receipt amt/no.: \$10,000.00 🥅 162
Fund:	Building Fund
Appeal:	Open House Letter
Package:	▲ A
Solicitors	▼ (A)
Pay method:	Credit Card EFT? Card no./exp.: **********8811 04/2009
Card type:	Discover Auth. code:
Cardholder:	Alison Andrews
Date added: 0	/30/2001
Press F7 for table I	okup

When you save a gift record that contains new or edited recurring credit card information, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage. For one-time credit card transactions, *The Raiser's Edge* sends no information to the Blackbaud *Payment Service*. Instead, in the **Credit Card No.** field, *The Raiser's Edge* displays a masked credit card number, with only the last four digits visible, and stores only the last four digits in the database. For more information, see the *Gift Records Guide*.

Electronic Funds Transfer

If you use the optional module *Electronic Funds Transfer* to generate transmission files to process credit card payments through IATS/Ticketmaster or ICVerify, *The Raiser's Edge* no longer includes unencrypted credit card numbers in the transmission files. The transmission files generated by *The Raiser's Edge* now contain the reference tokens generated by the Blackbaud *Payment Service* to identify the credit card numbers.

If you process credit card transactions through IATS, *The Raiser's Edge* now sends the transmission file to the Blackbaud *Payment Service*, which then securely replaces the tokens with their corresponding credit card numbers and sends the complete file to IATS for authorization and processing.



If you process and authorize direct debit transactions through IATS, *The Raiser's Edge* now receives a response file with a rejection code from IATS to indicate the reason a funds transfer fails, such as an invalid account number.

If you process credit card transactions through ICVerify, *The Raiser's Edge* securely retrieves the credit card numbers from the Blackbaud *Payment Service* and immediately encrypts the transmission file with the ICVerify *EncryptionManager* utility. To help you comply with PCI DSS, you can no longer obtain a copy of the unencrypted credit card transmission file through *The Raiser's Edge*. For more information, see the *Electronic Funds Transfer* (*EFT*) *Guide*.

Export

Under the Credit Cards node, a new **Card Token** field exists. Select this field to export the string of characters used to identify the credit card number in the Blackbaud *Payment Service*.



When you export the existing credit card **Number** field, credit card numbers now automatically export as a masked number. For example, credit card numbers appear as a string of asterisks that end using the last four digits of the actual credit card number. The option to export unmasked credit cards numbers has been removed.

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In *Export*, you can now select to export one or more attribute descriptions for attributes with a data type of table. For example, the Interests table attribute includes entries such as Biking, Fishing, and Tennis. In *Export*, when you select **Attributes**, **Interests**, **Description**, the Interests screen now appears with a **Selected Interests attributes** option.

Interests	×
For each Constituent, er	ter the number of Interests attributes to export:
C All Interests attributes	Selected Interests attributes
Basketball Biking Cards Contemporary art Cooking Cricket Fishing Football Gardening Golf Horseback riding	
Show inactive entries	Order by <no order="" specific=""> Ascending Descending </no>
	OK Cancel

After you select this option, you can select to include multiple attribute descriptions in the export.

Interests	×
For each Constituent, er	nter the number of Interests attributes to export:
C All Interests attributes	Selected Interests attributes
Horseback riding	 Biking
Outdoor activities	Fishing
Photography	Tennis
Rugby	>
Sailing	
Soccer	
Stamp collecting	
Volunteering	
Walking	
Wine tasting	
Women's issues	▼
Show inactive entries	- Order by
	<pre>cho specific order></pre>
	Ascending Descending
	OK Cancel
Mail

To help you comply with PCI DSS, you can no longer create mailings that display unencrypted credit card numbers. You can now output only masked credit card numbers in mailings generated in *The Raiser's Edge*.

If you use the optional module *PostalSaver*, you can now generate barcodes for mailings through *The Raiser's Edge* that meet the requirements of the US Postal Service Intelligent Mail barcode. For information about how to enable the Intelligent Mail barcode, see "Mail Options" on page 110.

For more information about mailings in *The Raiser's Edge*, see the *Mail Guide*.

Batch

When you enter or edit credit card information in a constituent or gift batch, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage when you leave the row in the batch entry grid. However, if a credit card number or expiration date is blank, *The Raiser's Edge* does not send the information to the Blackbaud *Payment Service* but instead displays and stores only the last four digits of the account number.

If you select **Tools**, **Authorize Credit Card Transactions** from the menu bar to generate a request file to process credit card payments in a gift batch, your batch must now include the new **Cardholder Name** field. *The Raiser's Edge* no longer includes unencrypted credit card numbers in the request files. The request files generated by *The Raiser's Edge* now contain the reference tokens generated by the Blackbaud *Payment Service* to identify the credit card numbers. If you process credit card transactions through IATS, *The Raiser's Edge* now sends the request file to the Blackbaud *Payment Service*, which then securely replaces the tokens with their corresponding credit card numbers and sends the complete files to IATS for authorization and processing. If you process credit card numbers from the Blackbaud *Payment Service* and immediately encrypts the request file with the ICVerify *EcryptionManager* utility. To help you comply with PCI DSS, you can no longer obtain a copy of the unencrypted request file through *The Raiser's Edge*. For more information, see the *Batch Guide*.

Administration

To help you comply with PCI DSS, all credit card numbers appear masked throughout *The Raiser's Edge*, regardless of the personal information security options set for users in *Security*. We recommend you continue to use the Personal Information security options to mask Social Security, bank account, and insurance policy numbers. For more information, see the *Configuration and Security Guide*.

When you install or update *The Raiser's Edge 7.91.50*, you can select to send existing credit card and merchant account information in your database to the Blackbaud *Payment Service* for secure storage.

The Raiser's Edge						
Blackbaud. The Raiser's Edge						
To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), Blackbaud has created the Blackbaud Payment Service to securely store credit card and merchant account information.						
The upgrade process removes full credit card numbers from your database and stores the credit card information in the Blackbaud Payment Service. Credit card numbers that are expired or from one-time gifts such as donations are truncated and not stored in the Blackbaud Payment Service.						
Do you want to store your credit card information in the Blackbaud Payment Service?						
No, just truncate all credit card information. WARNING: Truncated card numbers cannot be used to process transactions. Select this option only after you back up your database and are prepared to lose full credit card numbers.						
Yes, store my credit card information in the Blackbaud Payment Service.						
Blackbaud Payment Service Credentials						
User Name:						
Password:						
Security Token: (ICVerify Only)						
OK Cancel						

To view credit card data that the Blackbaud *Payment Service* cannot accept, such as invalid or incomplete information, you can generate a Credit Card Exception Report. With this static report, you can identify credit card information to correct for submittal and secure storage in the Blackbaud *Payment Service*. When you generate the report, you can select the record types and credit card types to include. To generate the Credit Card Exception Report, click **Credit Card Exception Report** on the Administration page. For more information, see the *Electronic Funds Transfer (EFT) Guide*.



Import

If you attempt to import unencrypted credit card information from a plain text file, for security reasons, *The Raiser's Edge* stores your imported credit card information in the Blackbaud *Payment Service*. We strongly recommend you encrypt credit card information in compliance with PCI DSS. The retention of credit card information in an unencrypted file leaves you vulnerable to malicious users. Import files generated by *The Raiser's Edge* provide only masked credit card numbers.

In a constituent import, you can now include the new **Cardholder Name** field. For more information, see the *Import Guide*.



Configuration

In *Configuration*, you can manage your organization's credentials to use the Blackbaud *Payment Service*. *The Raiser's Edge* uses these credentials to log into the web service to securely store your credit card and merchant account information. You can now manage business rules for your merchant accounts, password options, and account lockout options. If you use the optional module *PostalSaver*, you can also select whether to use the Intelligent Mail barcode with your mailings created in *The Raiser's Edge*.

Blackbaud Payment Service Credentials

To help you comply with the PCI DSS, *The Raiser's Edge* now uses the Blackbaud *Payment Service* to securely store your credit card and merchant account information. After your organization updates *The Raiser's Edge*, the first user to log into *The Raiser's Edge* must enter your organization's credentials to use the Blackbaud *Payment Service*. For information about how to log into The Raiser's Edge the first time after the update, see "Log into the updated The Raiser's Edge for the first time" on page 90.

In *Configuration*, the **Blackbaud Payment Service Credentials** frame now appears on the General page. In this frame, you can manage the user name and password your organization uses to communicate with the Blackbaud *Payment Service*. If your organization uses *ICVerify* to process credit card transactions through *The Raiser's Edge*, you can also manage the security token used to identify your organization in the Blackbaud *Payment Service*.



For information about the other items on the General page, see the *Configuration and Security Guide*.





International Settings

To help further identify countries, the **ISO name** field appears when you add or edit a country. In this field, you can select the country name according to the International Organization for Standardization (ISO).

New Country
File Edit Country Help
Save and Close - 🛃 📈 🔹 🤰 ? -
Name: Canada Abbreviation: CAN
ISO Name: Canada
Currency: Canadian Dollars 🔹 1000 separator: 🗍
Exchange rate: Decimal separator:
Symbol: \$ Decimal digits: 2
Placement: \$1 💌 Leading zero: O .9 💿 0.9
Addresses with this country are eligible for AddressAccelerator
Use the fields below to build the address block for this country. Select the country to display the available address fields, then use the fields to customize the address block.
Display available fields for this country Canada
Available fields: Address block:
Address lines City Province Postal Code Country Country abbreviation
Use the commands below to insert symbols, lines, and spaces into the address block.

For more information about international settings, see the *Configuration and Security Guide*.

Merchant Accounts

If you use IATS/Ticketmaster to process credit card transactions, you must set up a merchant account. To add or edit a merchant account in *Configuration*, click **Business Rules** and select **Merchant Accounts** from the tree view.



On the Business Rules page for merchant accounts, the grid displays all the merchant accounts your organization uses with the Blackbaud *Payment Service*. Since your organization may use a merchant account with another Blackbaud program, you can add or edit merchant accounts that appear in the grid, but not delete them.

When you save new or edited merchant account information, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage. For more information, see the *Configuration and Security Guide*.

System Access Options

In *Configuration*, you can now set business rules to require users to change their passwords on a routine basis. For example, to comply with PCI DSS, users must change their passwords at least every 90 days. New passwords created by users cannot match one of the last four passwords used by the user.

Configuration • Business Rules						
Configuration General Tables Addressees / Salutations Attributes Financial Institutions General Ledger Letters International Business Rules Fields Membership Categories Custom Views Reporting Hierarchies	General □ Oplicates □ Oplicates □ Options □ Options □ Name display □ Batch options □ Membership □ Generale Ds □ Batch options □ Membership □ Generale ploins □ Membership □ General options □ General options □ General options □ General options □ Decessed options □ Decessed options □ Decessed options □ Disable inactivity timeout for all non-Supervisor users □ Autivity options □ Disable inactivity timeout for all non-Supervisor users □ Autivity options □ Disable inactivity timeout for all non-Supervisor users □ Autivity options □ General options □ Disable inactivity timeout for all non-Supervisor users □ Autivity options □ Queue Options □ Decentule turber □ Constituent □ Distable inactivity timeout for all non-Supervisor users □ Activity options □ Queue Options □ Disable inactivity options					
	Business Rules Apply predefined and customized validation rules to records in <i>The Raiser's Edge</i>					

When you select to enable password expiration, you can enter the number of days to allow users to use a password before it expires and how many days in advance to notify the user before the password expires. For more information about password expiration, see the *Configuration and Security Guide*.

To help protect your database, *The Raiser's Edge* automatically locks out a user account for a period of time after a number of failed login attempts. In *Configuration*, you can now set business rules to specify the number of failed attempts to allow before the program locks a user account and the duration of the lockout.

To help protect your database, *The Raiser's Edge* now automatically logs out a user when a session is idle for 15 minutes. To activate the workstation, the user must enter the password again. You can select whether to enable this inactivity timeout for all users or only Supervisor users, which are users who log in as the default Supervisor login, have Supervisor rights, or belong to a user group with Admin/Security access.

For more information about user account lockout, see the *Configuration and Security Guide*.

Mail Options

If you use the optional module *PostalSaver*, you can now select whether to use the 65-character Intelligent Mail barcodes to sort and track your mailings with the US Postal Service.

escale escale	When sending eReceipts or using the 'Send as Mail' action in Queue use: SMTP email server: Port number: 25 When using PostalSaver to presort mailings: Use Intelligent Mail barcodes
orting Hierarchies	

To use the 62-character Delivery Point Validation (DPV) barcode, do not mark **Use Intelligent Mail barcodes**.

Workplace Giving

On the Pledge Detail tab of a Pledge Envelope, *The Raiser's Edge* no longer displays unmasked credit card numbers. For pledge types of Credit card, Direct bill, Corporate, or Other with a payment method of credit card, the **Card Number** column now displays masked credit card numbers, with only the last four digits visible. The credit card grid also now includes a **Card Holder** column. The Blackbaud *Payment Service* requires the card holder name when it receives new or edited credit card information from *The Raiser's Edge*.

述 New Pledge Envelope	from ABC Learning (Center					_ 🗆 >
File Edit View Pledge E	Envelope Favorites T	ools Help					
🔁 Save and Close 🕶 🛃	📑 🗟 • 🗟 • 🖻	∆ ia a ≽	ы → • 🗵	달 ? - 왕 -			
Envelope Summary Pled	lge <u>D</u> etail						
Pledge Types	Credit Card Pledge Cards						
Payroll Deduction	Constituent	Pledge Amount	Card Type	Card Number	Expires On	Card Holder	Auth. Code
🙀 Cash	Allison Andrews	\$5,000.00	Visa	********************1111	04/2015	Allison E. A	124
Uredit Card							
Stock							
Corporate Pledge							
🗹 Other							



When you save the pledge envelope record that contains new or edited credit card information, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage. However, if a credit card number or expiration date is blank, *The Raiser's Edge* does not send the information to the Blackbaud *Payment Service* but instead displays and stores only the last four digits of the account number. For more information, see the *Workplace Giving Guide*.

Blackbaud Sphere Integration

The Raiser's Edge is now compatible with Blackbaud **Sphere**. You can use the Sphere Connector to synchronize information entered online in Blackbaud **Sphere** with information entered in **The Raiser's Edge** database. For information about how to configure the Sphere Connector, see the *Blackbaud Sphere & The Raiser's Edge Integration Guide*.

In *Administration*, system administrators can assign Security rights to the user roles that access the data downloaded from *Sphere*. For information about how to assign security rights, see the *Configuration and Security Guide*.

Query

To help you organize queries in category folders, you can now drag and drop queries from the query list into the appropriate category in the box on the left. For example, to move the Board Members query into the Constituent category, select the query and drag the cursor to the Constituent category on the left.

👚 <u>N</u> ew Query 🔄 <u>O</u> pen <u>M</u> er	ge Queries 🗙 <u>D</u> elete 🤮	Print 🔄 Run Query 🤮	Export 🖓 Find	O <u>r</u> ganize C	Categories
General	Type: <all types=""></all>	Format: <all f<="" td=""><td>Formats></td><td>•</td><td></td></all>	Formats>	•	
Constituent	Name	Туре	Description	Format	Created
	Appeal search for Supervisor	Appeal	Used by the S	Dynamic	08/23/1999
	Fund search for Supervisor	Fund	Used by the S	Dynamic	08/23/1999
	Member search for Supervisor	Membership	Used by the S	Dynamic	08/23/1999
	Individual search for Superv	Individual	Used by the S	Dynamic	09/02/1999
	Job search for Supervisor	Job	Used by the S	Dynamic	09/21/1999
	Organization search for Sup	Organization	Used by the S	Dynamic	09/21/1999
	Action search for Supervisor	Action	Used by the S	Dynamic	12/28/1999
	Board Members	Constituent	This query is b	Dynamic	12/29/1999
	Inactive Records	Constituent	This query is $\ensuremath{b}\ldots$	Dynamic	01/31/2000
	Invalid Address/Blank Prefe	Constituent	This query is $\ensuremath{b}\ldots$	Dynamic	01/31/2000
	Prospects	Constituent	This query is u	Dynamic	02/07/2000
	Action Track: Completed =	Action	Segments of t	Dynamic	02/21/2000
	Action Track: Interest Gene	Action	Segments of t	Dynamic	02/21/2000
	Action Track: Interest Gene	Action	Segments of t	Dynamic	02/21/2000
	Tribute Records	Constituent	These constitu	Dynamic	03/07/2000
	Campaigns/average gift ov	Campaign	Campaigns wh	Dynamic	05/24/2000
	Funds with no ending date	Fund	These funds $\operatorname{d}\ldots$	Dynamic	05/24/2000
	Received amount greater th	Appeal	List of Appeals	Dynamic	05/24/2000
	Events with other donations	Event	All events that	Dynamic	05/24/2000
					<u> </u>
	Only show my queries				



The query moves from the General category to the Constituent category.

SQL Server Compatibility

For Microsoft SQL Server 2005 Standard, Workgroup, or Enterprise, **The Raiser's Edge 7.91.50** now requires Service Pack 2 and supports Service Pack 3.

The Raiser's Edge 7.91.50 is also now compatible with Microsoft *SQL Server* 2008 and *SQL Server* 2008 Service Pack 1.

Microsoft Windows Compatibility

The Raiser's Edge 7.91.50 is now compatible with Microsoft *Windows Vista* Service Pack 2, *Windows 7*, and *Windows Server 2008*.

Mapping

The Raiser's Edge is now compatible with Microsoft *MapPoint 2009*. For information about integration with *MapPoint*, see the *Mapping Guide*.

NetSolutions

To help you comply with PCI DSS, *NetSolutions* no longer stores credit card numbers locally or in the database. All numbers for recurring gifts are stored remotely in the Blackbaud *Payment Service*. For one-time gifts, *The Raiser's Edge* downloads and stores a truncated credit card number. In addition, retention of credit card information associated with donor logins is no longer possible.

Merchant Accounts used in NetSolutions are now created on the Business Rules page. Once an account is in place, you can associate the account with your entire *NetSolutions* site or a specific *NetSolutions* page (NetDonors, NetEvents, NetMembers) without re-entering the account's credentials.

For more information about *NetSolutions*, see the *NetSolutions Guide*; for more information about creating merchant accounts in *The Raiser's Edge*, see the *Configuration & Security Guide*.



Nonprofit Central Web Service

You can now use the *Nonprofit Central* web service to view and print information about the organization from the *Nonprofit Central* database from within *The Raiser's Edge*. The *Nonprofit Central* database is available to community foundations who purchase an annual subscription. For information about how to set up this service in *The Raiser's Edge*, see the *Web Services Installation and Set Up Guide*.





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