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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What Is In This Guide?

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 www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

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

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

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.

Welcome

Icons

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

Chapter 1

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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*** 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*.
- ❑ ***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.

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 www.blackbaud.com to view the system requirements. From the website, select **Products**, **System Requirements** from the menu bar.

Back Up Your Network Database

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

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.

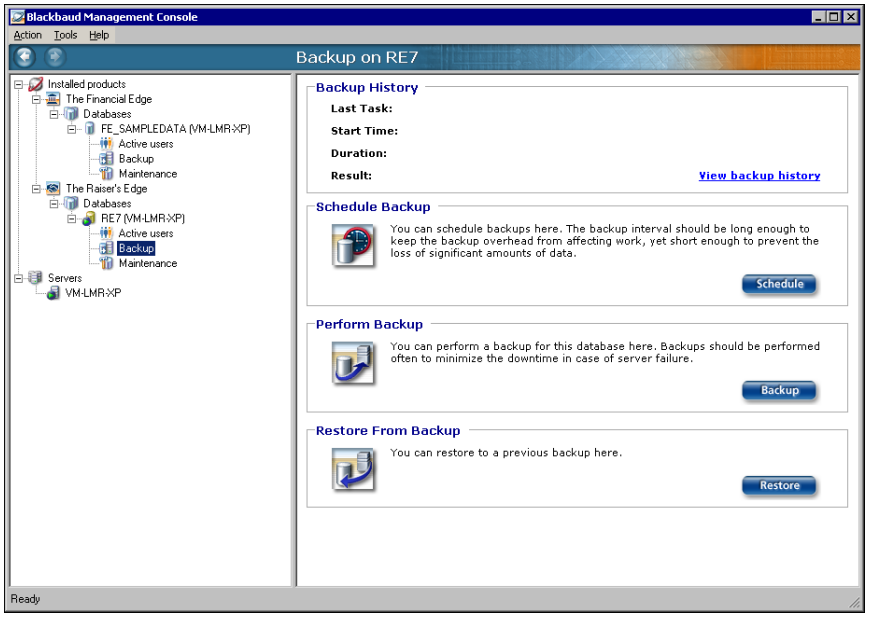
Back Up Your Database from The Raiser's Edge 7.6 or Higher

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.

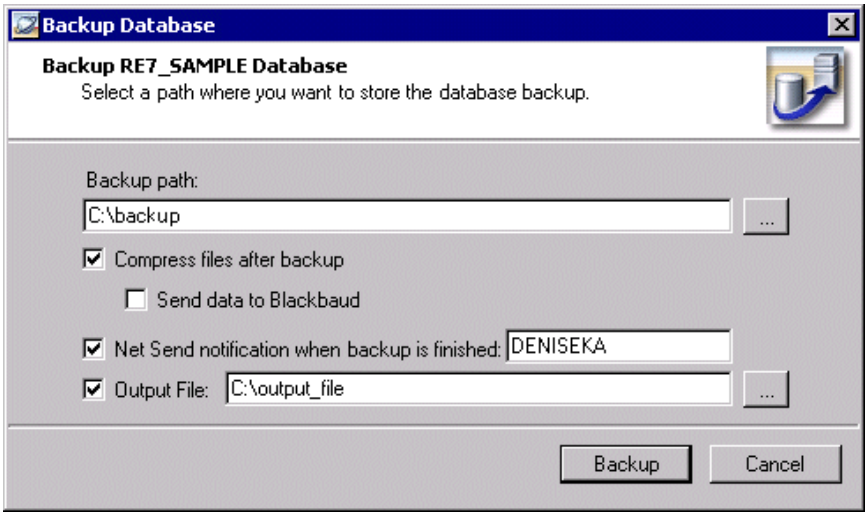
Although this utility conveniently backs up your database while allowing users to continue to work in the program, we recommend you also create a proper tape backup of your data.

➢ **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.



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**.

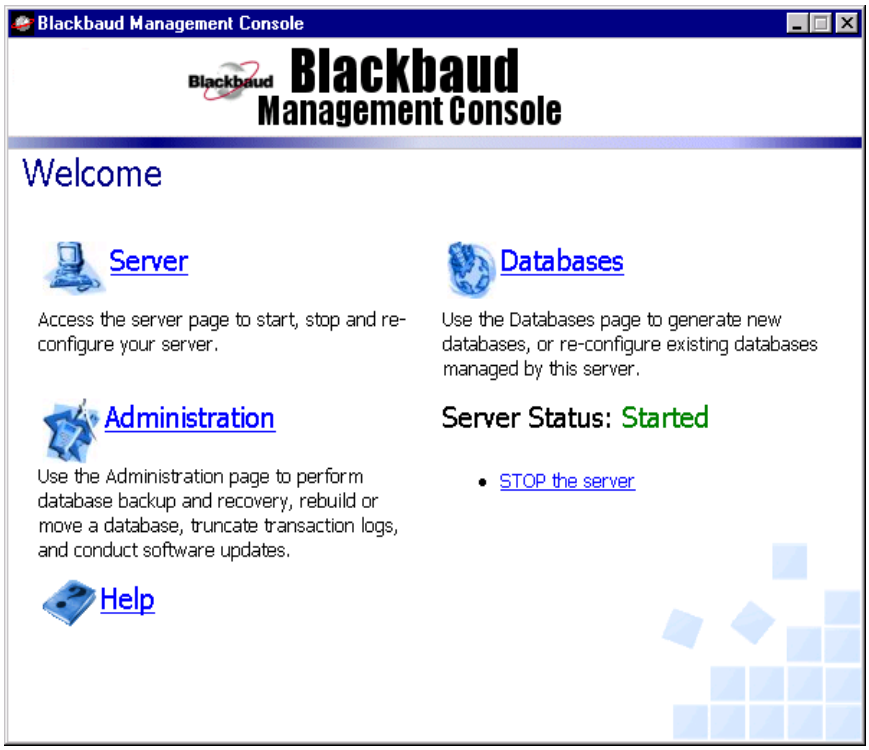
   Do not mark **Send data to Blackbaud** unless directed to do so by Blackbaud Customer Support.
5. To send a notification to a specified workstation when the backup is created, mark **Net Send notification when backup is finished**. You must enter the name of the workstation or user to receive the notification, 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

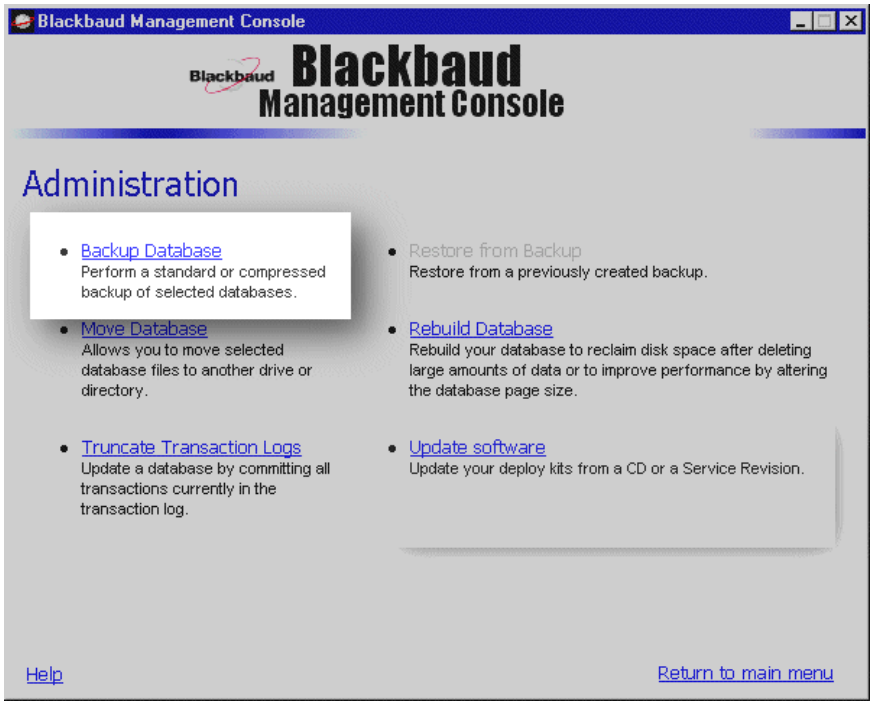
Although this utility conveniently backs up your database while allowing users to continue to work in the program, we recommend you also create a proper tape backup of your data.

➢ **Back up your database from The Raiser's Edge 7.5**

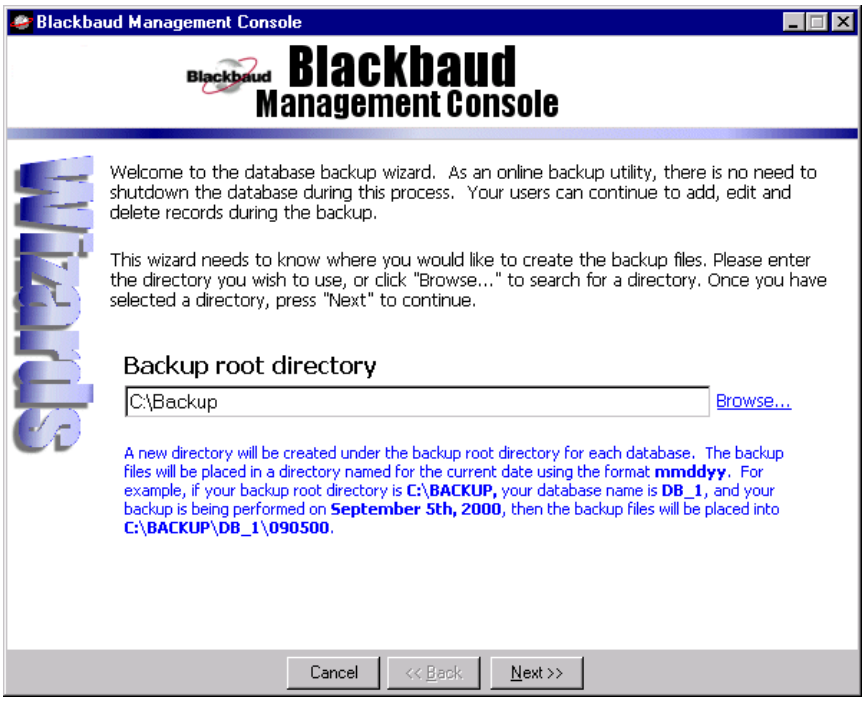
1. Before you update ***The Raiser's Edge***, click the Blackbaud Management Console shortcut on your desktop. The Blackbaud Management Console Welcome screen appears.



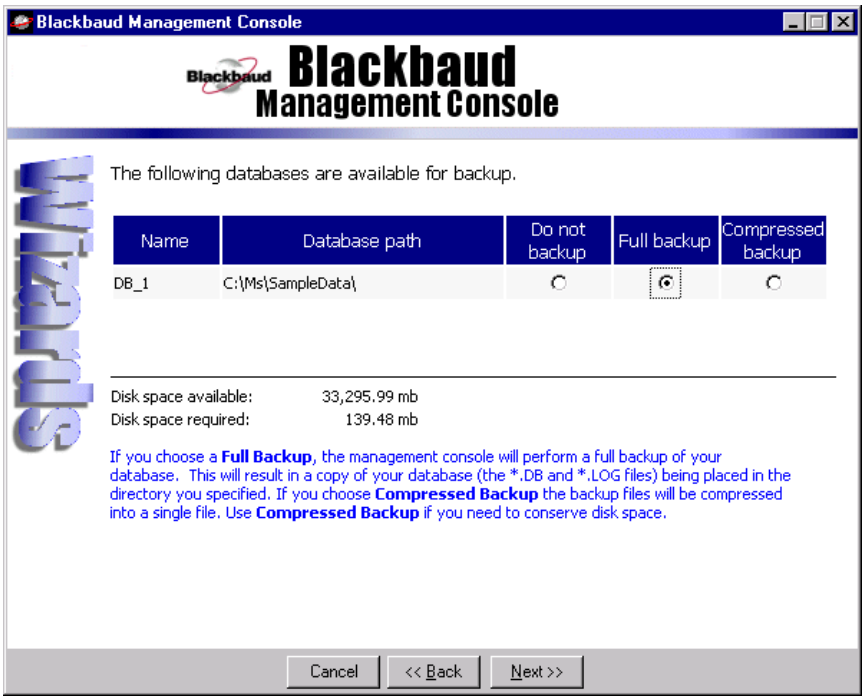
2. Click **Administration**. The Administration screen appears.



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



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.



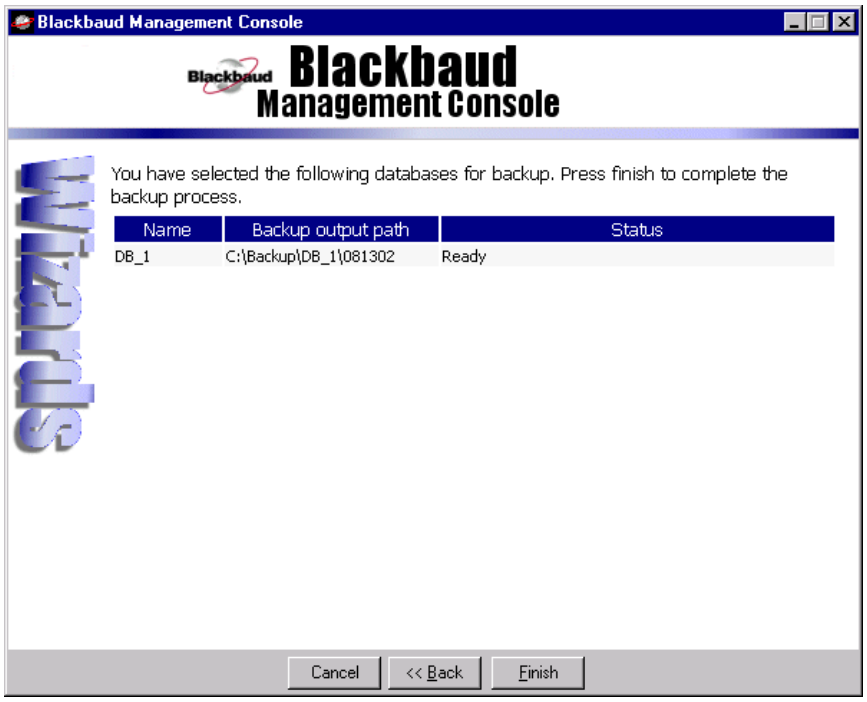
6. Next to the database to back up, select the type of backup to run. It may take a few minutes before the program accepts your selection.

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.

- 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**.

If the backup fails, a message appears to warn you that one or multiple backups failed.

7. Click **Next**. A screen appears to confirm the backup settings.



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.

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

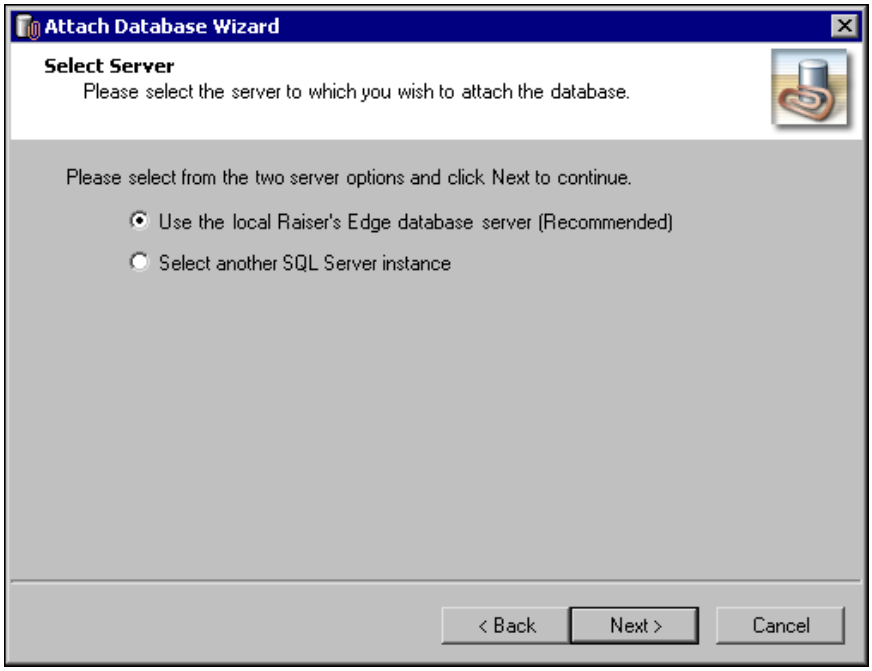
Attach Database Wizard

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.

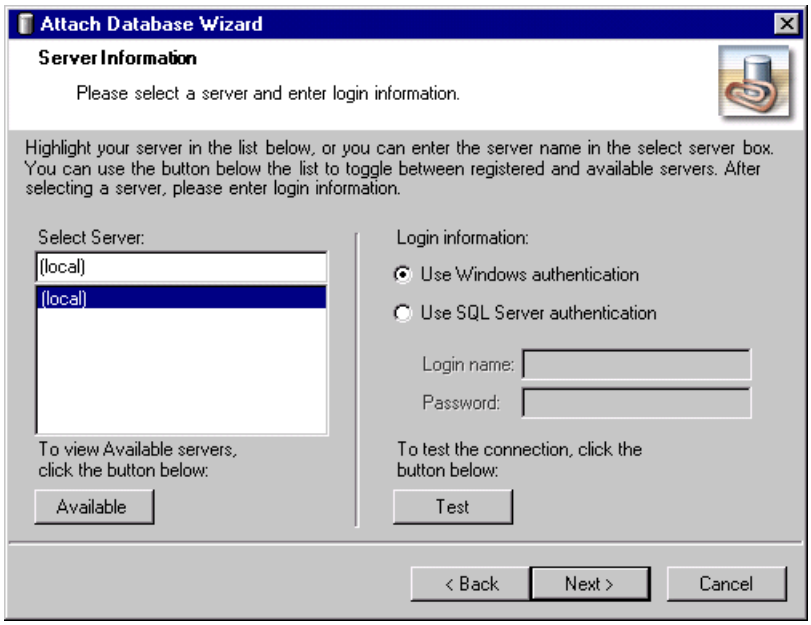


- To use ***The Raiser's Edge 7*** server installed with the program, select **Use the local Raiser's Edge database server** and go to step 3.

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***.

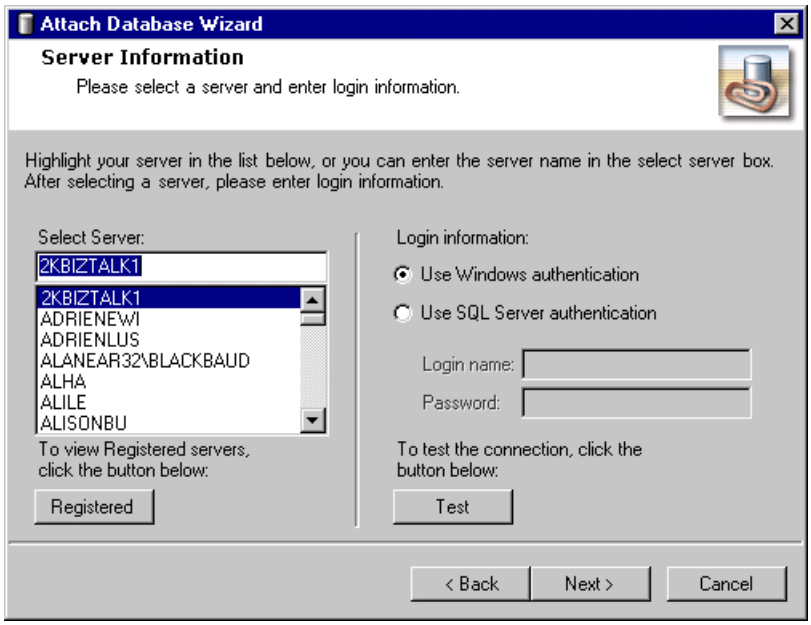
- To use a separate installed instance of Microsoft *SQL Server*, select **Select another SQL Server instance** and select the *SQL Server* instance to use.

  a. Click **Next**. The Server Information screen appears.



  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**.



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.

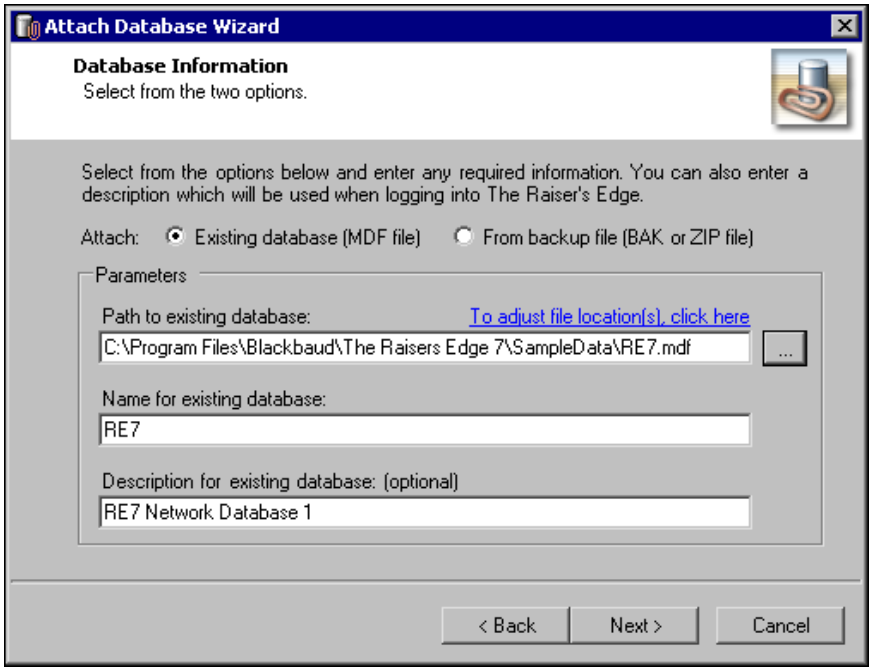
d. In the **Login information** frame, select the type of authentication to use.

   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.

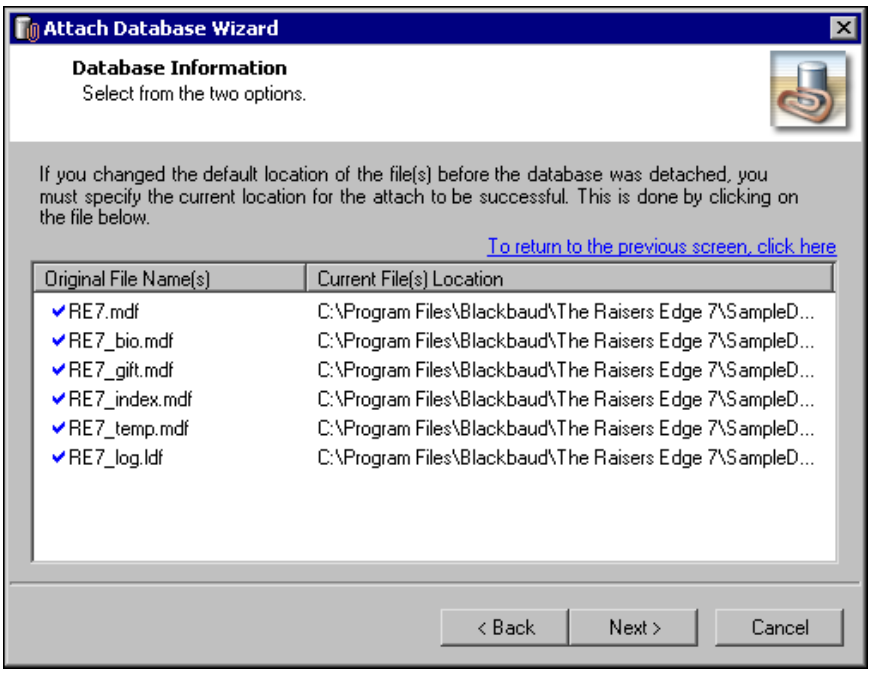
e. To check the server connection, click **Test**. If the connection fails, check the login information and verify you selected the correct server.

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



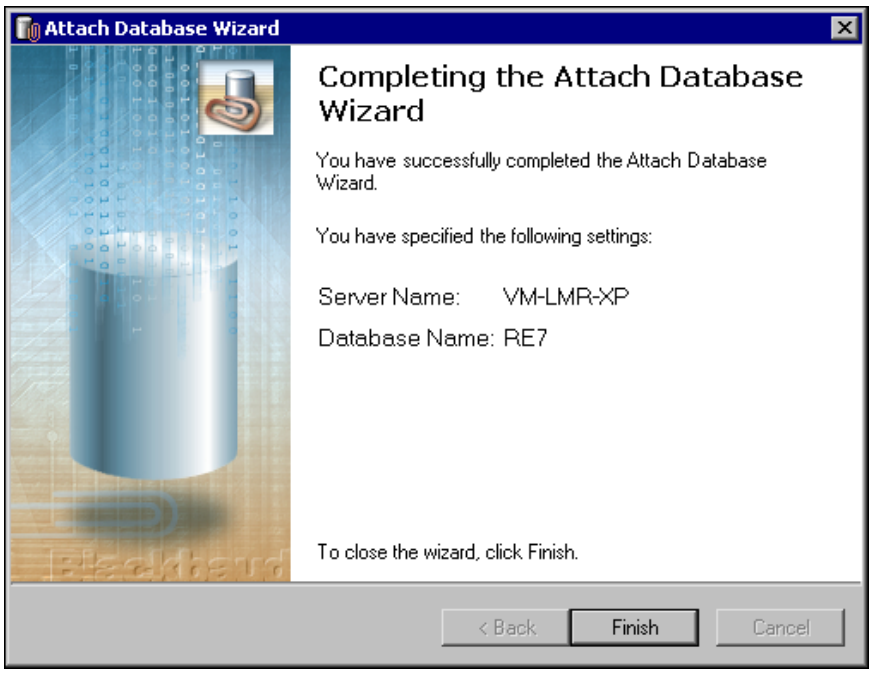
4. In the **Attach** field, select the type of ***Raiser's Edge*** database to attach:
   - To attach an existing database, select **Existing database (MDF file)**.
   - To attach a backup of a database, select **From backup file (BAK or ZIP file)**.
5. In the **Path to existing database** field, enter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



    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**.

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



10. Click **Finish**. You return to the Blackbaud Management Console screen. The attached database appears under the product to which you attached it.

    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*.

➢ Migrate an ASA database into SQL Server

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.

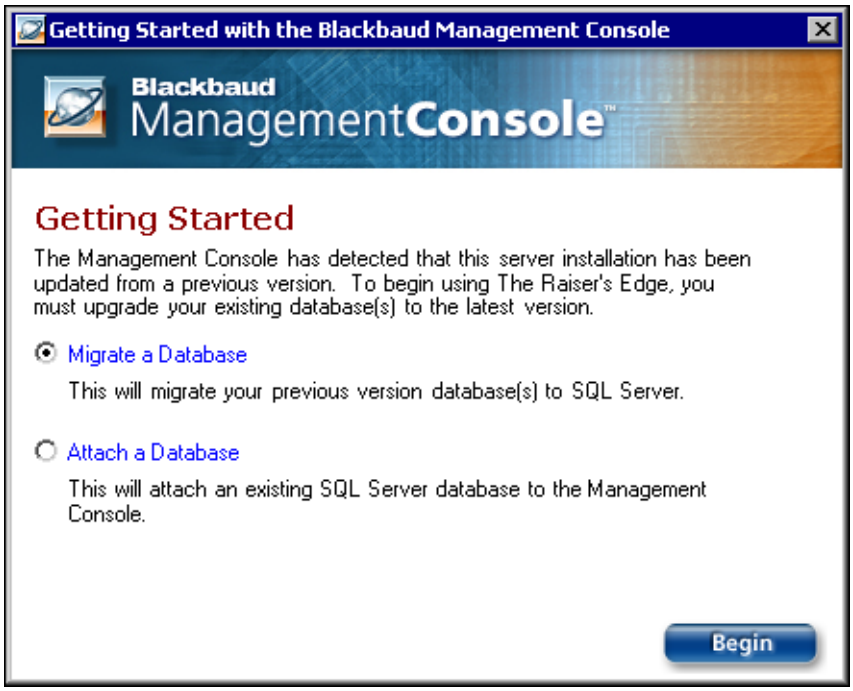
If you update from ***The Raiser's Edge 7.5*** and, when you installed ***The Raiser's Edge 7.5***, you selected **Automatically Start the database when the system starts**, the *ASA* database restarts when you restart your computer at the end of the update procedure. Before you migrate your *ASA* database 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.

If you have an existing Microsoft *SQL Server* database, you can attach the database to the Blackbaud Management Console for use with ***The Raiser's Edge***. For information about how to attach a database, see "Attach Database Wizard" on page 9.

If your system satisfies these conditions, you receive three options.

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 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.

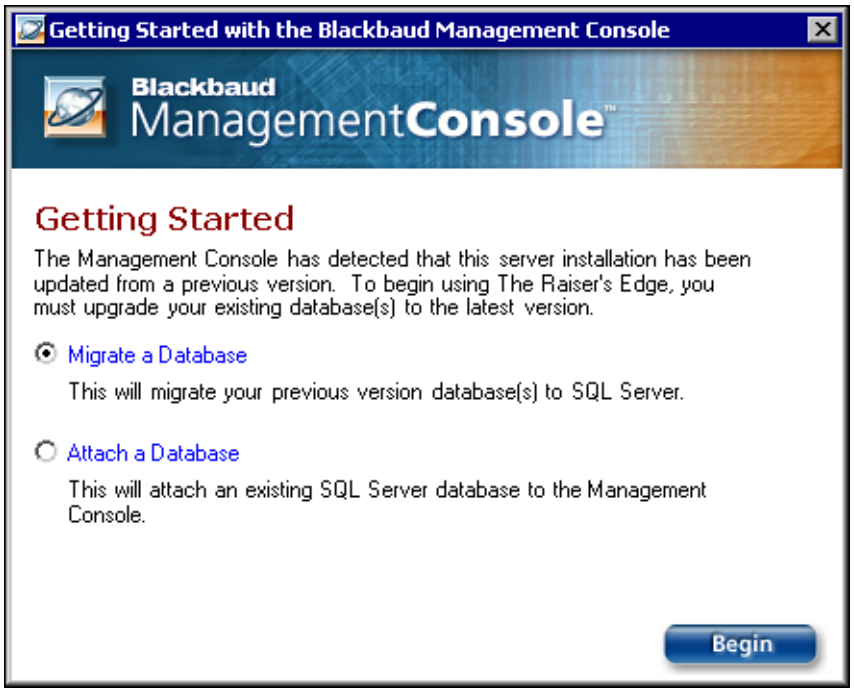
Migrate Database Wizard

➢ **Use the Migrate Database Wizard**

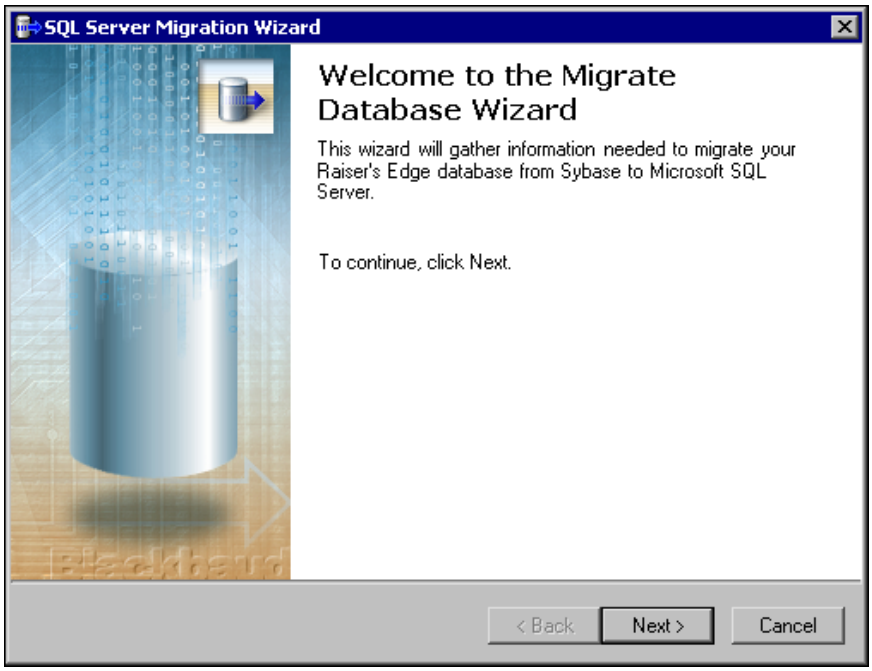
After you restart your computer, the Blackbaud Management Console shortcut appears on your desktop. However, if you use Blackbaud's accounting software, ***The Financial Edge***, or education software, ***The Education Edge***, a new management console shortcut does not appear. All programs use the same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

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

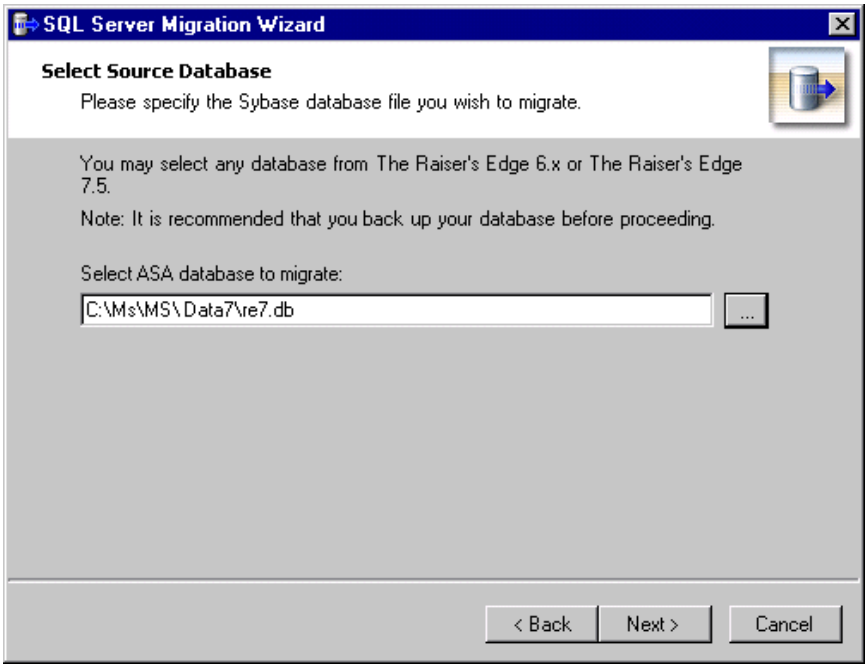
The Getting Started Screen appears.



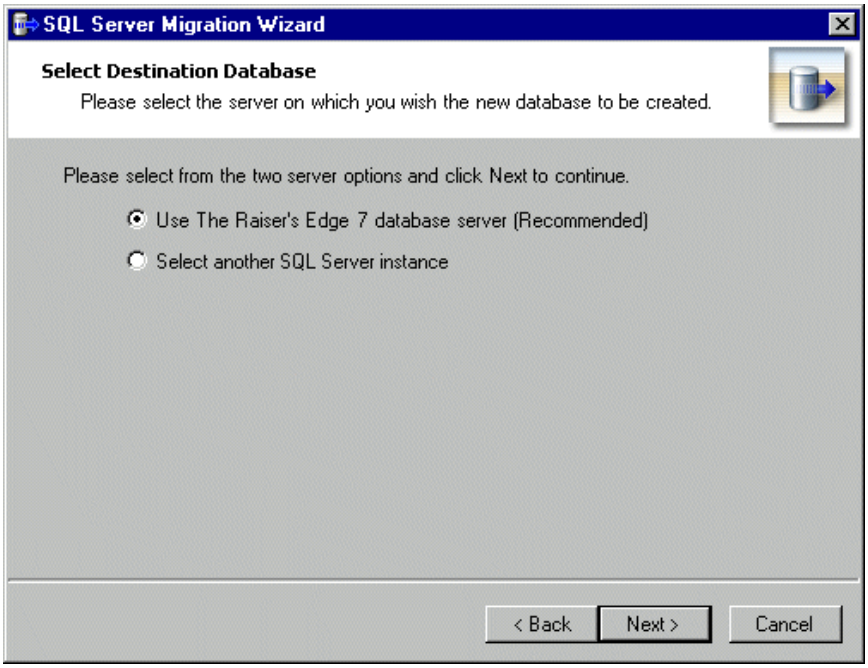
2. Select **Migrate a Database** and click **Begin**. The Welcome to the Migrate Database Wizard screen appears.



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



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.

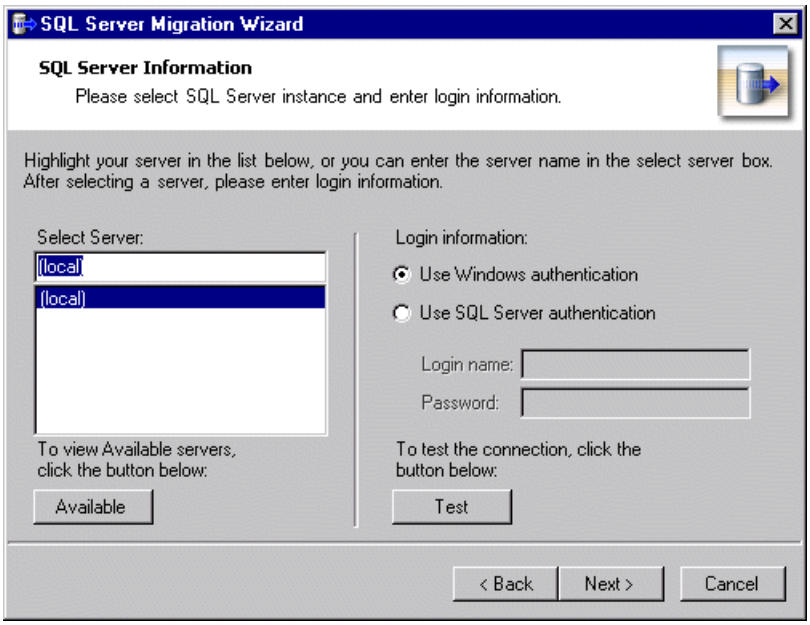


- To use the database server installed with ***The Raiser's Edge***, select **Use The Raiser's Edge 7 database server (Recommended)** and go to step 6.

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*.

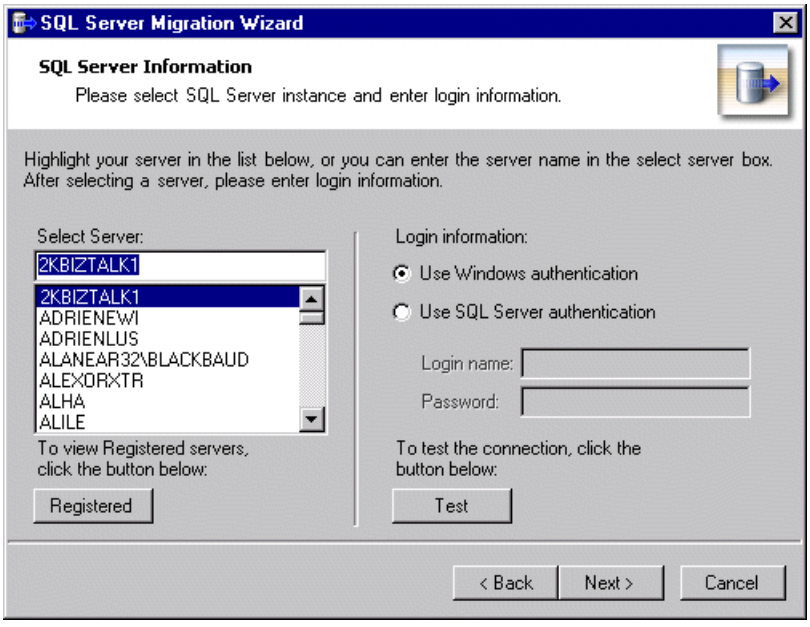
- To use a separate installed instance of Microsoft *SQL Server*, select **Select another SQL Server instance** and select the *SQL Server* instance to use.

  a. Click **Next**. The SQL Server Information screen appears.



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

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



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.

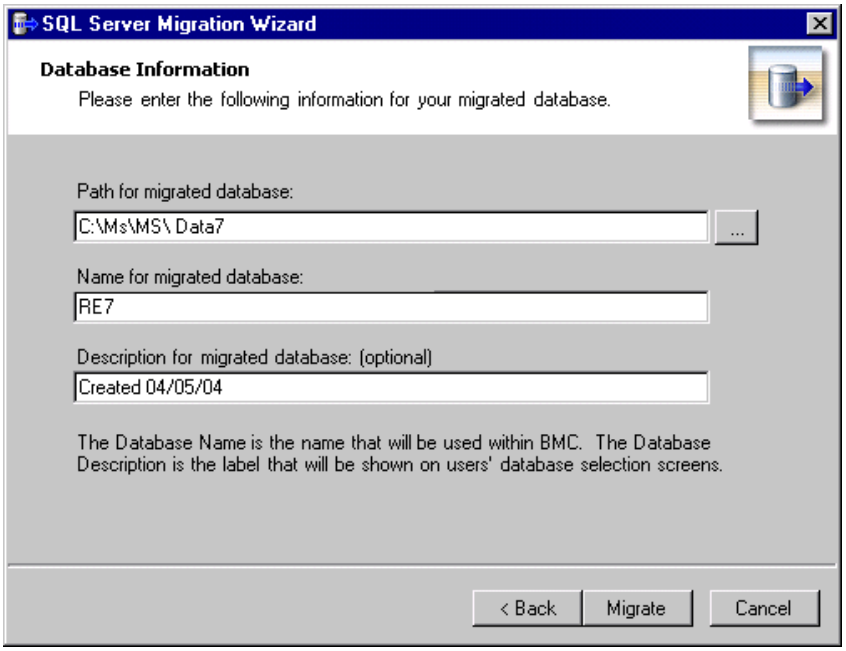
   If you have *SQL Server Standard* or *Enterprise* editions configured to work with *Windows* authentication, select **Use Windows authentication**. This allows you to log into the *SQL Server* instance with the same login name and password as your network.

   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.

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.

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

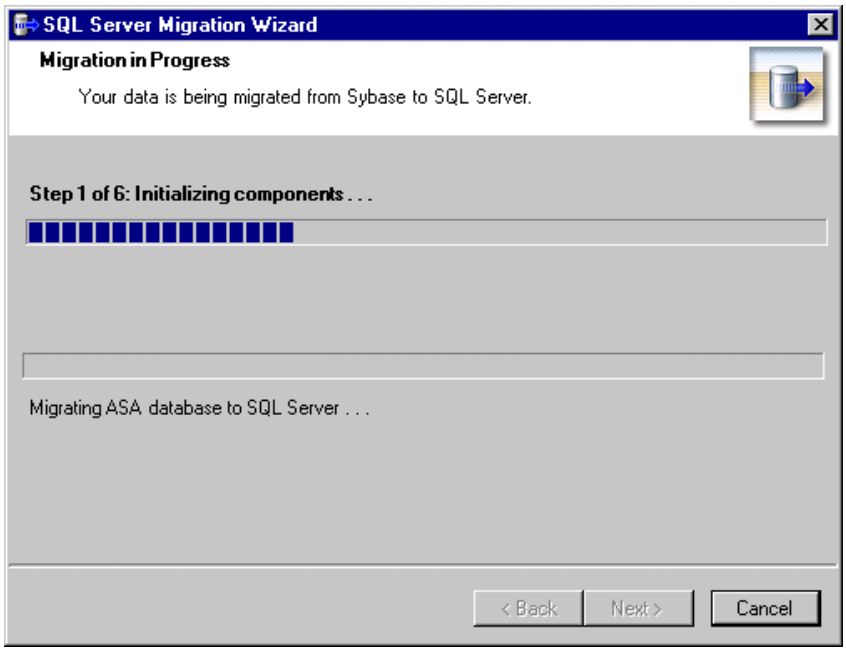


7. In the **Path for migrated database** field, enter a location for the database. To map to the location, click the ellipsis.

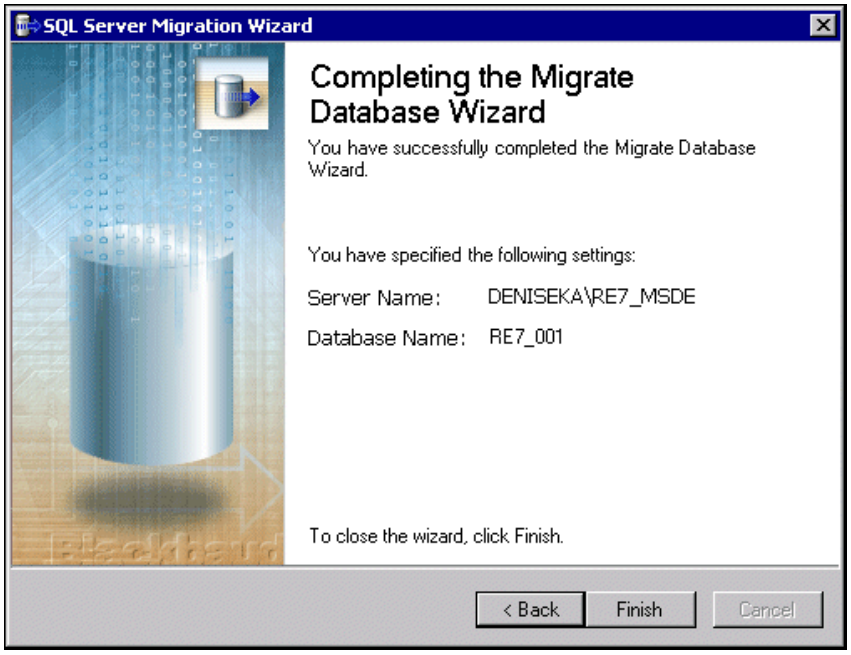
8. In the **Name for migrated database** field, enter a name to identify the database in the Blackbaud Management Console.

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.

10. Click **Migrate**. As the database migrates, a processing screen appears.



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



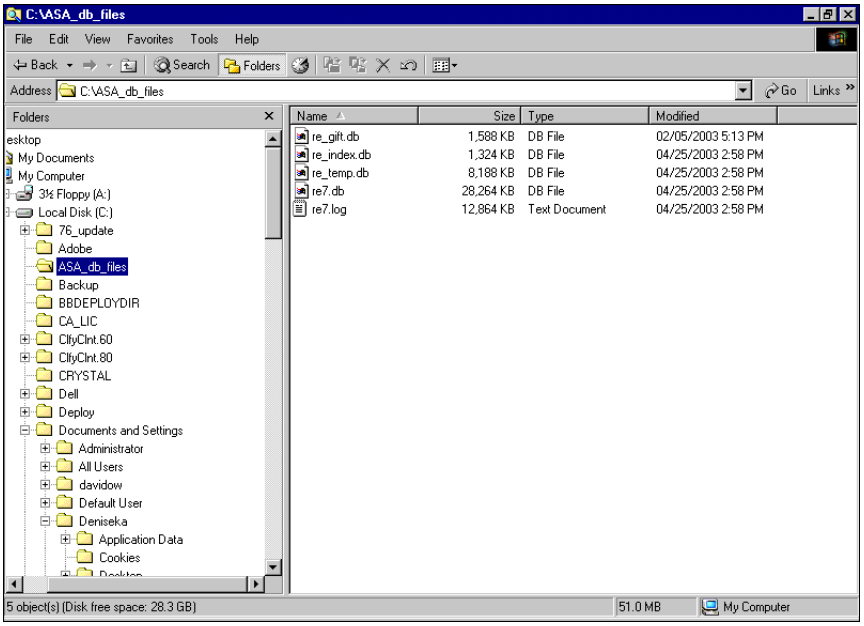
11. Click **Finish**. You return to the Blackbaud Management Console screen.

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.



2. 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***.

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.

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.

Installation Requirements

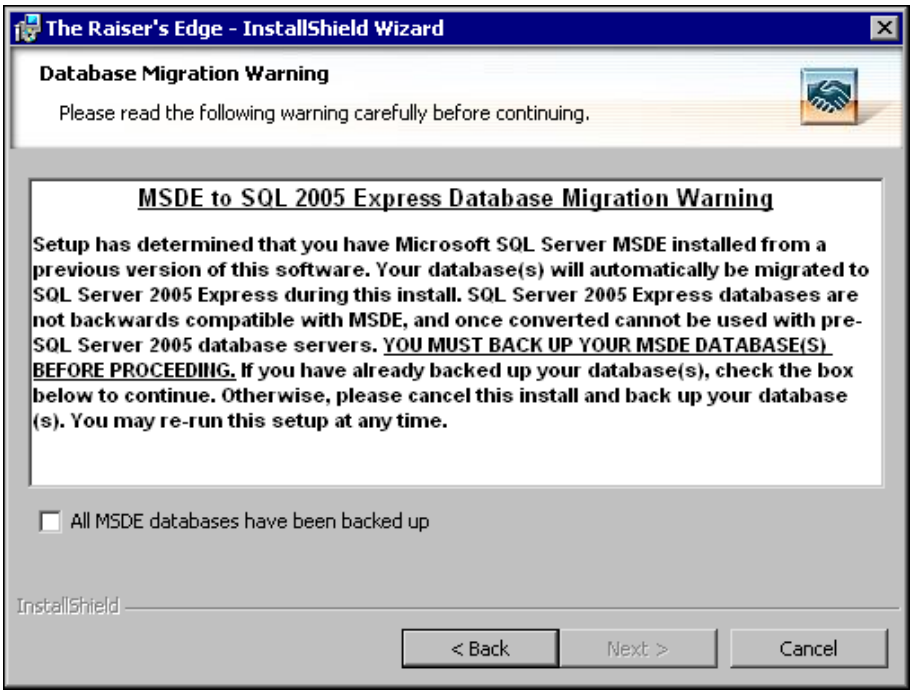
If you currently use ***The Raiser's Edge***, before you update to ***The Raiser's Edge 7.91.50***, you must have at least ***The Raiser's Edge 7.5*** installed. You cannot update from ***The Raiser's Edge 7.0, 7.01***, ***7.02***, or ***7.03***.

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*.



- ❑ 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 www.microsoft.com/ie to download the latest version.
- To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), ***The Raiser's Edge*** does not store credit card numbers in your database. To securely store sensitive credit card and merchant account information, the program uses the Blackbaud *Payment Service* web service. Before you can download the 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 www.microsoft.com/downloads/ 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.

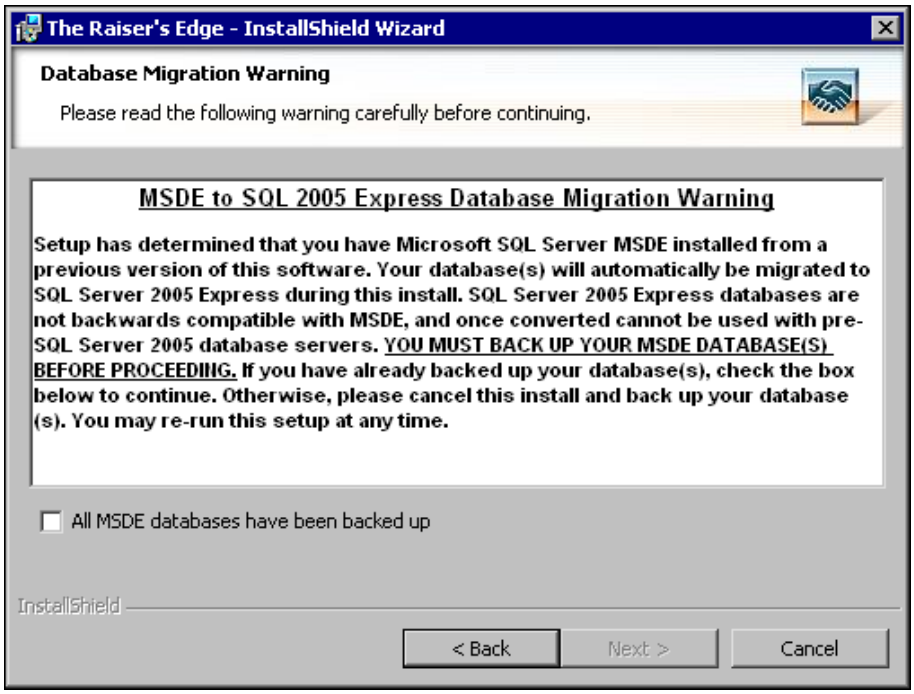
Installation Requirements for a Server

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

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*.

- 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. 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*.



- ❑ Make sure clients of ***The Raiser's Edge*** are logged out of the system.
- ❑ 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 www.microsoft.com/ie to download the latest version.
- ❑ To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), ***The Raiser's Edge*** does not store credit card numbers in your database. To securely store sensitive credit card and merchant account information, the program uses the Blackbaud *Payment Service* web service. Before you can download the 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/sqlserver/bb671408.aspx.

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

- ❑ 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 www.microsoft.com/downloads/ 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.

- 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*.

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/support/downloads/downloads.aspx.

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.

The update includes a `NoDBAForRewin.sql` 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.

- ❑ 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 www.microsoft.com/ie to download the latest version.
- ❑ To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), ***The Raiser's Edge*** does not store credit card numbers in your database. To securely store sensitive credit card and merchant account information, the program uses the Blackbaud *Payment Service* web service. Before you can download the 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*.

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.

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

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*.

.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.

SQL Server Requirements

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 *SQL 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/howtobuy/sqlserverlicensing.mspx for more information about *SQL Server* licensing 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 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 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.

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

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.

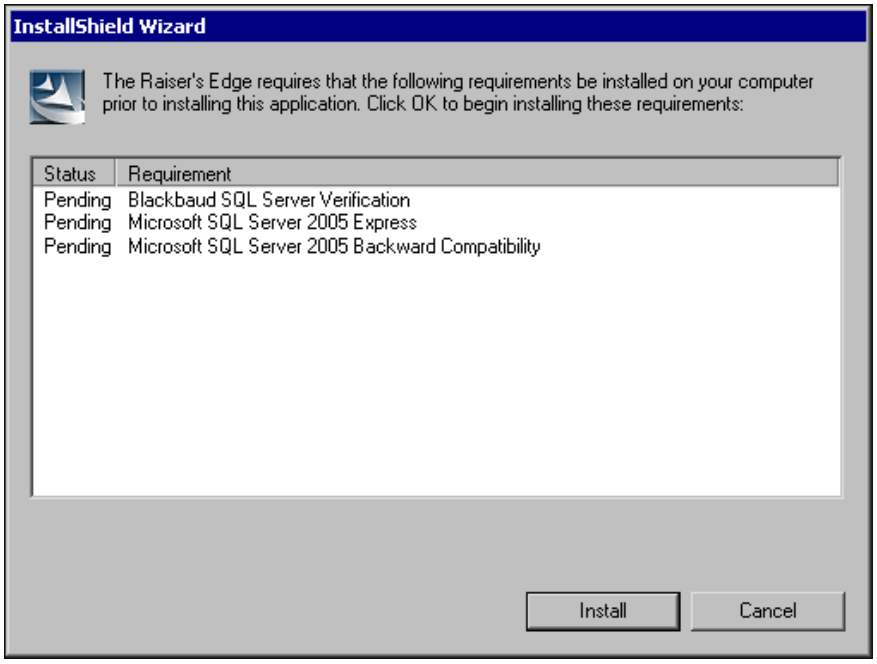
Install The Raiser's Edge Update on a Standalone Machine

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.

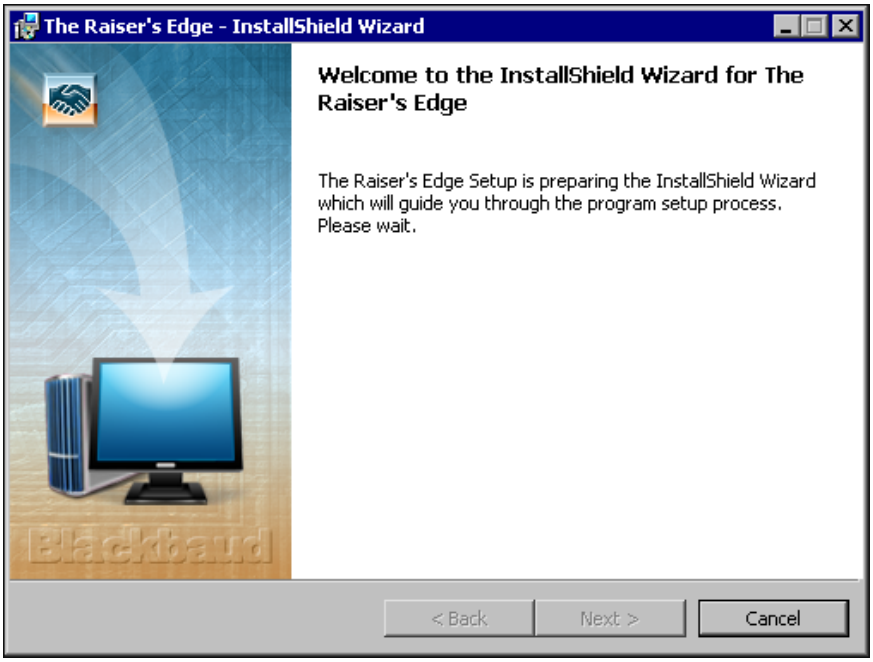


If the installation options screen fails to appear, you can use Microsoft *Windows Explorer* to access `setup.exe` on your CD-ROM drive.

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/support/downloads/downloads.aspx.

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.

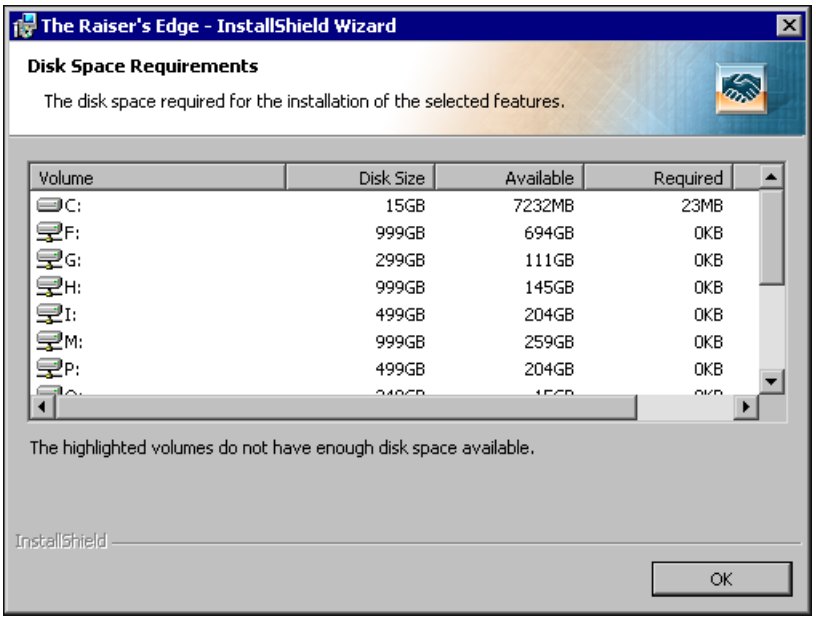


3. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access ***The Raiser's Edge*** documentation. Click **OK** and visit Adobe's website at www.adobe.com/products/acrobat/readermain.html to download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

a. Click **Space**. The Disk Space Requirements screen appears.

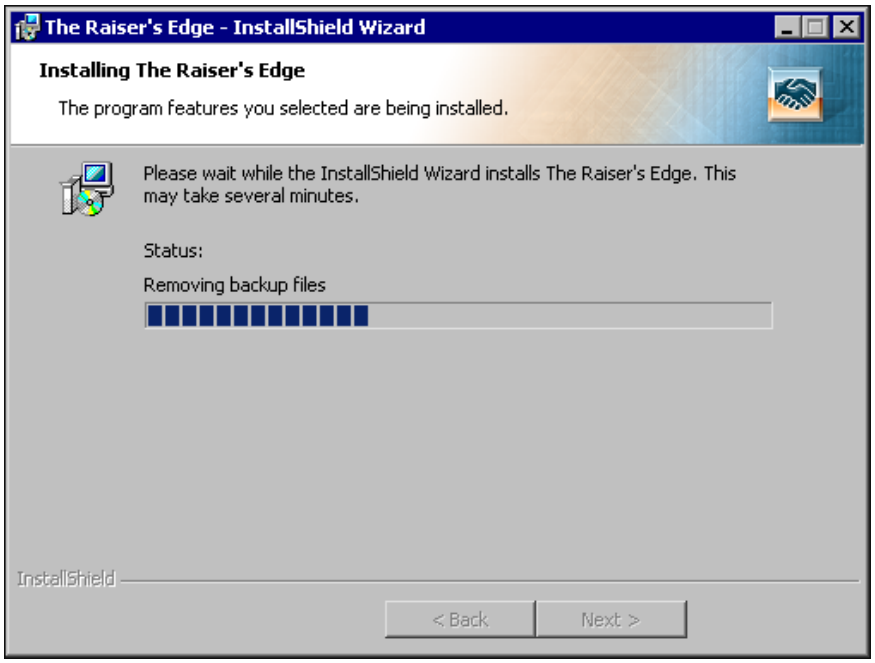


b. For each volume on your workstation, view the disk size, available disk space, and required disk space.

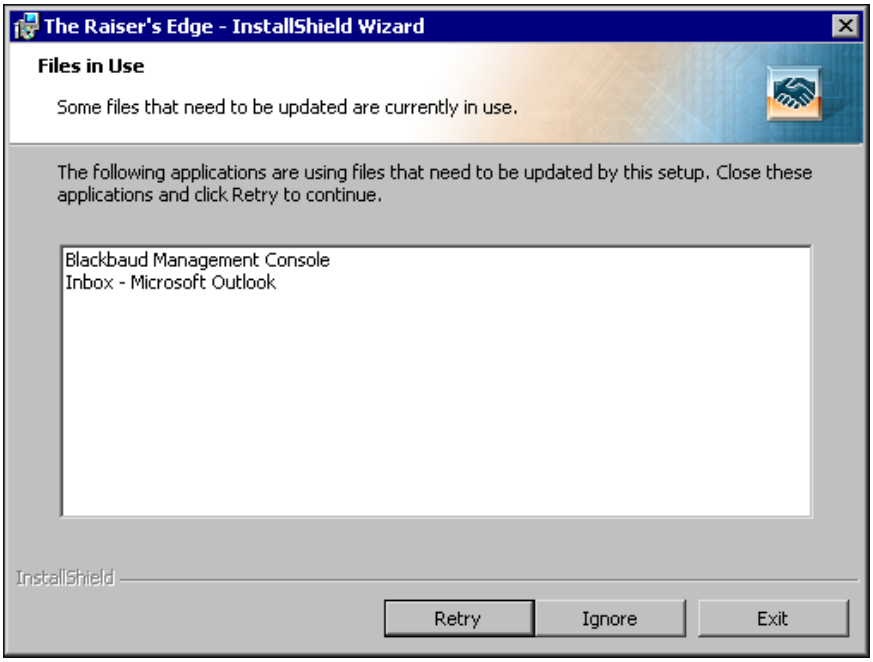
   If a volume does not have the required disk space, it is highlighted. If a volume does not meet the disk space requirements, we recommend you cancel the installation and free up the required disk space.

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.



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



   - 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**.

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

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**.

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

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.

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

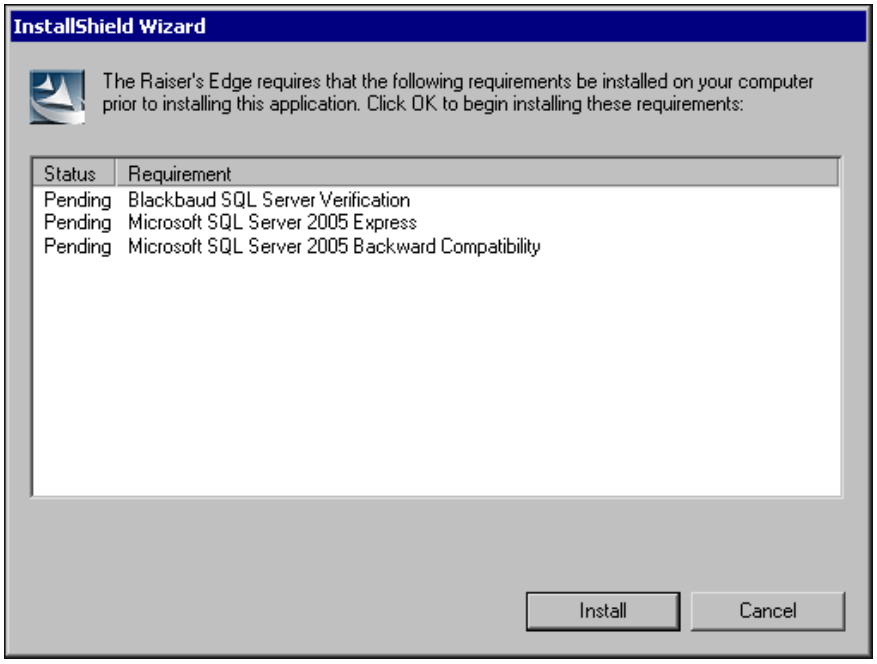
If you use ***RE:Anywhere***, you must install the latest version of the software along with your update of ***The Raiser's Edge***. You can install the newest version of ***RE:Anywhere*** from your update CD or update files downloaded from www.blackbaud.com/support/downloads/downloads.aspx.

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

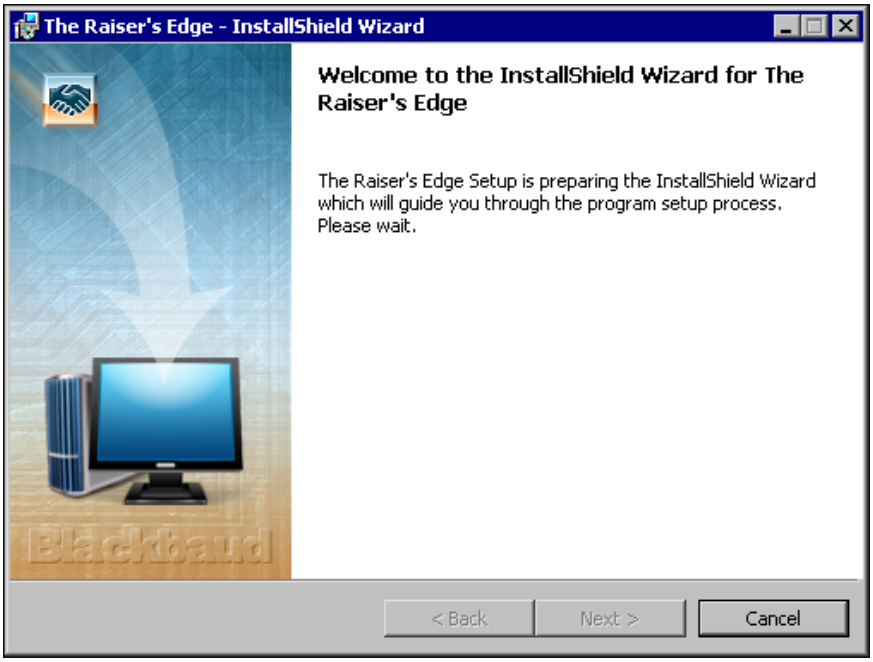
1. Access the update files.
   - Insert the update CD in your CD-ROM drive. A screen appears and displays the installation options.
   - If you downloaded the update, extract the update files to a directory on your server and then double-click the `setup.exe` file.
2. To verify you have the correct version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



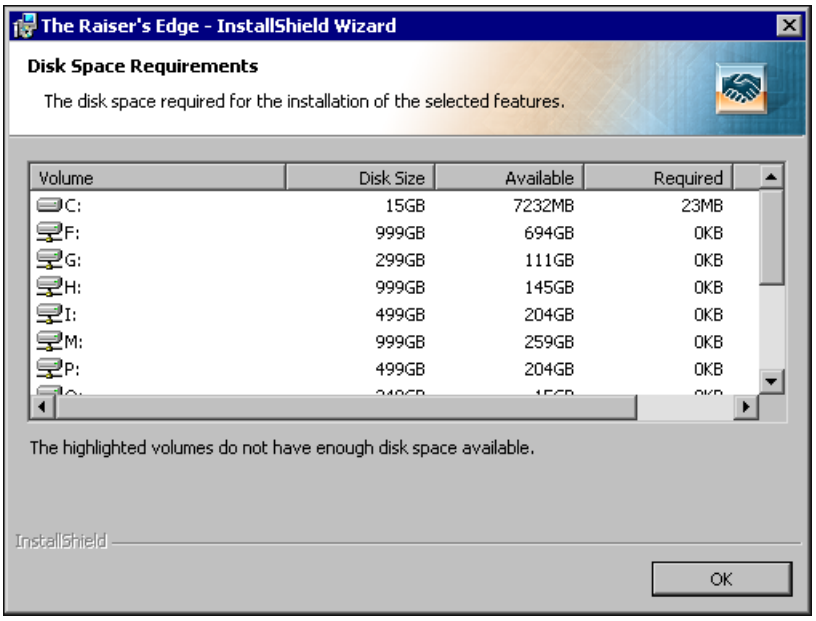
   If the *SQL Server 2005* verification tool detects that your version does not meet the minimum service pack requirement, a message appears to inform you of this. To automatically install the required service pack, click **Yes**.

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 www.adobe.com/products/acrobat/readermain.html 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:

a. Click **Space**. The Disk Space Requirements screen appears.

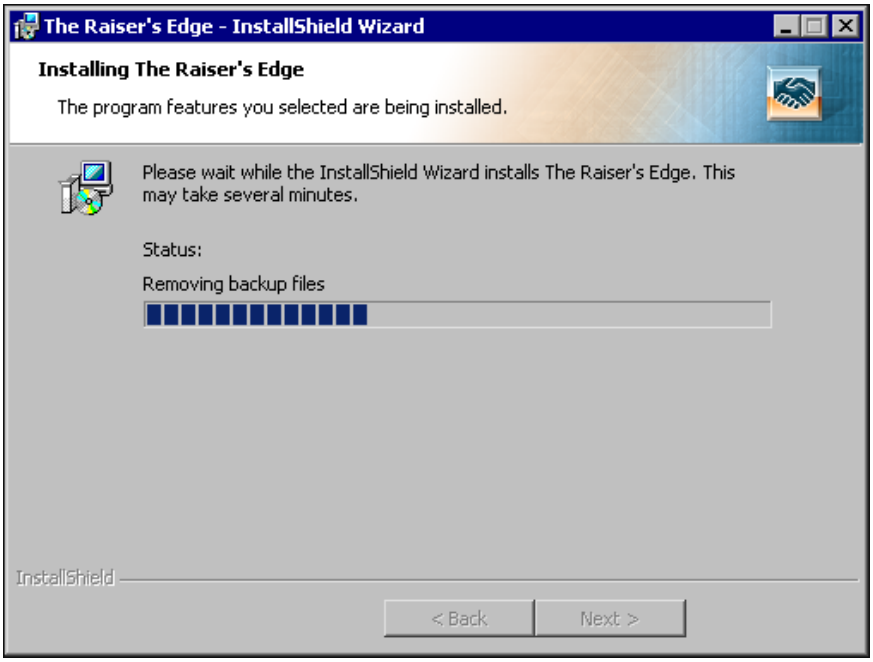


b. For each volume on your workstation, view the disk size, available disk space, and required disk space.

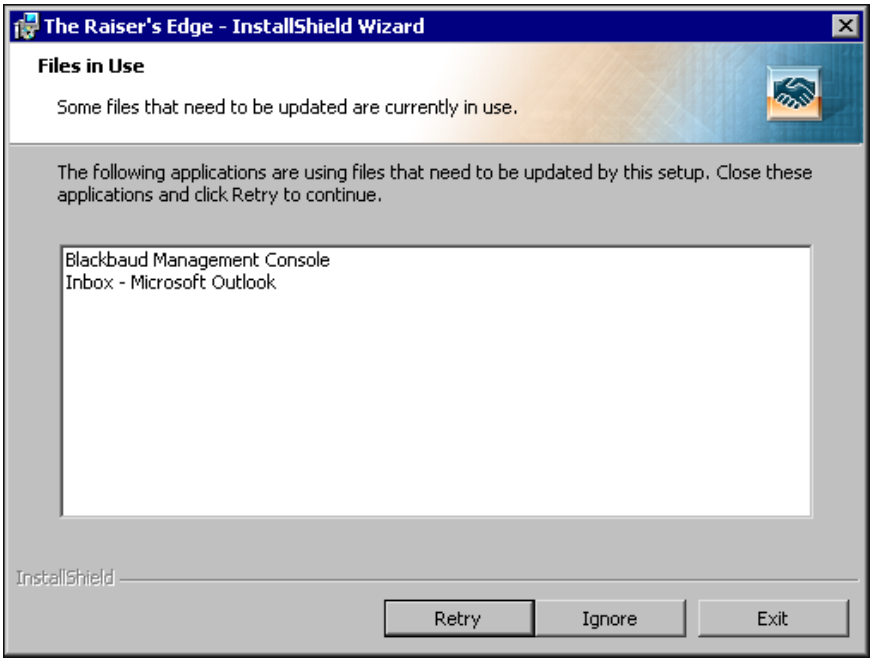
   If a volume does not have the required disk space, it is highlighted. If any volumes do not meet the disk space requirements, we recommend you cancel the installation and free up the required disk space.

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.



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



- 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**.

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 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*.

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

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 www.blackbaud.com and select **Support**, **User Guides** from the menu bar.

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

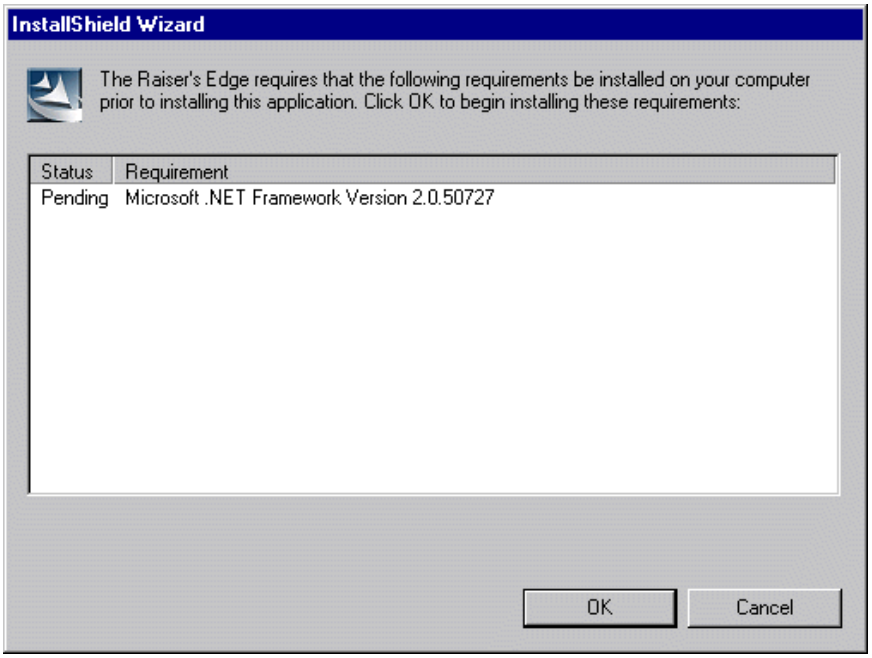
After you update ***The Raiser's Edge***, a message appears on all workstations to inform your users of the update when they log in. Before users can continue to work on their workstation, they must install the update.

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.

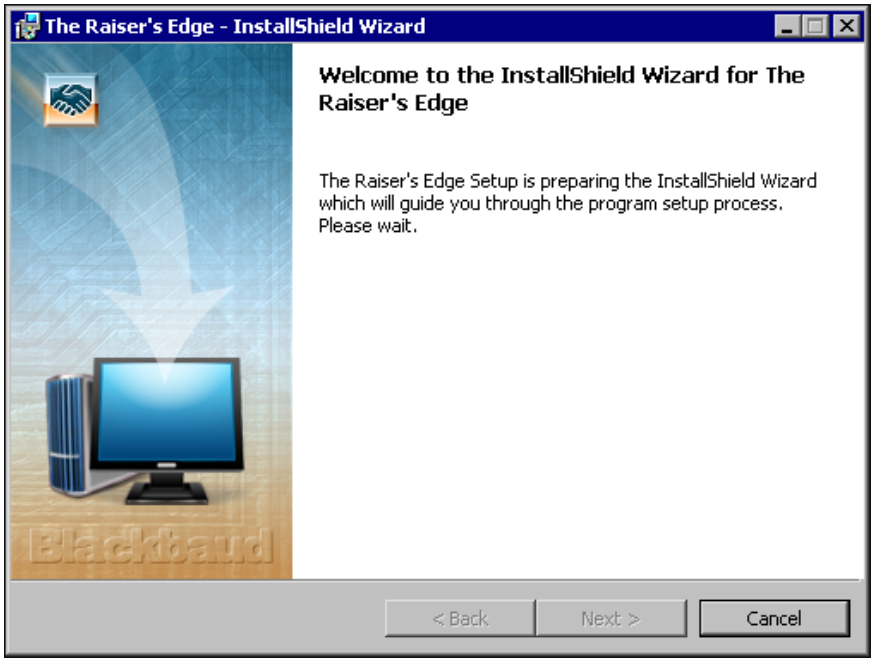
➢ Update The Raiser's Edge for Oracle

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.



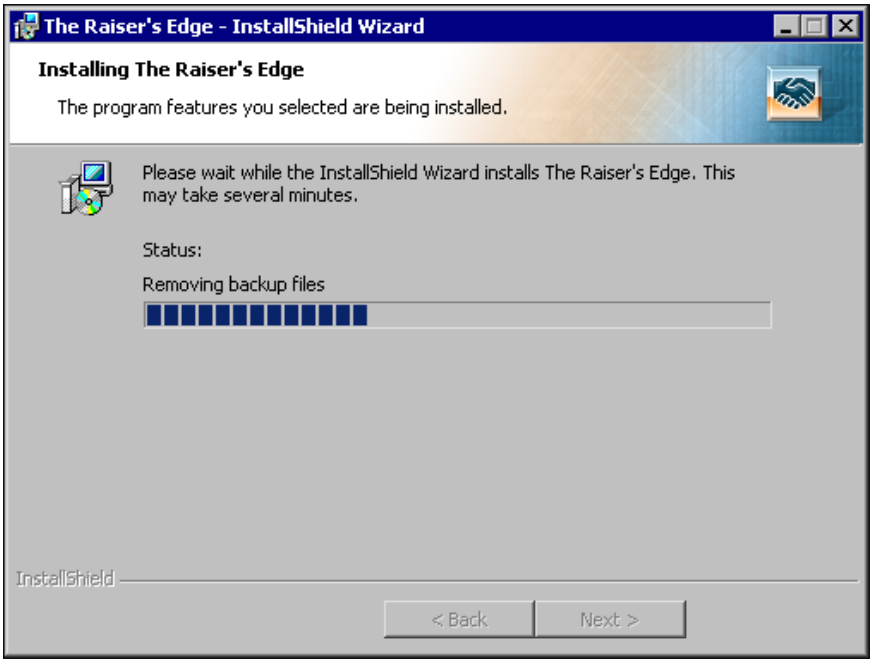
If the installation options screen fails to appear, use Microsoft *Windows Explorer* to access `setup.exe` on your CD-ROM drive.

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 www.adobe.com/products/acrobat/readermain.html 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.



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.

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.

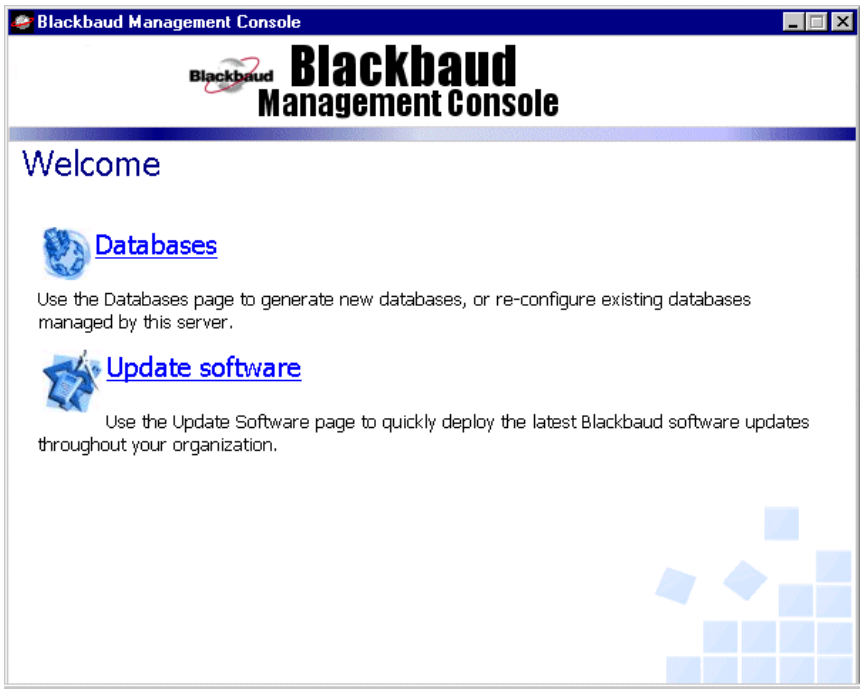
If you currently map ***Raiser's Edge*** users to database users, after you update ***The Raiser's Edge***, you must map your ***Raiser's Edge*** users to the database users again.

Use the Blackbaud Management Console to Update Only the Deployment Package

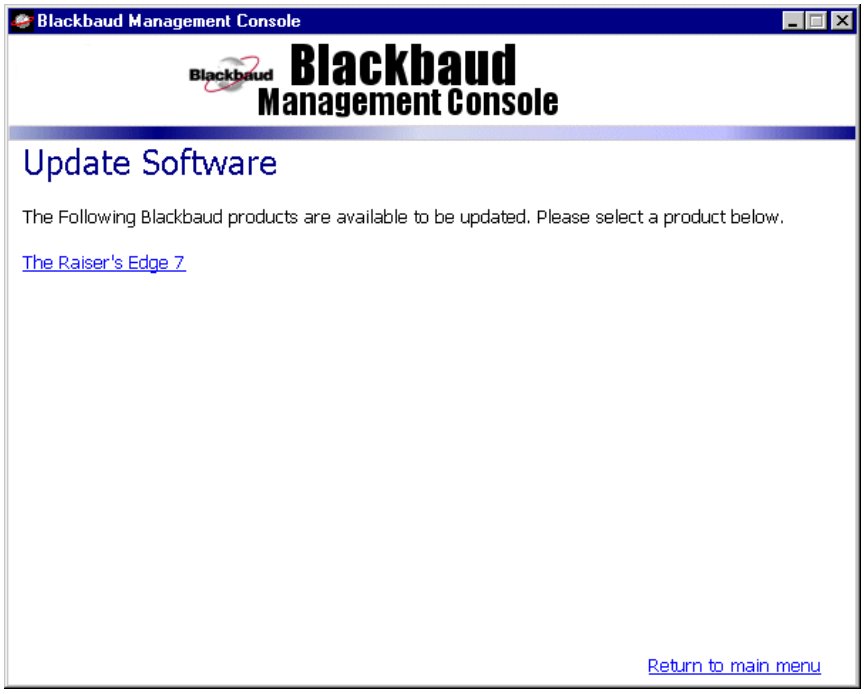
When you run the software update on your server, your deployment package automatically updates. However, if you must update just the deployment package, you can use the Blackbaud Management Console.

➢ **Update your deployment package**

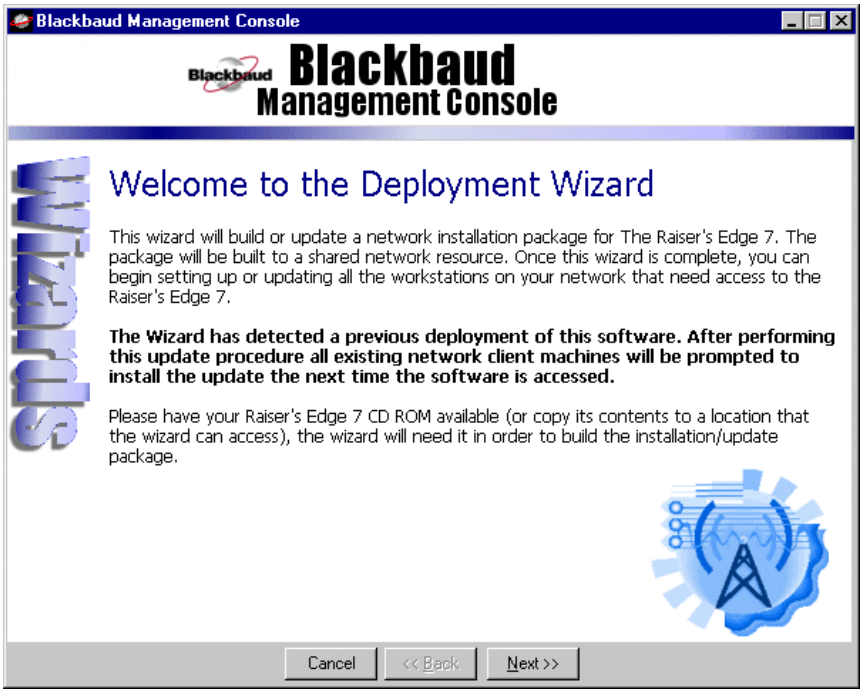
1. On your desktop, click the Blackbaud Management Console shortcut. The Blackbaud Management Console Welcome screen appears.



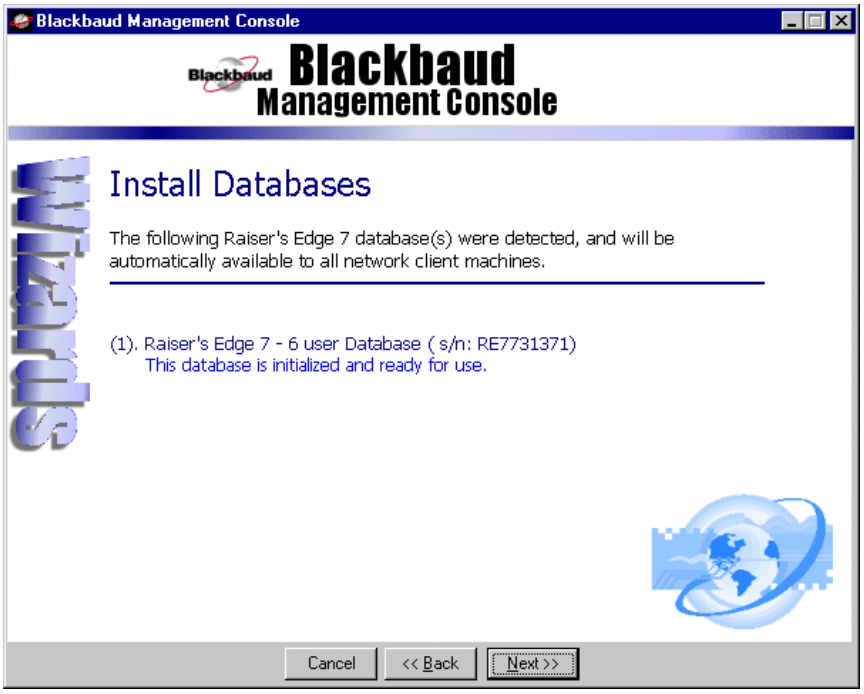
2. Click **Update software**. The Update Software screen appears and displays all Blackbaud software available for update.



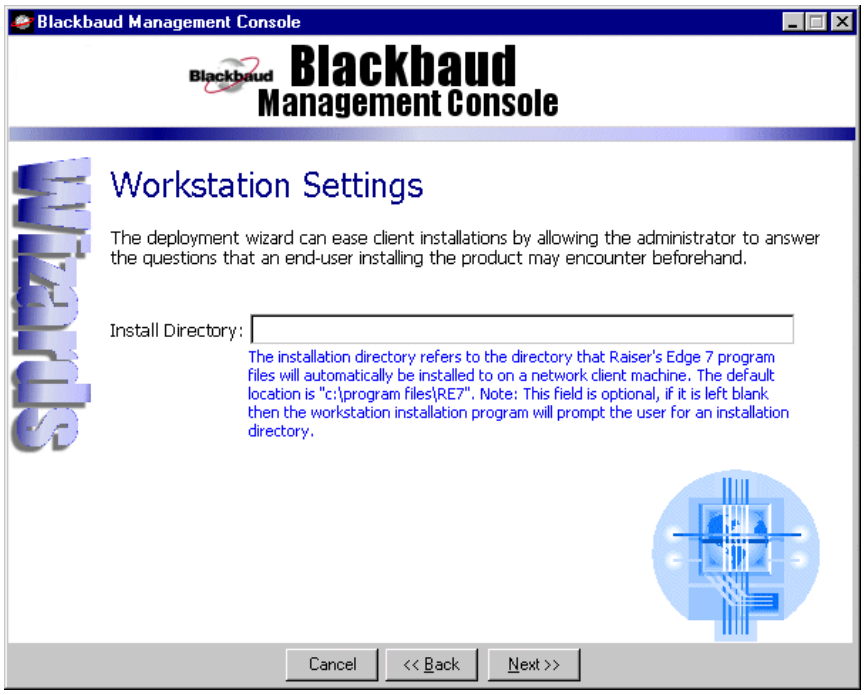
3. Click the link to the software to update. The Welcome to the Deployment Wizard screen appears.



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



5. Click **Next**. The Workstation Settings screen appears.

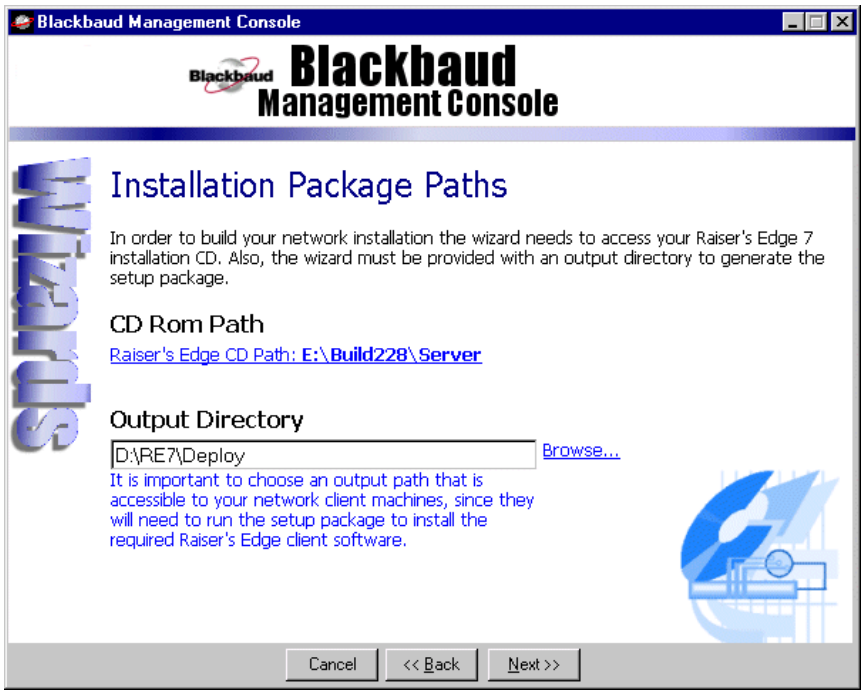


To install ***The Raiser's Edge*** in the same directory in all workstations, we recommend you enter an install directory.

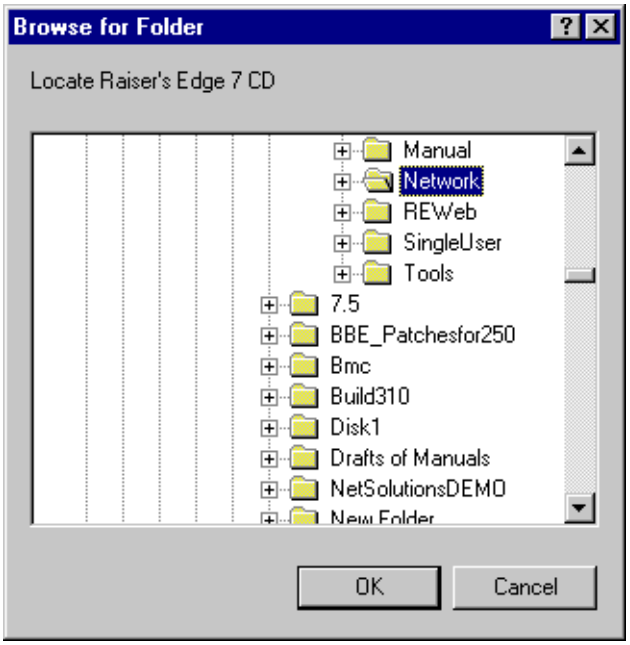
6. In the **Install Directory** field, enter an install directory for ***The Raiser's Edge***. This is where the program files are installed on your workstations. If you leave this field blank, each workstation user must enter the install directory when he installs the program.

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

7. Click **Next**. The Installation Package Paths screen appears.

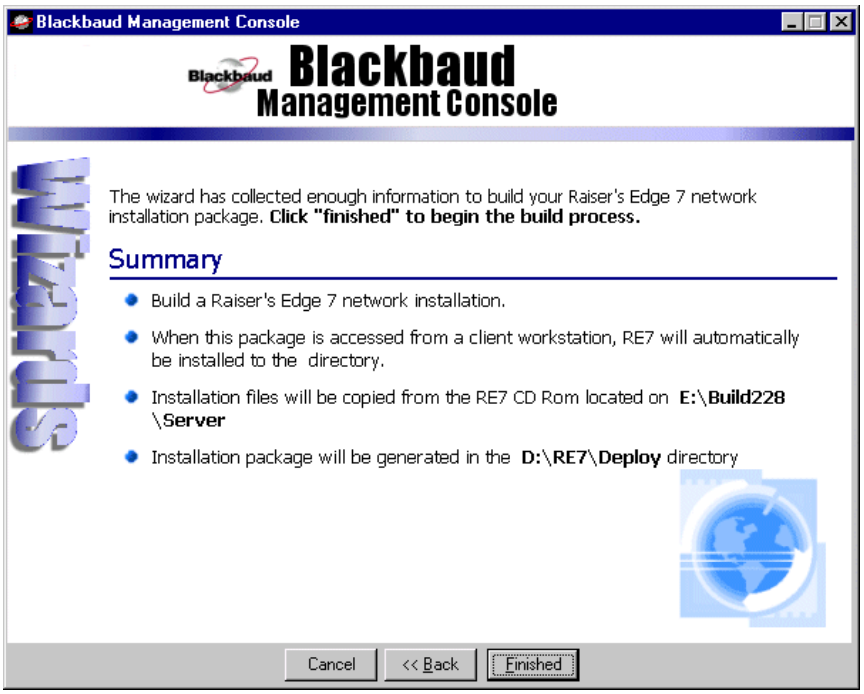


8. Under **CD Rom Path**, click **Click here to browse to the RE7 installation CD**. The Browse for Folder screen appears so you can map to the location of ***The Raiser's Edge*** CD.

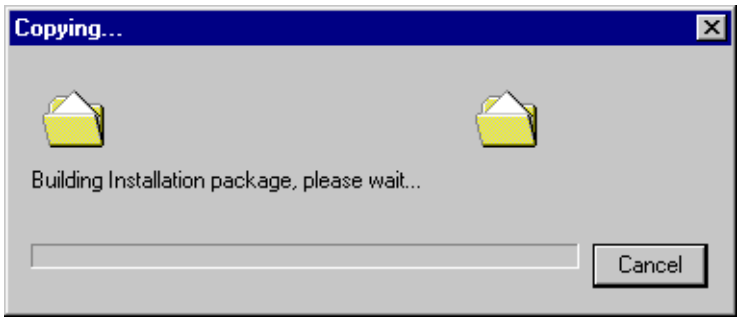


9. In the **Output Directory** field, enter the directory in which to put the software on the network for your workstations. We recommend you enter "RE7\deploy". Make sure all workstation users have full rights to this directory.

10. Click **Next**. The Summary screen appears and displays all the data you entered in the Deployment Wizard.



11. Click **Finished**. A screen tracks the update progress.



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.

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*.

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

We recommend only a qualified network professional update ***The Raiser's Edge*** 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

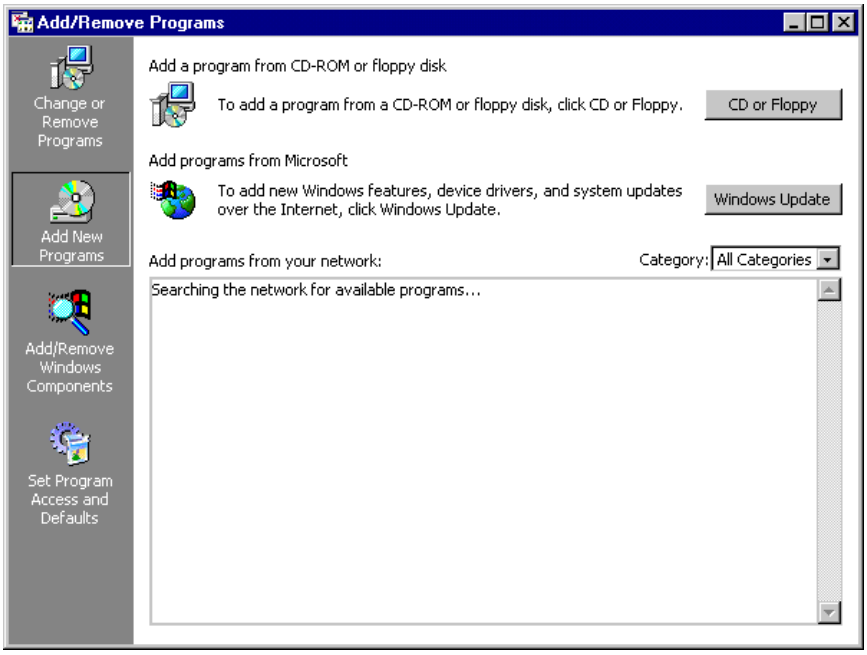
If the *Terminal* server does not host the Blackbaud Management Console and database, perform this procedure.

➢ **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`.

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

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.

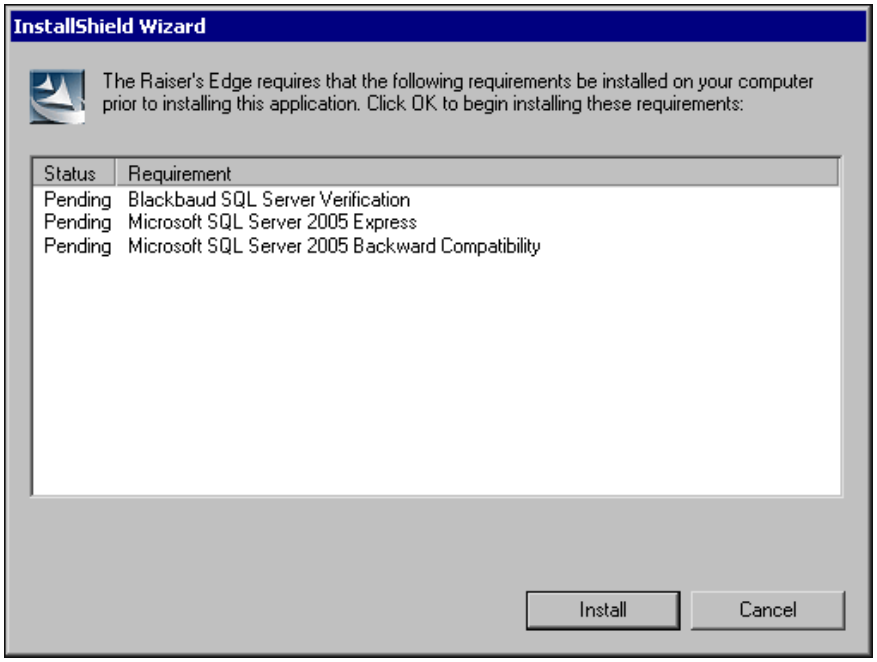
a. Click **Browse**.

b. Locate the shared deploy directory.

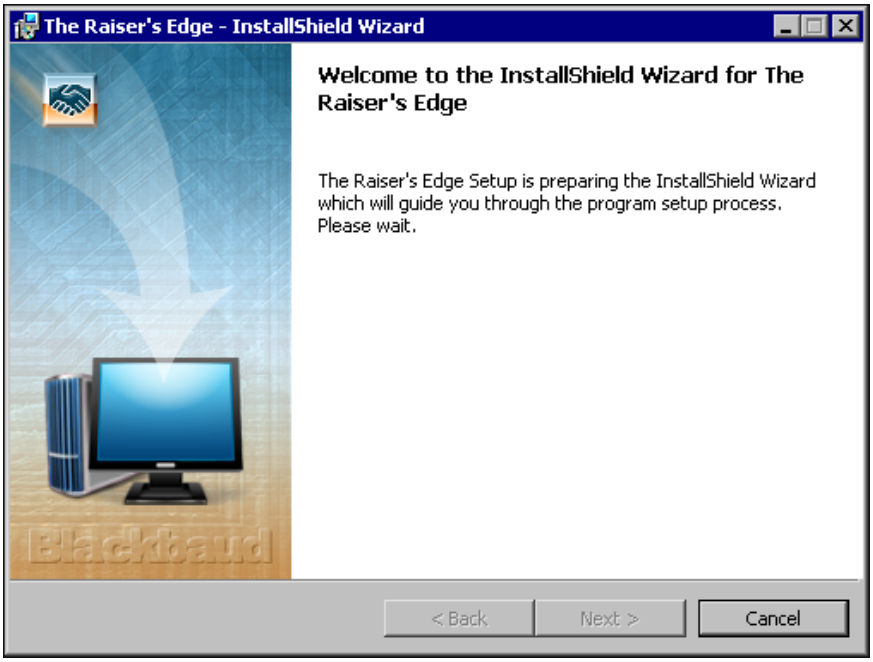
c. Double-click `setup.exe`. You return to the Run Installation Program screen. In the **Open** field, the program location appears.

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.

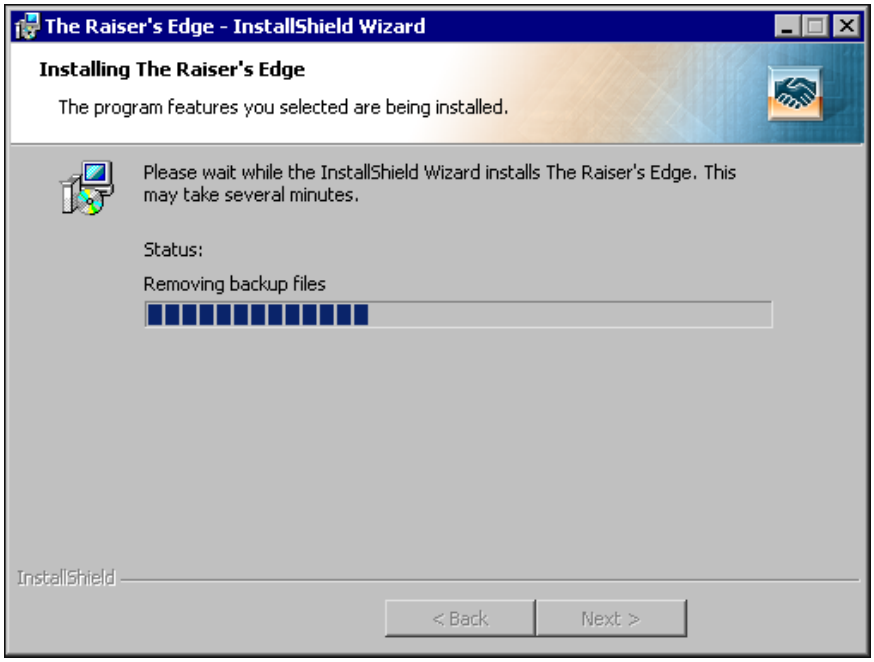


A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



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 www.adobe.com/products/acrobat/readermain.html 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.



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

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

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

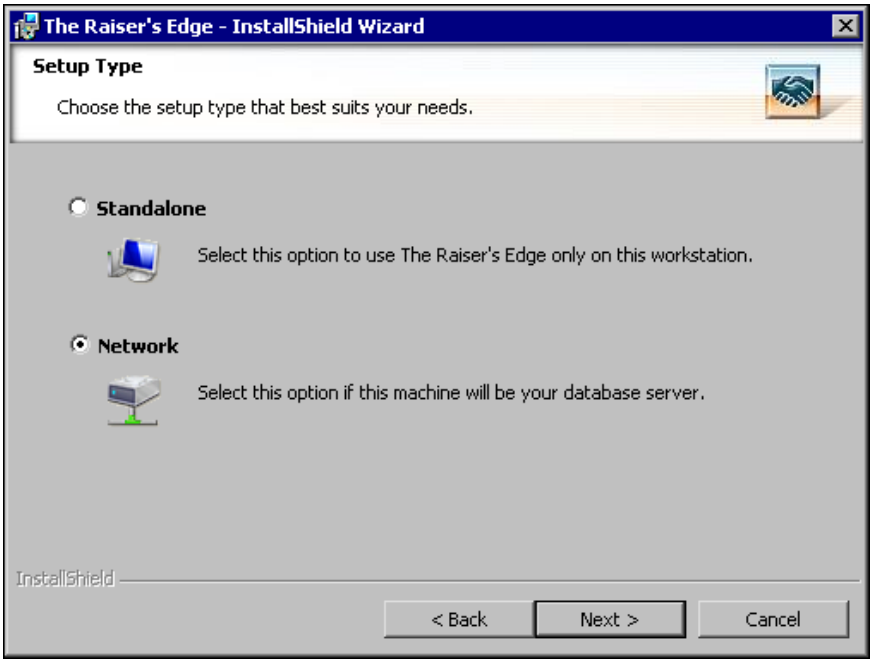
Customer Support cannot assist with the installation or configuration of the *Terminal*/*Citrix* server. However, we can provide consulting services to assist in areas outside the scope of support.

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`.

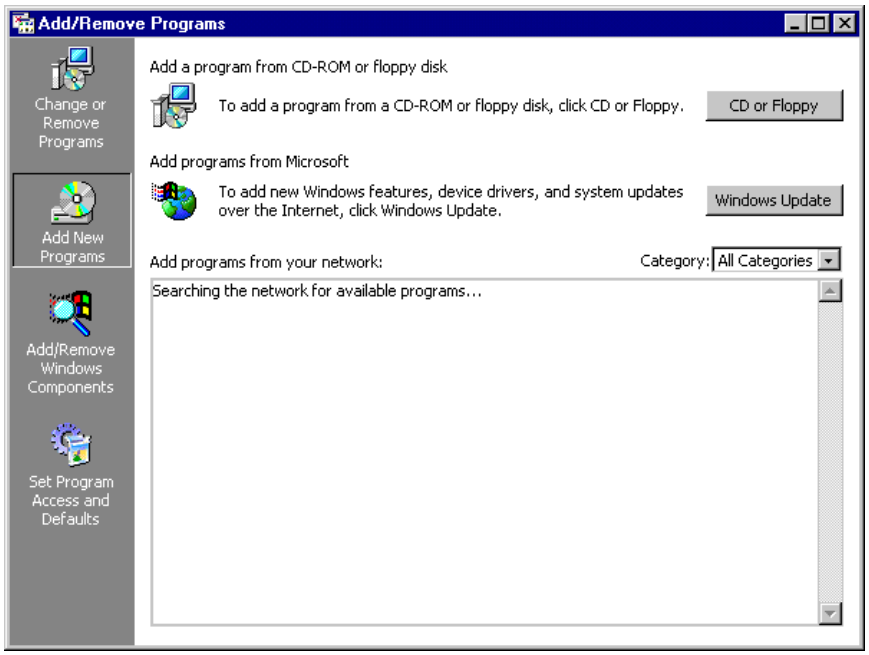
5. Insert the ***The Raiser's Edge*** update CD into your server's CD-ROM. The Setup Type screen appears.



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.

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

8. Click **Add New Programs**. The Add/Remove Programs screen appears.



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.

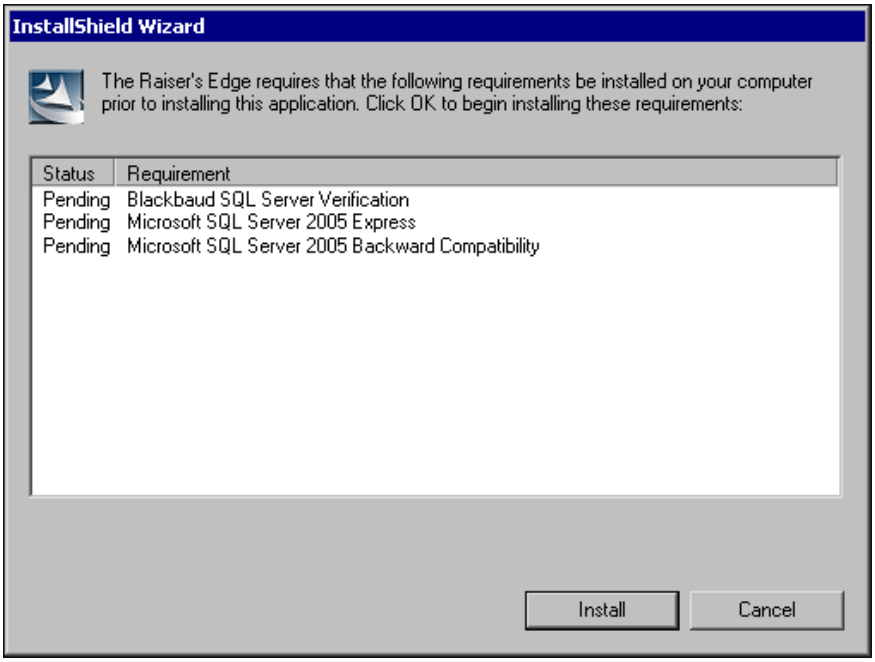
    a. Click **Browse**.

    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/support/downloads/downloads.aspx.

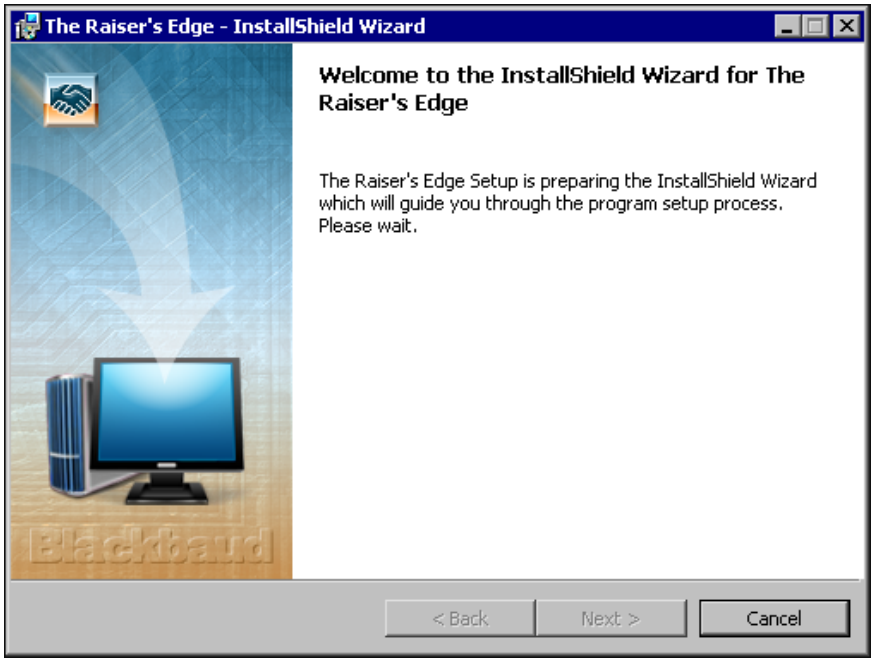
If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.



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.

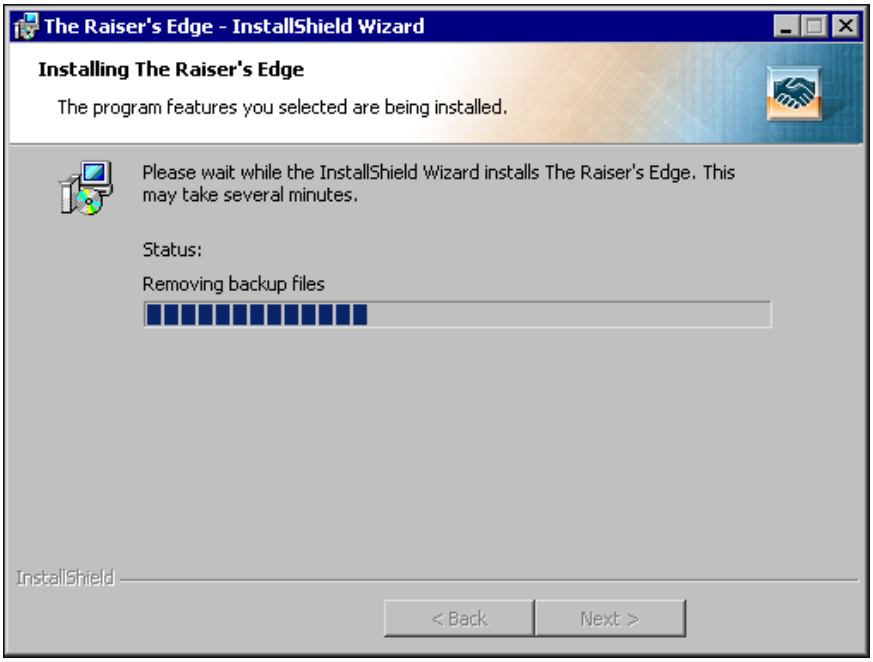
A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



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 www.adobe.com/products/acrobat/readermain.html 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.



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

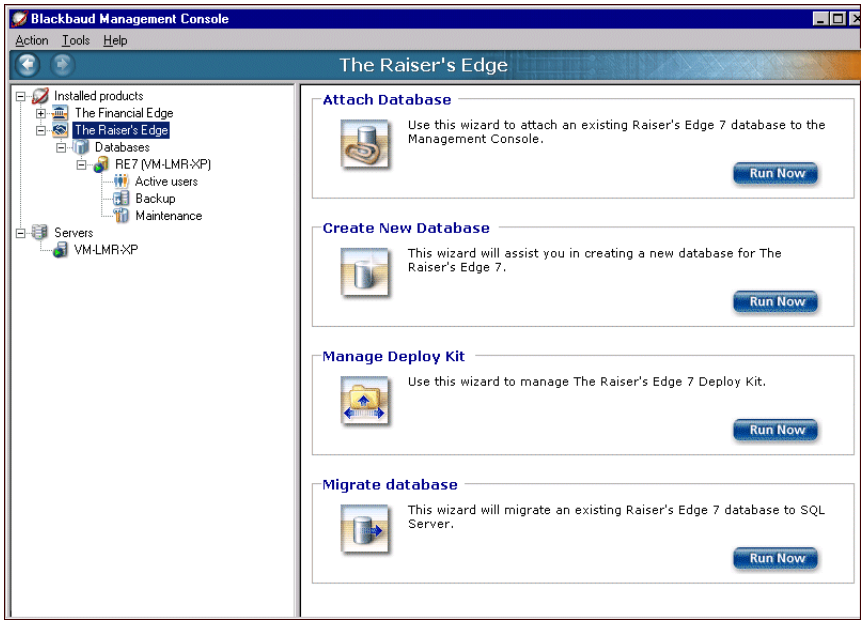
14. Click **Finish**. You return to the Add/Remove Programs screen.
15. To close the Add/Remove Programs screen, click **OK**.
16. If prompted, restart the server.
17. To allow users to create new sessions to the server, at a command prompt, enter `CHANGE LOGON /ENABLE`.

➢ **Manually update your software deployment kit**

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

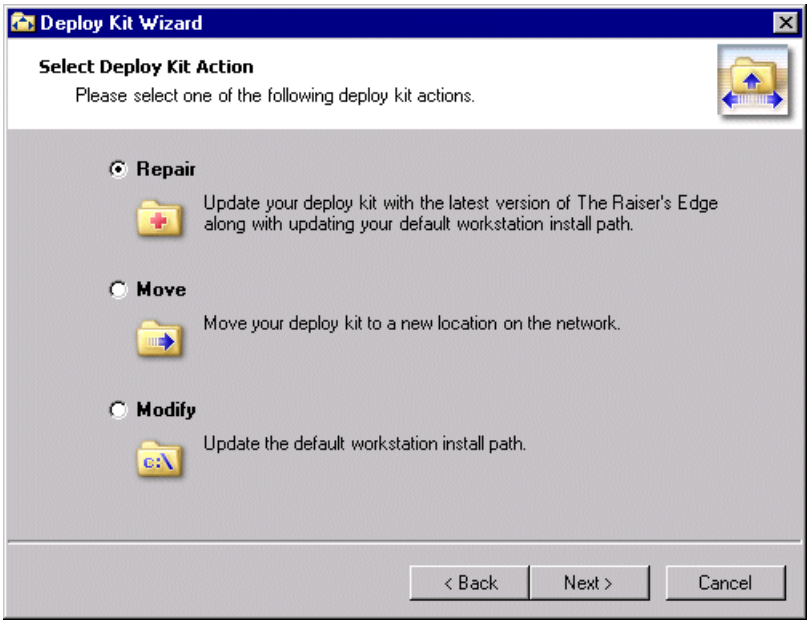
The deployment kit your workstations use may update automatically. If the deployment kit fails to update automatically, a message appears to tell you to manually update the deployment kit. For information about how to manually update the deployment kit, see "Manually update your software deployment kit"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

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 .

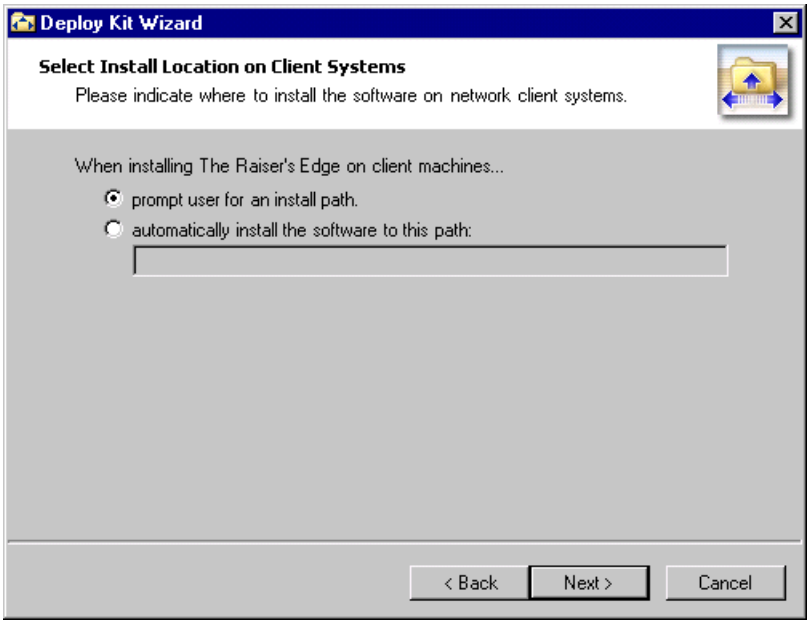


3. In the **Manage Deploy Kit** frame, click **Run Now**. The Welcome to the Deploy Kit Wizard screen appears.

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

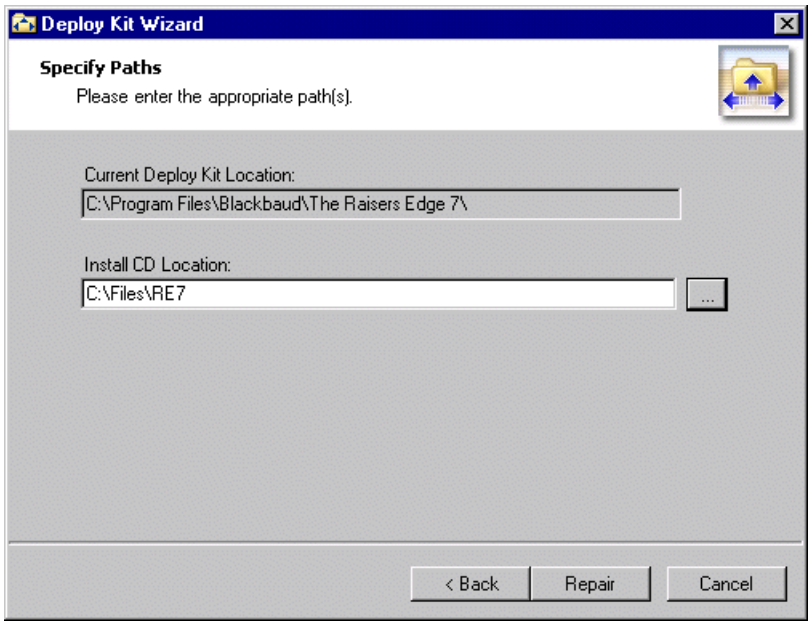


5. Select **Repair**.
6. Click **Next**. The Select Install Location on Client Systems screen appears.

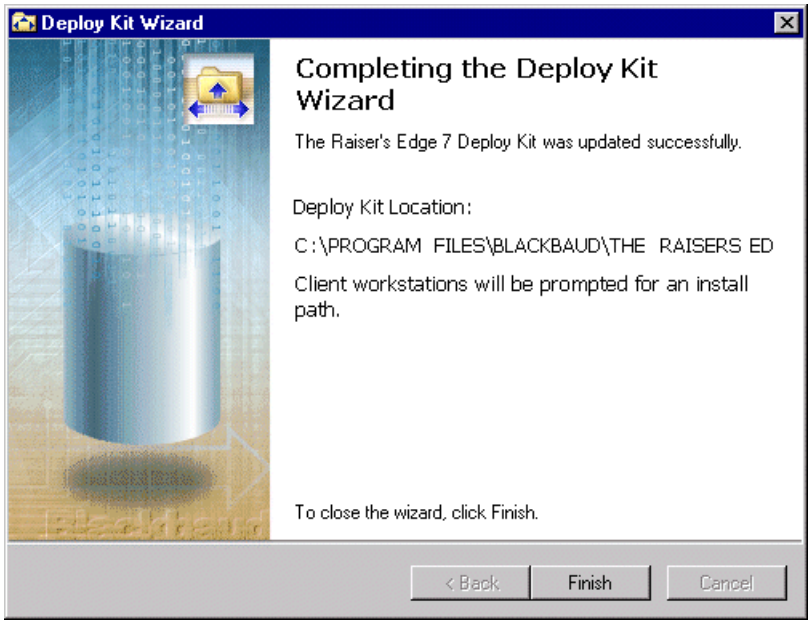


7. Select where to install the installation folder on the workstations.
   - To allow each workstation user to name the installation folder and choose its location, select **prompt user for an install path**.
   - To use the same installation folder name and location for all workstations, select **automatically 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.



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 www.oracle.com.
2. Reset your installation of Internet Information Server (IIS).

   To reset IIS from the command line, enter `iisreset`. 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 www.blackbaud.com 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.
- ❑ Verify 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**

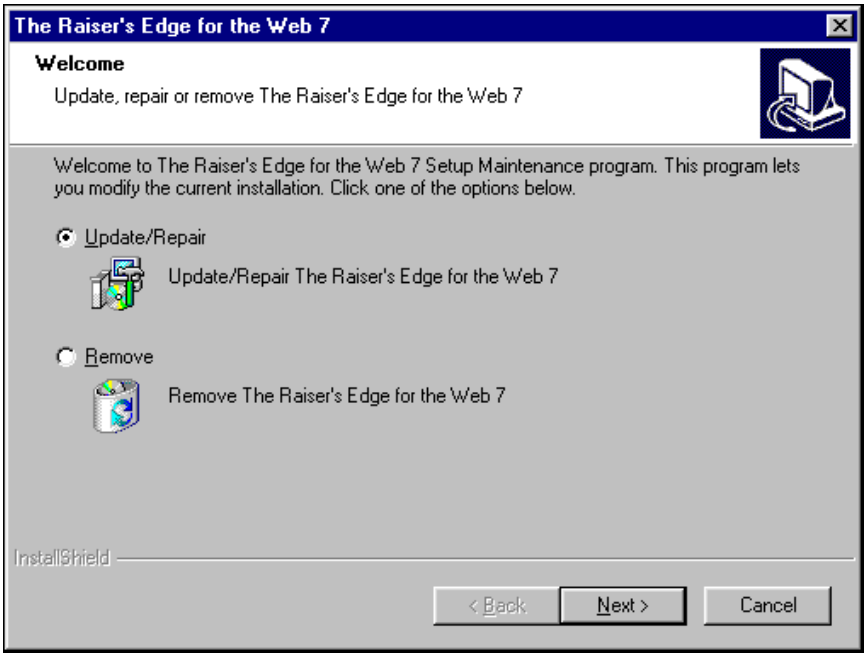
1. In Internet Information Server (IIS), access the properties for the website used.
2. Select the Directory Security tab.
3. Under **Anonymous Access and Authentication Control**, select **Edit**.
4. Change the user name and password to an account that has permissions to the ***Raiser's Edge*** database.
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**

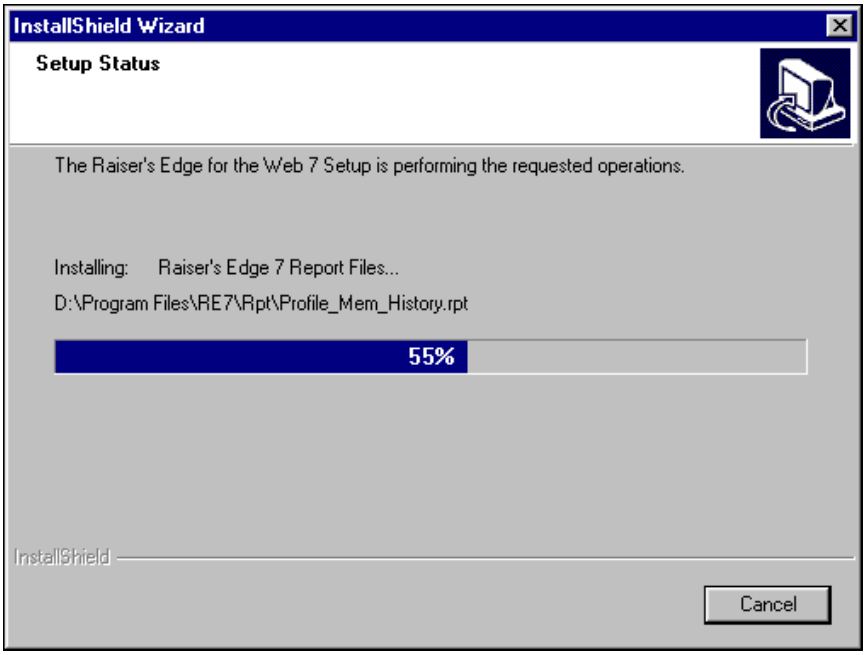
Both ***The Raiser's Edge*** and ***RE:Anywhere for Remote Access*** must run on the same versions. Use this procedure to update ***RE:Anywhere for Remote Access*** and the web server.

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.



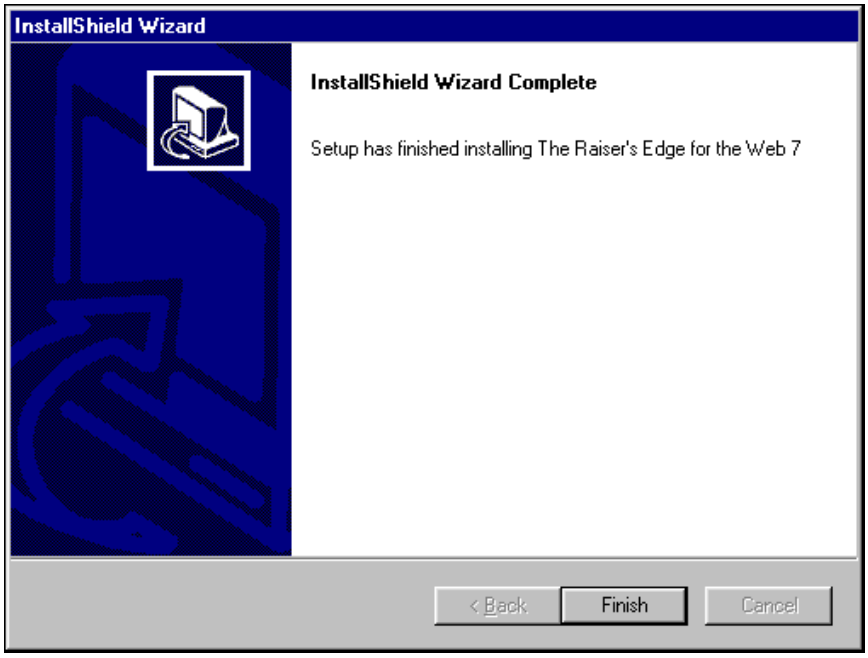
4. Select **Update/Repair** and click **Next**.
5. If you have not stopped your web server and FTP service, a message appears. To stop the web server and FTP service, click **Yes**. When the upgrade is complete, both restart automatically.
6. A status screen appears to verify you have the proper Internet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



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.

To exit the upgrade installation at any time, click **Cancel**.

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***.

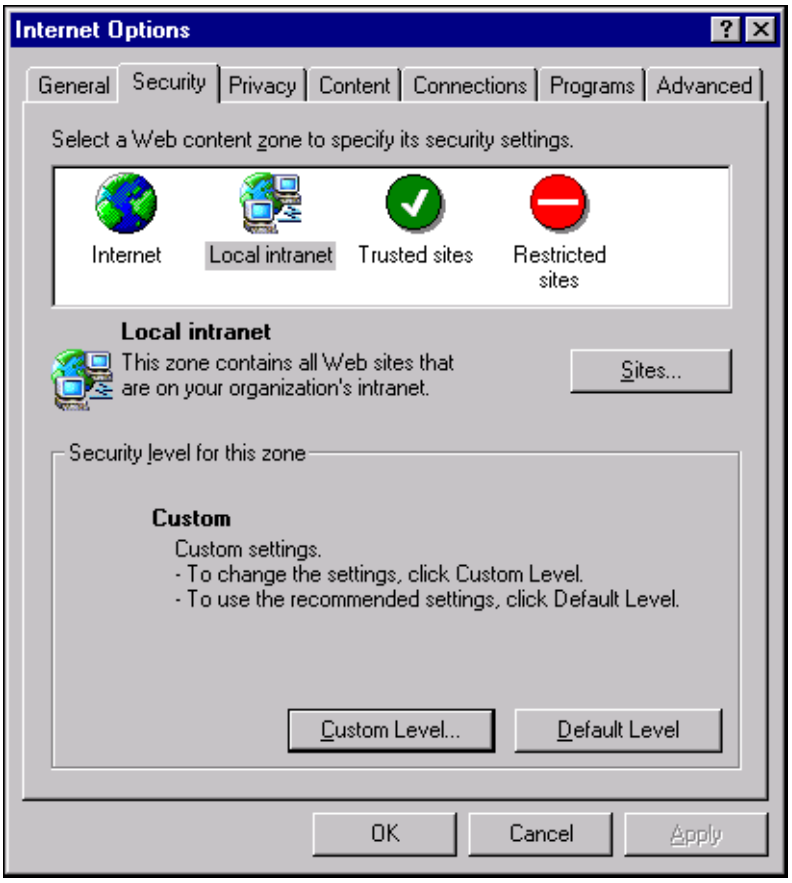
Browser Settings to Create Letters and Email from Constituent Records

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**

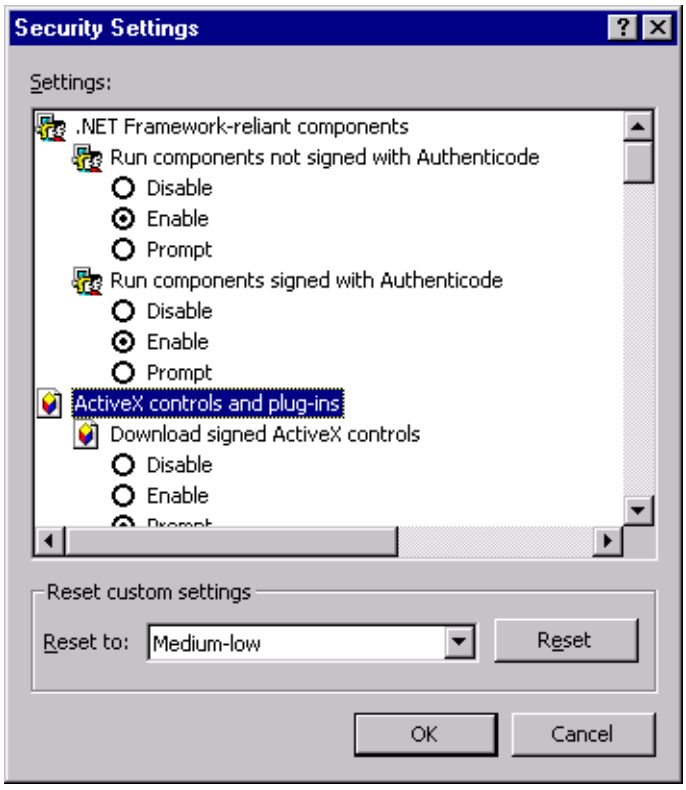
1. Include the ***RE:Anywhere for Remote Access*** server in an *Internet Explorer* Security Zone for which you feel safe manipulating the settings. For information about security zones and how to configure them, see the *Internet Explorer* help file.
2. From the *Internet Explorer* **Tools** menu, select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

5. Click **Custom Level**. The Security Settings screen appears.



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.

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 www.office.microsoft.com, 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.

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

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 www.blackbaud.com 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.

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.

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.***

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

➢ **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*.

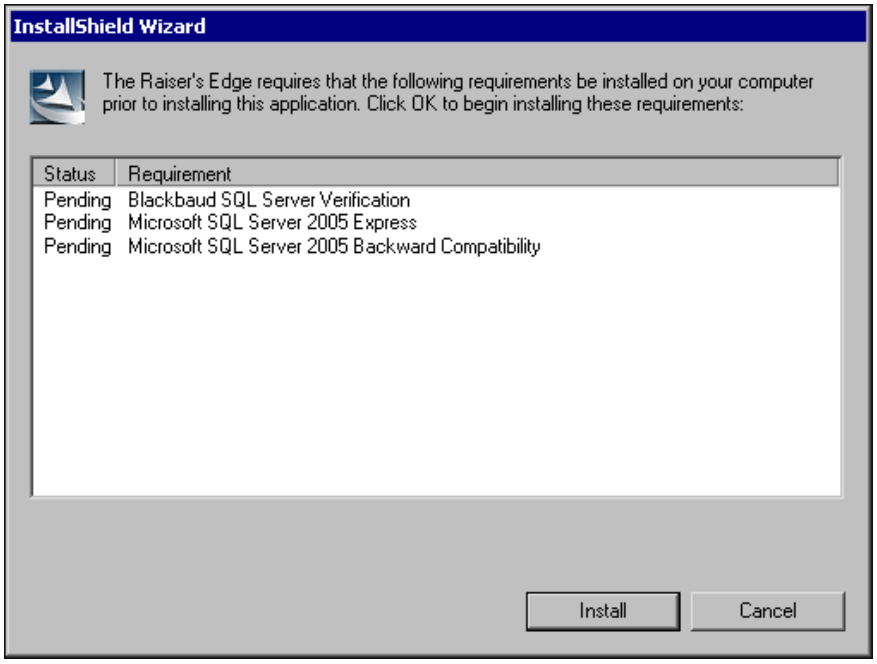
1. Access the update files.
   - Insert the update CD in your CD-ROM drive. A screen appears and displays the installation options.
   - If you downloaded the update, extract the update files to a directory on your server and then double-click the `setup.exe` file.

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.

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/support/downloads/downloads.aspx.

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

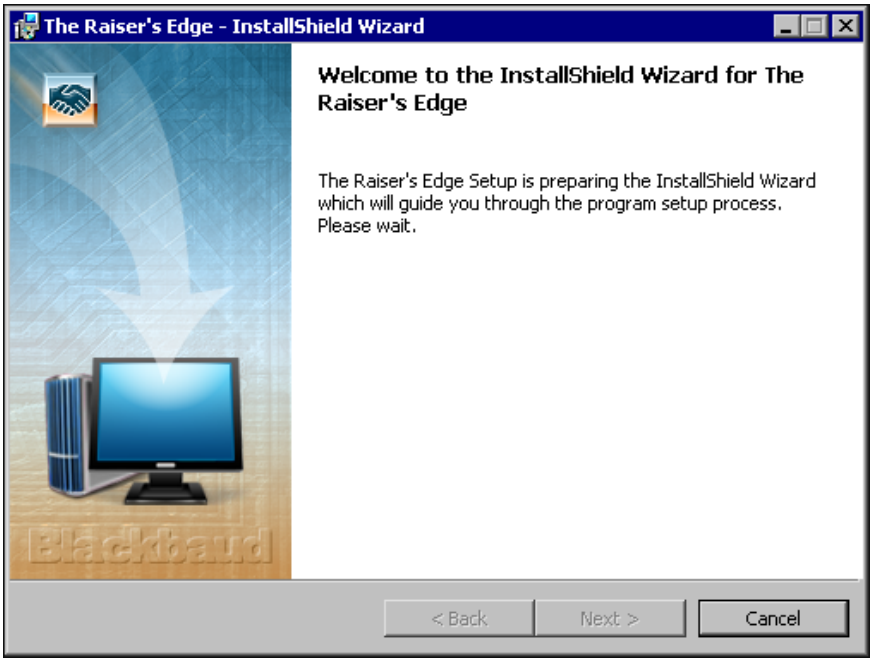
   If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.



   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**.

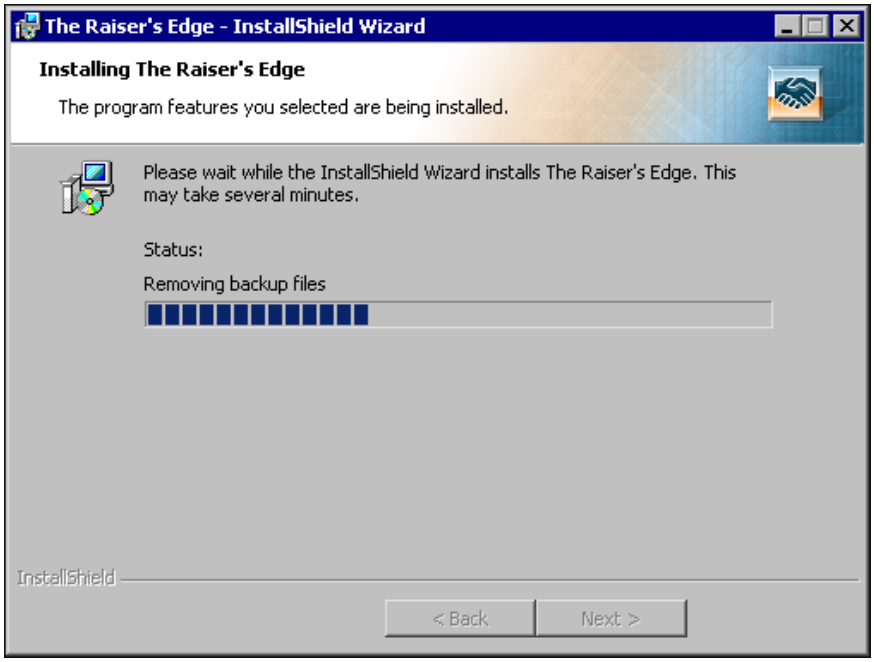
To manually install Service Pack 2 or higher for *SQL Server 2005*, click **No**. The setup utility installs any remaining prerequisites and then cancels the installation. You can download and install the service pack from Microsoft's website.

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



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 www.adobe.com/products/acrobat/readermain.html 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.



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*.

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**.

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

   - 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.

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.

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.

➢ Update from The Raiser's Edge 7.5 on each workstation

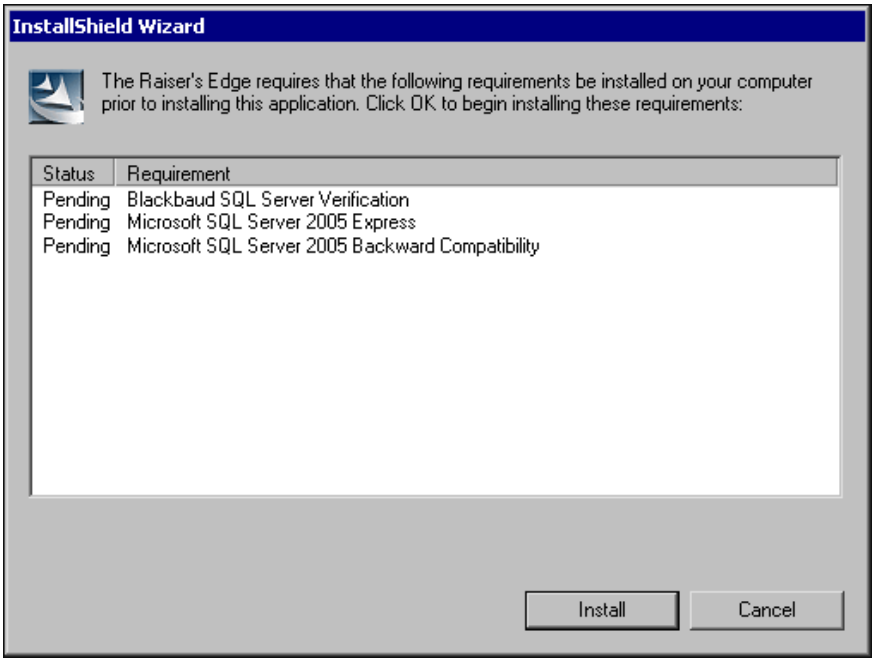
To update to ***The Raiser's Edge 7.91.50***, each workstation must complete this procedure.

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.



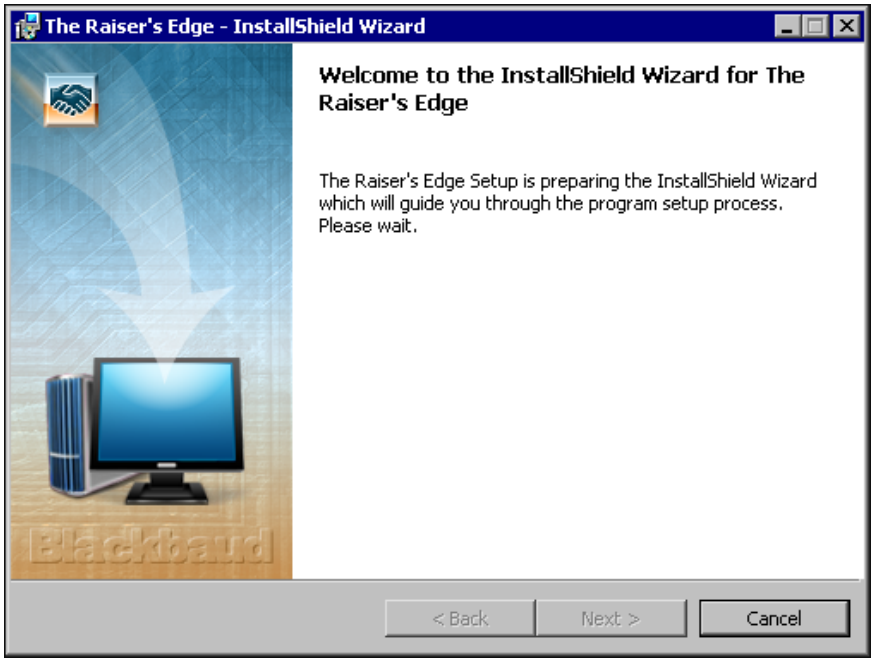
You cannot use the software CDs to manually install the update to ***The Raiser's Edge 7.91.50*** on workstations. You must use the deployment kit.

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/support/downloads/downloads.aspx.

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.

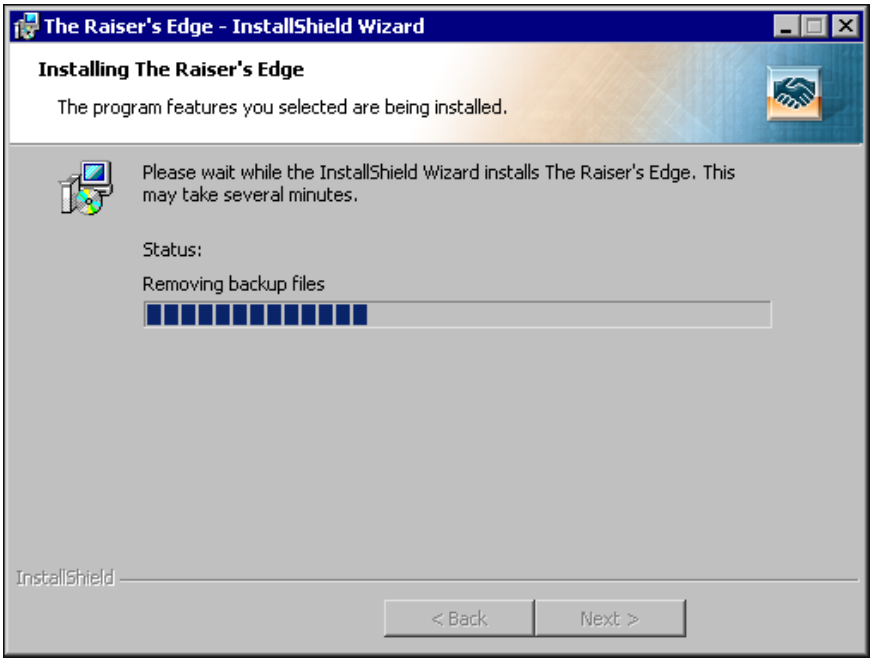
If the *SQL Server 2005* verification tool detects that your version does not meet the minimum service pack requirement, a message appears to inform you of this. To automatically install the required service pack, click **Yes**.

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



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 www.adobe.com/products/acrobat/readermain.html 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.



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.

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

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.

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.

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.

- ❑ Visit the Blackbaud website at www.blackbaud.com 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

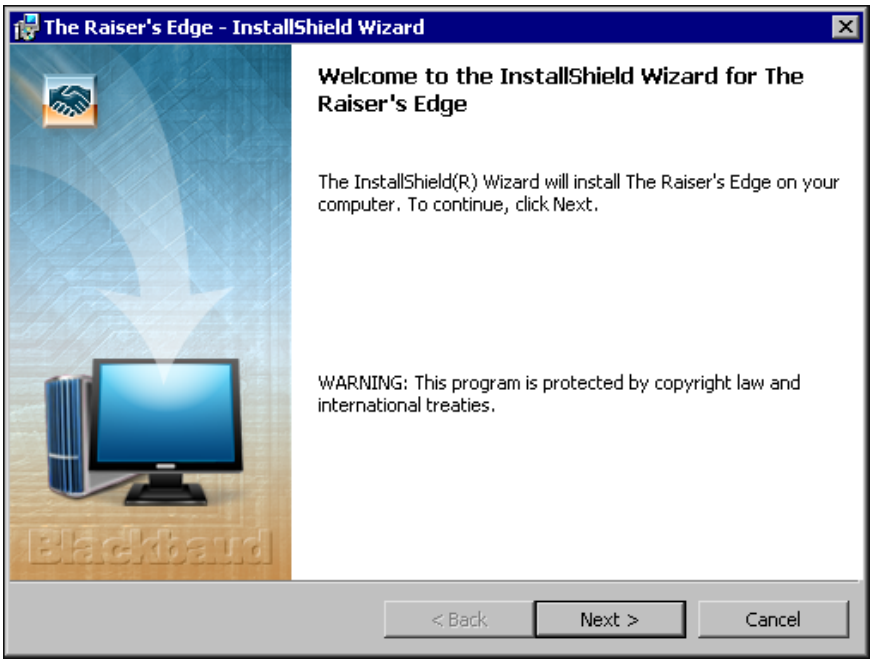
The Raiser’s Edge does not support domain controllers, small business servers, NT 4.0 Server, and peer-to-peer networks are not supported.

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.

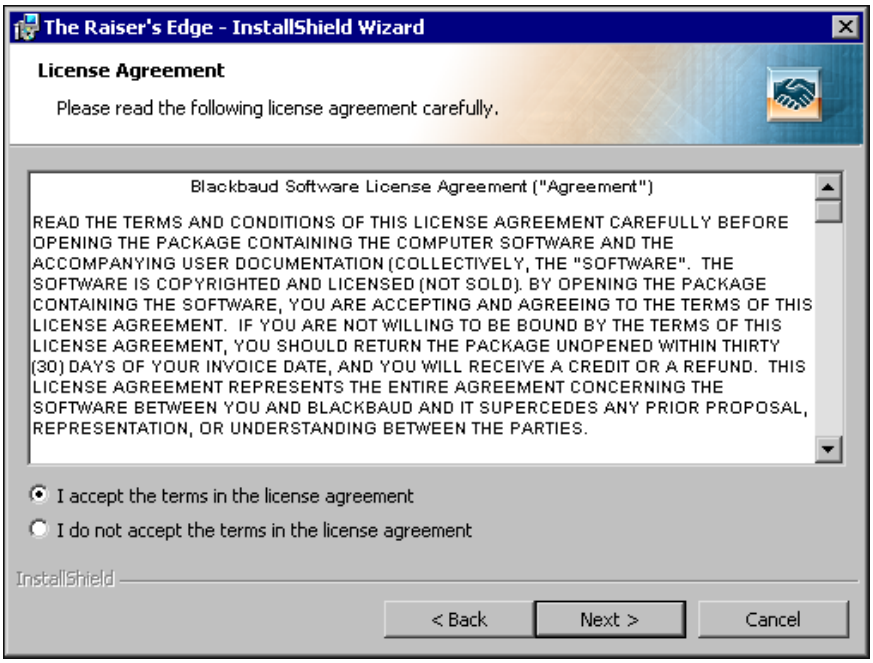
➢ **Update from The Raiser’s Edge 7.5 on a new server**

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 InstallShield Wizard welcome screen appears.



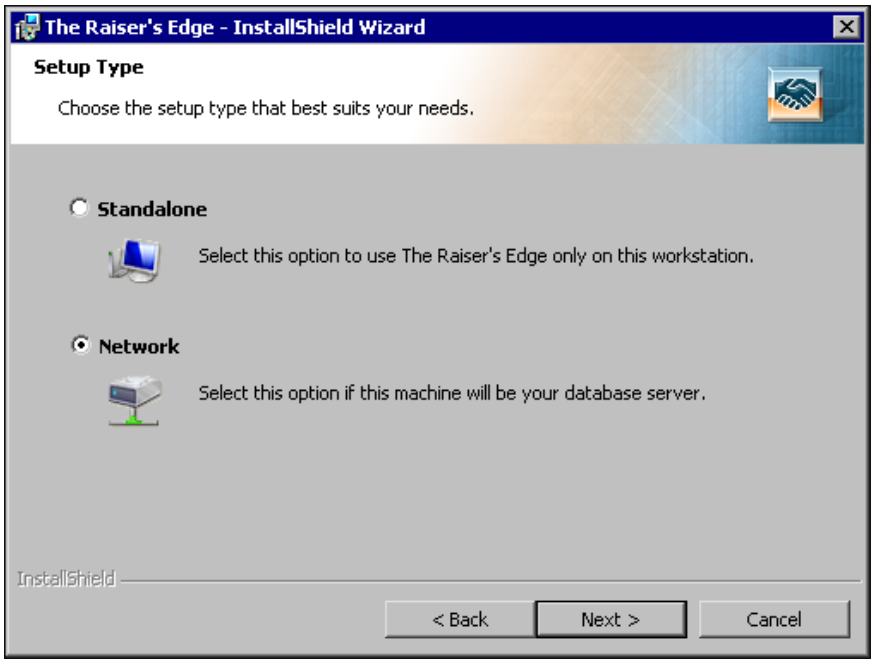
3. Click **Next**. The License Agreement screen appears.



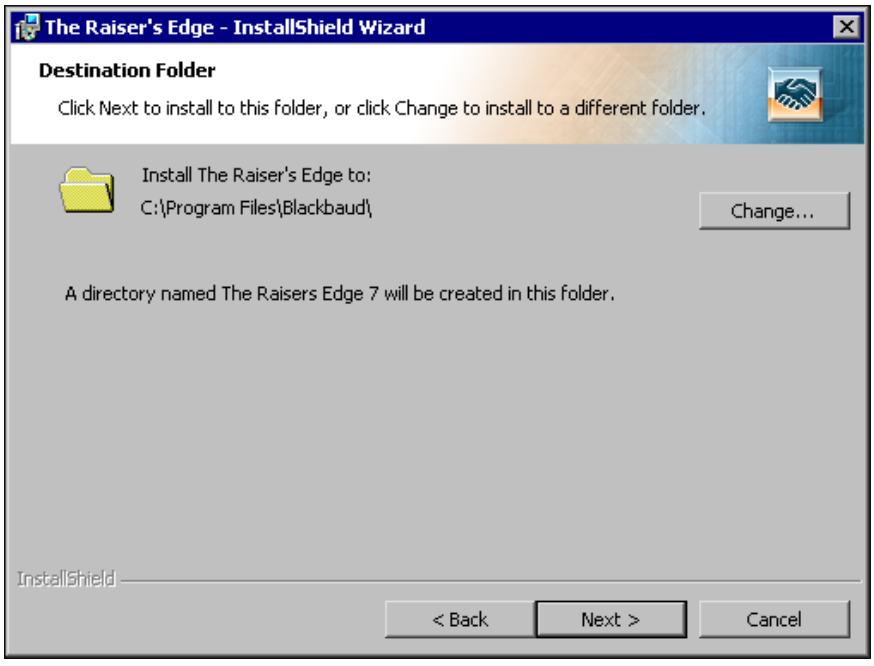
4. Review the terms of the license agreement. To print the license agreement, click **Print**.
5. If you accept the terms of the license agreement, select **I accept the terms in the license agreement**.

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/acrobat/readermain.html to download the latest version.

6. Click **Next**. The Setup Type screen appears.



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



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

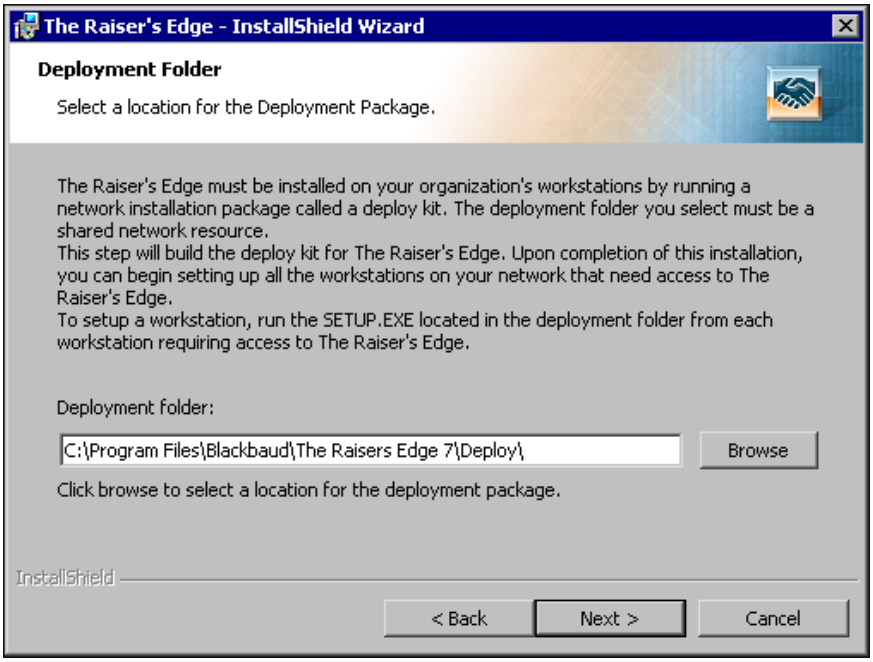
   To change the default location:

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

b. Browse to the directory on which to install the program.

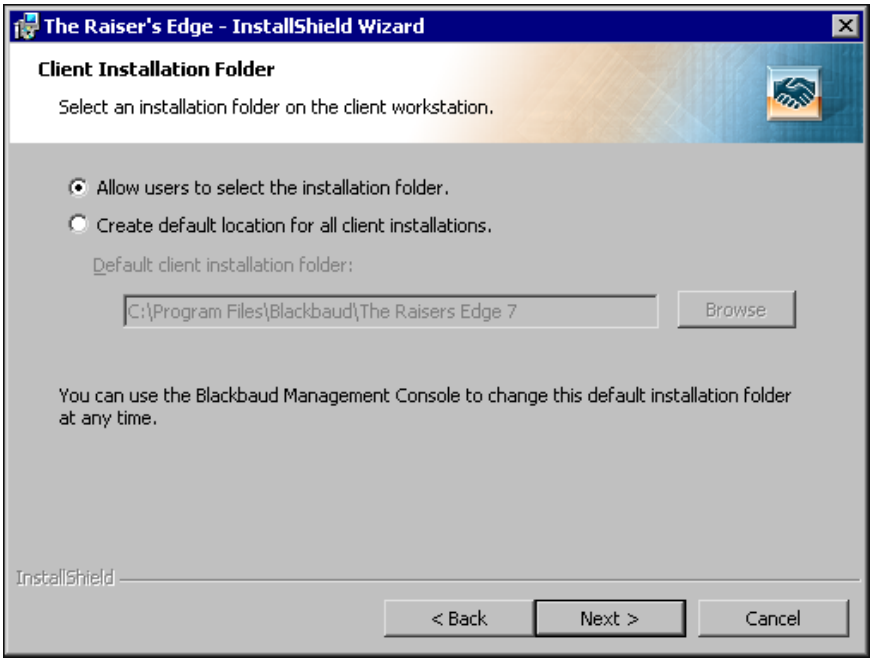
c. Click **OK**. You return to the Destination Folder screen.

10. Click **Next**. The Deployment Folder screen appears.



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.

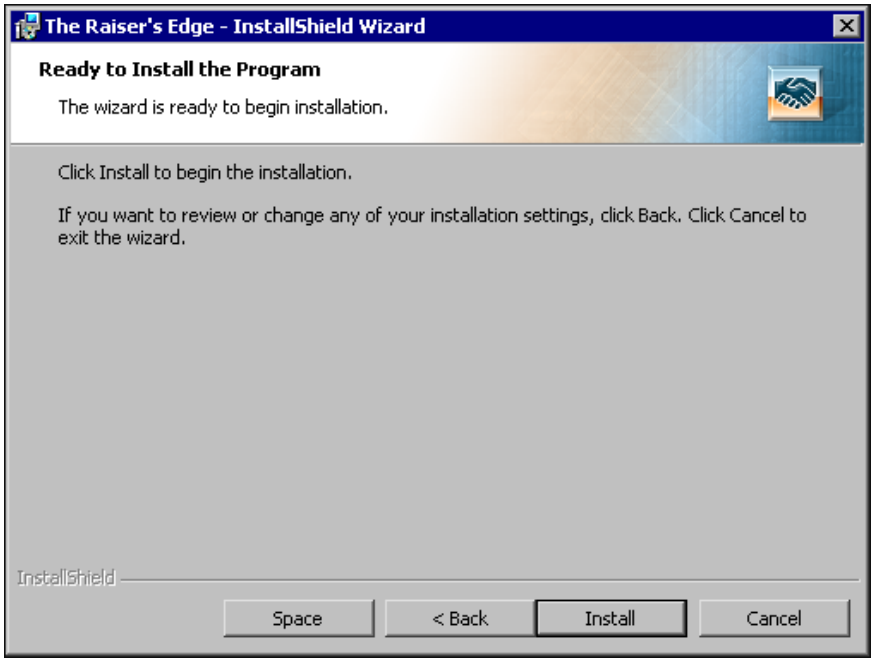
11. Click **Next**. The Client Installation Folder screen appears.



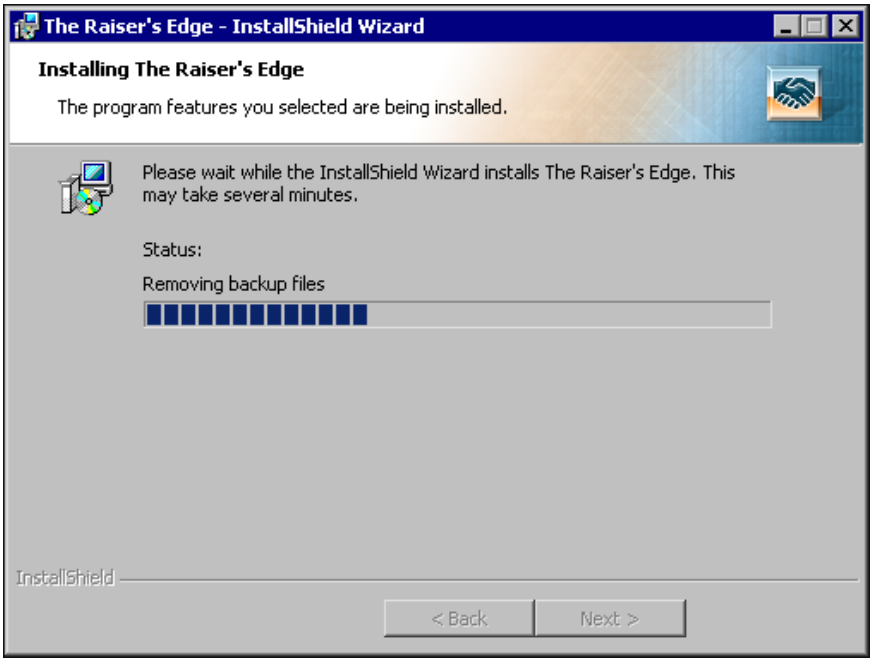
12. Select where to install the installation folder on the workstations.

- To allow each workstation user to select where on the computer to install the program files, select **Allow users to select the installation folder**.
- 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.



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.



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.

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 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.

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***.

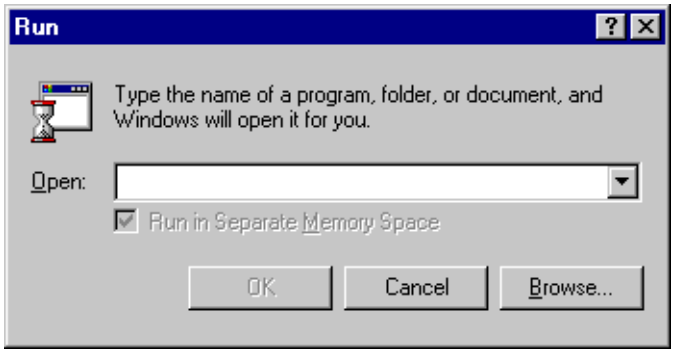
➢ Update workstations from a new server

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

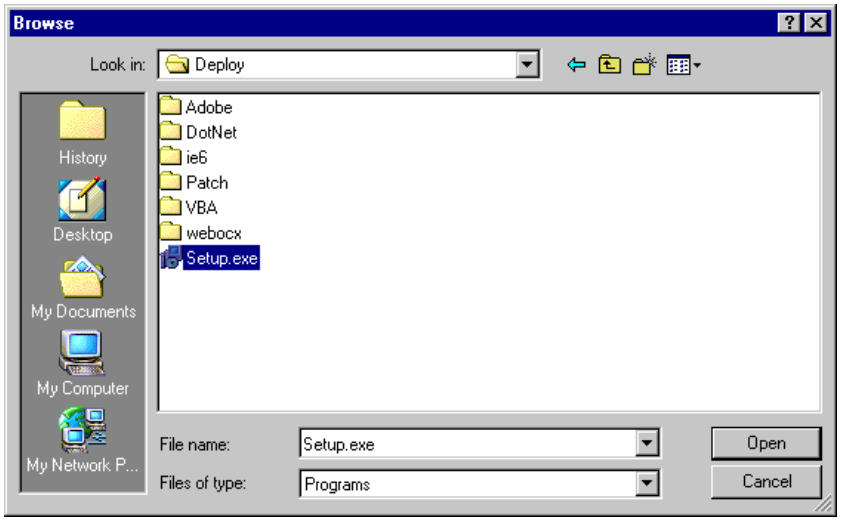
   Due to the integration between ***The Raiser's Edge*** and Microsoft *Outlook*, if your workstations users use *Outlook*, they must exit and log out of *Outlook* before they update ***The Raiser's Edge*** on their computers. If they fail to exit and log out of *Outlook*, the update does not install properly.

2. Disable any screen savers.

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

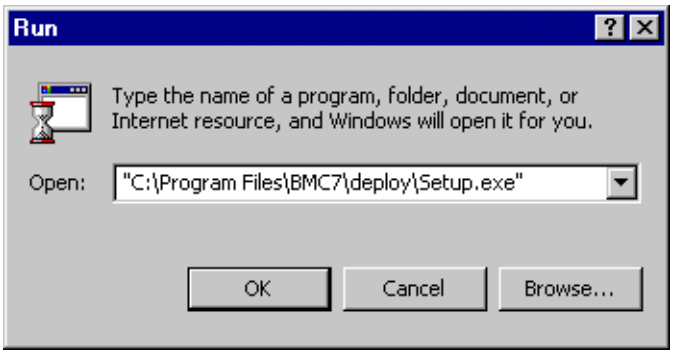


4. Click **Browse**. The Browse screen appears.

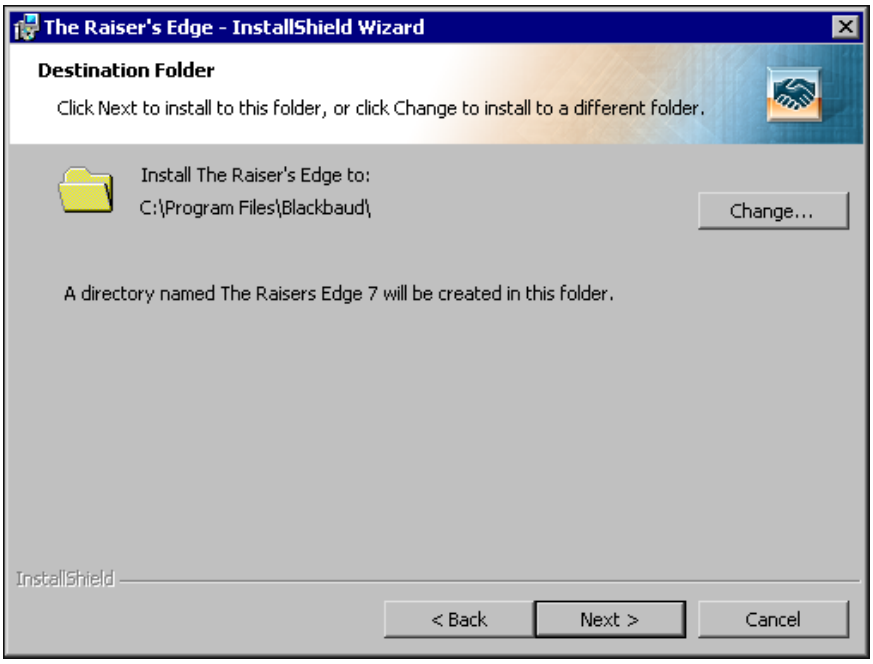


5. Locate the shared directory in which you created the deploy kit and select `setup.exe`.

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

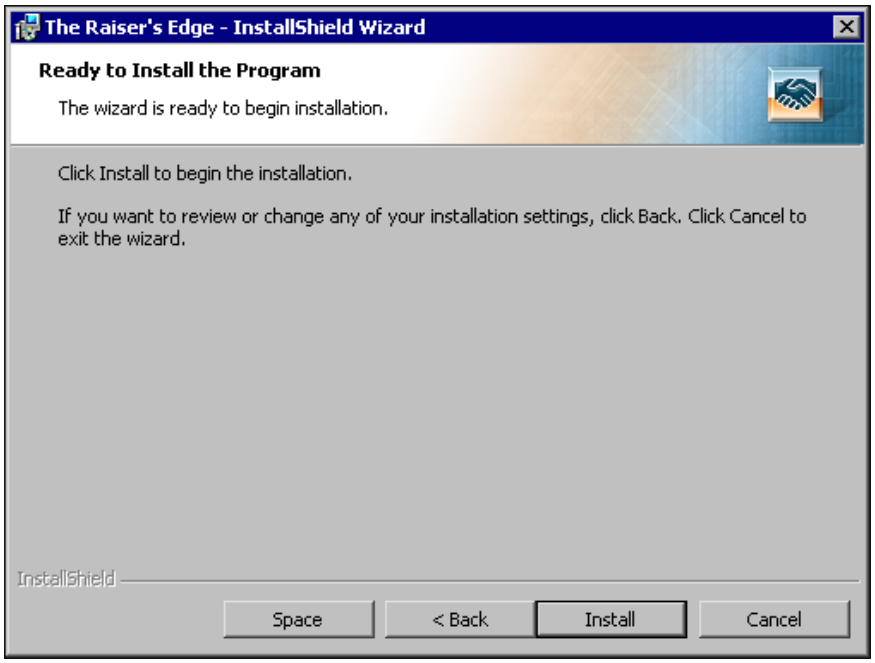


7. Click **OK**. The Destination Folder screen appears.

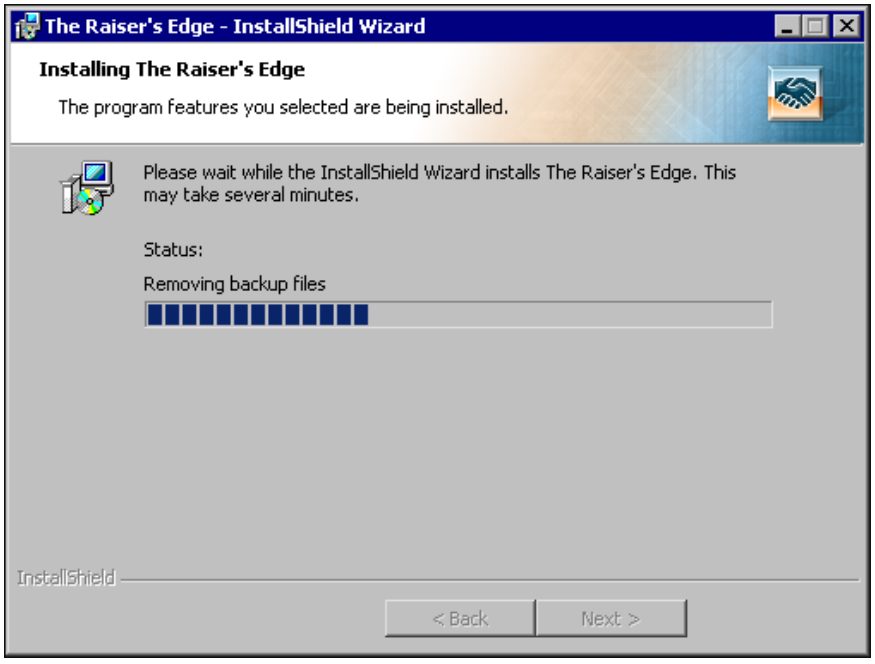


8. If, when you established the deployment kit, you selected a default installation directory, the default location appears. If not, the workstation user can enter a location in the Destination Folder screen. Accept the program default, or click **Change** to map to another location.

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.

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

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 www.blackbaud.com 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.

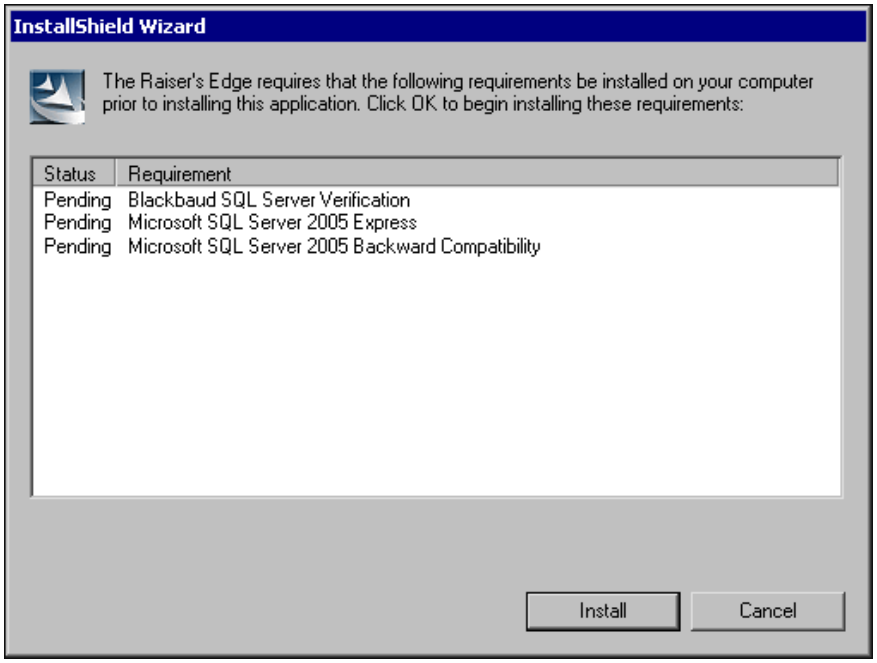
If your database exceeds 3.7GB, the installation process terminates. Before you continue the installation process, you must purchase and install Microsoft *SQL Server 2005 Standard*, *Enterprise*, or *Workgroup* editions, or *SQL Server 2008*.

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.

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/support/downloads/downloads.aspx.

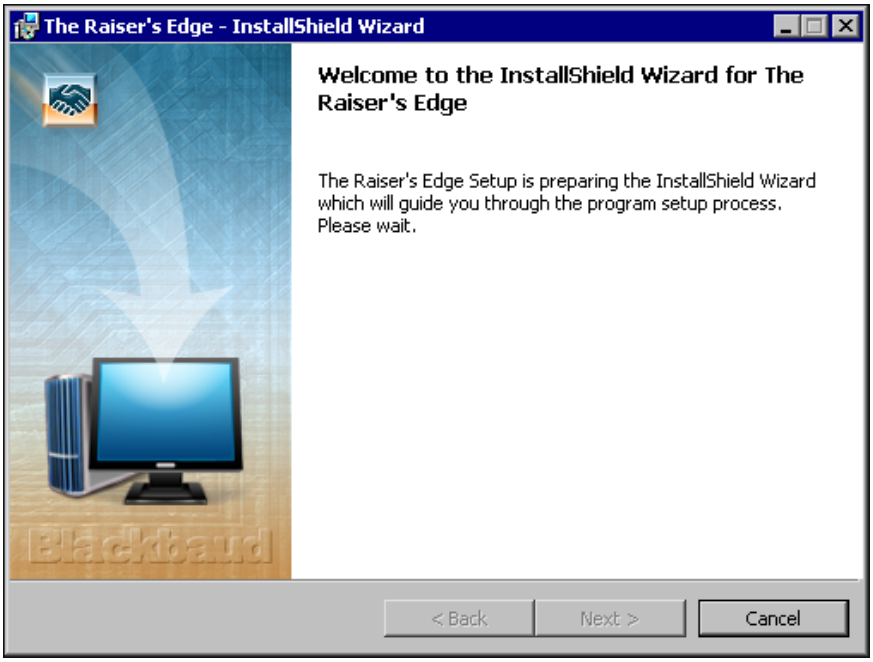
If additional prerequisites must be installed, they are listed below the Blackbaud SQL Server Verification requirement. To verify your server and install the prerequisites, click **Install**. The prerequisites install before the update continues.



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 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**.

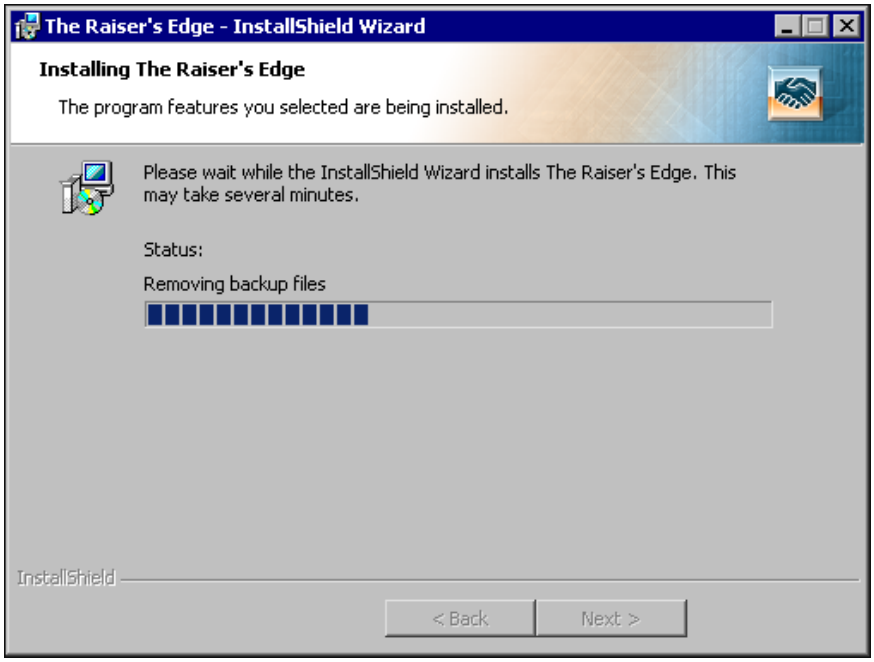
3. A welcome screen appears and displays the progress of the InstallShield Wizard preparation and verification of your system configuration and installation requirements.



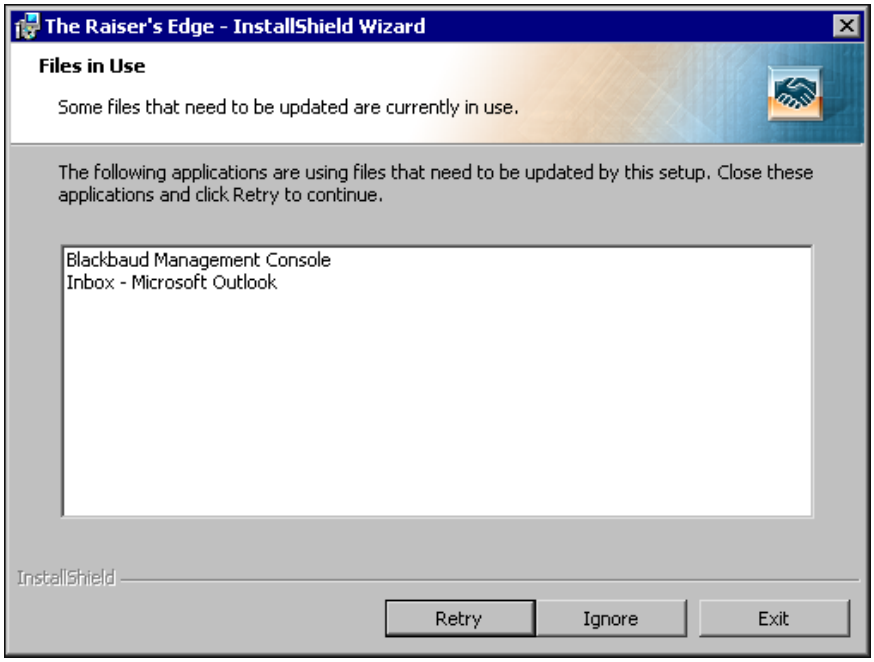
4. If the update utility detects that you do not have Adobe *Acrobat Reader* installed, a message appears. You must have Adobe *Acrobat Reader* installed to access ***The Raiser's Edge*** documentation. Click **OK** and visit Adobe's website at www.adobe.com/products/acrobat/readermain.html to download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

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

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.



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



- 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.

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.

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

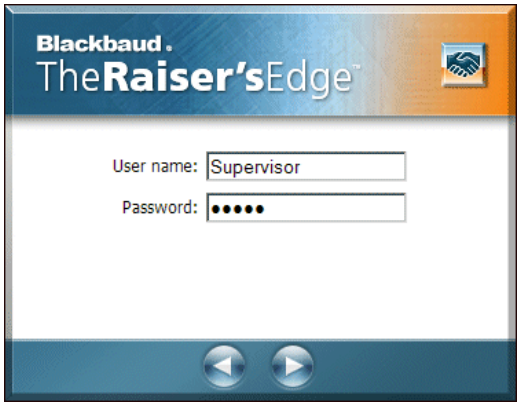
After you update your server to ***The Raiser's Edge 7.91.50***, consider these suggestions.

- ❑ 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.

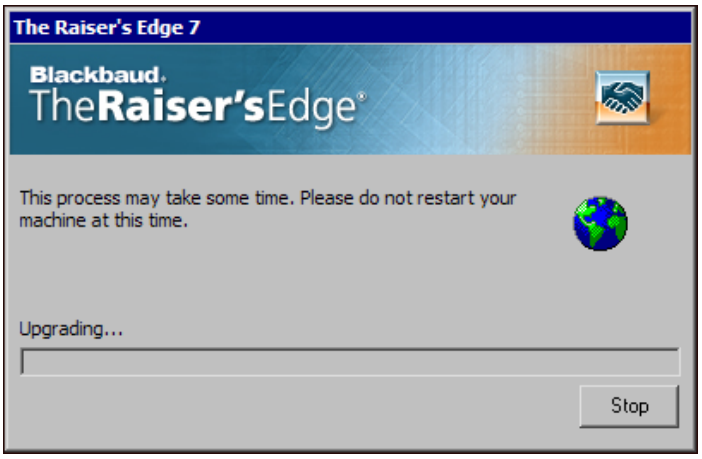
- To help you comply with PCI DSS, ***The Raiser's Edge*** uses the Blackbaud *Payment Service* to securely store sensitive credit card and merchant account information. If you update from a version earlier than ***7.91*** and your organization runs ***The Raiser's Edge*** locally on a server or workstation 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

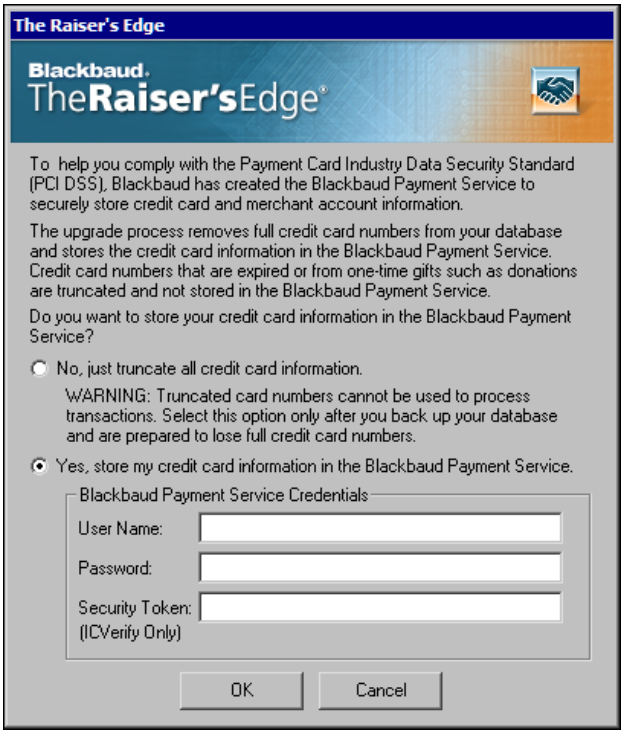
1. On your desktop, double-click **The Raiser's Edge**, or select **All Programs**, **The Raiser's Edge** from the **Start** menu. The login screen appears.



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*.



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.

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

If ***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.

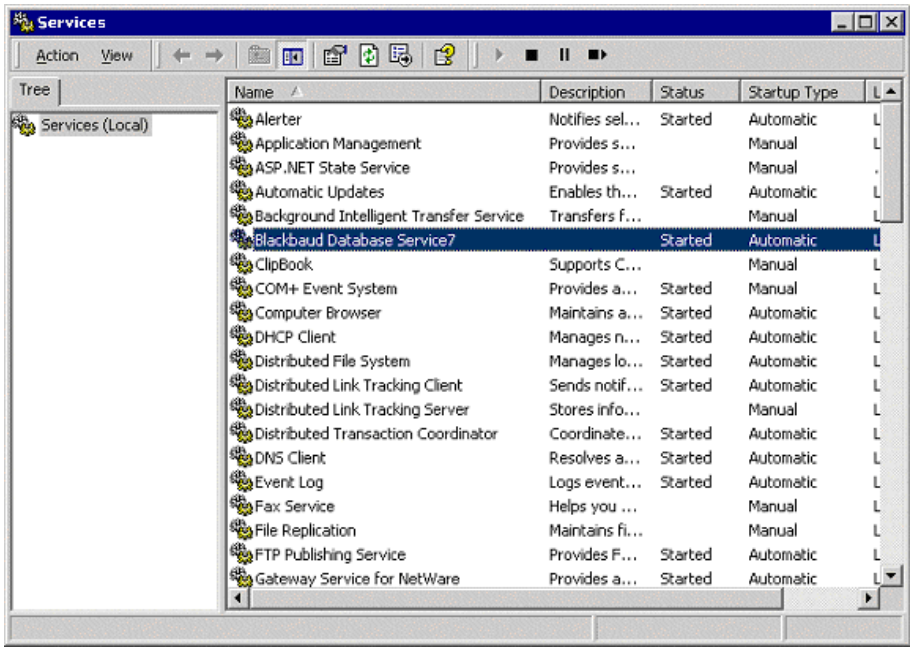
  The Raiser's Edge sends valid credit card numbers from constituent records, batches, recurring gifts, and pledges to the Blackbaud *Payment Service* to secure storage. In your database, ***The Raiser's Edge*** replaces these credit card numbers with reference numbers to identify each card number in the 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.

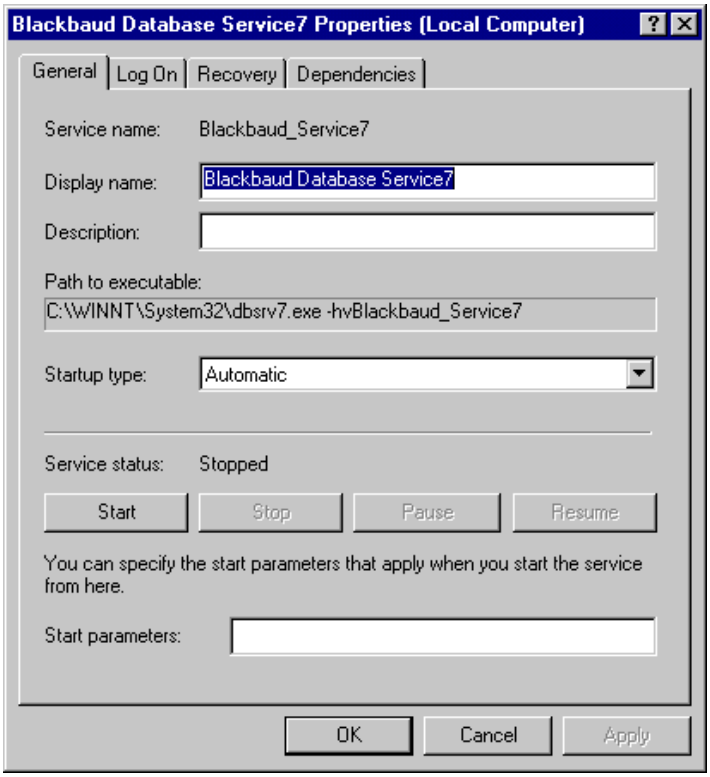
When the database update process finishes, ***The Raiser's Edge*** opens. Before you start to work, we recommend you review the release notes for updates to this version.

➢ **Shut down the Blackbaud Database Service**

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



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



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

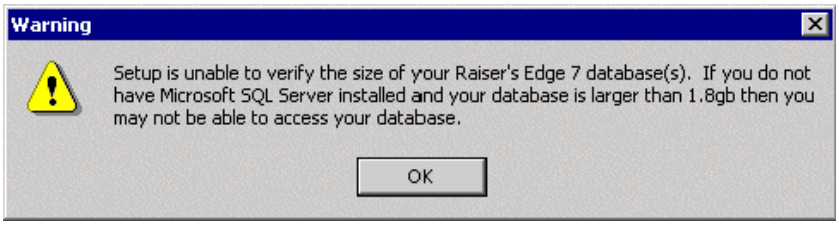
When you install ***The Raiser' Edge*** on an existing ***Raiser's Edge*** server machine, the setup program connects to the server and checks the size of each ***Raiser's Edge*** database in your server. This check may result in one of these situations.

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 2008*.

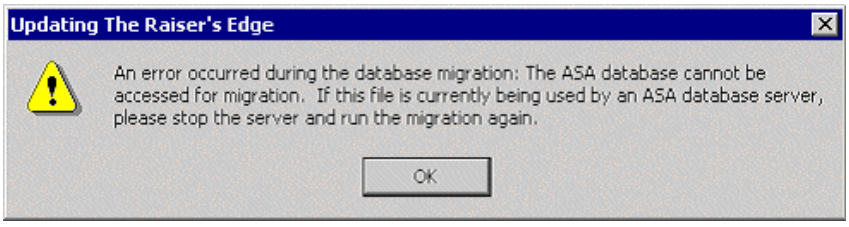
Setup Unable to Verify Size of Database

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

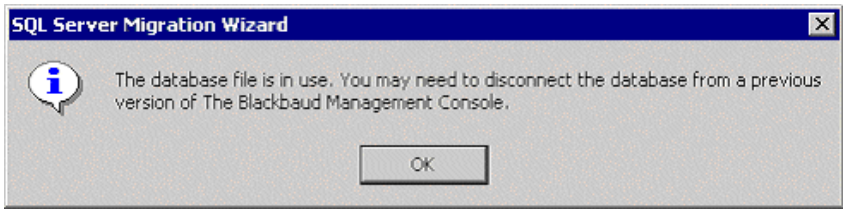
If you select **Automatic Database Migration** from the Getting Started screen to start the migration process, you may receive this message.



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

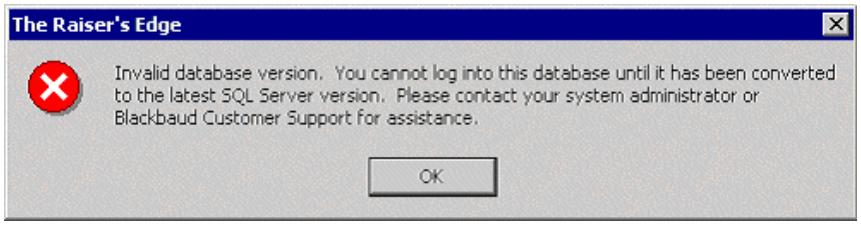
If you select **Custom Database Migration (Advanced)** to start the migration process, you may receive this message.



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.

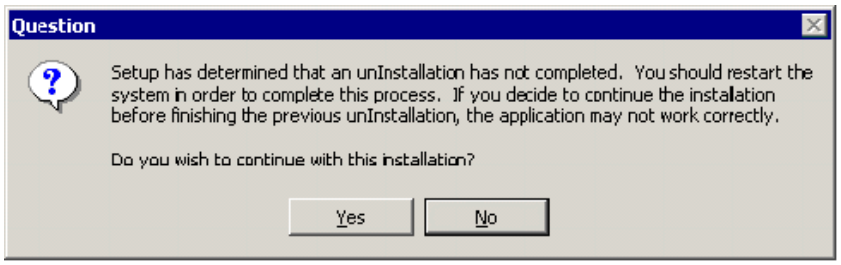
➢ **Use the numproc boot.ini switch to use only one processor of a multi-processor machine**

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`.

3. In *Notepad*, open the file: `C:\> notepad boot.ini`.
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**.



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

Chapter 2

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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

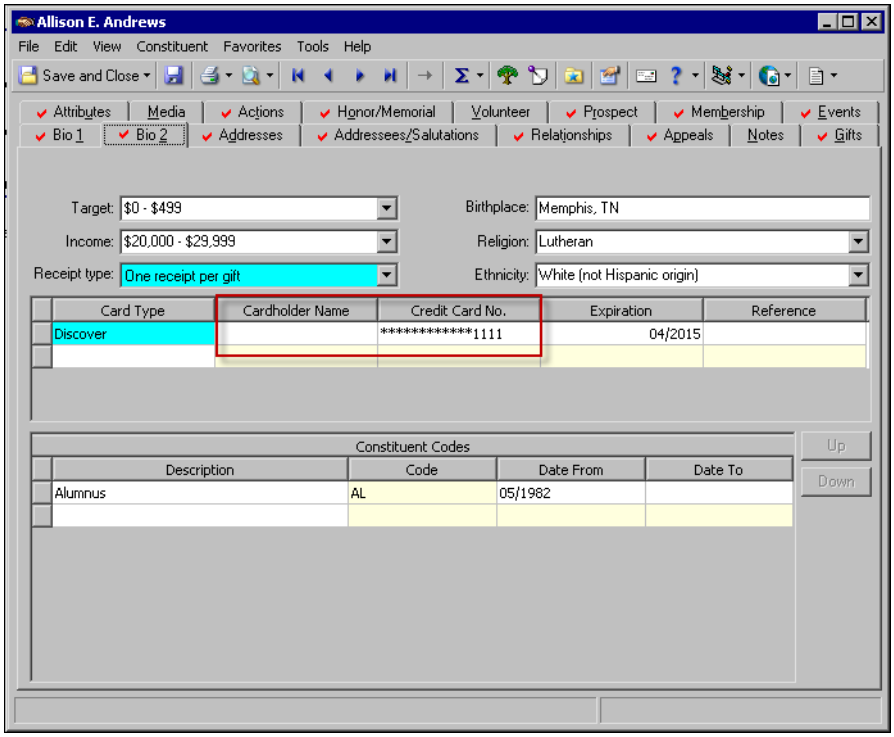
To help you comply with PCI DSS, ***The Raiser's Edge*** now requires strong and complex passwords. Passwords are case-sensitive and require both alphabetic and numeric characters. Passwords can be up to 50 characters in length, but must have a minimum of eight characters. You can also set business rules to require users to change their passwords on a routine basis. For example, to comply with PCI DSS, users must change their passwords 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.

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

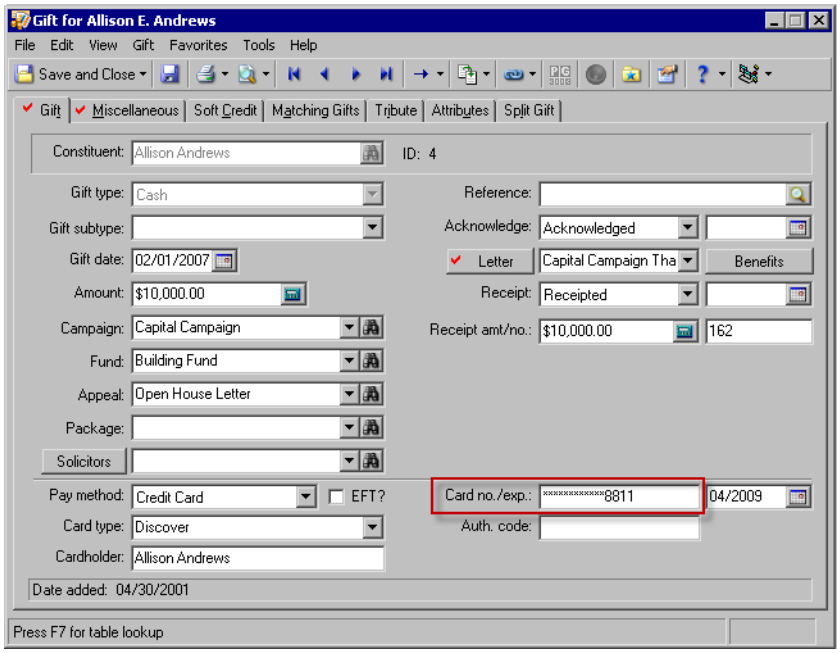
On the Bio 2 or Org 2 tab of a constituent record, ***The Raiser's Edge*** no longer displays unmasked credit card numbers. In the credit card grid, the **Credit Card No.** column now displays masked credit card numbers, with only the last four digits visible. The credit card grid also now includes a **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***.



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***.



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.

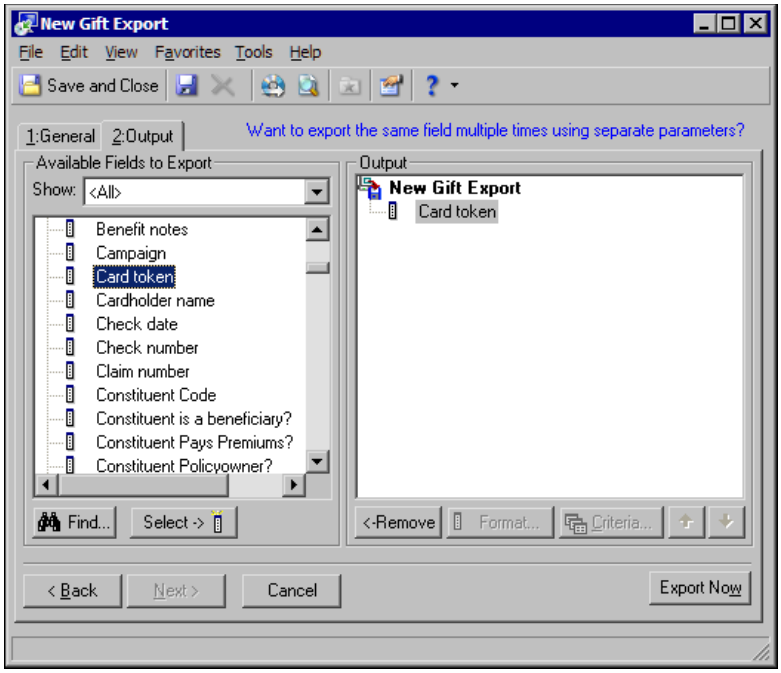
If you process credit card transactions through IATS, ***The Raiser's Edge*** now sends the transmission file to the Blackbaud *Payment Service*, which then securely replaces the tokens with their corresponding credit card numbers and sends the complete file to IATS for authorization and processing.

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*.

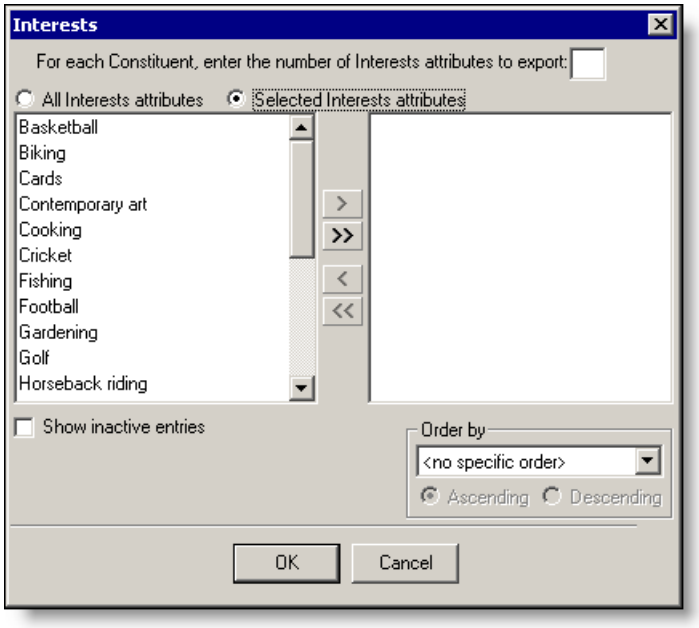
Export

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*.

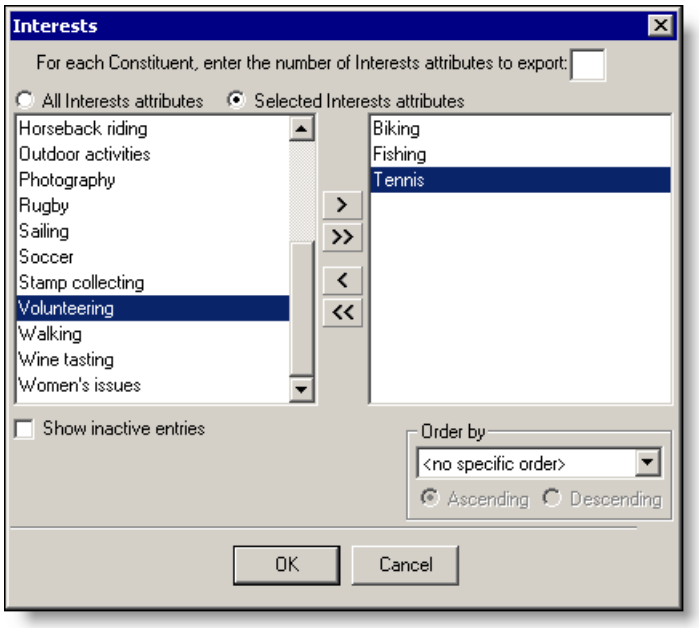


When you export the existing credit card **Number** field, credit card numbers now automatically export as a masked number. For example, credit card numbers appear as a string of asterisks that end using the last four digits of the actual credit card number. The option to export unmasked credit cards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

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.



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



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

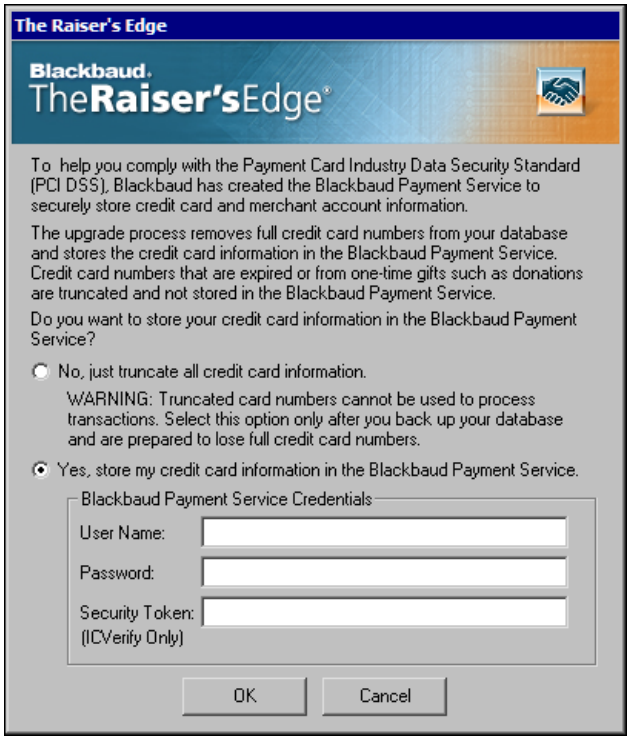
When you enter or edit credit card information in a constituent or gift batch, ***The Raiser's Edge*** automatically sends the information to the Blackbaud *Payment Service* for secure storage when you leave the row in the batch entry grid. However, if a credit card number or expiration date is blank, ***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 transactions through ICVerify, ***The Raiser's Edge*** securely retrieves the 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*.

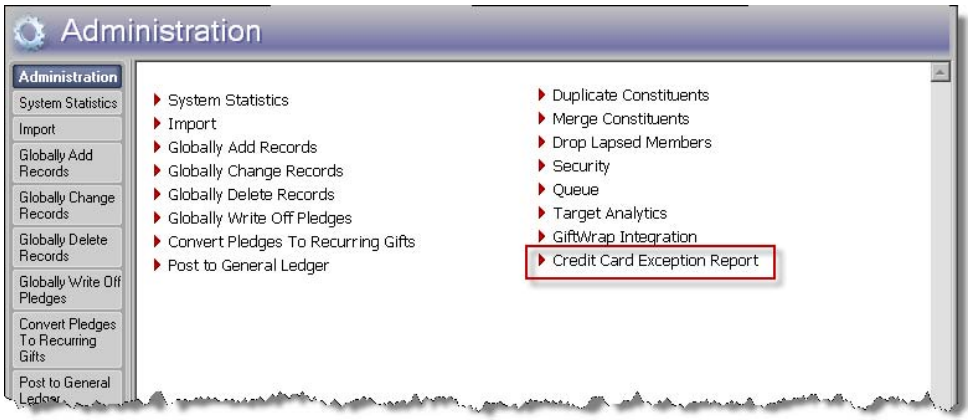
Administration

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.



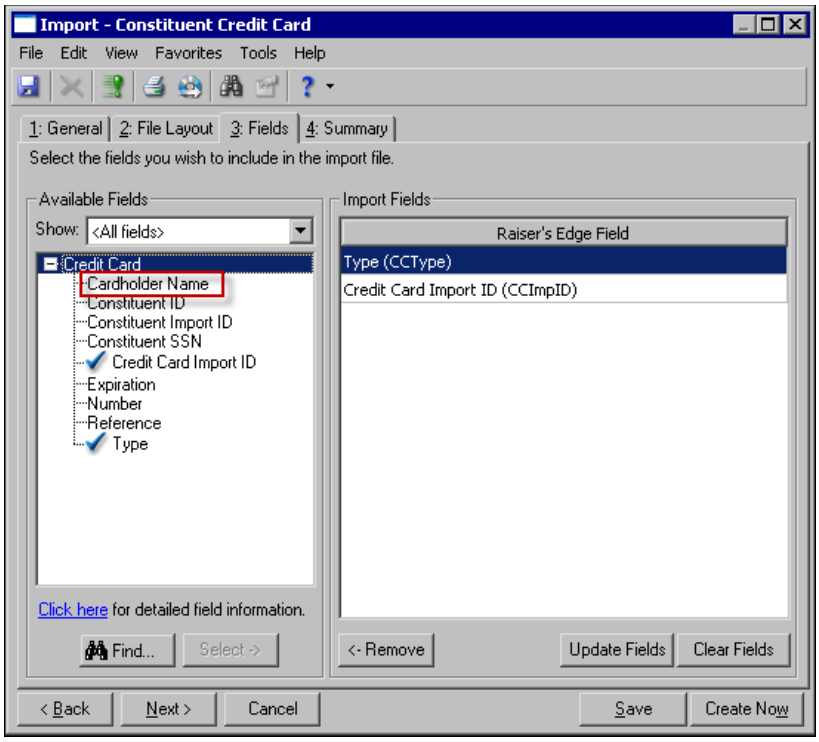
To view credit card data that the Blackbaud *Payment Service* cannot accept, such as invalid or incomplete information, you can generate a Credit Card Exception Report. With this static report, you can identify credit card information to correct for submittal and secure storage in the Blackbaud *Payment 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*.



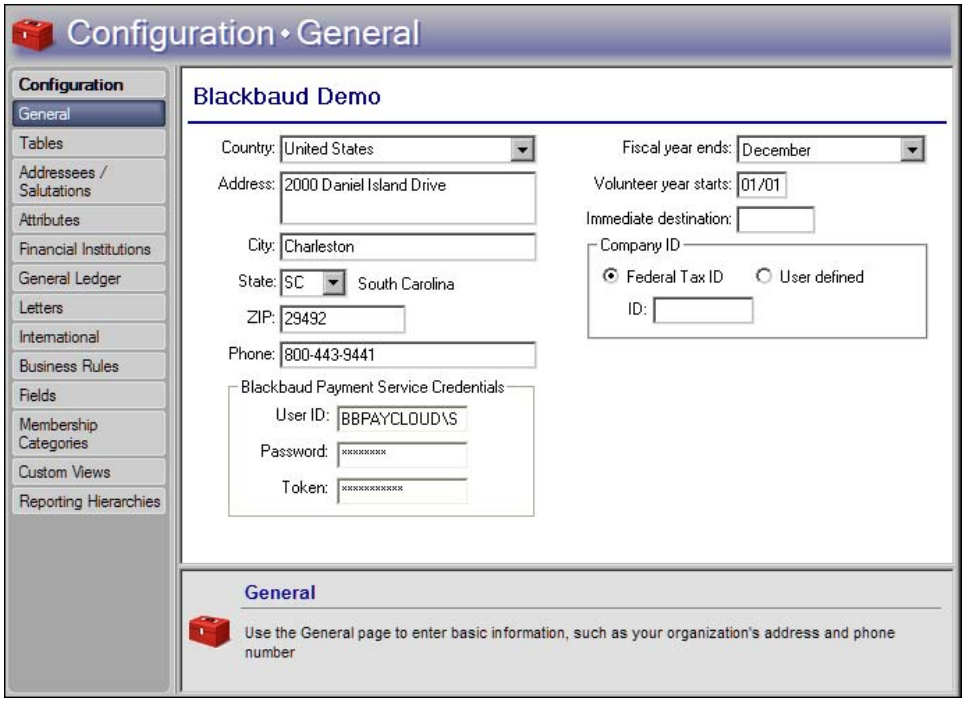
Configuration

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.

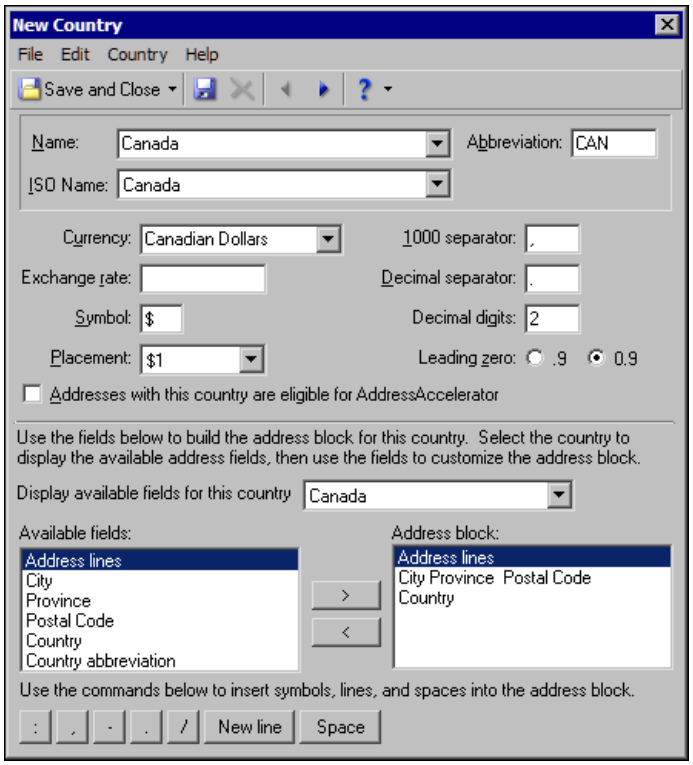
In *Configuration*, the **Blackbaud Payment Service Credentials** frame now appears on the General page. In this frame, you can manage the user name and password your organization uses to communicate with the Blackbaud *Payment Service*. If your organization uses *ICVerify* to process credit card transactions 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

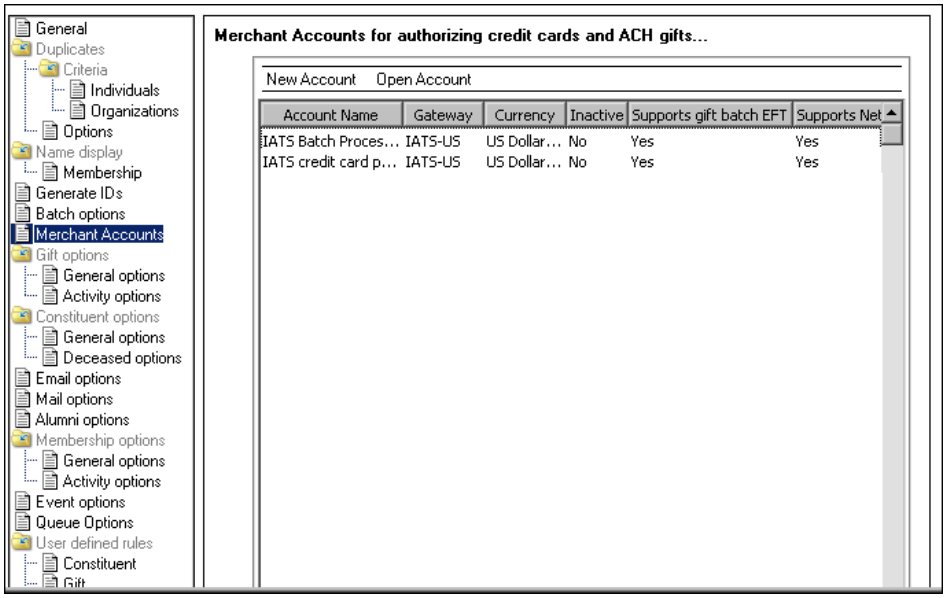
To help further identify countries, the **ISO name** field appears when you add or edit a country. In this field, you can select the country name according to the International Organization for Standardization (ISO).



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.

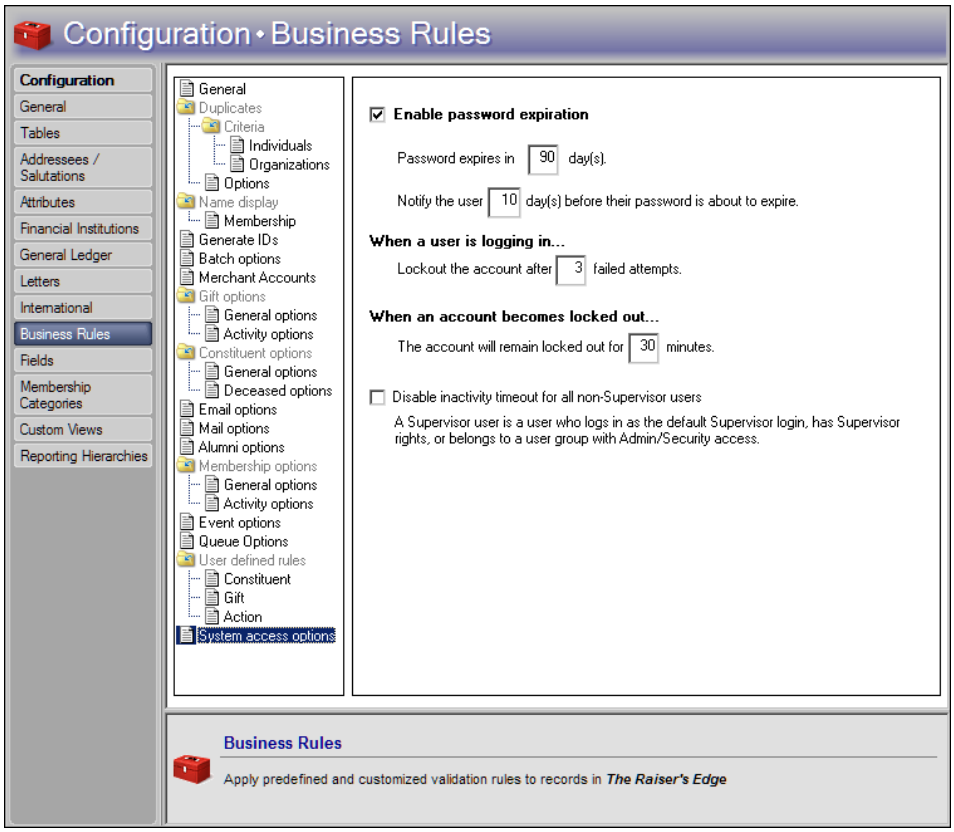


On the Business Rules page for merchant accounts, the grid displays all the merchant accounts your organization uses with the Blackbaud *Payment Service*. Since your organization may use a merchant account with another Blackbaud program, you can add or edit merchant accounts that appear in the grid, 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.



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*.

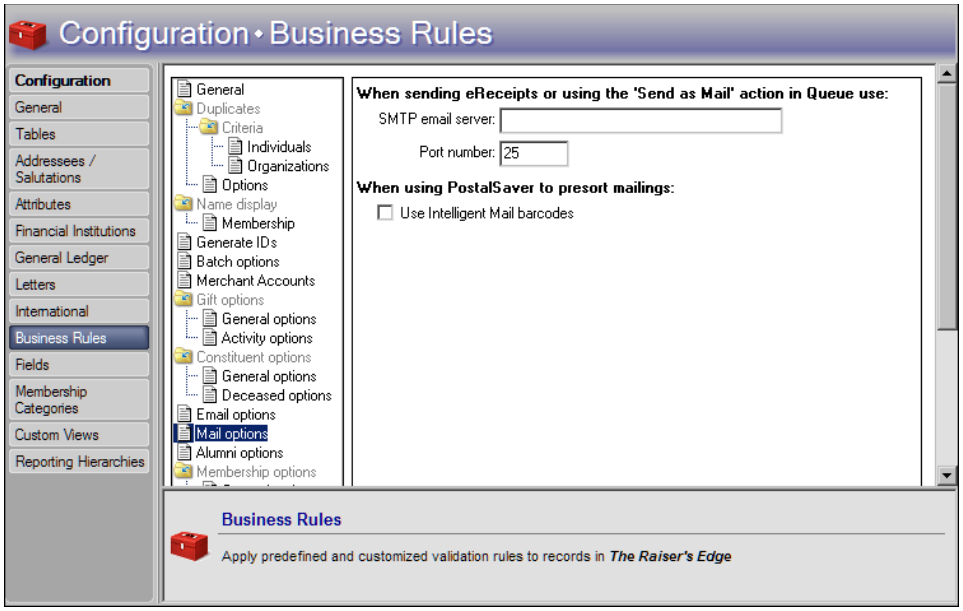
To help protect your database, ***The Raiser's Edge*** automatically locks out a user account for a period of time after a number of failed login attempts. In *Configuration*, you can now set business rules to specify the number of failed attempts to allow before the program locks a user account and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

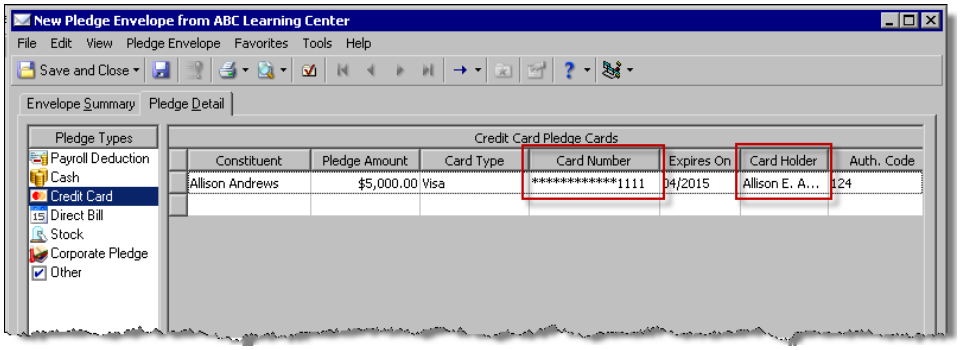
If you use the optional module *PostalSaver*, you can now select whether to use the 65-character Intelligent Mail barcodes to sort and track your mailings with the US Postal Service.



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***.



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*.

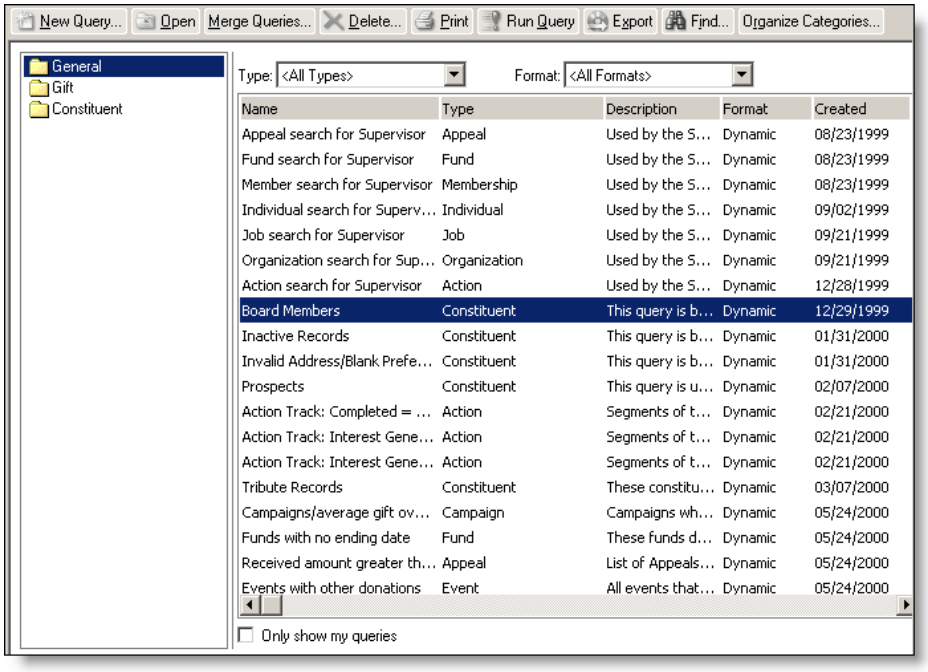
Blackbaud Sphere Integration

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*.

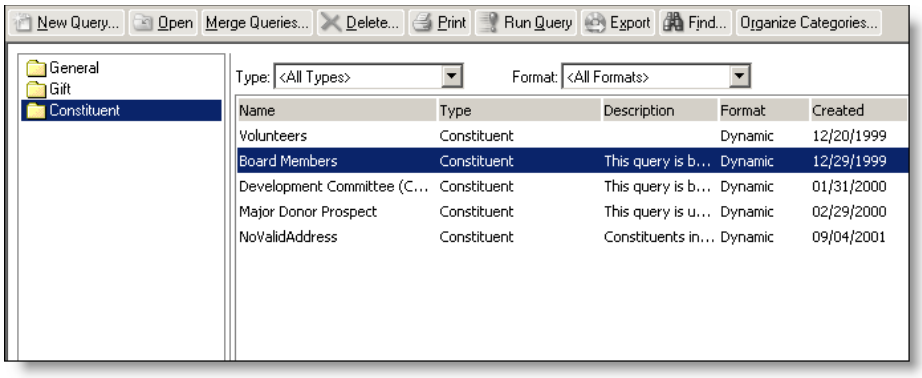
In *Administration*, system administrators can assign Security rights to the user roles that access the data downloaded from ***Sphere***. For information about how to assign security rights, see the *Configuration and Security Guide*.

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.



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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