

The **Education** Edge<sup>TM</sup>

**7.87 Update Guide**

## **080714**

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# Update The Education Edge



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This guide provides step-by-step update procedures for clients who are currently using *The Education Edge* and are updating to *The Education Edge 7.87*. To help you successfully update *The Education Edge*, review the information provided in this section. We provide a checklist of recommended steps, a list of important notes to review, procedures for backing up your databases and running the update for standalone and network versions, and information about updating *Faculty Access for the Web* and *NetClassroom*.

## Pre-Update Recommendations

This section provides the recommended steps to follow for successfully updating the *The Education Edge*. You should complete the following steps. We recommend using this checklist to help guide you through the process. As you complete each task in the list, place a mark in the corresponding checkbox.

- Review “Pre-Update Recommendations” on page 2 and follow the recommendations that apply to you.
- Review “Installation Requirements” on page 2.
- Update your system by installing *The Education Edge*. For more information, see “Install the Update on a Standalone Computer” on page 6 or “Install the Update on a Server” on page 8.
- If you have *Faculty Access for the Web*, update to the latest version. For more information, see “Install the Update for Faculty Access for the Web” on page 10.
- If you have *NetClassroom*, update to the latest version. For more information, see “Install the Update for NetClassroom” on page 10.

## Installation Requirements

This section provides important notes you should read before attempting to update your system. We recommend that you verify each item in this list before moving on to the update procedures. Many of the items in this section are important precautions you should take to ensure a successful update. If you ignore recommendations in this list, you may have problems during the update process.

- *The Education Edge* includes Microsoft’s *SQL Server 2008 Express Edition*.
- You should make a complete backup of your *Education Edge* database before you update. We strongly recommend you use a proper tape backup system. However, when you do not have such a system in place, you can run backup using the existing Blackbaud Management Console. For detailed instructions, see “Back Up Your Database” on page 3.
- If you are using Microsoft *SQL Server 2005 Standard/Workgroup/Enterprise Edition*, Service Pack 4 must be installed. This is a Microsoft patch required to keep your system current with Microsoft’s security recommendations. If you have not installed Service Pack 4, you can download it from Microsoft’s *SQL Server 2005 Downloads* page.
- *The Education Edge* is compatible with Microsoft’s *SQL Server 2012* and *2014*.
- The following prerequisites must be installed before you can update *The Education Edge*:
  - Microsoft SQL Server Express 2008 R2 SP2
  - Microsoft SQL Server Express 2005 Backward Compatibility Components
  - Microsoft Windows Installer 3.1
  - Microsoft Windows Installer 4.5
  - Microsoft Data Access Components (MDAC) 2.8
  - Microsoft .NET Framework 2.0.50727
  - Microsoft .NET Framework 4
  - Visual Basic for Applications (VBA) Components

- Crystal Report XI Runtime Components
- Internet Explorer
- Visual Basic for Applications (optional module)
- Microsoft System CLR Types 2012
- Microsoft SQL Server 2012 Shared Management Objects
- You should have a complete backup of your current **Education Edge** database before running the update. See “Back Up Your Database” on page 3 for instructions. For additional information about creating and restoring backups, see the *Database Administration Guide*.
- Before you update, make sure all users are logged out of **The Education Edge**.
- We recommend you update the program using the same format you used for the original installation. For example, if you originally installed from the network, do not update directly from the update CD. You must copy the install directory from the CD to your server machine and run the update from the network.
- Ensure your equipment meets all system and free space requirements for the update. Current system requirements are available on the support section of our website at support.blackbaud.com.
- If you are updating a network installation, you need a CD-ROM drive at the server or on a workstation with network access. The update process copies all update files from the CD to the server, thus eliminating the need to copy the contents of the CD to a shared network drive first.
- Exit all *Windows* applications on the server and the workstations where **The Education Edge** will be updated.
- Close any virus scanning programs or services 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. Close the Microsoft *Office* toolbar, if present. It may interfere with the installation of some files.
- A new set of sample data is installed automatically during the update. For network installations, the sample data is installed only on the server and is shared by client machines. To save your current sample data, make a backup copy before installing **The Education Edge**. We recommend you use the new sample data as a training tool because it contains examples of the new features available in the update.
- If you are updating a network installation, for the deployment package to update **The Education Edge** on a workstation, a user must have administrative rights to add software to that computer. For information about required NTFS rights, “Required NTFS Rights” on page 5.
- Before updating *Faculty Access for the Web*, you must manually stop the website in IIS hosting *Faculty Access for the Web*. When you complete the update, restart the website in IIS.

Before using *Faculty Access for the Web*, you need to update the client components on your Web server after running the **Education Edge** update. To update the client components, simply log on to **The Education Edge** on the Web server. For information about updating *Faculty Access for the Web*, see “Install the Update for Faculty Access for the Web” on page 10.

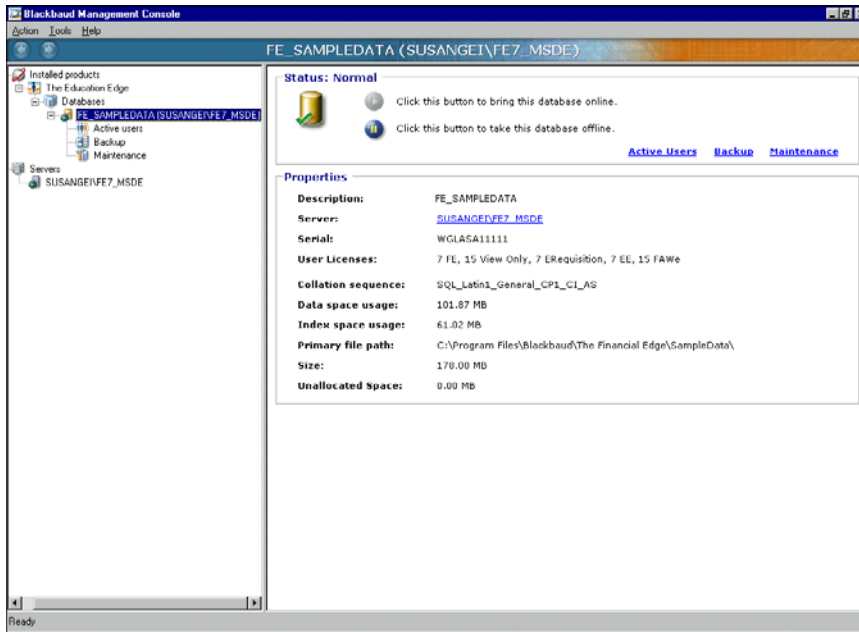
## Back Up Your Database

We recommend making a backup of your current database before installing the update. You can run a full or compressed backup of your database while users continue working 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, then 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.

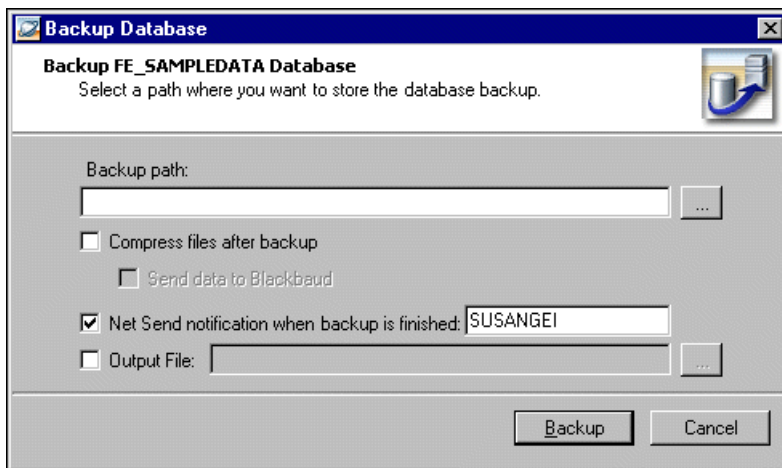
### ► Back up your database

This section provides a procedure for backing up your database using the Blackbaud Management Console. For more information about backing up and restoring databases, see the *Database Administration Guide*.

1. Double-click the Blackbaud Management Console icon on your desktop. The Blackbaud Management Console opens.



2. In the Installed products tree view on the left side of the screen, select **Backup** under the name of the correct database. The backup options appear on the right side of the screen.
3. In the **Perform Backup** frame, click **Backup**. The Backup Database screen appears.



4. In the **Backup path** field, select a location to save the backup. You can use the browse button to specify a location.
5. Mark **Compress files after backup** to have the files zipped after the backup process. If you select this option, the **Send data to Blackbaud** option is enabled. Do not mark **Send data to Blackbaud** unless you have been directed to by Blackbaud technical support.
6. Mark **Net Send notification when backup is finished** to send notification to a specified workstation. You must enter the name of the workstation or user you want to net send, if it differs from the default.

7. To generate a text file that details the backup process, mark **Output File** and select a location to generate the output file.
8. Click **Backup** to start the backup process and return to the Blackbaud Management Console.

## Required NTFS Rights

**Note:** The directories included in the table are system defaults only. Your directory locations and names could be different if they were changed from the original default settings.

To update *The Education Edge* on a workstation, users need NTFS rights to the following directories, including subdirectories:

Directory	Permissions
Deploy folder on server	RX
C:\Program Files\Blackbaud\The Financial Edge	FULL
C:\Program Files\Common Files\Blackbaud	FULL
C:\TEMP	FULL
C:\Windows\System32	RX

- If running *Windows*, when adding these NTFS folder permissions, click the **Advanced** button on the NTFS Properties tab and mark the **Reset permissions on all child objects and enable propagation of inheritable permissions** checkbox. This step will propagate the permissions to all files and folders within the parent folder.
- For information about editing NTFS permissions, reference Knowledgebase Solution BB3124. You can access the Knowledgebase on our website at [kb.blackbaud.com](http://kb.blackbaud.com).
- If these rights prove to be insufficient, we recommend using *ProcessMonitor* to determine where additional rights are needed. *ProcessMonitor* is a third-party utility that is useful for troubleshooting permission issues. For more information about *ProcessMonitor*, reference Knowledgebase Solution BB50451. You can access the Knowledgebase on our website at [kb.blackbaud.com](http://kb.blackbaud.com).

## Integrate with The Raiser's Edge

To integrate *The Education Edge* with *The Raiser's Edge*, you must be on *Raiser's Edge* version 7.92 or higher. Please note you must be on the latest *Raiser's Edge* patch before integrating the systems.

To use integration, both programs must be installed on the same workstation so they can communicate in the background, but you do not have to be logged into both. We recommend you dedicate a workstation for the integration process of automatically synchronizing data. Visit [www.blackbaud.com](http://www.blackbaud.com) for the latest system requirements.

## Install the Update

Use the following procedures to update *The Education Edge*. This section includes procedures for updating a standalone version and a network version. For instructions guiding you through the update on a standalone, see "Install the Update on a Standalone Computer" on page 6. For instructions guiding you through the update on a server, see "Install the Update on a Server" on page 8.

For instructions for updating your optional modules, see "Install the Update for Faculty Access for the Web" on page 10 and "Install the Update for NetClassroom" on page 10.

Before you begin, make sure you have read “Pre-Update Recommendations” on page 2, “Installation Requirements” on page 2. and performed the recommended tasks to prepare for the update.

## Install the Update on a Standalone Computer

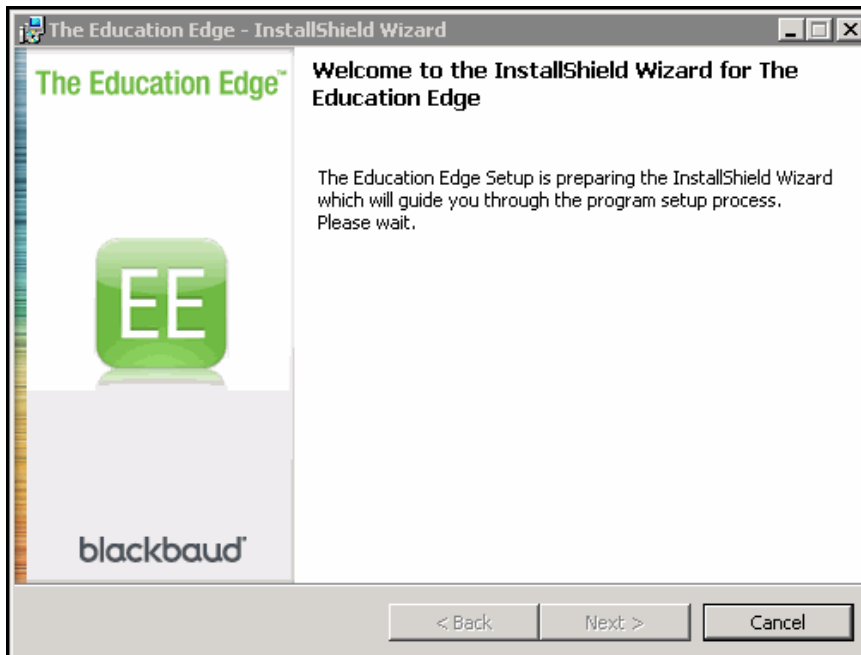
This section provides step-by-step instructions for clients who are currently using a standalone version of *The Education Edge* and are updating to *The Education Edge 7.87*.

▶ **Install the update on a standalone computer**

1. Insert the update CD into your CD-ROM drive. The AutoPlay Menu screen appears.

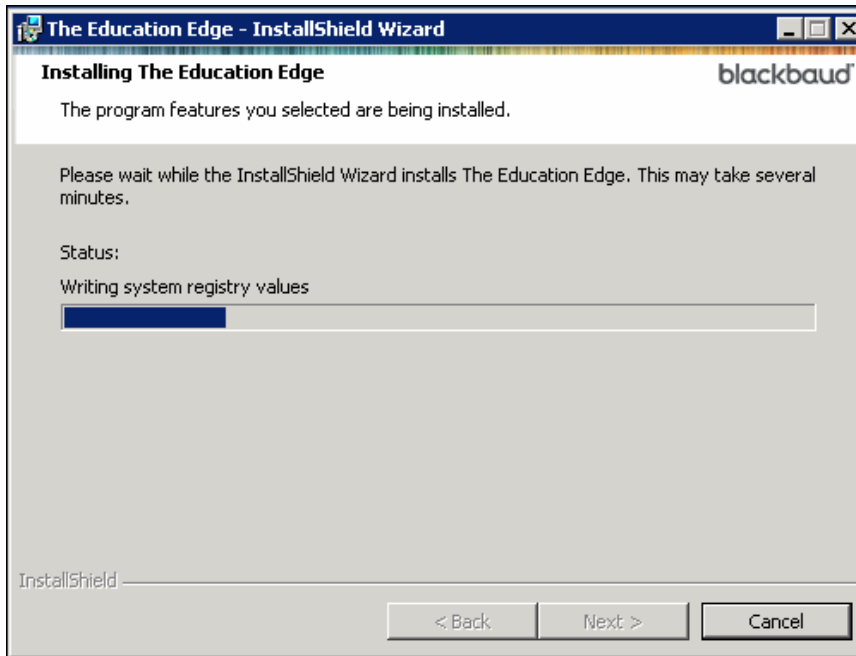
**Note:** After clicking **Install Software**, you may see additional processing screens and/or a prompt to restart your computer. If prompted, restart your computer and continue with the procedure.

2. Click **Install Software**. The InstallShield Wizard screen for upgrading *The Education Edge* appears.



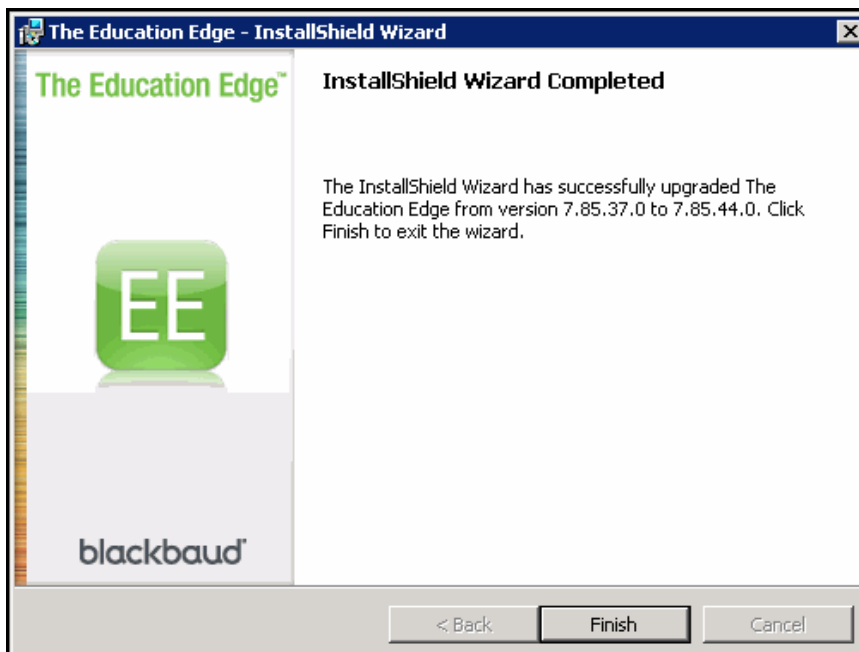


3. Click **Next**. The Installing The Education Edge screen appears displaying the status of the update.



**Note:** If there are files in use that the installation process needs to update, a screen appears notifying you. Close the requested files and click **Retry** to continue.

4. Once the installation is complete, the InstallShield Wizard Completed screen appears.



5. Click **Finish**.

## Install the Update on a Server

This section provides step-by-step instructions for clients who are currently using a network version of *The Education Edge* and are updating to *The Education Edge 7.87* on a server.

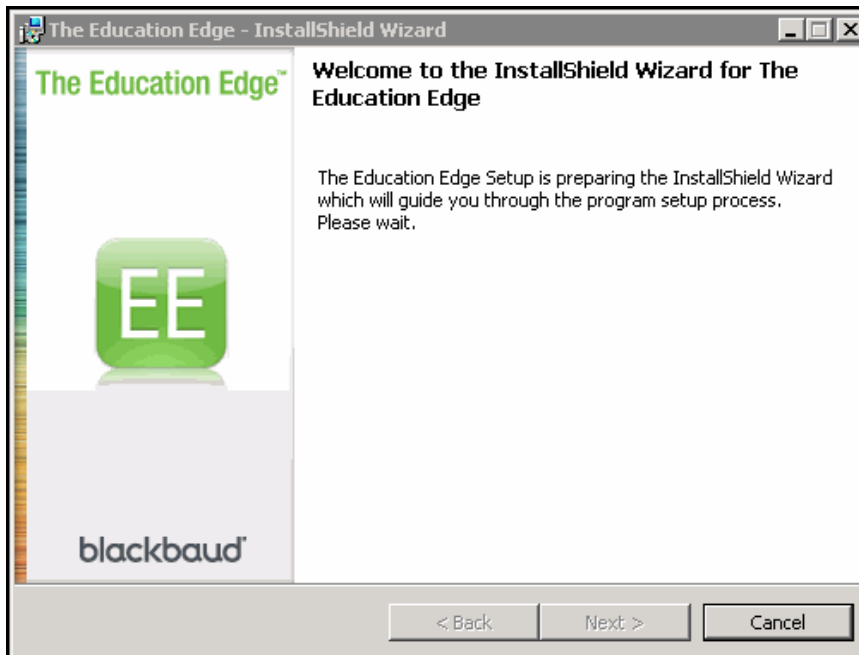
### ► Install the update on a server

Follow these instructions to update a server, deployment package, and workstations. For more detailed information about how to update user workstations and the deployment package, see the *Database Administration Guide*.

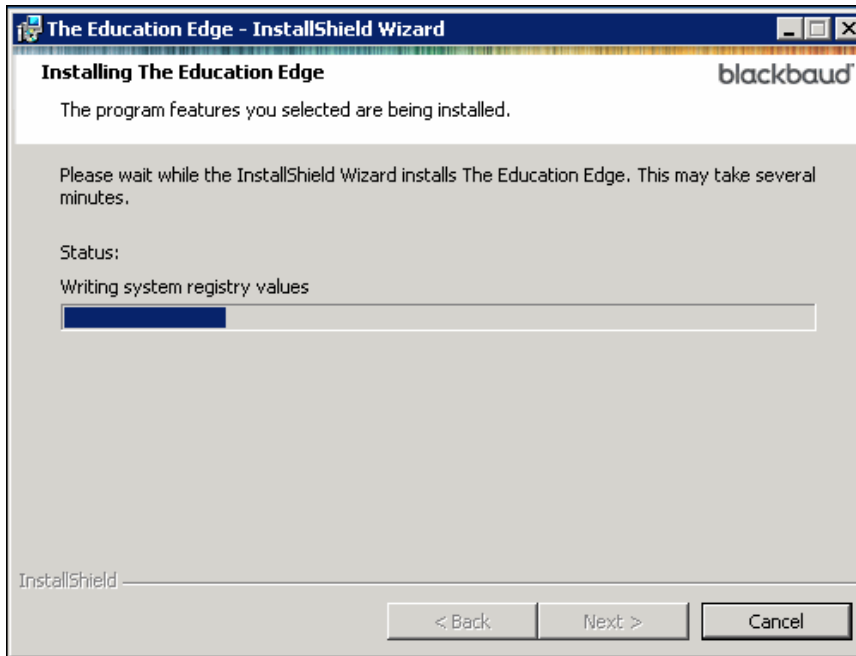
1. Insert the update CD into your CD-ROM drive. The AutoPlay Menu screen appears.

**Note:** After clicking **Install Software**, you may see additional processing screens and a prompt to restart your computer. If prompted, restart your computer and continue with the procedure.

2. Click **Install Software**. The InstallShield Wizard screen for upgrading *The Education Edge* appears.

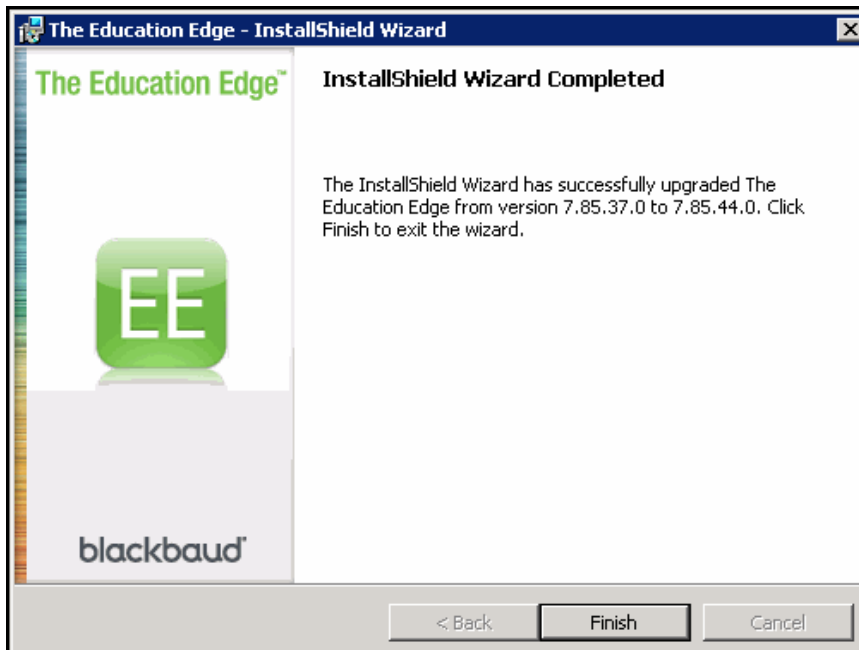


3. Click **Next**. The Installing The Education Edge screen appears displaying the status of the update.



**Note:** If there are files in use that the installation process needs to update, a screen appears notifying you. Close the requested files and click **Retry** to continue.

4. Once the installation is complete, the InstallShield Wizard Completed screen appears.



5. Click **Finish**.

## Install the Update for Faculty Access for the Web

Before updating *Faculty Access for the Web*, you must manually stop the website in IIS hosting *Faculty Access for the Web*.

To update *Faculty Access for the Web*, place the update CD in the CD-ROM drive at the Web server. Next, run the setup.exe file located in the “FAWeb7” directory. You must run setup.exe from the Web server machine. When you complete the update, restart the website in IIS.

Before you can use *Faculty Access for the Web*, you need to update the **Education Edge** client components on your Web server. To update the **Education Edge** client components, simply log on to **The Education Edge** on the Web server after **The Education Edge** update is complete.

If you are installing *Faculty Access for the Web* for the first time or need detailed information about security and user rights, see the *Administration Guide for Faculty Access for the Web*. You can download this guide from our website at [userguides.blackbaud.com](http://userguides.blackbaud.com).

## Install the Update for NetClassroom

If you update from *Netclassroom 6* to version 7, you need to uninstall your existing version of *NetClassroom* before installing the latest version. For information about installing *NetClassroom*, see the *Administration Guide for NetClassroom*. You can download this guide from our website at [userguides.blackbaud.com](http://userguides.blackbaud.com).

## Post Update & Troubleshooting

After you update **The Education Edge**, review the following information.

### Unlock Optional Modules

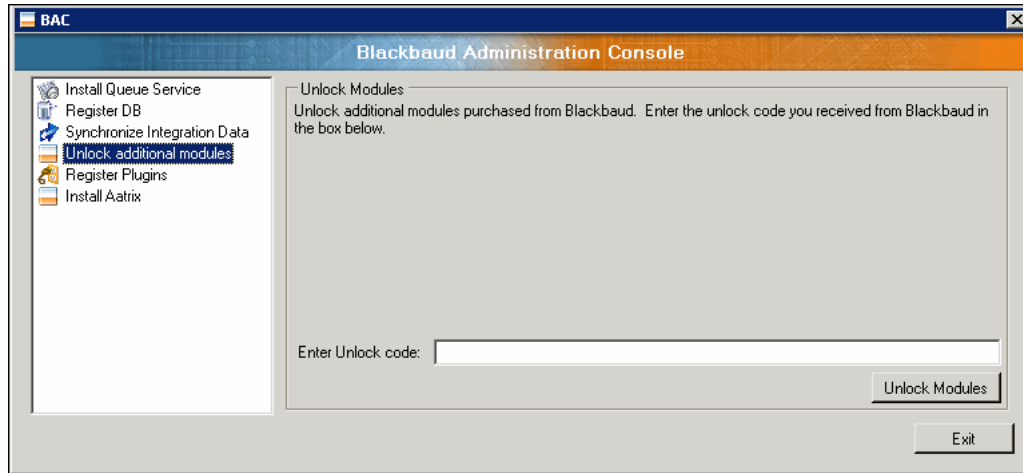
When you purchase an optional module or additional user license from Blackbaud, you are given a code. You must enter this code to “unlock” or activate the optional module or user license.

**Note:** If you need to purchase additional modules or user licenses, please contact your Account Representative.

If you did not receive your unlock code, or the code does not work, you can create a case in Case Central on our website. Please include the database serial number when you request this information. You can locate the database serial number by selecting **Help, About The Education Edge** on the menu bar.

► **Unlock an optional module or additional user licenses**

1. From the shell menu bar in *The Education Edge*, select **Tools, Unlock Add-on Modules**. The Blackbaud Administration Console appears. Click **Yes** to launch the console. The Blackbaud Administration Console screen opens to the Unlock additional modules option.



2. In the **Enter Unlock code** field, enter the code you were given when you purchased the optional module or user license. The code must be entered in all capital letters.
3. Click **OK**.
4. If you enter the code incorrectly, a message appears.  
Click **OK** and enter the activation key again. After you enter the key correctly the confirmation message appears.
5. Once you have entered the correct activation key, click **OK**. Before you can use the optional module or user licenses, you must log off and log back into *The Education Edge*.

## Access Documentation

**Note:** Visit our website at [www.blackbaud.com](http://www.blackbaud.com) for the latest documentation and information.

Each user's guide for *The Education Edge* is in a portable document format (\*.pdf), which requires a pdf reader to view. If you do not have a reader, you must install one before you can view the user guides.

