

Onsite Training Pre-Training Checklist

2012

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1 Preferred Training Setup Requirements

1.1 Preferred Training Environment for Attendees

- Separate room or offsite facility
 - Goal: Distraction-free setting
- Attendee workspace for computer and workbook
 - Goal: Sufficient space and resources for practicing and taking notes
- Projected display of instructor's computer
 - Goal: Watching demonstrated functionality and exercises
- Whiteboard or easel/pad with markers
 - Goal: Visible diagrams or listings of information or next steps

1.2 Preferred Computer Environment for Attendees

- Individual laptops or workstations
 - Goal: Allow each attendee to practice training examples
 - System Requirements: Please review the appropriate system requirements at <https://www.blackbaud.com/nonprofit-resources/system-requirements.aspx>.
- Windows environment configuration
 - Goal: Ensure compatibility with standalone use of Blackbaud software
 - Configuration: See [Configuring Windows for Use During Blackbaud Training](#) in this document.
- Microsoft Office installation and configuration
 - Goal: Ensure compatibility of Word, Excel, and Web components with Blackbaud software
 - Installation Requirement: Blackbaud software functional areas use Microsoft Office components (Word, Excel, Web components).
 - Configuration: See [Configuring Microsoft Office for Use During Blackbaud Training](#) in this document.
- Blackbaud software standalone installation
 - Goal: Standalone software installation with locally-installed training database
 - Configuration: See [Installing Blackbaud Software and Training Databases](#) in this document.

1.3 Exceptions to Preferred Environments

- Please contact Blackbaud: If you are unable to provide a separate training environment or standalone installations, please contact the Operations group to discuss implications.
 - Email: Onsitetraining@blackbaud.com
 - Phone: 1.800.468.8996 option 3

2 Configuring Windows for Use During Blackbaud Training

2.1 Folder Security Considerations

- Full Control of Blackbaud folders: User accounts logged into the laptop or workstation will need full control security permissions to all Blackbaud installation folders on the local machine.
 - For Windows 7, you may need to change the Owner of Blackbaud installation folders from Trusted Installer to the Administrators group.

2.2 SQL Server Considerations

- Verify existing SQL Servers: Uninstall any version of SQL Server prior to SQL Server 2005, unless SQL Server 2005 or later is also installed.
- For Training Database: If you will be using the Blackbaud training database, no additional action is normally required.
 - Blackbaud software will normally install Microsoft SQL Server 2005 Express with SP3 unless a version of SQL Server 2005 already exists on the machine.
- For Your Database Copy: If your server uses SQL Server 2005, no additional action is normally required (see above section For Training Database). If your server uses SQL Server 2008 or higher, you will need to install SQL Server 2008 R2 Express.
 - SQL Server 2008 R2 Express is available as a free download.
 - <http://www.microsoft.com/sqlserver/en/us/editions/express.aspx>
 - Install before proceeding with the Blackbaud software installation.
 - You must create a separate named instance during the installation.
 - Please follow How to configure SQL Server 2008 or SQL Server 2008 R2 for use with Blackbaud databases (BB541928) for additional configuration requirements.
 - <https://www.blackbaud.com/kb/index?page=content&id=BB541928>

2.3 Default printer considerations

- Printing Not Required: The training environment does not need to include access to a printer.
- Full-featured Printer Driver Required: Blackbaud software reports do require that a full-featured, regular printer driver is set as the default printer in order to preview reports.
 - The Microsoft Document Writers are insufficient for report preview.
 - If no regular printer drivers have been installed, consider installing the HP Laserjet 2200 Series PCL, available in Microsoft Windows, as the default printer.

2.4 Internet connection

- Optional: Training uses an internet connection to demonstrate accessing helpful information on Blackbaud websites
 - You could restrict internet access to the instructor to lessen distractions during training.
 - Unless you specify otherwise, the instructor will normally access work emails during breaks, including correspondence related to the onsite training.

3 Configuring Microsoft Office for Use During Blackbaud Training

3.1 Installation and Activation Considerations

- Word and Excel Required: Please ensure complete installation of Microsoft Word and Excel, including activation, before installing Blackbaud software.

3.2 Microsoft Office XP Web Components Installation

- Web Components Required: Blackbaud software dashboards use the Microsoft Office XP Web Components.
 - Microsoft Office installations beginning with Office 2003 no longer install these components.
 - Later versions of the web components will not work with dashboards. You must install the XP version.
 - The web components must be installed after installing Microsoft Office.
 - If you upgrade or reinstall Microsoft Office after installing Blackbaud software, you may need to reinstall these components.
 - You can download the file from the Microsoft website.
 - More information: <http://www.blackbaud.com/kb/index?page=content&id=BB528952>
 - Download: <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=9468>

3.3 Microsoft Office 2007 and later Security Considerations

- Turn Off SQL Access Warning: By default, a security warning will appear every time users initiate a Word merge. The warning will stay in the background, stop the merge process, and require a confirmation to proceed. You can add this registry setting to stop the warning:
 - HKEY_CURRENT_USER\Software\Microsoft\Office\12.0\Word\Options
 - Add new DWORD value with the name "SQLSecurityCheck" and a value of 0 (00000000)
- Turn Off Protected View of Older Excel Worksheets: By default, Excel 2010 uses File Block and Protected View to restrict access to Excel workbooks created in older versions. Some Blackbaud software creates older version worksheets by default that cannot be saved in Excel 2010 format unless you change the security settings.
 - You can enable editing or access in the Excel Trust Center.
 - The Microsoft Help Files include information and steps to fix.
 - <http://office.microsoft.com/en-us/excel-help/what-is-file-block-HA010355927.aspx>

4 Installing Blackbaud Software and Training Databases

4.1 Installation Overview

- Verify a clean installation environment
 - Fully remove any existing installations of Blackbaud software
- Install standalone versions of all software and patches
 - Install both the Blackbaud software and the latest patch.
 - Install Crystal Reports, if included in training.
- Attach the correct training database
 - If you asked for training using Blackbaud data, you will need to detach the Sample database and attach the Training database instead on each laptop or workstation.
 - If you asked for training using a copy of your database, you will attach a copy on each laptop or workstation. You will not need to detach the Sample database.

4.2 Verify a Clean Installation Environment

- Complete uninstall: Fully remove any existing installations of Blackbaud software
 - How to uninstall The Raiser's Edge software (BB41415):
 - <http://www.blackbaud.com/kb/index?page=content&id=BB41415>
 - How to uninstall The Education Edge, The Financial Edge, or Student Information Systems software (BB61870):
 - <http://www.blackbaud.com/kb/index?page=content&id=BB61870>

4.3 Install Standalone Versions of All Software and Patches

- Download the latest software version and patch.
 - <https://www.blackbaud.com/support/downloads/downloads.aspx>
- Install the Blackbaud software as a standalone installation.
 - <http://www.blackbaud.com/kb/index?page=content&id=BB720326>
 - Select a standalone installation, which will also locally install a Sample database. This sample database will not be used during training.
- Install the Blackbaud software patches.
- Install Crystal Reports, if included in training.
 - If you cannot locate the Crystal Reports software disks provided when you first licensed Blackbaud software, follow these instructions:
 - How to request a Crystal Reports installation CD (BB12531)
 - <https://www.blackbaud.com/kb/index?page=content&id=BB12531>
 - If you are using Crystal Reports XI or later, you may need to upgrade to the latest release version or install the latest service pack.
 - How to upgrade Crystal Reports XI Release 1 to Crystal Reports XI R2 (BB723157)
 - <https://www.blackbaud.com/kb/index?page=content&id=BB723157>

4.4 Attach the Correct Training Database

- If you asked for training using Blackbaud data, you will need to detach the Sample database and attach the Training database instead on each laptop or workstation.
 - Download the Training Database.
 - <https://www.blackbaud.com/support/downloads/sample.aspx>
 - Note: The Blackbaud website describes these as sample databases; however, these are updated versions of the installed sample database created specifically for use during training.
 - Detached the default sample database installed with the software.
 - How to detach a database from within the Blackbaud Management Console (BB96700)
 - <https://www.blackbaud.com/kb/index?page=content&id=BB96700>
 - Attach the Training Database (updated sample database) on each laptop or workstation.
 - How to attach a database to the Blackbaud Management Console (BB95152)
 - <http://www.blackbaud.com/kb/index?page=content&id=BB95152>
- If you asked for training using a copy of your database, you will attach a copy on each laptop or workstation. You will not need to detach the Sample database.
 - Download the returned copy of your database from your FTP folder
 - How to prepare and send files to or retrieve files from Blackbaud (BB45967)
 - <http://www.blackbaud.com/kb/index?page=content&id=BB45967>
 - Attach the copy of your database on each laptop or workstation.
 - How to attach a database to the Blackbaud Management Console (BB95152)
 - <http://www.blackbaud.com/kb/index?page=content&id=BB95152>

4.5 Contacting Blackbaud for Additional Assistance

- Contacting Training Specialists
 - Email: OnsiteTraining@Blackbaud.com
 - Phone: 1.800.468.8996 option 3
- Contacting Customer Support
 - Case Central: <http://www.blackbaud.com/casecentral/casesearch.aspx>
 - Chat support: <http://www.blackbaud.com/support/needhelp.aspx>
 - Phone: 1.800.468.8996 option 1