Blackbaud

Helping You Make The World A Better Place

The Raiser's Edge for Windows
Upgrade Instructions

Before installing this update, read the *Important Notes Before Installing* section below. Please use the *Update Procedure*, which follows the *Important Notes*, to update all your **Raiser's Edge for Windows** programs. For more information about new features available in this upgrade, consult the online documentation by selecting **Help**, **Online Manual** from the menu bar after you install the program.

Important Notes Before Installing

You should:

- Have a complete backup of your **Raiser's Edge for Windows** database.

- Ensure all users of **The Raiser's Edge for Windows** are logged out of the system.

- Have a CD-ROM drive at the server or on a workstation with network access. The update process is easier if you copy the contents of the CD to a shared network drive first. You can then run the setup from each workstation without the CD. You can also access the CD from a shared CD-ROM drive.

- Exit all Windows applications on the server and the workstations where the **The Raiser's Edge for Windows** will be updated.

- 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 a disk.

- Close the Microsoft Office toolbar, if present, as it may interfere with the installation of some files.

- Use this CD to install new workstations, if necessary.

- Understand that **The Raiser's Edge for Windows** Oracle version does not currently support Windows 2000.

Update Procedure

The following procedure should be used to update **The Raiser's Edge for Windows**.

Updating a Standalone Computer

1. Insert the Blackbaud CD-ROM into your CD-ROM drive.

2. From Windows, select Run from the Start menu on the taskbar. Use Browse, if necessary, to locate SETUP.EXE on the CD-ROM.

   For SQL Anywhere upgrades, SETUP.EXE is in the \REWIN folder.

   For Oracle, SETUP.EXE is in the REWIN\CLIENT folder.

   Click **OK** after locating and selecting the appropriate SETUP.EXE.

   Note: Do not reboot your computer after *Adobe Acrobat* 5.0.5 installs. Select the reboot later option and reboot your computer after **The Raiser's Edge** is completely installed.

3. Setup locates the database for you and prompts you with additional options during the upgrade. Confirm your options and proceed with the upgrade by clicking **Next** when appropriate.

Updating the Server

Follow these instructions to update the server.

- If you have a Windows network, you must perform the server update on the server machine. If you are on a Novell network, perform the server update from a workstation machine.

- This server upgrade procedure is only for the SQL Anywhere version of *The Raiser's Edge*. You must shut down the SQL Anywhere database before performing the server upgrade.

1. Shut down your SQL Anywhere database.

Note: Shutting down the database while users are connected automatically closes the connections and may result in lost data. You are warned if there are any open connections.

2. Insert the Blackbaud CD-ROM into your CD-ROM drive.

3. From Windows, select **Run** from the **Start** menu on the taskbar. Type *D:\REWIN\SETUP.EXE* where *D* is the letter representing the location of (or complete path to) the CD-ROM drive, and click **OK**.

4. Select the Multi-User Network Version and click **Next**.

5. Select Install/Migrate Database Components on a File Server and click **Next**.

6. Select the appropriate server configuration for your network and click **Next** to update the server.

   A message appears confirming the installation completed successfully.

7. Click **OK** to exit the setup program and proceed with upgrading the workstation files.

8. Restart your SQL Anywhere database and proceed with the instructions for upgrading the workstation files.

Updating the Workstation Files

Follow these instructions to upgrade the workstations. Note that some screens and options may vary depending on your database version. With *The Raiser's Edge* version 6.42, you can configure the program to automatically install updates on your workstations. For more information, see the "Auto Installation" appendix of the *Installation Guide* or online *Administrator's Guide*.

Note: **You must run the setup program from each workstation using The Raiser's Edge for Windows system.** This process is easier if you copy the contents of the CD to a shared network drive first. Setup can then be done from each workstation without the CD. Or, you can access the CD from a shared CD-ROM drive. You may also use this update CD to install new workstations.

1. Start the database.

2. Insert the Blackbaud CD-ROM into the CD-ROM drive.

3. From Windows, select Run from the Start menu on the taskbar. Use Browse, if necessary, to locate SETUP.EXE on the CD-ROM.

   For SQL Anywhere upgrades, SETUP.EXE is in the \REWIN folder.

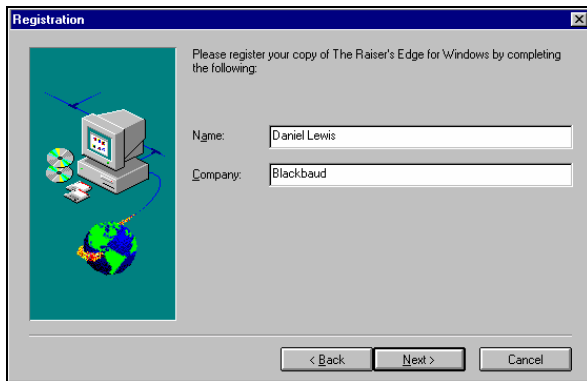   For Oracle, SETUP.EXE is in the REWIN\CLIENT folder.

   Click **OK** after locating and selecting the appropriate SETUP.EXE.

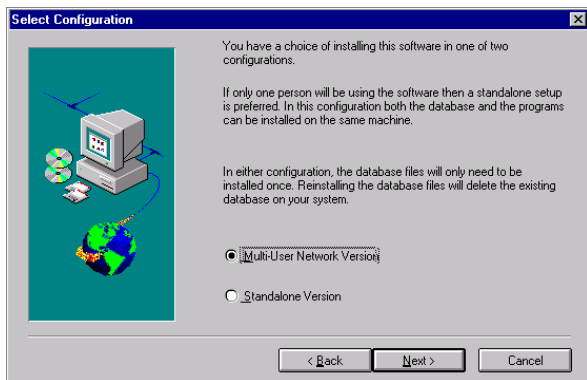   The setup program initializes and the Welcome screen appears.

   The screen warns you to exit all Windows programs before running the setup program.

4. Click **Next** to continue. The Registration screen appears.
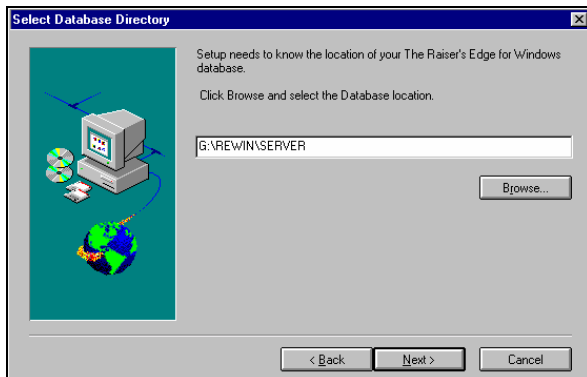

To register your copy of *The Raiser's Edge*, enter your complete name and organization name.

5. Click **Next** to continue. The Select Configuration screen appears.

Select the **Multi-User Network Version** option.

6. Click **Next** to continue. The Multi-User Setup screen appears. Select the **Install Workstation Components to this Machine** option.

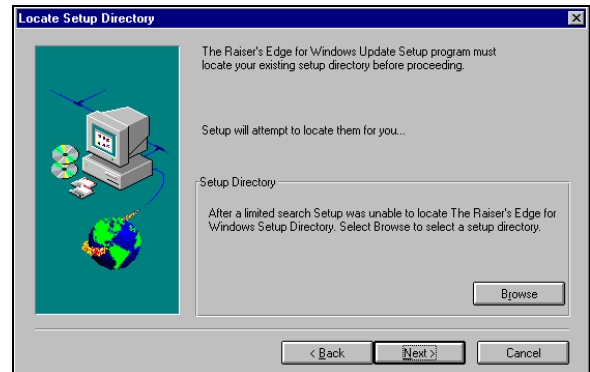7. Click **Next** to continue. For SQL Anywhere versions, the Select Database Directory screen appears.

The setup program tries to locate the correct directory. Use **Browse**, if necessary, to locate the database directory.
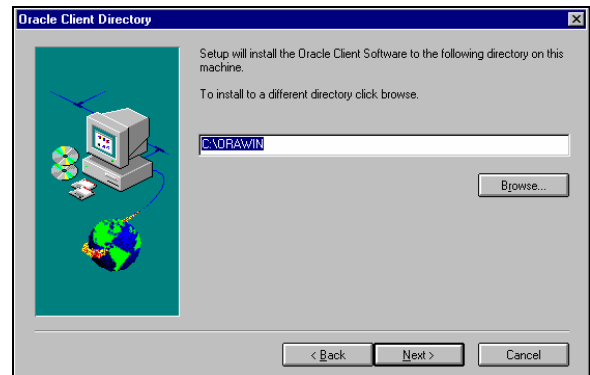
8. Proceed to step 10.

   OR

   If you are running the Oracle database version, the Locate Setup Directory Screen appears.

The setup program tries to locate the correct directory. Use **Browse**, if necessary, to locate the setup directory.
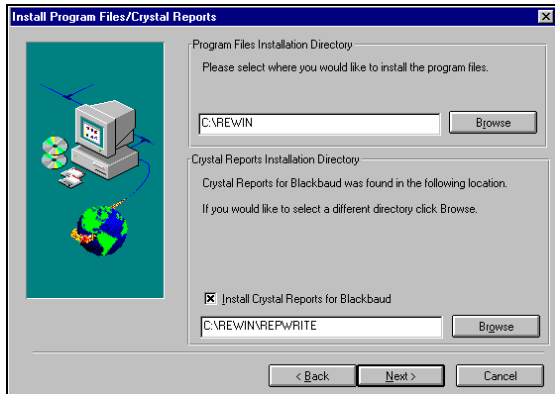
9. Click **Next** to continue. The Oracle Client Directory screen appears.

The client directories default for you. Use **Browse**, if necessary, to change the destination directory.
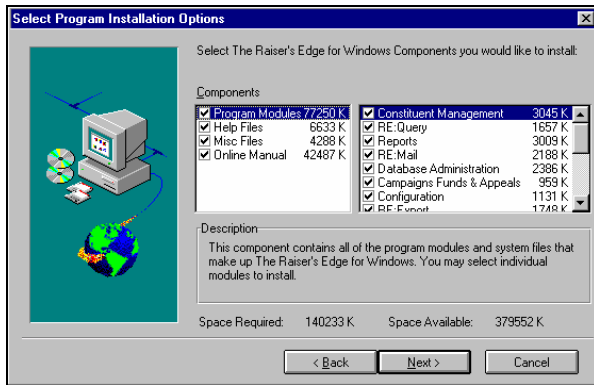
10. Click **Next** to continue.

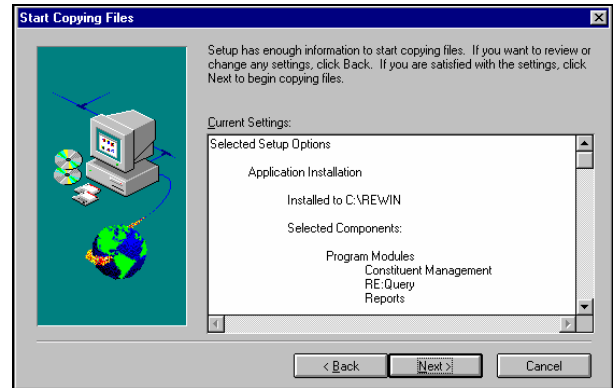The Install Program Files/Crystal Reports screen appears.

The installation and Crystal Reports directories default for you. Use **Browse**, if necessary, to change the destination directory.

11. Click **Next** to continue. The Select Program Installation Options screen appears.

12. Choose the components to install. By default, all components are selected and are installed. An estimate of the disk space required and disk space available is given. Verify that the Space Available exceeds the Space Required.

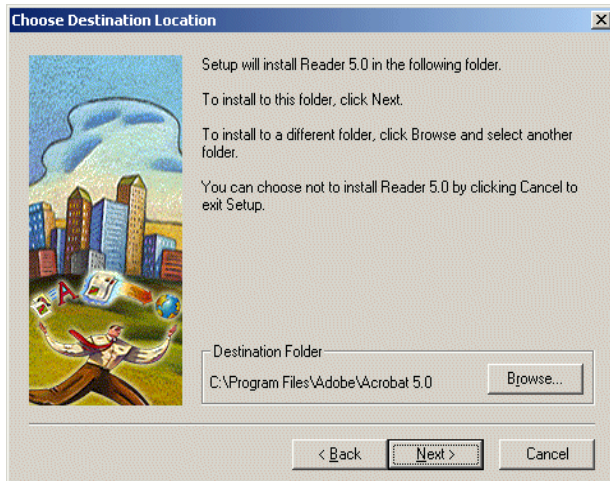13. Click **Next** to continue. The Start Copying Files screen appears.

14. Verify the current settings and click **Next** to begin copying the files to the workstation.

The setup program copies the files and updates the *Raiser's Edge for Windows* database.

At about 80% completion, the Acrobat Reader 5.0.5 Setup screen appears.

To install *Acrobat Reader*, click **Next**. The Choose Destination Location screen appears.
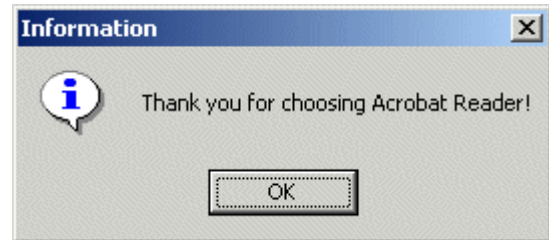

To continue with the installation, click **Next**. Depending on the workstation configuration, either the Setup Complete screen or Information screen appears.

If the Setup Complete screen appears, to return to the Blackbaud setup program, mark **No, I will restart my computer later**, and click **Finish**.

Note: Do not reboot your computer after *Adobe Acrobat* 5.0.5 installs. Select the reboot later option and reboot your computer after ***The Raiser's Edge*** is completely installed.

If the Adobe Information screen appears, to return to the Blackbaud setup program, click **OK**.

You return to the Blackbaud setup program, and the ***Raiser's Edge*** installation completes.

A message appears confirming the installation completed successfully.

15. Click **OK** to exit the setup program.

16. Upgrade all workstations with ***The Raiser's Edge*** using the same procedure.

Note: With some versions, the first user to log into any module of ***The Raiser's Edge*** receives a message indicating the database files are being updated. This process may take some time and should not be interrupted. You cannot access ***The Raiser's Edge*** until this process is complete.

Note: The automatic installation feature is now available to make updates of ***The Raiser's Edge for Windows*** even easier. This feature enables the update of workstation components to run from start to finish on its own. In addition, the program can determine whether an updated version of the software is available on the server whenever you open a module. For more information about setting up these features, see the "Auto Installation" appendix of either the *Installation Guide* or the online *Administrator's Guide*.