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T HE R AISER ' S E DGE FOR W INDOWS
I NSTALLATION G UIDE

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About this Installation Guide

This guide contains complete instructions for installing your Blackbaud software. Additional information about your Blackbaud software is available online at www.blackbaud.com, on your Installation CD, and also from the software after your successful installation. If you are installing multiple Blackbaud Systems, please refer to Appendix A of *The Raiser's Edge for Windows Administrator's Guide* in your *Online Manual* after you install ***The Raiser's Edge for Windows*** (***The Raiser's Edge***).

General Recommendations

We recommend you close any alternate desktops, anything other than Explorer or Program Manager, while installing Blackbaud Windows programs.

We strongly recommend the Windows operating system be installed locally on each workstation. This configuration allows for easier installation and better performance.

You must completely back up all workstations and servers before installing any new software.

We recommend you install the latest drivers and updates for the network and desktop operating systems used by your organization.

Pre-Installation Considerations

General Considerations

You should:

☑ Fully understand and ensure system requirements are met. Hardware requirements are subject to change and updated as necessary. We recommend visiting www.blackbaud.com for the most recent hardware requirements.

☑ Have a complete backup of the server and each workstation before installation.

☑ Have a CD-ROM drive at the server or on a workstation with network access. Files can be copied to and run from a network drive if the server does not have a CD-ROM drive.

☑ Map a drive from all workstations to the location of your database before installing the software. A mapped drive is required to install and operate this software.

☑ Exit all Windows applications on the server and workstations where *The Raiser's Edge* will be installed.

☑ Close any virus scan programs on the server and workstations. Virus detection programs can mistakenly interpret the setup/upgrade process of a program as contamination of existing files on the disk.

☑ Close any screen saver programs on the server and workstations. Screen savers can cause memory conflicts.

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

If you are migrating from an existing *Raiser's Edge* Jet, Oracle, or DOS database, or migrating from *Fund-Master*

☑ Review the *Conversion Guide* if migrating from DOS or Fund-Master.

☑ Make sure all users have exited from all *Raiser's Edge* modules.

☑ Ensure you are running *The Raiser's Edge for Windows* version 6.2 or higher.

☑ Compact all *Raiser's Edge* databases if using the Jet version.

☑ Write down your preferences. A new .INI file is created and your current preferences do not convert to the new version.

For Windows 95, Windows 98, Windows NT Server 3.51 or higher, or Windows 2000 Server Network

In addition to completing the General Checklist, you should:

☑ Be logged on as Administrator.

☑ Install the latest Service Pack for your version of Windows.

☑ Have the TCP/IP protocol stack installed correctly on both the server and all workstations running Blackbaud programs. To verify this information:

1. On the Windows NT server, Windows 2000 server, or any Windows NT 3.51 or NT 4.0 workstation, type *IPCONFIG* at a DOS prompt or from the **Run** command.

   OR

   On Windows 95 or Windows 98 workstations, type *WINIPCFG* at a DOS prompt or from the **Run** command.

2. If the TCP/IP protocol is installed correctly, you will receive a return similar to the one below.

   Token Ring Adapter ProNET1:
   IP Address………………:172.20.2.116
   Subnet Mask……………:255.255.0.0
   Default Gateway………:172.20.0.2

3. Test the TCP/IP connection between all workstations and the database server using the "Ping" utility and the IP address of the server.

☑ Reboot your server.

For Novell NetWare (Version 3.2, 4.2, or 5) Network

In addition to completing the General Checklist, you should:

☑ Have supervisor rights to the server.

☑ Install the latest Novell updates from www.novell.com.

☑ Install the Microsoft Client for NetWare or the latest Novell Intranetware Client for Windows on the Windows 95, Windows 98, Windows NT, or Windows 2000 workstations accessing *The Raiser's Edge* database on a Novell NetWare server. We recommend using Novell Intranetware Client.

☑ Install and properly configure TCP/IP or IPX/SPX on both the server and workstations that access *The Raiser's Edge*. TCP/IP is the recommended database communication protocol for all network and workstation operating systems.

☑ Not attempt to run your database in Protected mode on NetWare 5. SQL Anywhere databases are not supported in Protected mode in NetWare 5.

☑ When installing on a Novell NetWare server, you must map a drive from the workstation to the SYS volume on the server. If you are installing data to a volume other than SYS, you must map a drive to that volume.

☑ Reboot your server. We recommend temporarily disabling additional processes in the AUTOEXEC.NCF during the installation process.

Installing The Raiser's Edge for Windows

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

2. From Windows 95, Windows 98, Windows NT 4.0, or Windows 2000, select **Run** from the **Start** button on the taskbar. Type *D:\REWIN\SETUP.EXE*, where *D* represents the location of (or complete path to) the CD-ROM drive.

   OR

   From Windows 3.11 or Windows NT 3.51, select **File**, **Run** from the Program Manager. Type *D:\REWIN\SETUP.EXE*, where *D* represents the location of (or complete path to) the CD-ROM drive.

3. The Welcome screen appears with a final warning to exit all Windows programs before running the setup program. Click **Next** to continue.

4. Enter your Name and Organization name on the Registration screen. Click **Next** to continue.

5. On the Select Configuration screen, mark the **Multi-User Network Version** option if you are installing on a network. If you are installing a Standalone Version, mark this option and proceed to Step 7. Click **Next** to continue.

6. The Multi-User Setup screen appears. Mark the **Install/Migrate Database Components on File Server** option. Click **Next** to continue.

7. The Select Database to Install screen appears.
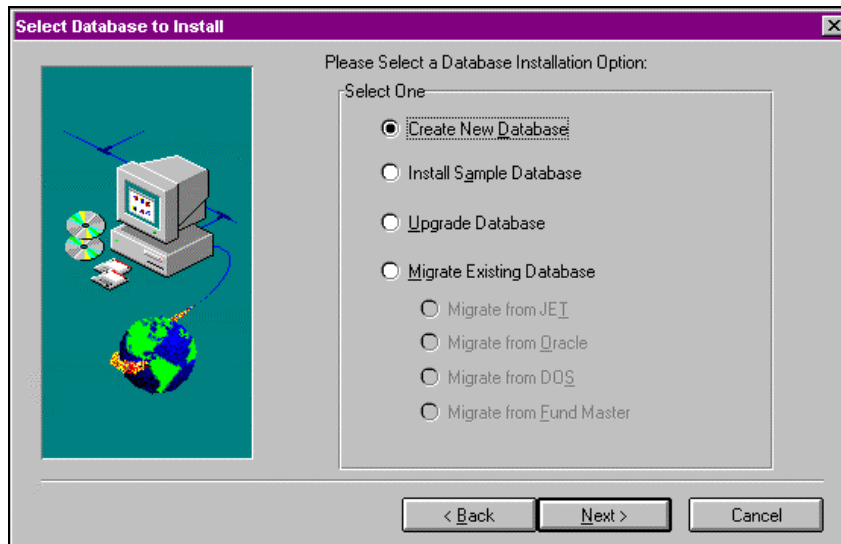
8. On this screen, you can choose to:

   - **Create New Database** – Mark this option if you would like to install a new *Raiser's Edge* database. The new database is the one you use to enter your organization's data, as it contains no records.

   - **Install Sample Database** – Mark this option if you would like to install a "practice" database. The sample database should be used for training purposes only. If you install a sample database, you must go through the installation process again and select **Create New Database** before you begin entering you own data.

- **Upgrade Database** – Mark this option to upgrade a current *Raiser's Edge* database from an earlier version to version 6.41.

- **Migrate Existing Database** – Mark this option if you are migrating from *The Raiser's Edge* Jet, Oracle, or DOS version, or if you are migrating from *Fund-Master*. When you select to migrate an existing database, your current Jet, Oracle, DOS, or *Fund-Master* database is copied into the new *Raiser's Edge* SQL Anywhere database. This is the database you use to enter your organization's data.

9. Click **Next** to continue. If you are installing a Standalone version, proceed to Step 15.

10. The Select Server screen appears. Select your network environment.

- If you mark either of the NetWare options, **NetWare 3.2** or **NetWare 4.2 or Higher**, click **Next** and go to the next step.

   OR

- If you mark the **Windows 95/98/NT/2000** option, click **Next** and go to step 15.

Note: NetWare 4.11 users should select the **NetWare 4.2 or Higher** option. However, Blackbaud tests its applications only on NetWare version 4.2 or higher.

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11. The Server Install for NetWare screen appears.
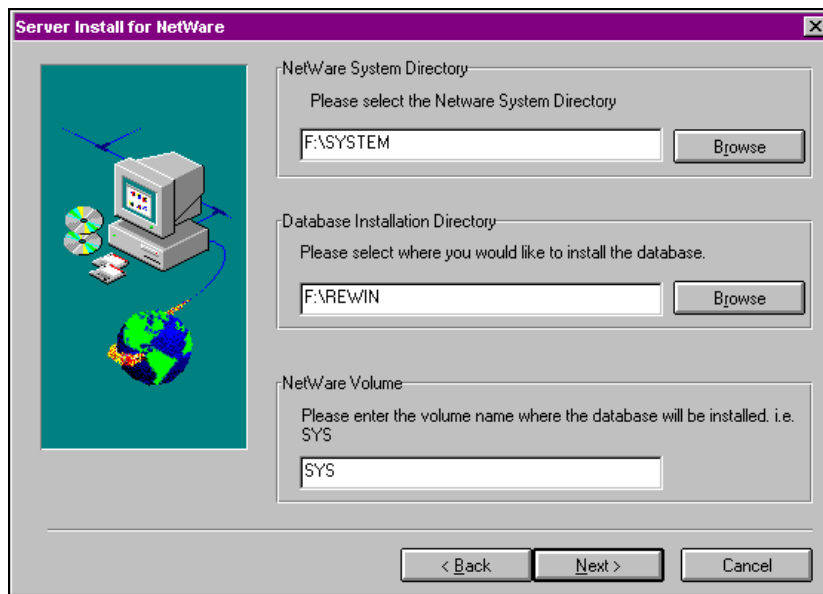
12. On the Server Install for NetWare screen:

- Specify where the Novell NetWare system directory is on your network. Use **Browse** to select the drive you mapped to the SYS volume on your NetWare server.

- Browse to the directory where you want to install the database. The default database directory is \REWIN. You can choose the volume for the directory, but we strongly recommend using \REWIN as the directory name.

- Specify the volume where the database will be installed. The default is SYS. You can choose a new volume if necessary. If you choose to install data to a volume other than SYS, enter the volume name here.

13. Click **Next** to begin copying the SQL Anywhere files.

14. During the process, the Autoexec.ncf screen appears. If you want *The Raiser's Edge* database to start automatically when the server is started, click **Yes**. This adds a command line to the AUTOEXEC.NCF file. Click **Yes**.

> *Note:* If you click **No**, the database must be manually loaded using the REWSTART.NCF file each time the server is rebooted. No workstations can access *The Raiser's Edge* until the database is started.

Proceed to step 16.

15. The Database Installation Directory screen appears. Specify the directory where the database will be installed. The default is C:\REWIN. Use **Browse**, if necessary, to specify the location. Click **Next.** If you are installing a Standalone version, skip ahead to step 9 in the "Installing Workstation Components" procedure.

16. The setup program copies the files and creates a program group for *The Raiser's Edge* database.

17. If you are migrating an existing *Raiser's Edge* or *Fund-Master* database, perform the additional steps described in the "Migrating an Existing Database" section of this guide.

18. A message appears confirming the installation completed successfully. Click **OK** to exit the setup program.

19. Reboot the server.

20. Start the SQL Anywhere database. For more information on starting the database, see the "Starting Up and Shutting Down the Database" section of this guide.

21. Complete the Installing Workstation Components procedure on all workstations that access *The Raiser's Edge*.

➢ **Installing workstation components**

> *Note:* The workstation must have a drive permanently mapped to the database location on the server. For consistency, we recommend you map each workstation to the server using the same drive letter.

1. Make sure the SQL Anywhere Database engine is started on the server.

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

3. From Windows 95, Windows 98, Windows NT 4.0, or Windows 2000, select **Run** from the **Start** button on the taskbar. Type `D:\REWIN\SETUP.EXE`, where *D* represents the location of (or complete path to) the CD-ROM drive.

   OR

   From Windows 3.11 or Windows NT 3.51, select **File**, **Run** from the Program Manager. Type `D:\REWIN\SETUP.EXE`, where *D* represents the location of (or complete path to) the CD-ROM drive.

4. The Welcome screen appears giving you a final warning to exit all Windows programs before running the setup program. Click **Next** to continue.

5. The Registration screen appears. Enter your complete name and organization name to register your copy of *The Raiser's Edge.* Click **Next** to continue.

6. The Select Configuration screen appears. Mark the **Multi-User Network Version** option. Click **Next** to continue.

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

8. The Select Database Directory screen appears. Specify where *The Raiser's Edge* database is on your network. If necessary, you can use **Browse** to find the drive that is mapped to the database location on the server. Click **Next** to continue.

9. The Install Program Files/Crystal Reports screen appears. These components are installed on the workstation. The installation and Crystal Reports directories default for you. Use **Browse**, if necessary, to select a new location. Click **Next** to continue.

10. The Select Program Installation Options screen appears.
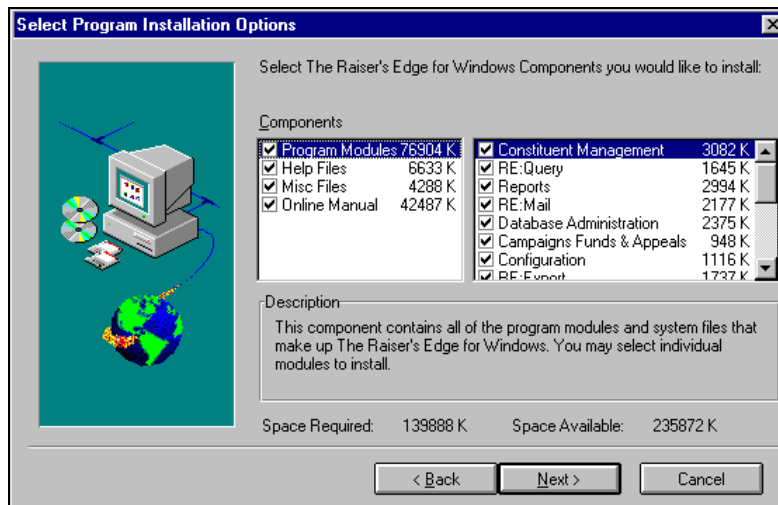
11. Select the components to be installed. By default, all components are selected and installed. An estimate of the disk **Space Required** and disk **Space Available** is given. Verify the **Space Available** exceeds the **Space Required**. Click **Next** to continue.

> *Note:* We strongly recommend you install the Help Files and Online Manual so you have access to all *Raiser's Edge* documentation.

12. The Start Copying Files screen appears. Verify the current settings and click **Next**.

13. 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.

14. 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.

15. A message appears confirming the installation completed successfully. Click **OK** to exit the setup program.

16. Reboot the workstation.

Migrating an Existing Database

If you selected the **Migrate Existing Database** option during installation, the Blackbaud Database Setup Wizard starts after server files are installed. To migrate a *Fund-Master* or **Raiser's Edge** DOS database, follow the conversion procedure in your online *The Raiser's Edge Conversion Guide*.

> *Note:* Remember, if you are accessing your database from a network, after you migrate the database, you must install workstation components on each workstation that uses the database. A standalone installation installs database and workstation components together on one machine only.

➢ **Running the Blackbaud Database Setup Wizard**

1. The Welcome screen appears. Click **Next** to continue.

FOR A JET DATABASE MIGRATION

2. The Locate Existing Database screen appears. The setup program attempts to locate the ***The Raiser's Edge for Windows*** Jet database directory. If the setup program is unable to locate the database directory, use **Browse** to specify the correct path. Click **Next** to continue and proceed to step 3.

FOR AN ORACLE DATABASE MIGRATION

> *Note:* The Oracle Database must be running and you must have
> SQL*NET connectivity to your Oracle Database from this
> computer before you begin the migration.

2a. The Migration program needs to attach to your existing Oracle Database tables. Click **Next** to continue.

2b. Select the name of *The Raiser's Edge for Windows* Oracle Database to migrate. Click **OK** to continue. You see the progress of attaching to the database.

> *Note:* This process may take some time and should not be interrupted.

2c. Click **Next** to continue.

3. The Analyzing Database screen appears. Click **Next** and the setup program analyzes your existing database.

4. After the database analysis is complete, the Migrate Data screen appears. Click **Next** to begin the database migration process.

5. A status screen displays during the migration giving you information on the migration process. Please note this process may take some time and should not be interrupted. Once the migration process is finished, click **Finish** to exit the setup program.

6. Reboot the server or workstation.

7. Start your *Raiser's Edge* SQL Anywhere database. For more information on starting the database, see the "Starting Up and Shutting Down the Database" section of this guide.

8. If you are installing the network version of *The Raiser's Edge*, start your *Raiser's Edge* SQL Anywhere database and complete the Installing Workstation Components procedure on all workstations that access *The Raiser's Edge*.

> *Note:* *The Raiser's Edge* SQL Anywhere database must be running
> before you install workstation components.

Post-Installation Checklist

> *Note:* Once ***The Raiser's Edge for Windows*** has been installed, the default password for Supervisor is set to "Admin". For security reasons, make sure you change the password.

☑ Set your database cache at the server. For more information, see the "Setting Database Startup Parameters" section of this guide.

☑ On Novell NetWare, when the database is started, it may auto-detect the need for updated files from Novell. Take note of any such messages and install the necessary updates. For more information, see the pre-installation recommendations for Novell NetWare.

☑ After you install ***The Raiser's Edge***, make sure you access the software on each server and workstation.

☑ Understand the process of starting up and shutting down the database. For more information, see the "Starting Up and Shutting Down the Database" section of this guide.

☑ Implement a reliable backup procedure for database files. For more information, see the "Backing up the SQL Anywhere Database" section of this guide.

Database Service Manager

Available for Windows NT and Windows 2000 servers only, the Blackbaud Database Service Manager (hereafter referred to as Service Manager) is a utility you can use to start your SQL Anywhere databases as a service. You can also use the Service Manager to edit the startup parameters (configure the database command line) for your SQL Anywhere databases.

Why use the Service Manager? The Service Manager runs your SQL Anywhere databases as a service, instead of as an application. A service runs independently of any user account. A user does not have to be logged on to run the service, which means the computer does not pose a security risk. You can also set your SQL Anywhere databases to automatically start and stop. Finally, the Service Manager is an easy way to change settings in the database command line and to configure multiple databases.

Installing the Service Manager

➢ **Installing the Service Manager for Windows NT or Windows 2000**

You must be at the server logged on as Administrator. Close all other applications.

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

2. From Windows NT 4.0 or Windows 2000, click **Run** from the **Start** button on the taskbar. Type *D:\BBSERVICE20\SETUP.EXE*, where *D* represents the location of (or complete path to) the CD-ROM drive.

    OR

    From Windows NT 3.51, select **File**, **Run** from the Program Manager. Type *D:\BBSERVICE20\SETUP.EXE*, where *D* represents the location of (or complete path to) the CD-ROM drive.

3. A Welcome screen appears. Click **Next** to continue.

4. The Select Directory screen appears. Select the directory where the Service Manager files will be installed. The default directory is C:\BLACKBAUD. Use **Browse**, if necessary, to select a new location. Click **Next** to continue.

5. After the setup program copies the files and creates the Service Manager program group, the Setup complete screen appears. Click **Finish**.

    Note: If the Setup Incomplete screen appears, reboot the computer.

6. To start the database, click the **Start** button on the taskbar and select **Programs**, **Blackbaud Service Manager v2**.

Configuring the Service Manager

This section shows you how to quickly set up the Service Manager so you can start managing your Blackbaud SQL Anywhere databases. The next section, "Understanding the Service Manager," explains each tab in detail so you can configure the Service Manager to meet your specific needs.

➢ **Configuring the Blackbaud Database Service Manager**

1. From the **Start** button on the taskbar, select **Programs**, **Blackbaud Service Manager v2** and click the shortcut.

2. Select the Databases tab. On this tab, you specify the name and location of all Blackbaud SQL Anywhere databases you want to manage using the Service Manager. The database must be on this server.
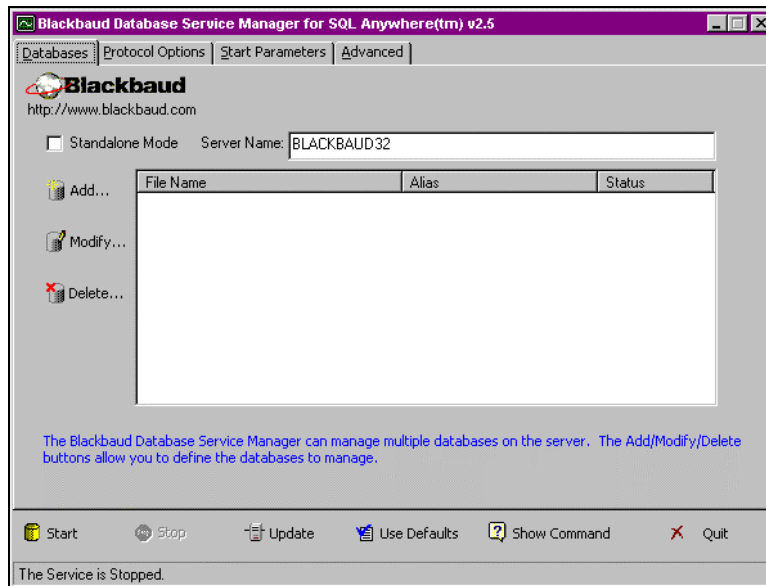
3. In the **Server Name** field, enter the name of your SQL Anywhere Database engine. The default is BLACKBAUD32, but you should change this to the name of your SQL Anywhere server/engine name. For example, if you are running *The Raiser's Edge* and no other Blackbaud products on the server, you should enter REWIN_BLACKBAUD instead.

4. Add the database files to the Service Manager. If you are adding a new database file to the Service Manager, click **Add**. If you are using an existing database file in the Service Manager, click **Modify**.

   • After you click **Add** or **Modify**, a screen appears. In the **Database File Name** field, browse to the database file. You can recognize *The Raiser's Edge* database file from the RE.DB name.

   • If you are adding multiple database files, you need to add an alias (a unique name) for each database. For example, if you are adding two *Raiser's Edge* databases, you can name the first database DATABASE1 and the second database DATABASE2. See Appendix B in the *Online Raiser's Edge Administrator's Guide* for information on configuring multiple *Raiser's Edge* databases.

> *Note:* You can delete a database from the service by highlighting the
> database file and clicking **Delete**.

5. Select the Protocol Options tab. On this tab, you specify the protocol the
    Service Manager uses to communicate with your SQL Anywhere
    databases. Selected protocols include TCP/IP, NetBios, and IPX.
    TCP/IP is the recommended database communication protocol for
    Windows servers.
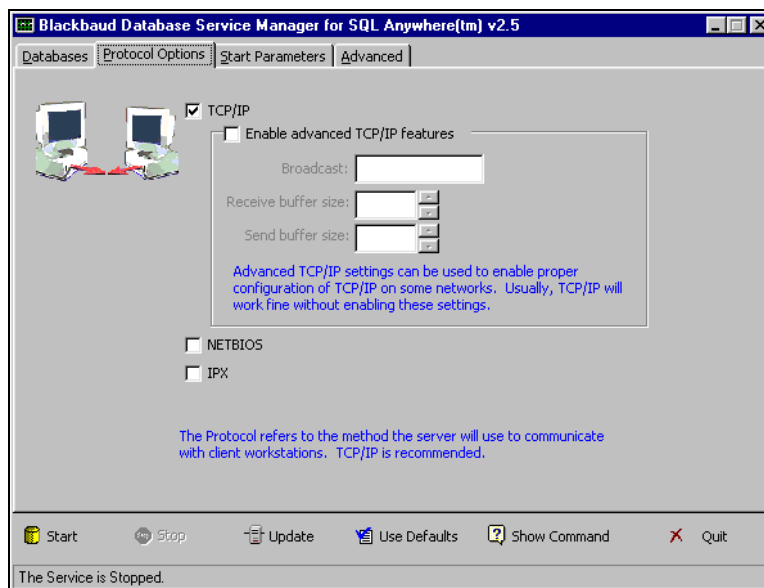
6. Select the protocol by marking the **TCP/IP**, **NETBIOS**, and/or
    IPX/SPX checkboxes. You can specify more than one protocol, but it is
    better to select fewer protocols.

7. Click **Update** to save your changes.

8. To run the Service Manager as a service, click **Start**. For more
    information on running the databases as a service, see the
    "Understanding the Service Manager" section of this guide.

9. Click **Quit** to exit Service Manager.

Understanding the Service Manager

This section explains the Service Manager's general controls and then takes you through each tab of the Service Manager. You should first complete the Configuring the Blackbaud Database Service Manager procedure.

General Controls

The general controls are available from any tab in the Service Manager. These controls allow you to start, stop, and update the service according to the information you specify on the various tabs.

Once you configure the Service Manager to meet your needs, click **Start** to start the service. A message appears confirming the successful startup.

- Click **Stop** to stop the service and all databases controlled by the service.

- Click **Update** after you make changes to any tabs in the Service Manager. This control updates the command line used when starting your service. The changes take effect the next time the service is started.

- Click **Use Defaults** to remove the options you selected on the tabs and return the Service Manager to the original default selections.

- Click **Show Command** to review the options you have already set. When you click **Show Command**, the database command line appears.

- Click **Quit** to exit the Service Manager.

Databases Tab

You use the Databases tab to specify the name and location of all SQL Anywhere databases you want to manage using the Service Manager.

- In the **Server Name** field, enter the name of your SQL Anywhere server/engine. For *The Raiser's Edge*, the default server/engine name is REWIN_BLACKBAUD.

- Click **Add** to add a database to the service. After you click **Add**, a screen appears. In the **Database File Name** field, browse to the database file. If you are adding multiple database files, you need to add an alias (a unique name) for each database.

- Click **Modify** to change the name, location, or alias of a database already listed in the service.

- Click **Delete** to remove a database from the service.

- On the Add/Modify Database screen, you can mark the **Disable this database** checkbox to prevent the data file from starting when SQL Anywhere is started. This is a useful option if you configure multiple databases and you need to recover a database using the **-f** switch. When you use this switch, only one database can be started, so all other databases *must* be disabled.

Protocol Options Tab

You use the Protocol Options tab to select the protocol(s) you want the SQL Anywhere components to use. Supported protocols include TCP/IP, IPX/SPX, and NetBios. You can specify more than one protocol. TCP/IP is the preferred protocol for all network operating systems.

- If you mark the **TCP/IP** checkbox, you can **Enable advanced TCP/IP features**. You can use these options to manually configure TCP/IP for your SQL Anywhere database components.

Note: Advanced TCP/IP settings are not normally necessary for successful implementation of TCP/IP on a network.

Broadcast: Specifies the IP address used by your SQL Anywhere server.

Receive buffer size and *Send buffer size*: Allocates memory in the protocol stack for receiving TCP/IP packets going to the SQL Anywhere client or server.

Start Parameters Tab

You use the Start Parameters tab to specify startup settings.

- To start the database automatically each time your Windows NT or Windows 2000 server boots up, mark the **AutoStart database when NT server starts** checkbox. We recommend this option for standalone systems and for network systems where the server is regularly restarted.

- Set the size of your database cache by sliding the cache indicator to the appropriate amount. We recommend setting the cache to 20% of the total size of all your Blackbaud SQL Anywhere databases. For example, if your *Raiser's Edge* database is 100 MB, set the cache to 20 MB (20% of 100 MB is 20 MB).

> *Note:* Do not set your database cache higher than 75% of available memory because it may adversely affect the performance of your Windows NT or Windows 2000 server.

Advanced Tab

You use the Advanced tab to tune your SQL Anywhere databases. We *strongly* recommend you contact Customer Support before changing the defaults on this tab. The **Additional Switches** field is usually the only field you need to use on this tab.

- Mark the **Disable engine/server dual threading** checkbox if you want to force the database to never use more than one processor of a multi-processor machine.

- Mark the **Truncate the transaction log after checkpoint** checkbox if you want to delete the transaction log either at shutdown or as a result of a checkpoint scheduled by the server. This provides a way to limit the growth of the transaction log.

> *Note:* When you select the **Truncate the transaction log after checkpoint** option, you have no protection against media failure on the device containing the database files.

- Mark the **Disable asynchronous I/O** checkbox if you want to force the program to use synchronous I/O instead of asynchronous I/O. Asynchronous I/O is the preferred option.

- Mark the **Display debugging information** checkbox if you want to display additional connectivity information during startup of the database and workstation components. This information is useful for troubleshooting problems in these areas.

- Mark the **Use buffered disk I/O** checkbox if you want to enable the operating system disk cache in addition to the database cache.

  While the operating system disk cache may improve performance in some cases, better performance is generally obtained without this option (in other words, by using the database cache only).

- Mark the **Hide message window** checkbox if you want to hide the server screen display for standalone installations.

- Set the **Database process priority class** to the appropriate level.

  Level must be **Idle**, **Normal**, **High**, or **Maximum**. The priority process class determines the order of processes completed on your computer. Setting the process priority class to maximum may interfere with the server's other processes.

- Mark the **Log message window to file** checkbox if you want to print all server message output to a file in addition to displaying on screen.

- Mark the **Override network packet size** checkbox if you want to set the maximum size of communication packets. The default size is 512 bytes. The minimum size is 200 bytes.

  Note: If this option is used, the **-p** switch must also be placed in the ODBC.INI file on each installed workstation. Failure to set the corresponding packet size on all client machines may result in software communication problems.

- Mark the **Override default timeout settings** checkbox if you want to specify how long a field remains active before the computer automatically shuts down a communication connection.

  Client idle time before shutdown: Disconnects connections that have not submitted a request for the number of minutes specified. The default is 240 minutes (4 hours).

Client liveliness timeout: For TCP/IP or IPX communication protocols, a liveliness packet is sent periodically to confirm that a connection is still intact. If the server runs for the liveliness timeout specified without detecting a liveliness packet, the communication is disconnected.

Active request termination: An active request and connection is terminated if the server does not receive a retransmit within the specified number of seconds.

Setting Database Startup Parameters

You can influence the performance of your SQL Anywhere database by setting a memory cache allocation parameter for starting the database. This parameter is set on the database command line. Cache allocation determines the amount of RAM the SQL Anywhere database can use for processing. The cache defaults to 8 MB of RAM when you install **The Raiser's Edge for Windows** SQL Anywhere database.

We recommend you adjust the cache to approximately 20% of the total size of the SQL Anywhere database. For example, if your SQL Anywhere database (the RE.DB file) amounts to 100 MB of data stored on the hard drive, you should set the cache parameter to 20 MB. If you are running multiple Blackbaud databases, you should set the database cache to 20% of the size of the sum of all databases. The 20% rule allows the SQL Anywhere database to achieve optimum performance.

To set the memory cache allocation for your SQL Anywhere database, you must edit the **-c** parameter in the database command line.

SQL Anywhere database icon

If you use an icon to start your SQL Anywhere database (in other words, you are running SQL Anywhere as an application), you must edit the properties of the database icon. This icon is found in **The Raiser's Edge** database program group on the machine installed with **The Raiser's Edge** server components.

If you are running SQL Anywhere as a service on a Windows NT or Windows 2000 server, you make the cache adjustment on the Start Parameters tab of the Blackbaud Database Service Manager. For more information on the Service Manager, see the "Understanding the Service Manager" section of this guide.

If your SQL Anywhere database is on a NetWare server, the edits are made in the REWSTART.NCF file. Follow the instructions in this section for the network operating in your environment. For changes to take affect, the database must first be stopped and restarted.

Windows NT 4.0 and Windows 2000

➢ **Setting the memory cache allocation of the SQL Anywhere database installed as an application**

1. Right click the **Start** button on the taskbar.

2. Select **Open All Users**. The Start Menu screen appears.

3. Double click the Programs folder.

4. Double click *The Raiser's Edge for Windows* Database folder.

5. Right click the icon and select **Properties**.

6. Select the Shortcut tab.

7. Edit the Target line and find the parameter **-c8MB.**

8. Change the 8 to the appropriate number, based on the 20% rule described on the previous page. 8 MB is the default cache size.

9. Click **Apply**.

10. Click **OK**. The new cache setting takes effect the next time the database is started.

➢ **Setting the memory cache allocation of the SQL Anywhere database installed as a service**

1. Select **Programs**, **Blackbaud Service Manager v2** from the **Start** button on the taskbar. The Service Manager appears.

2. On the Start Parameters tab, make the appropriate adjustment to the cache by sliding the cache indicator to at least 20% of the total size of the SQL Anywhere database. See the beginning of this section for cache information.

3. Click **Update**. The new cache setting takes effect the next time the database is started.

Windows 95 or Windows 98

➢ **Setting the memory cache allocation of the SQL Anywhere database**

1. Right click the **Start** button on the taskbar.

2. Select **Open**.

3. Double click the Programs folder.

4. Double click The Raiser's Edge for Windows Database folder.

5. Right click the icon and select **Properties**.

6. Select the Program tab.

7. Edit the Target line and find the parameter **-c8MB.**

8. Change the 8 to the appropriate number, based on the 20% rule described at the beginning of this section.

9. Click **Apply**.

10. Click **OK**. The new cache setting takes effect the next time the database is started.

Windows NT 3.51

➢ **Setting the memory cache allocation of the SQL Anywhere database**

1. In Program Manager, maximize *The Raiser's Edge for Windows* database program group.

2. Highlight the icon and select **File**, **Properties** from the menu bar.

3. Edit the Command line and find the parameter **-c8MB.**

4. Change the 8 to the appropriate number, based on the 20% rule described at the beginning of this section.

5. Click **OK**. The new cache setting takes effect the next time the database is started.

Novell NetWare

➢ **Setting the memory cache allocation of the SQL Anywhere database from a Windows workstation:**

> *Note:* You will need to map a drive to the Novell NetWare SYS volume where you installed the SQL Anywhere database.

1. Right click **Start** on the taskbar and select **Explore**. Windows Explorer appears.

2. Locate the drive mapped to the SYS volume of the Novell NetWare server.

3. Open the System folder.

4. Double click the REWSTART.NCF file. This opens the file in Wordpad or Notepad.

5. Find the **-c8MB** parameter.

6. Change the 8 to the appropriate number, based on the 20% rule described at the beginning of this section.

7. Save the file and exit. The new cache setting takes effect the next time the database is started.

➢ **Setting the memory cache allocation of the SQL Anywhere database from the Novell NetWare server:**

> *Note:*   You will need to map a drive to the Novell NetWare SYS volume where you installed the SQL Anywhere database.

1. At the NetWare system server prompt, type
   `LOAD EDIT SYS:\SYSTEM\REWSTART.NCF`

2. Edit the Database Command line and find the parameter **-c8MB**.

3. Change the 8 to the appropriate number, based on the 20% rule described at the beginning of the "Setting Database Startup Parameters" section.

4. Save the changes by pressing **ESCAPE**, highlighting **Yes**, and pressing **ENTER**. The next time you start your database by typing `REWSTART` at the NetWare system console prompt, SQL Anywhere will use the figure you entered for the memory cache allocation.

Starting Up and Shutting Down the Database

The SQL Anywhere database must be started before any workstation can access the information within the database. The database is implemented on Novell as a Novell NetWare Loadable Module and on Windows NT and Windows 2000 as a compiled executable file.

Manual Startup and Shutdown

Novell NetWare

➢ **Starting the SQL Anywhere database**

1. Type the command `REWSTART` at the system console prompt.

2. The database starts.

➢ **Shutting down the SQL Anywhere database**

1. Press ALT + F.

2. Press the down arrow and choose Exit

3. The database shuts down.

Blackbaud does not recommend unloading the DBSRV50.NLM to shut the database down on a Novell NetWare Server.

Windows 95, Windows 98, Windows NT, or Windows 2000

For information on starting and stopping the database as a service, see the "Understanding the Service Manager" section of this guide.

➢ **Starting the database as an application**

1. Double click the ![icon] icon/shortcut in *The Raiser's Edge* database program group. This icon, automatically created on the file server machine during the database setup, references the *\\%windows%\system\DBSRV50.EXE* program file.

2. The database starts.

➢ **Stopping the database**

1. Select **File**, **Exit** on the SQL Anywhere database engine monitor.

2. The database shuts down.

Automatic Startup and Shutdown

To properly back up the SQL Anywhere database, the database MUST BE SHUT DOWN while the backup executes. SQL Anywhere includes a switch option (the **-tq** switch) to specify a quit time for the database.

Novell NetWare

If you did not do so during the setup program, you can place the REWSTART command in the AUTOEXEC.NCF on your file server if you would like to start *The Raiser's Edge* database each time the file server is started. You can then add a -tq switch to the REWSTART.NCF file you created to automatically shut down the database.

➢ **Setting up an automatic database startup**

1. To automatically start the SQL Anywhere database, we recommend a third-party utility to automatically run REWSTART.NCF at a specific time. One such utility is CRON.NLM. You can download this utility free from Novell's web site, or you can log onto Blackbaud's web site at www.blackbaud.com. Go to Customer Support then choose the Grab Bag option, Other Web Links, Downloads, and Novell's CRON.NLM.

2. At the Novell site, you can download a file called CRON5.EXE. Double click this self-extracting zip file to access CRON.NLM and CRON5.TXT, which gives you complete instructions for installing and using CRON.NLM.

Note: While the CRON utility provides a solution for starting a SQL Anywhere database after a timed backup, we do not endorse the CRON utility. We are not a vendor of the CRON utility; therefore, we do not support the download, installation, setup, configuration, or troubleshooting issues that may result from CRON5.EXE or similar files. Contact the CRON vendor with any problems or questions regarding this utility.

➢ **Setting up an automatic database shutdown**

When you installed *The Raiser's Edge* on your Novell NetWare server, a REWSTART.NCF file was added to your SYS:\System directory. This file contains the SQL Anywhere database command line that has the parameters needed to start your database. A typical database command line found in the REWSTART.NCF file looks like this:

```
Load DBSRV50 -nREWIN_BLACKBAUD SYS:\rewin\re.db -c8mb -tl0 -ti0
-ta0 -tr0
```

To shutdown the database automatically, you must add a **-tq** switch and a time.

```
Load DBSRV50 -nREWIN_BLACKBAUD  SYS:\rewin\re.db -c8mb -tl0
-ti0 -ta0 -tr0 -tq19:00
```

In this example, the `-tq19:00` will shut down the database at 7:00 p.m. (24-hour clock) on any day the database is running.

To add the **-tq** switch, you can:

1. Edit the REWSTART.NCF file from Windows Explorer at a workstation (you will need to map a drive to the Sys:\System directory on your Novell server).

OR

Use Edit at the NetWare server as follows:

1. At the NetWare system console prompt, type
   ```
   LOAD EDIT SYS:\SYSTEM\REWSTART.NCF
   ```

2. Go to the end of the database command line and add a space, **-tq**, and the time (24-hour clock) to shut down the database each night.

3. Press **ESCAPE** to save the changes, highlight **Yes**, and press **ENTER**.

Windows NT or Windows 2000

After you install the Service Manager on your Windows NT or Windows 2000 server and set up the SQL Anywhere database to run as a service, you can configure your SQL Anywhere database engine to start and stop automatically by using Windows NT scheduling tools.

➢ **Creating a "start" batch file**

1. Open Notepad.

2. Type the following:
   ```
   Net Start "Blackbaud Database Service for SQL Anywhere"
   ```

Note: This line is case sensitive and MUST appear exactly as above for this process to work.

---

3. Save the file as C:\SQLSTART.BAT.

➢ **Creating a "stop" batch file**

1. Open Notepad.

2. Type the following.

    ```
    Net Stop "Blackbaud Database Service for SQL Anywhere"
    ```

Note: This line is case sensitive and MUST appear exactly as above for this process to work.

---

3. Save the file as C:\SQLSTOP.BAT.

➢ **Setting the Windows NT or Windows 2000 Schedule Service to run automatically**

1. Go to **Control Panel**, **Services**.

2. Set the Schedule Service to run automatically. Make sure the service is started before continuing.

➢ **Setting the Windows NT or Windows 2000 Schedule Service to run the "start" batch file**

1. At the command prompt, type the following.

    ```
    AT 6:30 /INTERACTIVE /EVERY:M,T,W,TH,F,S,SU C:\SQLSTART.BAT
    ```

    where 6:30 equals the time (24-hour clock) when you want the database to start. Include the days of the week that apply.

2. When the command is accepted and the Schedule Service is set to run, you should see the message:

    ```
    "Added a new job with ID #"
    ```

    The service will now be started automatically by the Windows NT Schedule Service.

➢ **Setting the Windows NT or Windows 2000 Schedule Service to run the "stop" batch file**

1. At the command prompt, type the following.

    ```
    AT 22:30 /INTERACTIVE /EVERY:M,T,W,TH,F,S,SU C:\SQLSTOP.BAT
    ```

    where 22:30 equals the time (24-hour clock) when you want the database to stop. Include the days of the week that apply.

2. When the command is accepted and the Schedule Service is set to run, you should see the message:

```
"Added a new job with ID #"
```

The service will now be stopped automatically by the Windows NT Schedule Service.

➢ **Checking the Windows NT or Windows 2000 Schedule Service for accuracy**

1. At the command prompt, type the following.

```
AT
```

2. If the process is set correctly, you should see a message similar to the following.

```
Status  ID        Day            Time        Command Line
   0     Each M T W Th F S Su  6:30 AM    c:\sqlstart.bat
   1     Each M T W Th F S Su  10:30 PM   c:\sqlstop.bat
```

Note: To delete a scheduled item from the Windows NT Schedule Service, after the items have been listed, type:

```
AT # /d
```

where # is the ID number of the scheduled item.

You should delete a scheduled item only when errors were made during setup, or when you need to modify scheduled times or days.

Backing Up the SQL Anywhere Database

Backing up your Blackbaud data is an important part of your daily routine. Frequent backups are your best protection against data loss. We strongly recommend the purchase and scheduled use of a tape or archival backup solution. Back up nightly and prior to any global change or import.

Before backing up your Blackbaud SQL Anywhere database, you MUST successfully shut down the database. Shutting down the database closes all open tables and files, enabling the backup procedure to archive your data correctly.

Blackbaud does not recommend or condone the use of open-file backup ("hot backup") solutions. We have had many unfortunate experiences with clients whose backup software claimed to be able to successfully archive database files while they were in use, only to find in their moment of need that the hot backups had failed. Blackbaud urges you to shut down the SQL Anywhere database before attempting to back up your data, and to frequently test your backups.

The database can be shut down manually or automatically. For information on shutting down the database see the "Starting Up and Shutting Down the Database" section of this guide.

A backup is a copy or duplication of the files found on the hard disk onto another media such as a tape, CD, or Zip/Jaz disk. It is a replica of your data, which can be stored and protected for later use. We can send you a replacement copy of the program, but your data is irreplaceable. We recommend that you not span your data across a series of floppy disks. Floppy disks hold a tiny amount of data and are unreliable.

We suggest that you make three sets of daily backups and three sets of weekly backups for all logical drives. Keep one set of backup tapes off-site, preferably in a fireproof safe. This ensures the survival of your data should anything happen to your office. Do not make a backup on top of data you backed up the night before; rotate your backup media.

It is critically important that you test your backup to insure that your backup system is operating properly.

➢ **Testing your backup**

1. Shut down your SQL Anywhere database engine.

2. Rename the RE.DB and RE.LOG files that are in the REWIN directory on your server.

3. Copy your backup RE.DB into the REWIN directory on your server.

4. Start the SQL Anywhere database engine and access *The Raiser's Edge*.

Common Questions & Troubleshooting Tips

Problem: I have completed my installation successfully. I tried to open a module and it is asking for a password for the username *Supervisor*. What is the password?

Solution: The password is *Admin*.

Problem: I have a multi-user system, but I can only log into the system on one machine at a time. What can I do to fix this?

Solution: This problem occurs if you are trying to log in multiple times using the username of *Supervisor*. You can log into the system as one user on only one machine at a time. You should create new users with their own passwords in the *Configuration* module.

Problem: My workstation installation stops at 65%. Why?

Solution: The SQL Anywhere database engine on the server is not started. Refer to the Starting Up and Shutting Down the Database section of this chapter for information.

Problem: Now that I have **The Raiser's Edge** installed and running, are there any special steps that need to be taken to perform a data backup?

Solution: Yes. To perform a data backup on your SQL Anywhere database, the database must be shut down. Refer to the corresponding section in this guide for more information.

Problem: I purchased the optional module *RE:Tribute*, but when I am in *Constituent Management*, the Hon/Mem tab is disabled. How do I activate it?

Solution: On the Bio 1 tab, you can mark a checkbox to indicate a constituent is an Honor/Memorial. Once you select this checkbox, the tab will be available and Honor/Memorial information can be entered. See your online *RE:Tribute* manual for more information about this optional module.

Problem: My data was migrated to the SQL Anywhere version successfully. What do I need to do with my Jet data?

Solution: If you do not need to access the Jet data, you can remove RE.MDB, COMMON.MDB, REMEDIA.MDB, and REQUERY.MDB. We highly recommend a backup be done for your archives. The \REWIN shared directory on the server must not be deleted. Files in this directory are needed by the program.

Problem: Can I start the database as a service on my Windows NT or Windows 2000 network?

Solution: Yes. Refer to the sections in this guide on installing and using the Blackbaud Database Service Manager for Windows NT or Windows 2000.

Problem: When trying to start the database on my Novell NetWare file server, I am getting the message "*A known NetWare bug has been detected. A work-around for this will be used: however, extending database and log files will be slower. Please obtain a new NLM to correct the problem.*"

Solution: Refer to the Pre-Installation Considerations for Novell NetWare section of this guide for more information.

Problem: Starting the database on a Novell NetWare 3.2 or 4.x server results in the error "*SYS\path\DBSRV50 not found*".

Solution: The server to which you installed the Blackbaud program(s) has a 16-bit operating system and does not support long file names; the database has been installed to a directory with a name longer than eight characters. Delete the server installation and re-install to a directory with a name that is not more the eight characters long. Or you can contact Novell for the appropriate NLM updates that allow support of long file names.

Problem: I have implemented all my hardware and software according to the guidelines you provided, but still find ***Raiser's Edge for Windows*** runs slowly.

Solution: Reset your memory cache allocation for the SQL Anywhere database to help it use more memory while processing. The cache defaults to 8 MB when you install ***The Raiser's Edge*** SQL Anywhere database. We recommend you adjust the cache to at

least 20% of the total size of the SQL Anywhere database. To do this, edit the properties of the database icon and change the parameters from -c8M to the number based on the 20% rule. For more information on this rule, see the "Setting Database Startup Parameters" section of this guide.

A P P E N D I X   A

The Raiser's Edge for Windows Auto Installation

About Auto Installation

This appendix contains information for automatically updating the installation of your *Raiser's Edge* software. When you follow these procedures, your users need only click **Setup** and the update installation can run from start to finish with no additional input. In addition, the software can be configured to notify users that an updated version of the program is available on your network.

Whenever you update your *Raiser's Edge* software, follow the general recommendations listed in the beginning of this guide. We strongly recommend the Windows operating system be installed locally on each workstation. This configuration allows for easier installation and better performance. Auto install is used only for a multi-user network. You will not see the Configuration screen or the Multi-User Setup screen.

Setting Up the Auto Install

Use the following information to set up the auto installation for updating *The Raiser's Edge*.

- Copy the install CD to a network directory accessible by all workstations.

- Create a file named ADMIN.INI in that directory. This file contains the settings the update program uses so you can bypass screens in the update. Be sure to use MS-DOS file naming conventions when specifying file names in your INI settings. That is, a file name should be no more than eight characters with a three-character file extension.

For example, assume your server name is BLACKBAUD, the database name is RE, and the RE.DB file is located in G:\REWIN\SERVER. For the auto install to run without a user seeing any screens during the process, your file would look like this:

```
[General]
CommandLineParams = srvr=BLACKBAUD db=RE
ShowWelcomeScreen = No
ShowRegistrationScreen = No
DatabaseDirectory = G:\REWIN\SERVER
ProgramFilesInstallationDirectory = D:\REWIN
CrystalReportsInstallationDirectory = D:\REWIN\REPWRITE
InstallCrystalReports = No
ShowInstallationOptionsScreen = No
ShowStartCopyingScreen = No
ShowCompleteMessage = No
CreateSetupIcon = Yes
CreateAutoInstallINISetting = Yes
```

Remember that your ADMIN.INI settings for the server name and database name take precedence over settings users enter in the Run command line.

Note: If you omit a setting in the ADMIN.INI file, the Auto Install reads it as an invalid value, and the screen for that setting appears. For example, if you omit the `ShowWelcomeScreen` setting, the Welcome screen appears.
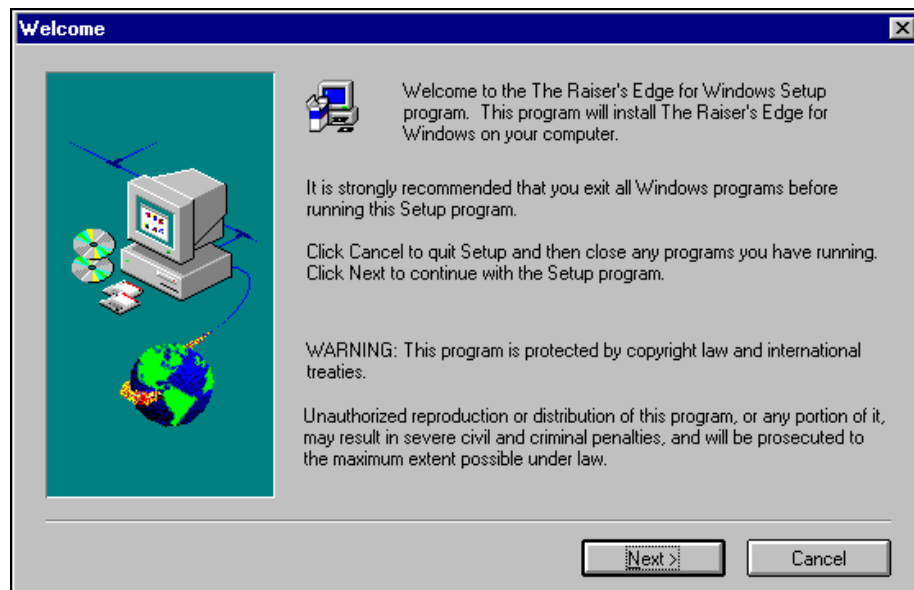
ShowWelcomeScreen

ShowWelcomeScreen. Use this setting to specify whether the program displays the Welcome screen during installation. Valid values are as follows:

No = Do not display screen.

{anything else} = Display screen.

For example, if you do not want the program to display the Welcome screen during setup, use `ShowWelcomeScreen = No`.

ShowRegistrationScreen

ShowRegistrationScreen. Use this setting to specify whether the program displays the Registration screen during installation. Valid values are as follows:

No = Do not display screen.

{anything else} = Display screen.

For example, if you do not want the program to display the Registration screen during setup, use `ShowRegistrationScreen = No`.

Note: The **Name** and **Company** fields are filled in from the Win.INI file on the workstation. If either of these fields cannot be populated, the Registration screen appears regardless of the value of `ShowRegistrationScreen`.
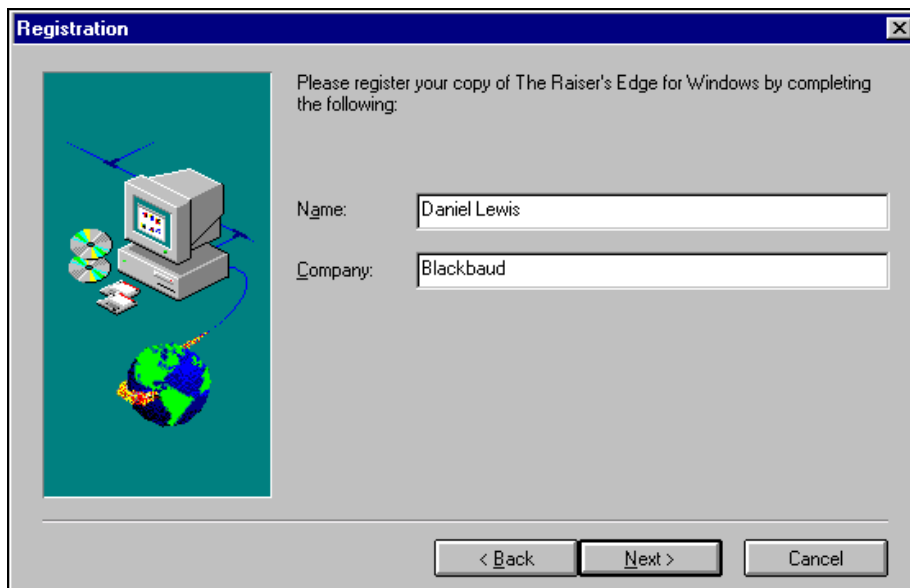

DatabaseDirectory

DatabaseDirectory. Use this setting to specify the location of the database for a workstation so you do not see the Select Database Directory screen during installation. Be sure to use a valid path to the RE.DB in your setting.

For example, to specify the REWIN database path on a server, use `DatabaseDirectory = G:\REWIN\SERVER`.

Note: If the specified path is not valid or if it does not contain an RE.DB file, the Select Database Directory screen appears.
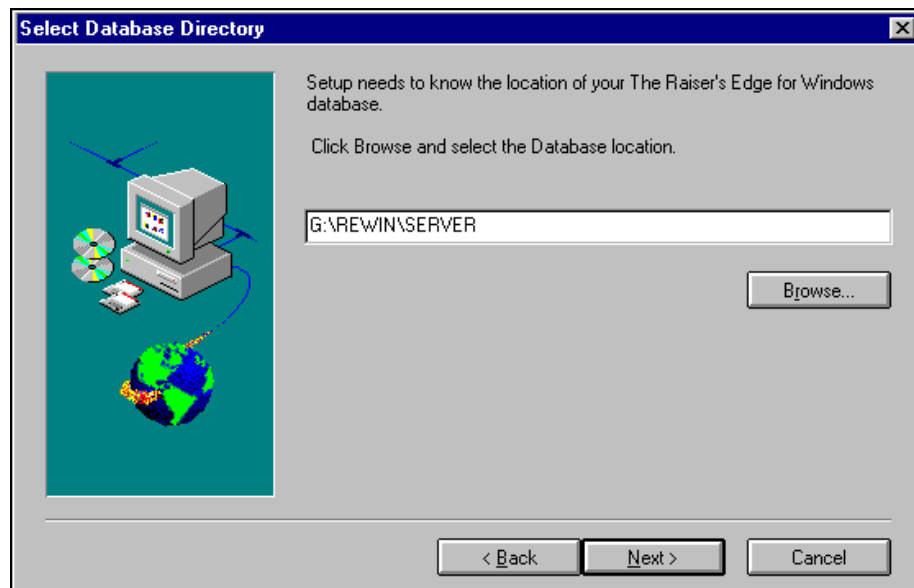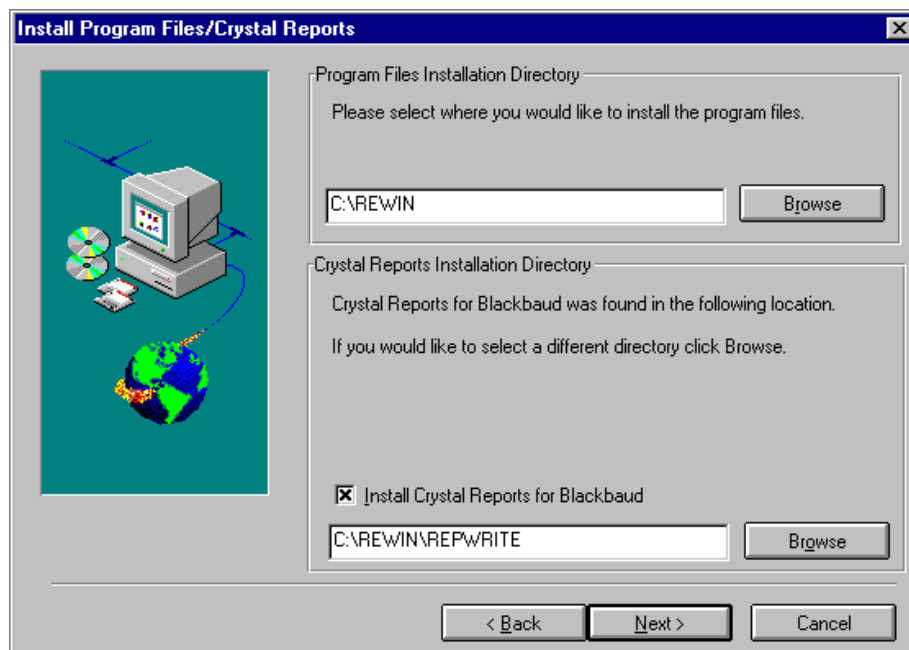
ProgramFilesInstallionDirectory

ProgramFilesInstallionDirectory. Use this setting to determine the installation paths for program files on a workstation so you do not see the Install Program Files/Crystal Reports screen during installation. A valid value is any valid path you want to use for program files.

For example, to specify the REWIN path, use
`ProgramFilesInstallionDirectory = C:\REWIN`.

Note: If the specified path does not exist, the program creates the path. If you leave the `ProgramFilesInstallionDirectory` setting blank, the auto install reads the blank as a path that cannot be created. A message alerts you to this, and the Install Program Files screen appears.
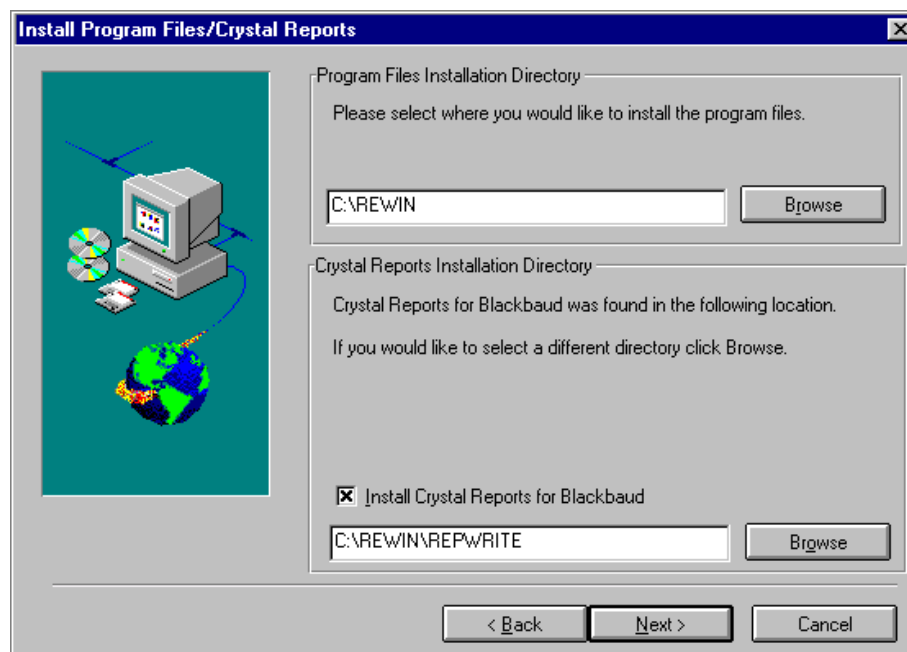

Note: If you leave the `ProgramFilesInstallionDirectory` setting blank, but set `InstallCrystalReports` to `No`, the Install Program Files screen still appears, but the **Crystal Reports Installation Directory** frame is not visible. For more information, see pg. A-8.

CrystalReportsInstallationDirectory

CrystalReportsInstallationDirectory. Use this setting to determine the installation path for Crystal Reports on a workstation so you do not see the Install Program Files/Crystal Reports screen during installation. A valid value is any valid path you want to use for the installation of the Crystal Reports files.

For example, to specify the REWIN path, use `CrystalReportsInstallationDirectory = C:\REWIN\REPWRITE`.

---

*Note***:** If the specified path does not exist, the program creates the path. If it cannot be created, a message alerts you and the Install Program Files/Crystal Reports screen appears. If you leave the `ProgramFilesInstallDirectory` setting blank, the auto install reads the blank as a path that cannot be created. A message alerts you to this, and the Install Program Files/Crystal Reports screen appears.
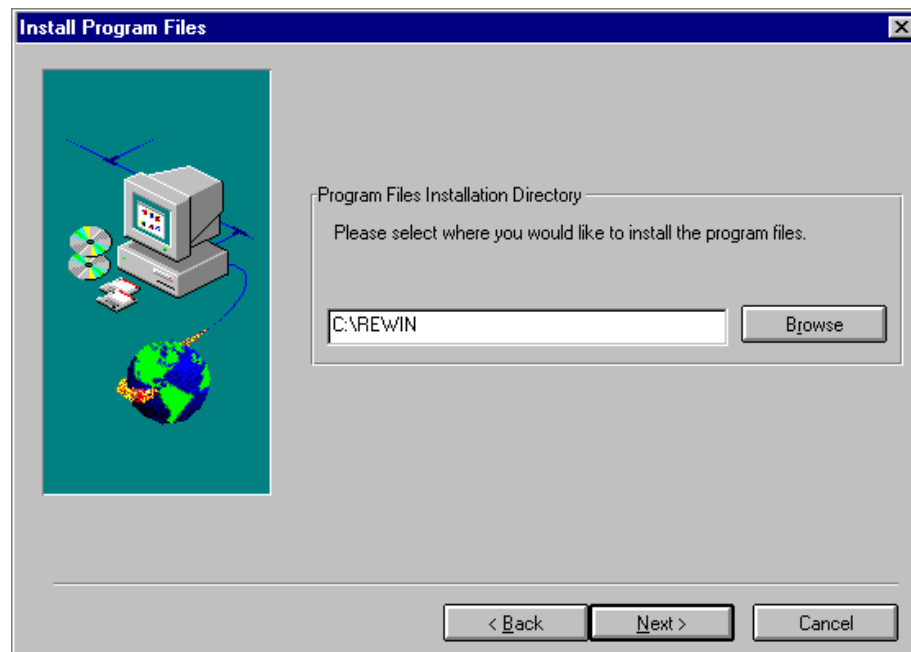

InstallCrystalReports

InstallCrystalReports. Use this setting if you do not want the program to install Crystal Reports on the workstation. Valid values are as follows:

No = Do not install Crystal Reports.

{anything else} = Install Crystal Reports.

For example, for the program not to install Crystal Reports, use
`InstallCrystalReports = No`.

Note: If you set `InstallCrystalReports` to `No`, the program ignores the setting for `CrystalReportsInstallationDirectory`.

Note: If you set `InstallCrystalReports` to `No`, but leave the `ProgramFilesInstallionDirectory` setting blank, the Install Program Files screen still appears, but the **Crystal Reports Installation Directory** frame is not visible as above.


ShowInstallationOptionsScreen

ShowInstallationOptionsScreen. Use this setting to specify whether the program displays the Select Program Installation Options screen. Valid values are as follows:

No = Do not display screen.

{anything else} = Display screen.

For example, to specify not to show the Select Program Installation Options screen, use `ShowInstallationOptionsScreen = No`.

Note: When the Select Program Installation Options screen is not displayed, the program installs all components. If there is not enough disk space to install the components, a warning message appears. If you click **Yes**, the installation continues. If you click **No**, the Select Program Installation Options screen appears, regardless of the INI setting. You can then select components you want to install. From the Select Program Installation Options screen, click **Back** or **Next** to continue the installation.
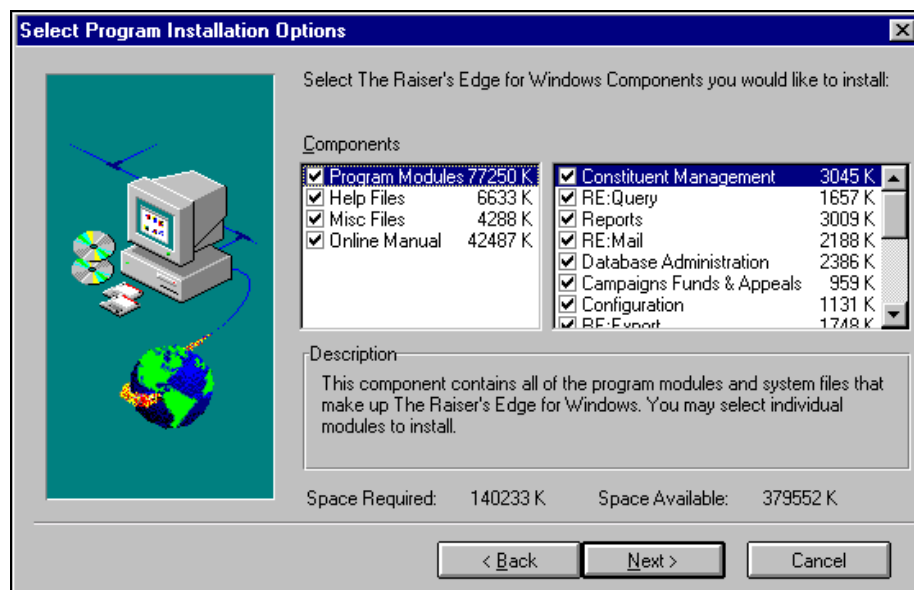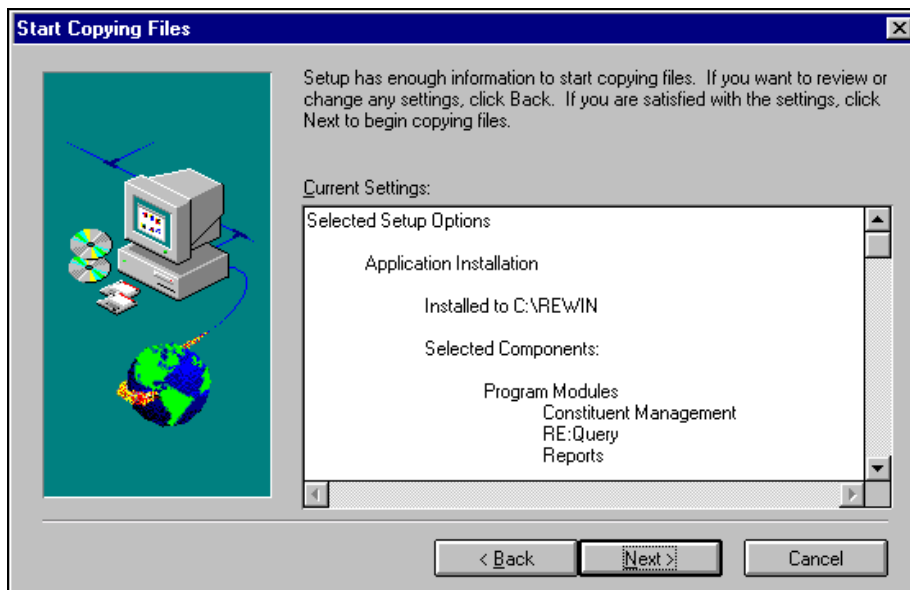

ShowStartCopyingScreen

ShowStartCopyingScreen. Use this setting to specify whether the program should display the Start Copying Files screen during installation. Valid values are as follows:

No = Do not display screen.

{anything else} = Display screen.

For example, to specify not to display the Start Copying Files screen, use `ShowStartCopyingScreen = No`.

ShowCompleteMessage

ShowCompleteMessage. Use this setting to specify whether the program should display the Information message upon completion of the installation. Valid values are as follows:

No = Do not display message.

{anything else} = Display message.

For example, to specify not to display the Information message, use `ShowCompleteMessage = No`.
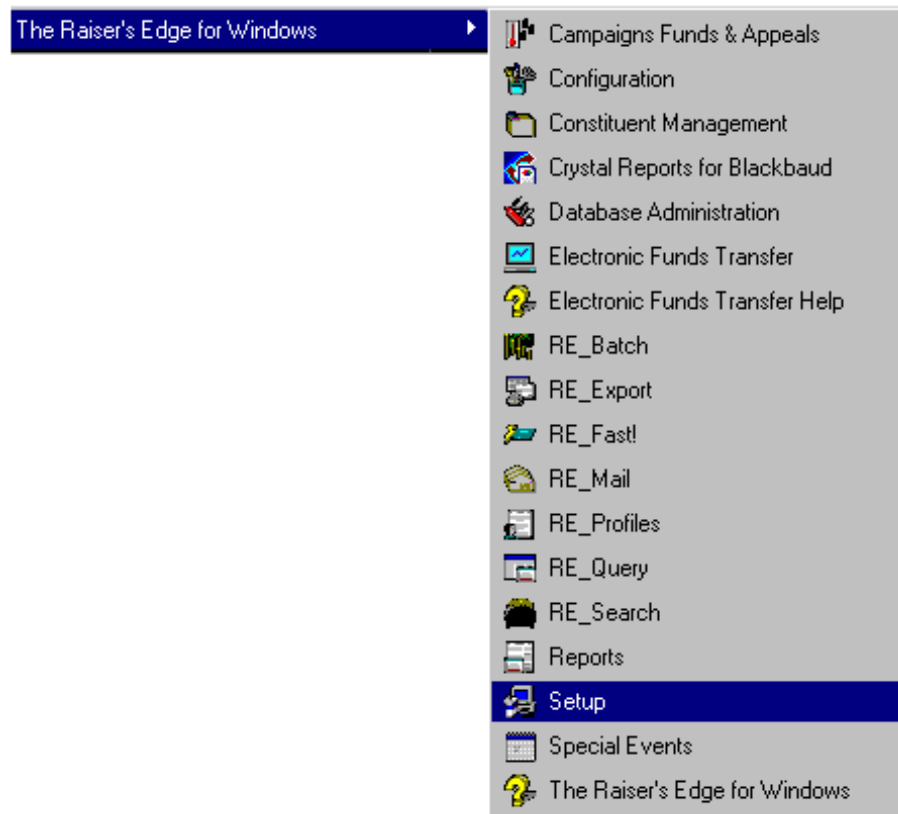
CreateSetupIcon

CreateSetupIcon. Use this setting to specify whether the program creates an icon to use for running the Setup program. Valid values are as follows:

Yes = Create the icon.

{anything else} = Do not create the icon.

For example, to specify that the program create a setup icon, use
`CreateSetupIcon = Yes`.

Note: If the value is anything other than `Yes`, or if you omit the `CreateSetupIcon` setting from the ADMIN.INI file, the program deletes the icon if it already exists.

The Raiser's Edge for Windows ▶	
	📁 Campaigns Funds & Appeals
	🐣 Configuration
	📁 Constituent Management
	📷 Crystal Reports for Blackbaud
	🦫 Database Administration
	🖼 Electronic Funds Transfer
	🐾 Electronic Funds Transfer Help
	🏛 RE_Batch
	🖥 RE_Export
	🗝 RE_Fast!
	🌐 RE_Mail
	🗄 RE_Profiles
	📇 RE_Query
	🐖 RE_Search
	🗄 Reports
	🖥 **Setup**
	📅 Special Events
	🐾 The Raiser's Edge for Windows

CreateAutoInstallINISetting

CreateAutoInstallINISetting. Use this setting to specify whether the program creates a setting specifying the location of the installation files in the RE.INI file. This setting is available only on workstations using Auto Install. When this setting is set to `Yes`, the program checks for an updated version of the software whenever you open a module. If a newer version of the program is on your network, a message appears telling you to run **Setup**. You must install the updated software before you can open any modules from your workstation. Valid values are as follows:

Yes = Create the setting.

{anything else} = Do not create the setting.

For example, to specify that the program create the setting, use `CreateAutoInstallINISetting = Yes`.

Note: *If you create the setting, an `AutoInstallDirectory` setting is added to the RE.INI file on the workstation. A message appears reminding you to update **The Raiser's Edge** when a newer version is detected at the location specified in the RE.INI file. We recommend you set `CreateSetupIcon` to `Yes` if you set `CreateAutoInstallINI`*