The Raiser’s Edge™

The Raiser’s Edge Mobile Event Management Application Guide
# Contents

**WHAT IS IN THIS GUIDE?** ................................................................. III

How Do I Use These Guides? ............................................................... iii

**THE RAISER’S EDGE MOBILE EVENT MANAGEMENT APPLICATION** ................. 1

<table>
<thead>
<tr>
<th>The Raiser’s Edge Mobile Event Management Application</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>How It Works</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Blackbaud Web Services</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install Blackbaud Web Services</td>
<td>3</td>
</tr>
<tr>
<td>Email System Key To Users</td>
<td>6</td>
</tr>
<tr>
<td>Other Tasks for Blackbaud Web Services</td>
<td>8</td>
</tr>
</tbody>
</table>

| Frequently Asked Questions                              | 9 |
What Is In This Guide?

In the *The Raiser’s Edge Mobile Event Management Application Guide*, you learn about how to prepare your system for use of *The Raiser’s Edge* mobile event management application, and how data is shared between your database in *The Raiser’s Edge* and the application. *The Raiser’s Edge* mobile event management application allows you to manage your events on-site, with the ability to check in attendees, register new attendees, and track attendance. You can also learn about the following:

- “Blackbaud Web Services” on page 2

How Do I Use These Guides?

*The Raiser’s Edge* user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser’s Edge* documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting Help, User Guides from the shell menu bar or by clicking Help on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select Support, User Guides.

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

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

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.
The Raiser’s Edge Mobile Event Management Application

With The Raiser’s Edge mobile event management application, users can access event information from their database in The Raiser’s Edge on an Apple iPad. You can check-in attendees, register new attendees, and track attendance and capacity to manage on-site events.

You can download The Raiser’s Edge mobile event management application by Blackbaud from Apple iTunes. Before you can use the application on your iPad, you must first install the mobile web service from Web Services in The Raiser’s Edge. For information about how to install the mobile web service, see “Blackbaud Web Services” on page 2.

The Raiser’s Edge mobile event management application respects the security rules and user rights already set for each user in your database. For example, users can only view the queries in the mobile application to which they have access in The Raiser’s Edge.

How It Works

The Raiser’s Edge mobile event management application displays live data directly from your database in The Raiser’s Edge. When you access an event record in the mobile application, the latest information from your database is loaded.

To share information between your database in The Raiser’s Edge and an iPad, your installation of the Blackbaud Web Services in Web Services uses the Windows Azure service bus to securely pass data between your database and mobile app through Blackbaud’s secure servers. A 128-bit encryption is used through all points of communication between your database in The Raiser’s Edge, Windows Azure, and your mobile application.

For information about Blackbaud Web Services, see “Blackbaud Web Services” on page 2.

Blackbaud Web Services

Before you can use The Raiser’s Edge mobile event management application, you must first install Blackbaud Web Services to your server or any workstation at your organization. You install Blackbaud Web Services through Web Services in The Raiser’s Edge.

When you install Blackbaud Web Services, you receive a system key that each mobile event management application user in your organization must use to log in to the application. The Raiser’s Edge mobile event management application respects user security settings already established in your database of The Raiser’s Edge.
In order for mobile event management application users to connect to your database in *The Raiser’s Edge*, you must have *Blackbaud Web Services* installed and running on your server or a single workstation that stays on, and is always connected to the Internet.

**Note:** *The Raiser’s Edge* does not need to be open and running at all times for users to use the mobile event management application. Rather, the server or workstation just needs to remain on and connected to the Internet. If *Blackbaud* hosts your installation of *The Raiser’s Edge*, you do not need to leave a machine on, as *Blackbaud*'s hosting service acts as your 24 hour access.

## Install Blackbaud Web Services

You must first install *Blackbaud Web Services* so that users can use *The Raiser’s Edge* event management application on iPads. When you install the Web Service, a system key is generated that each user must use to log in and access your database in *The Raiser’s Edge*.

1. **Install Blackbaud Web Services**
   2. Under **Available Services**, click *Blackbaud Web Services*. The *Blackbaud Web Services* moves from **Available Services** to **Installed Services**.

### Web Service Console

**Expand Raiser’s Edge functionality through Web-enabled subscription services.**

### Installed Services

<table>
<thead>
<tr>
<th>Service Name</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Health Center</td>
<td>Various services provided to maintain the health and completeness of your Raiser’s Edge database. Click here to learn more about this service...</td>
<td><img src="#" alt="Install Update" /></td>
</tr>
<tr>
<td>Charity Eligibility for The Raiser’s Edge (tm)</td>
<td>Review the online profile from Blackbaud’s Nonprofit Marketplace Website. Click here to learn more about this service...</td>
<td><img src="#" alt="Install Update" /> <img src="#" alt="Configuration" /></td>
</tr>
<tr>
<td>PhoneFinder for The Raiser’s Edge (tm)</td>
<td>Perform an online phone search directly from a Raiser’s Edge constituent record using the PhoneFinder for The Raiser’s Edge service. Click here to learn more about this service...</td>
<td><img src="#" alt="Install Update" /> <img src="#" alt="Configuration" /> <img src="#" alt="Show Usage Statistics" /></td>
</tr>
<tr>
<td>WealthPoint for The Raiser’s Edge (tm)</td>
<td>Perform an online wealth profile search directly from a Raiser’s Edge constituent record using the WealthPoint for The Raiser’s Edge service. Click here to learn more about this service...</td>
<td><img src="#" alt="Install Update" /> <img src="#" alt="Configuration" /> <img src="#" alt="Show Usage Statistics" /></td>
</tr>
<tr>
<td>Blackbaud Web Services</td>
<td>The service provides access to mobile applications, and other online connections to The Raiser’s Edge. Click here to learn more about this service...</td>
<td><img src="#" alt="Install Update" /></td>
</tr>
</tbody>
</table>

If Blackbaud hosts your installation of *The Raiser’s Edge*, the Configuration Options screen appears as shown below:

Click **Generate key**, then enter your site ID and email address associated with your organization’s Blackbaud Customer Account, and then click **Finish**.

If your organization hosts your installation of **The Raiser’s Edge**, click **Install service**. The Blackbaud Web Services Setup Wizard appears to help you install **Blackbaud Web Services**.

5. Click the **Open** button to browse to a location in which to install **Blackbaud Web Services**. Click **Next**.

6. Click **Install**. **Blackbaud Web Services** is installed to the location you specified.

7. After the installation completes, click **OK**. You return to the Configuration Options screen.

9. Click **Generate key**. The Customer Information screen appears.

10. Enter your organization’s Site ID and email address associated with your Blackbaud Customer Account. Click **Finish**. The Mobile Event Management web service is active.

11. Click **OK**. You return to the Web Services page.

## Email System Key To Users

After you install *Blackbaud Web Services*, you can email the system key to your users so they can log in to *The Raiser’s Edge* mobile event management application on their iPads.

- **Email system key to users**

  In order to log in to *The Raiser’s Edge* mobile event management application on an iPad, you must enter the system key provided after you install the *Blackbaud Web Service*.

1. After you install *Blackbaud Web Services*, from the Web Services page, click **Blackbaud Web Services**, under **Installed Services**. The Configuration Options screen appears.
If Blackbaud hosts your installation of *The Raiser's Edge*, the Configuration Options screen appears as shown below:


If Blackbaud hosts your installation of *The Raiser's Edge*, the Mobile Event Management screen appears as shown below:

3. Click **Email**. Your email client opens. Your system key is provided in the body of the email, along with information about how to log in to *The Raiser's Edge* mobile event management application on an iPad.

4. Enter the email addresses of each of your mobile event management app users and send the email message.

**Note:** If you do not want to use the email feature in Web Services to distribute the system key, under **Database**, you can click **Copy to clipboard** so that you can paste the key into your distribution message to users.
Now that users have the system key, they are ready to log in and use *The Raiser’s Edge* mobile event management application!

Other Tasks for Blackbaud Web Services

After you install the **Blackbaud Web Services**, and activate the **Mobile Event Management** feature, the service is automatically on and running so that users can connect to your database from their iPads. The Configuration Options screen for **Blackbaud Web Services** offers a few additional tasks you may complete to manage your connection, such as to start and stop the service, or edit the domain if you use Windows Authentication for security.

- “Start and Stop Blackbaud Web Services” on page 8
- “Activate and Deactivate Databases for Blackbaud Web Services” on page 8
- “Edit Domain for Windows Authentication” on page 9

Start and Stop Blackbaud Web Services

**Note:** If **Blackbaud** hosts your installation of *The Raiser’s Edge*, you do not have this option.

After you install **Blackbaud Web Services**, it is automatically on and running so that users can connect to your database from their iPads. If necessary, you can temporarily stop **Blackbaud Web Services**, rather than uninstall or deactivate it. When the service is stopped, users can no longer connect to the database from their iPads.

To stop **Blackbaud Web Services**, from the Web Services page, click **Blackbaud Web Services**, under **Installed Services**. The Configuration Options screen appears. Click the **Stop** button under **Service**. Your status changes to **Stopped**. To restart the service, click the **Start** button under **Service**. Your status changes to **Running**.

Activate and Deactivate Databases for Blackbaud Web Services

After you install **Blackbaud Web Services**, and activate the **Mobile Event Management** feature, your database is automatically activated so users can connect to it from their iPads. If necessary, you can deactivate the database.

When you deactivate the database, users cannot connect to it from their iPads until it is reactivated. Upon reactivation, you are provided a new system key that must be re-distributed to users in order to sign in to *The Raiser’s Edge* mobile event management application.
To deactivate a database for Blackbaud Web Services, access the Mobile Event Management screen, and click Deactivate, under Status. A confirmation message appears. Click Yes. Your database status changes to Inactive.

To reactivate the database, return to the Mobile Event Management screen, and click Generate key, under Key. The Customer Information screen appears. Enter your Site ID and email address associated with your Blackbaud Customer Account, then click Finish. Your database status changes to Active. You can then distribute the new system key to users so they can sign in to The Raiser’s Edge mobile application.

Edit Domain for Windows Authentication

Note: If Blackbaud hosts your installation of The Raiser’s Edge, you do not have this option.

If you use Windows Authentication for security, you can edit your domain if necessary. To edit your domain, from the Configuration Options screen, click Edit domain under Windows Authentication. The Blackbaud Web Services screen appears. Edit your domain name as necessary and click OK. You return to the Configuration Options screen.

Frequently Asked Questions

Please review the frequently asked questions for answers to questions about security, how to log in to the mobile event management application, application features, and more.
Where should we install Blackbaud Web Services? You can install the web service on any server or workstation, but it must run at all times. You need to install it only once and should install it on a machine with Internet access 24 hours a day, seven days a week. If Blackbaud hosts your installation of The Raiser’s Edge, you do not need to leave a machine on, as Blackbaud’s hosting service acts as your 24 hour access.

What rights do I need to initialize Blackbaud Web Services? The user that initializes mobile must have supervisor rights in The Raiser’s Edge and be an administrator on the machine.

How do I get the app on my iPad? Download and install the app from iTunes.

What do I need to log into the app? To log into the app, simply add your account with the system key provided by your administrator, and log in with your user name and password from The Raiser’s Edge.

How do licenses work with the app? The Raiser’s Edge mobile event management app will NOT lock a core license for The Raiser’s Edge. This allows for simultaneous use during events without license limits.

Is the event app the same as The Raiser’s Edge mobile app? No. The event app is a completely separate and distinct app from The Raiser’s Edge mobile app.

Is a specific version of The Raiser’s Edge required? Yes. The Raiser’s Edge version 7.92 is required.

Is the RE:Events module in The Raiser’s Edge required to use the app? Yes. The RE:Events module is required to download and use the new event app.

Does the app accept and natively process credit cards? Yes. However, for credit card payments to be processed within the app using the Blackbaud MobilePay card reader, Blackbaud Merchant Services must be selected as your payment processor in The Raiser’s Edge.

Can I connect the app to the sample database? No, you cannot use the sample database with the app.

What should I do if my device is lost or stolen? As a best practice, we recommend you have a policy to wipe the device. If you use a personal device to access company email or the mobile app, you should work with your organization to determine how your device handles remote lock, wipe, or location if it is misplaced.

How does the app work with my database in The Raiser’s Edge? To communicate with your database, the app uses Blackbaud Web Services and the Microsoft Azure service bus.

What is Microsoft Azure service bus? The service bus is a messaging infrastructure that sits between the app and your database so they can exchange messages in a loosely coupled way for improved sale and resiliency. Microsoft manages and operates the service bus with a 99.9% monthly SLA.

How secure is Microsoft Azure service bus? All service bus traffic is subject to TLS, with 128-bit encryption. For details about service bus security, visit https://www.windowsazure.com/en-us/support/trust-center.

Is there security in the app? The app respects the security rights set for users in The Raiser’s Edge. In addition, credit card payments taken with the Blackbaud MobilePay card reader are encrypted on swipe and not stored on the iPad. Since these transactions are processed by Blackbaud Merchant Services, Blackbaud’s end-to-end payment processing solution, they are protected by the industry’s strictest data security requirements: the Payment Card Industry Data Security Standard (PCI DSS) and the Payment Application Data Security Standard (PA DSS).

Can I use the Supervisor login with the app? The Supervisor account cannot log into the app. However, users who are supervisors can log in.

What devices and operating systems does the app support? The Raiser’s Edge event management app is available for the Apple iPad only. For operating systems, see the system requirements.