

The Raiser's Edge™

The Raiser's Edge Mobile Application Guide

040313

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What Is In This Guide?



In the *The Raiser's Edge Mobile Application Guide*, you learn about how to prepare your system for use of **The Raiser's Edge** mobile application, and how data is shared between your database in **The Raiser's Edge** and the mobile application. **The Raiser's Edge** mobile application puts fundraising on the go, as it allows you to access live constituent information directly from your database. You can also learn about the following:

- "Mobile Service For The Raiser's Edge" 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 Application



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The Raiser's Edge Mobile Application

With **The Raiser's Edge** mobile application, users can access information from their database in **The Raiser's Edge** on a mobile device. You can view constituent records, queries, recent giving information, add actions and notes, navigate to constituent locations, and email, call, or text constituents all while on the go!

You can download **The Raiser's Edge** mobile application by **Blackbaud** from your respective app store, such as *Apple iTunes*, *Google Play Store*, or *BlackBerry App World*. Before you can use the application on your device, 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 "Mobile Service For The Raiser's Edge" on page 2.

The Raiser's Edge mobile 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**.

Note: **The Raiser's Edge** mobile application users "lightly" use a user license. When you search for data in the app, it uses the license for the search and then holds it for five minutes so you can complete your task. Then, even though you are logged into the app, it releases the license until you make another request. **The Raiser's Edge Enterprise** users do not use a desktop license; instead, they have an initial limit of 25 concurrent mobile users.

How It Works

The Raiser's Edge mobile application displays live data directly from your database in **The Raiser's Edge**. When you access a page or 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 a mobile device, your installation of the *Mobile Service for The Raiser's Edge* 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 the *Mobile Service for The Raiser's Edge*, see "Mobile Service For The Raiser's Edge" on page 2.

Mobile Service For The Raiser's Edge

Before you can use **The Raiser's Edge** mobile application, you must first install the *Mobile Service for The Raiser's Edge* to your server or any workstation at your organization. You install the *Mobile Service for The Raiser's Edge* through *Web Services* in **The Raiser's Edge**.

When you install the *Mobile Service for The Raiser's Edge*, you receive a system key that each mobile user in your organization must use to log in to the mobile application. **The Raiser's Edge** mobile application respects user security settings already established in your database of **The Raiser's Edge**.

In order for mobile users to connect to your database in **The Raiser's Edge**, you must have the *Mobile Service for The Raiser's Edge* 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 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 Mobile Service For The Raiser's Edge

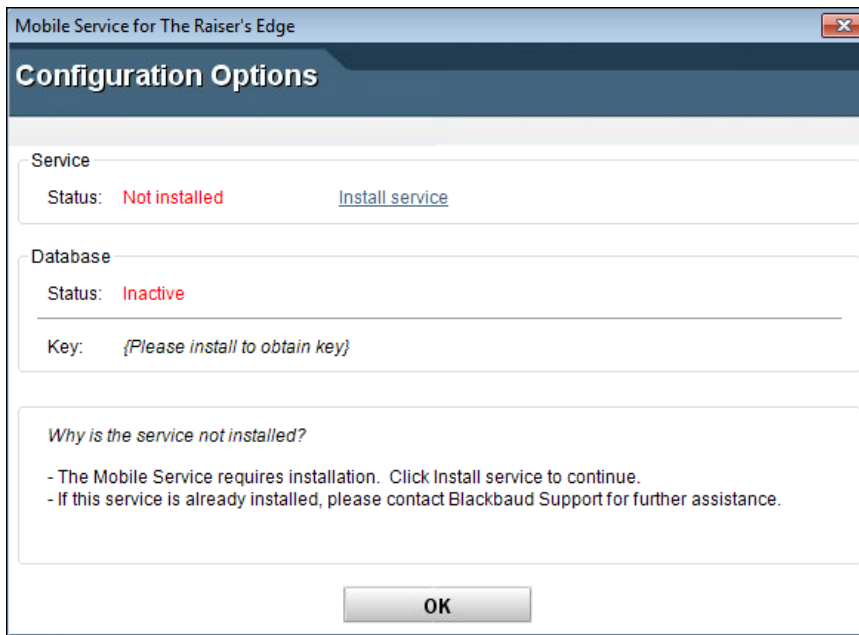
You must first install the *Mobile Service for The Raiser's Edge* so that users can use **The Raiser's Edge** application on mobile devices. When you install the Web Service, a system key is generated that each user must use to log in and access your database in **The Raiser's Edge**.

► Install Mobile Service For The Raiser's Edge

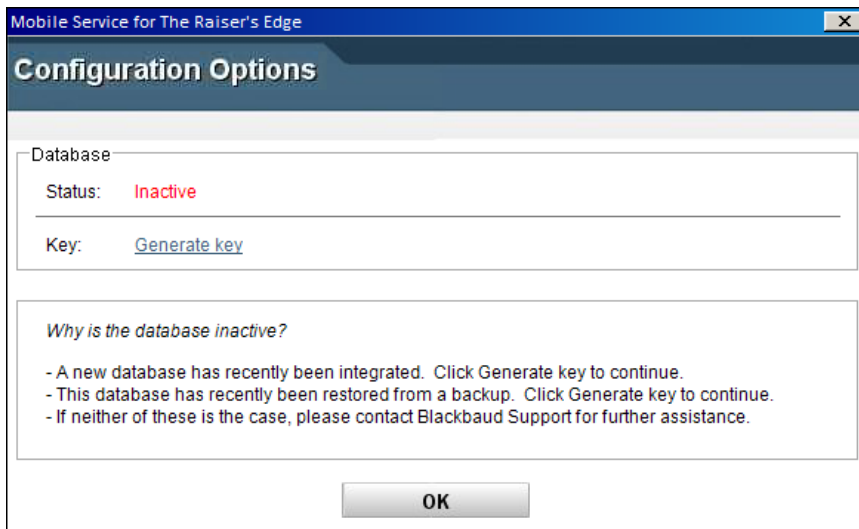
1. On the Raiser's Edge bar, click *Web Services*. The Web Services page appears.
2. Under **Available Services**, click **Mobile Service for The Raiser's Edge**. The **Mobile Service for The Raiser's Edge** moves from **Available Services** to **Installed Services**.

Web Services		
Web Service Console Expand Raiser's Edge functionality through Web-enabled subscription services.		
Installed Services Services currently installed on this computer are listed below.		
Service Name	Description	Action
Data Health Center	Various services provided to maintain the health and completeness of your Raiser's Edge database. Click here to learn more about this service...	► Install Update
Mobile Service for The Raiser's Edge (tm)	Service providing access to The Raiser's Edge for mobile devices. Click here to learn more about this service...	► Install Update
Charity Eligibility for The Raiser's Edge (tm)	Review the online profile from Blackbaud's Nonprofit Marketplace Website. Click here to learn more about this service...	► Install Update ► Configuration
PhoneFinder for The Raiser's Edge (tm)	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...	► Install Update ► Configuration ► Show Usage Statistics
WealthPoint for The Raiser's Edge (tm)	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...	► Install Update ► Configuration ► Show Usage Statistics

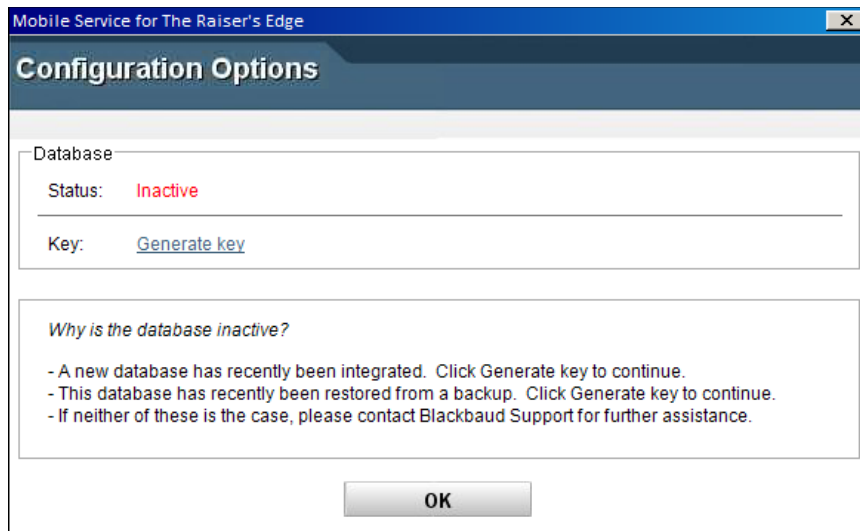
3. Under **Installed Services**, click **Mobile Service for The Raiser's Edge**. The Configuration Options screen appears.



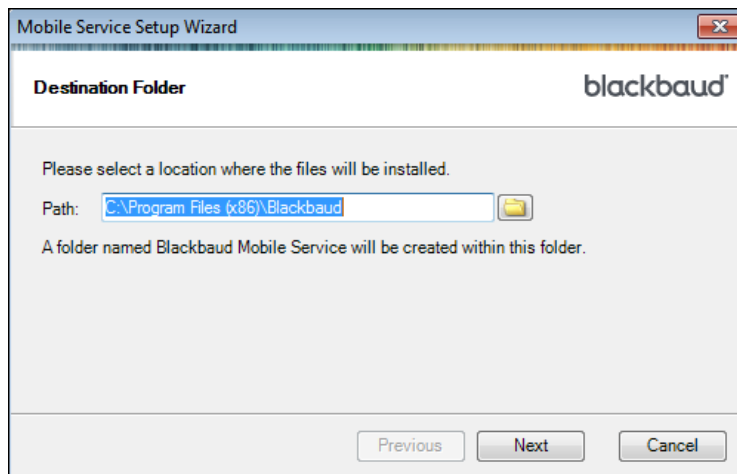
If Blackbaud hosts your installation of **The Raiser's Edge**, the Configuration Options screen appears as shown below:



4. If *Blackbaud* hosts your installation of **The Raiser's Edge**, click **Generate Key** to launch the Mobile Service Setup Wizard. Enter your site ID and email address associated with your organization's Blackbaud Customer Account, and then click **Finish**.

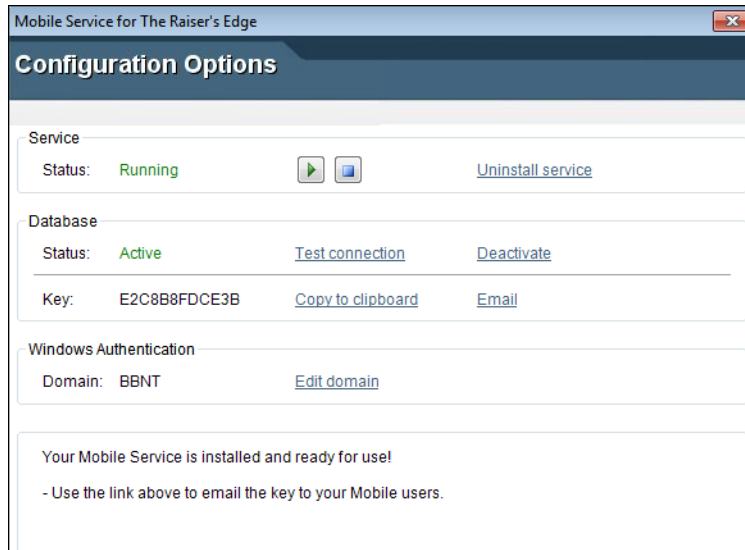


If your organization hosts your installation of **The Raiser's Edge**, click **Install service**. The Mobile Service Setup Wizard appears to help you install *Mobile Service for The Raiser's Edge*.



5. Click the **Open** button to browse to a location in which to install the *Mobile Service for The Raiser's Edge*. Click **Next**.
6. Enter your organization's Site ID and email address associated with your Blackbaud Customer Account. Click **Next**.
7. Click **Install**. The *Mobile Service for The Raiser's Edge* is installed to the location you specified.

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



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

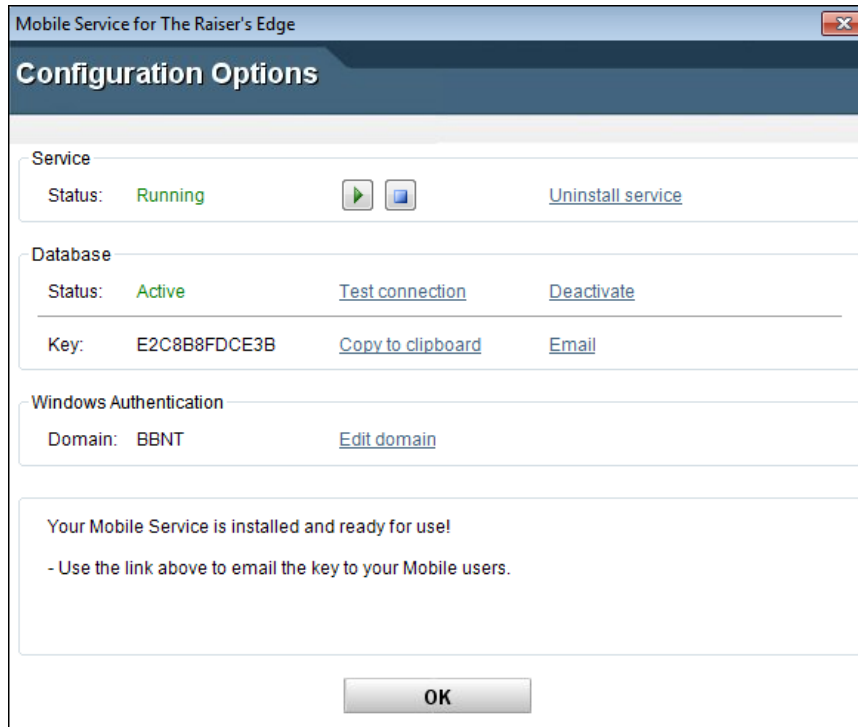
Email Mobile System Key To Users

After you install the *Mobile Service for The Raiser's Edge*, you can email the system key to your users so they can log in to **The Raiser's Edge** mobile application on their mobile devices.

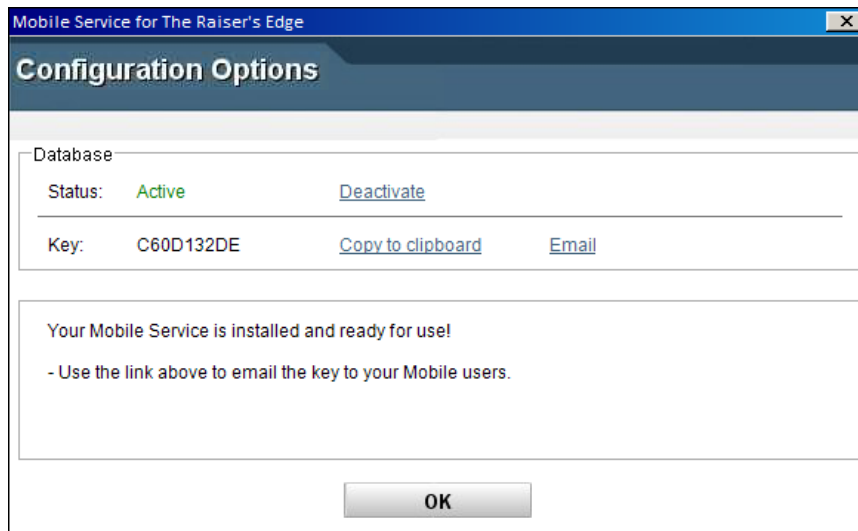
► **Email mobile system key to users**

In order to log in to **The Raiser's Edge** mobile application on a mobile device, you must enter the system key provided after you install the *Mobile Service for The Raiser's Edge*.

1. After you install the Mobile Web Service, from the Web Services page, click **Mobile Service for The Raiser's Edge**, 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:



2. Under **Database**, 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 application on a mobile device.

3. Enter the email addresses of each of your mobile 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 application!

Other Tasks for the Mobile Service for The Raiser's Edge

After you install the *Mobile Service for the Raiser's Edge*, it is automatically on and running so that users can connect to your database from mobile devices. The Configuration Options screen for *The Mobile Service for The Raiser's Edge* offers a few additional tasks you may complete to manage your connection, such as to start and stop the mobile service, or edit the domain if you use Windows Authentication for security.

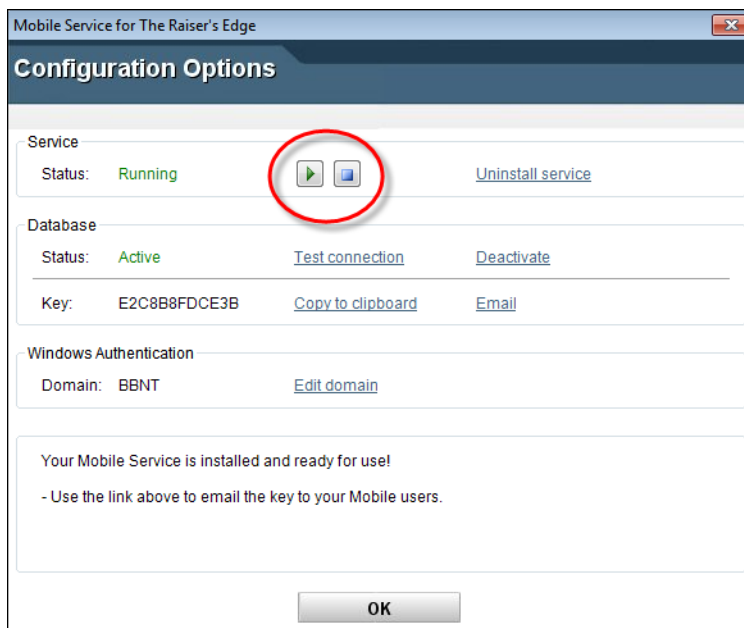
- "Start and Stop the Mobile Service for The Raiser's Edge" on page 8
- "Activate and Deactivate Databases for the Mobile Web Service" on page 9
- "Edit Domain for Windows Authentication" on page 11

Start and Stop the Mobile Service for The Raiser's Edge

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

After you install the *Mobile Service for The Raiser's Edge*, it is automatically on and running so that users can connect to your database from mobile devices. If necessary, you can temporarily stop the *Mobile Service for The Raiser's Edge*, rather than uninstall or deactivate it. When the service is stopped, users can no longer connect to the database from mobile devices.

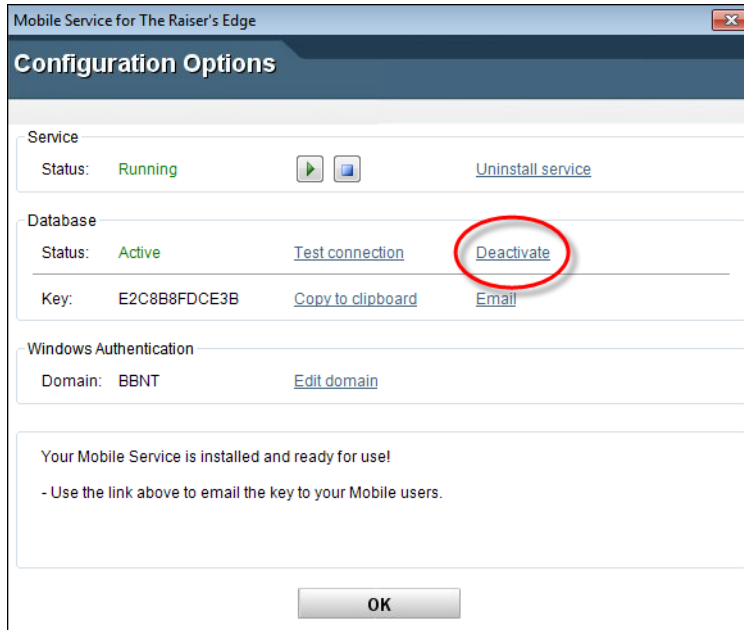
To stop the Mobile Web Service, from the Web Services page, click **Mobile Service for The Raiser's Edge**, under **Installed Services**. The Configuration Options screen appears. Click the **Stop** button under **Service**. Your status changes to **Stopped**. To restart the service, click the **Start**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



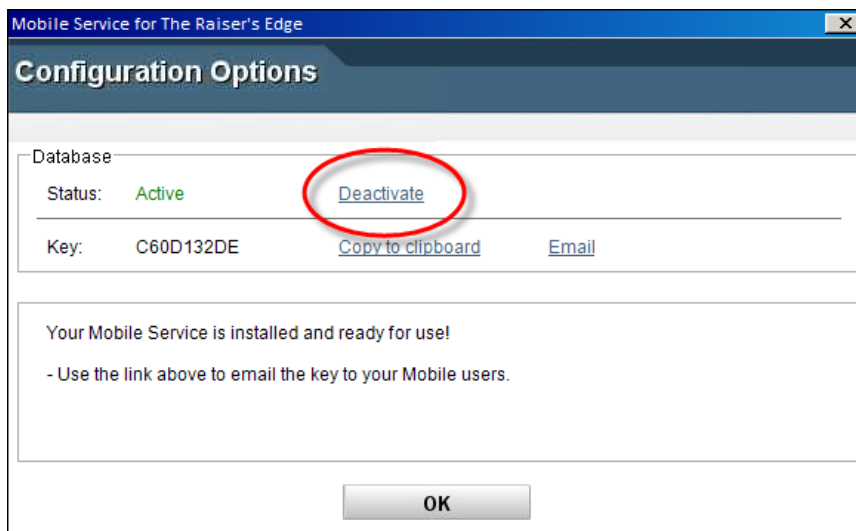
Activate and Deactivate Databases for the Mobile Web Service

After you install the Mobile Web Service for *The Raiser's Edge*, your database is automatically activated so users can connect to it from mobile devices. If necessary, you can deactivate the database. When you deactivate the database, users cannot connect to it from their mobile devices 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 application.

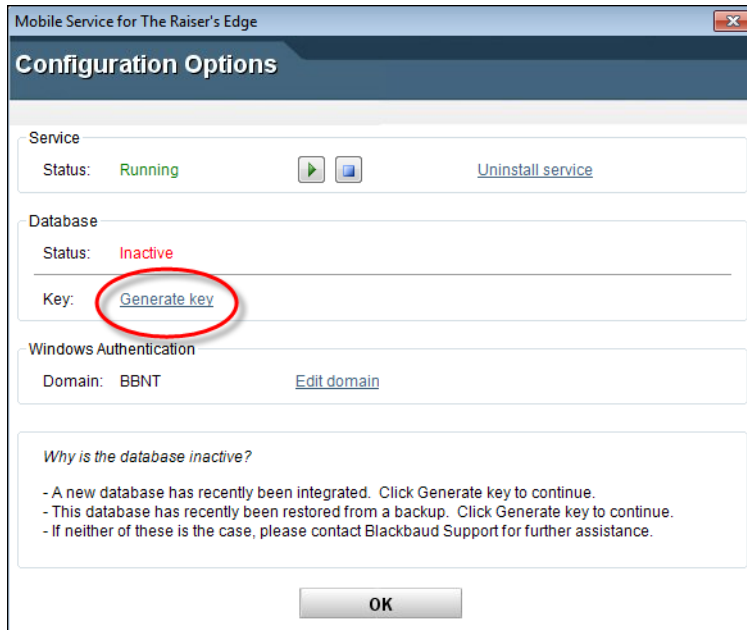
To deactivate a database for the Mobile Web Service, click **Deactivate**, under **Database**. A confirmation message appears. Click **Yes**. Your database status changes to **Inactive**.



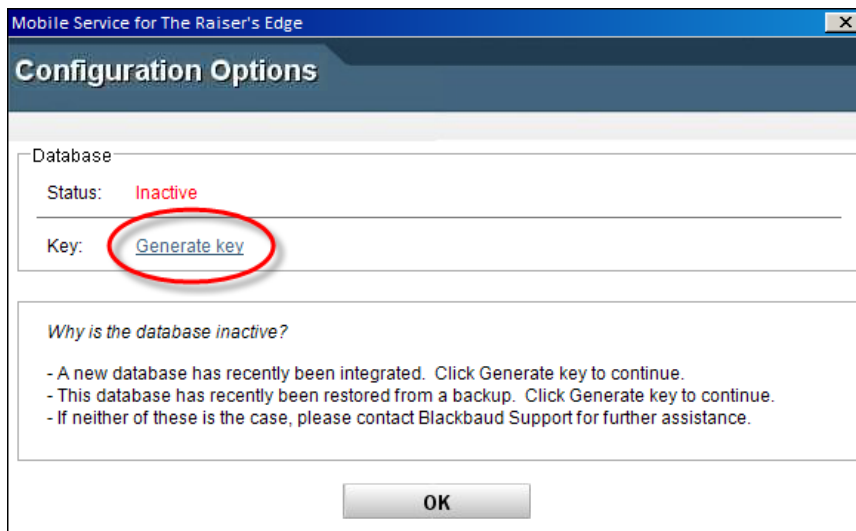
If *Blackbaud* hosts your installation of *The Raiser's Edge*, the Configuration Options screen appears as shown below:



To reactivate the database, click **Generate key**, under **Database**. The Mobile Service Setup Wizard 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.



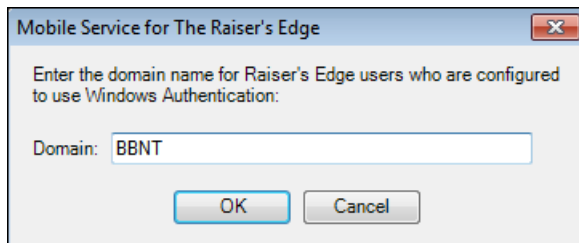
If Blackbaud hosts your installation of *The Raiser's Edge*, the Configuration Options screen appears as shown below:



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 Mobile Service for The Raiser's Edge 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 application, mobile application features, and more.

Where should we install the *Mobile Service for The Raiser's Edge*? 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 the *Mobile Service for The Raiser's Edge*? 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 phone? Download and install the app from the respective app marketplace such as *iTunes*, *Google Play Store*, and *BlackBerry App World*.

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 actions appear in the app? Only actions to which you are assigned as the solicitor appear in the mobile app. For your actions to appear, your username (in *Administration*, **Security**) must be linked to your constituent record, and the constituent record must be marked as a solicitor. You must then assign yourself as the solicitor for the action in *The Raiser's Edge*. When you create an action in the mobile app, you are automatically assigned as the solicitor.

How do lists appear in the app? To get queries to appear as lists in the app, you must manually assign the "Mobile" category to the queries in *The Raiser's Edge*. This category is automatically created when your organization installs the *Mobile Service for The Raiser's Edge*.

What types of records can I view in the app? Currently, you can access individual constituents, organization constituents, and gifts. We will continue to work with customers to further develop the app.

How are Year to Date (YTD) and Lifetime Giving (LTG) calculated in the app? Year to Date giving is either calculated based on the fiscal year or calendar year. You can define by which to calculate Year to Date giving from *Configuration* in *The Raiser's Edge*. Lifetime Giving is the total of all Cash, Pledge, Stock/Property - Sold, Other, and Recurring Gift Pay-Cash donations. Soft credits are not calculated in Year to Date or Lifetime Giving totals.

Where is information from my modules such as *Events*, *Memberships*, and *Prospects*? We have not yet added this into the app. We want to see how you use it first and will add additional fields and functionality thoughtfully over time so we can keep the app simple to use as well as powerful!

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 mobile 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 the *Mobile Service for The Raiser's Edge* 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 scale 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.

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.

How do licenses work with the app? Mobile app users "lightly" use a user license. When you search for data in the app, it uses the license for the search and then holds it for five minutes so you can complete your task. Then, even though you are logged into the app, it releases the license until you make another request. *The Raiser's Edge Enterprise* customers do not use a desktop license; instead, they have an initial limit of 25 concurrent mobile users.

What devices and operating systems does the app support? iOS, Android, and BlackBerry. For operating systems, see the system requirements.

Is there a separate app for iPads? Not yet! While you can use the current version of the app on your tablets, it will not be fully optimized for the iPad until a future release. Until then, you can use the iPad 2x function to allow the app to fit better on your screen. For information about the 2x function, see <http://support.apple.com/kb/HT4082>.