Installation

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Before you install *The Information Edge*, mark off the items on the Pre-installation checklist. During installation you will be prompted to create the database *The Information Edge* uses to analyze data.

Depending on how you establish authentication information for *SQL Server*, you may need to enter login and password information during the installation of *The Information Edge*.

### Pre-installation Checklist

- Ensure that you meet the system requirements. We strongly recommend you visit the Blackbaud Web site at www.blackbaud.com to review the system recommendations for *The Information Edge*.

- You must have Microsoft *SQL Server* 2000 (Service Pack 3) installed on your server (*SQL Server* Client Tools 2000 (Service Pack 3) must be installed on client workstations).

  To determine whether you have the necessary SQL Server 2000 service pack installed:
  - Open Enterprise Manager.
  - In the tree view, right-click on *Microsoft SQL Servers*.
  - Select *About SQL Server Enterprise Manager*.

  Your version should be 8.00.760.

- You must have Data Analysis Services for *SQL Server* 2000 (Service Pack 3) installed.

  To determine whether you have the necessary 2000 service pack installed:
  - Open Analysis Manager.
  - Under *Console Root*, right-click on *Analysis Servers*.
  - Select *About Microsoft SQL Server 2000 Analysis Services*.

  Your version should be 8.00.760.

If *SQL Server* and *The Information Edge* are installed on a different machine than Analysis Services, the Analysis Services service must be able to connect to the *SQL Server* machine to enable refreshing an *Information Edge* cube. Through *Control Panel, Administrative Tools, Services*, you can set up the service to run under an account with network rights so it can access the *SQL Server* machine.

- To create and interact with Pivot Tables and Charts, you must have Microsoft *Office XP* or 2003 with Web components installed.

  Microsoft supports using the *Office XP* web components on machines that do not have an *Office XP* license. The components run in non-interactive mode only, but users can view Charts and Pivot Tables created by others. You can install these components on any machines for which you do not have *Office XP* or 2003 licenses, but want to enable viewing content created with the components (whether in *The Information Edge* or a Web browser). The *Office XP* web components are available for download from the Microsoft Web site.
To create Data Analyzer Views, you must have Microsoft Data Analyzer installed. This is not required; however, if you do not have Data Analyzer, none of the Analyzer View options are available in The Information Edge console.

To create data marts from Raiser’s Edge databases, you must have The Raiser’s Edge version 7.6 or higher installed. To use any of the Raisers’ Edge integration features, The Raiser’s Edge client must be installed on the same computer as The Information Edge.

To create FE:Express data marts from Financial Edge databases, you must have The Financial Edge version 7.3 or higher installed. The Financial Edge client must be installed on the same computer as The Information Edge.

Have your SQL Server permissions information handy. You will need to enter this information during installation so The Information Edge can access SQL Server.

Installing The Information Edge

During installation of The Information Edge, you are prompted to specify an installation location, and to enter log in permissions information for SQL Server. The Information Edge installation program needs this information to create a database in which to store analytical data.

- Installing The Information Edge on the server
  1. Run The Information Edge Setup.exe file you downloaded from the Blackbaud Web site. The Welcome screen appears.
2. Click **Next**. The License Agreement screen appears.

   ![License Agreement Screen]

   **InstallShield Wizard**
   **License Agreement**
   Please read the following license agreement carefully.

   Press the PAGE DOWN key to see the rest of the agreement.

   Blackbaud Software License Agreement ("Agreement")

   READ THE TERMS AND CONDITIONS OF THIS LICENSE AGREEMENT CAREFULLY BEFORE OPENING THE PACKAGE CONTAINING THE COMPUTER SOFTWARE AND THE ACCOMPANYING USER DOCUMENTATION (COLLECTIVELY, THE "SOFTWARE"). THE SOFTWARE IS COPYRIGHTED AND LICENSED (NOT SOLD) BY OPENING THE PACKAGE CONTAINING THE SOFTWARE, YOU ARE ACCEPTING AND AGREEING TO THE TERMS OF THIS LICENSE AGREEMENT. IF YOU ARE NOT WILLING TO BE BOUND BY THE TERMS OF THIS LICENSE AGREEMENT, YOU SHOULD RETURN THE PACKAGE UNOPENED WITHIN THIRTY (30) DAYS OF

   Do you accept all the terms of the preceding License Agreement? If you choose No, the setup will close. To install The Information Edge, you must accept this agreement.

   ![License Agreement Acceptance]

   InstallShield
   ![Accept License Agreement]

   3. If you accept the terms of the license agreement, click **Next**. The Setup Type screen appears.

   ![Setup Type Screen]

   **InstallShield Wizard**
   **Setup Type**
   Choose the setup type that best suits your needs.

   Please select from one of the options below.

   - Install Server and Client
   - Install Client only

   ![Setup Type Selection]

   4. Select **Install Server and Client**. The Server and Client installation creates the **SQL Server** database in which **Information Edge** information is stored. The client version contains the necessary components for a workstation to be able to access **The Information Edge** database.
5. Click **Next**. The Choose Destination Location screen appears.

6. You can accept the default destination, or browse to another folder where you want to install **The Information Edge**.

7. Click **Next**. The Select Program Folder screen appears.

8. Select the program folder in which you want **The Information Edge** icons to be created.
9. Click **Next**. The installation begins and the Setup Status screen appears.

![Setup Status Screen](image)

10. During the **Client and Server** setup, the installation program needs to create a database in which to store *The Information Edge* data. The Database Setup Wizard screen appears.

![Database Setup Wizard](image)
11. Click **Next**. The Enter Server Names screen appears.

12. Enter the name of the server on which you want to create the database in the **SQL Server** field. Enter the server containing Microsoft **SQL Server Data Analysis Services** in the **Analysis Server** field.

If you are upgrading from a previous installation of *The Information Edge*, you can mark a checkbox to **Remove existing Information Edge database**. If you mark the checkbox, any data marts, cubes, segmentations, or any other features you created previously will not be saved. If you want to use this information in the new installation, do not mark the checkbox.

13. Click **Next**. The SQL Server Login screen appears.
14. Specify login information for the selected server. Mark an option to indicate whether you want to Use Windows NT authentication or Use SQL Server authentication to access the server. If you indicate server authentication, enter the Login name and Password necessary to connect to the server.

This information establishes authentication for The Information Edge to access your installation of SQL Server. After installation, you establish access to Information Edge data for users from within The Information Edge. For more information, see “Authentication and Database Security” on page 14.

15. Click **OK**. The Finish screen appears.

16. Click **Finish**. As items are created their status appears in the box on the Finish screen.
Upon completion, a message appears indicating that the database was created successfully.

17. Click OK. The InstallShield Wizard Complete screen appears.

This screen informs you that *The Information Edge* was successfully installed.

18. Click Finish. You are now ready to begin using *The Information Edge*. For information on getting started, see *The Information Edge User’s Guide*. 
Installing The Information Edge on client workstations


2. Click Next. The License Agreement screen appears.
3. If you accept the terms of the license agreement, click **Next**. The Setup Type screen appears.

4. Select **Install Client only**. The client version contains the necessary components for a workstation to be able to access *The Information Edge* database.

5. Click **Next**. The Choose Destination Location screen appears.

6. You can accept the default destination, or browse to another folder where you want to install *The Information Edge* client components.
7. Click **Next**. The Select Program Folder screen appears.

8. Select the program folder in which you want *The Information Edge* icons to be created.

9. Click **Next**. The installation begins and the Setup Status screen appears.
The InstallShield Wizard Complete screen appears.

This screen informs you that *The Information Edge* was successfully installed.

10. Click **Finish**. You are now ready to begin using *The Information Edge*. For information on getting started, see *The Information Edge User’s Guide*.

## Installing a Database Only

When installing *The Information Edge* if the setup program encounters a problem creating a database, the installation will continue. For example, if you do not have **SQL server** Service Pack 3 installed when the Database Setup wizard appears during *The Information Edge* install, you must cancel out of the wizard, but *The Information Edge* finishes installing even though the database was not created.

To prevent the need to uninstall and reinstall the entire program, you can run the Database Setup wizard separately from *The Information Edge* installation after you rectify the condition that resulted in the database not being created the first time. In the bin folder of *The Information Edge* installation directory, run the file named “BootStrapGUI.exe.” The Database Setup wizard appears so you can install an *Information Edge* database.

You can run this file in the unlikely event that you successfully installed *The Information Edge*, but did not successfully create a database. If you have already created a database, you should not run the wizard again. Doing so can result in removing your existing database and losing any existing data marts. If you want to remove a database you created previously (perhaps you were experimenting with sample data), mark the **Remove existing Information Edge database** checkbox on the Enter Server Names screen of the wizard. If you have already created a database and want to preserve it, do NOT mark this checkbox. Marking the checkbox will remove any data marts, cubes, segmentations, or any other features you created previously.
Authentication and Database Security

If your installation of SQL Server Analysis Services is on a domain controller server, the OLAP Administrators security group is created as a global, rather than local, group. Microsoft does not recommend installing Analysis Services on a domain controller because of security limitations and system resources used by analytical processing.

During installation, you can specify whether to use SQL Server or Windows authentication to enable The Information Edge to access SQL Server. Windows authentication is generally the preferred method for logging into SQL Server; however, you may have specified to use a SQL Server user name and password if your network is based on a workgroup (generally associated with smaller networks) instead of a domain for which you have applied a security policy.

Windows authentication is per specific machine. If you are an administrator on a particular machine, you are automatically made an administrator in The Information Edge.

To access Information Edge data, other users must be added from within The Information Edge. When adding users, you can specify the level of access rights they have: administrative rights to all data marts, administrative rights to only certain data marts, or user rights to selected data marts. User rights enable a user to create and view reports, but not to change the structure of the data. For more information about adding users to The Information Edge, see the Database Users section of The Information Edge User’s Guide.

Logging Into The Information Edge

After installation, each time you open The Information Edge a login screen appears.

The information you use to log in is based on the authentication information you specified in your installation of SQL Server, and the server you specified when installing The Information Edge.
If you attempt to log in after the database has already been updated by another user, a message appears.

Click OK to clear the message, upgrade your installation, and attempt to log in again.

**SQL Server Logins**

*The Information Edge* uses a *Raiser’s Edge* login on *SQL Server* to connect with *The Raiser’s Edge* database. You can view the logins enabled for it in *SQL Server Enterprise Manager*.

The *REUser* login enables *The Information Edge* to connect to the server on which *The Raiser’s Edge* resides. The connection has rights only to *Raiser’s Edge* databases. If a connection to the server cannot be made using the *REUser* login, *The Information Edge* attempts to connect to the server using *Windows* Authentication. If a connection still cannot be made, an error message appears.

The *REUser* login has DBO (database owner) rights to the database because *The Raiser’s Edge* uses it to log into the database. *The Raiser’s Edge* needs full database owner rights to perform all its functions, such as creating tables and views. For example, tables are created for static queries, and a wide range of temporary tables and views when running reports. *REUser* can also make more complicated changes to the database schema during an upgrade when database revisions run. Therefore, *REUser* must be able to add, drop, and alter tables, stored procedures, and functions.

It is important to note that the *REUser* login has DBO rights only for the *Raiser’s Edge* database, not for any other databases that may be running on the server. It is also important to note that connecting to the *Raiser’s Edge* server using the *REUser* login requires that the instance of *SQL Server* be set to SQL Server and *Windows* Authentication and not *Windows* Authentication only. If *Windows* Authentication only is specified, the connection to the server will fail even when the *REUser* login is present on the server.
The REUser_ReadOnly and WEBREPORTS logins are not used by The Information Edge. REUser_ReadOnly is used by The Raiser’s Edge for users who do not have security rights to edit records, and WEBREPORTS is used by RE:Anywhere, the Web-based version of The Raiser’s Edge.

The Information Edge and Raiser’s Edge Security

Information Edge users with administrative rights have full access to records in The Raiser’s Edge - even if those rights are not explicitly set in The Raiser’s Edge.

When editing an export definition for an RE:Express data mart, an Information Edge user can view and edit Raiser’s Edge records without security restrictions.

Windows XP Service Pack 2 Considerations

Windows XP Service Pack 2 is in part designed to tighten default security settings in Internet Explorer. Several of these settings can impact areas of The Information Edge. For example, when accessing the menu of an HTML Publication, Internet Explorer may display an “Information Bar” containing the following message: “To help protect your security, Internet Explorer has restricted this file from showing active content that could access your computer. Click here for options...”

The following options are available from the Information Bar.

When you click Allow Blocked Content, a message appears informing you that allowing blocked content can harm your computer. If you click OK on the message, the blocked items display and function normally.

If you click Information Bar Help, you can access instructions for altering security settings so that the Information Bar does not appear and blocked content is always allowed.
Installing Crystal Reports Professional

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You should not use the Crystal Reports Standard Edition license that comes bundled with The Raiser’s Edge with The Information Edge.

The Information Edge supports Crystal Reports Professional 8.5. If you purchased Crystal Reports Professional with The Information Edge, the Crystal CD is included in your Information Edge installation package.

Before installing the 8.5 version of Crystal Reports Professional, you must uninstall any earlier versions of the software existing on your computer. The following two procedures take you step by step through first uninstalling previous versions and then installing the new version.

- Uninstalling Crystal Reports 7 (or lower)

Before installing the 8.5 version of Crystal Reports Professional, you must uninstall any earlier versions of the software existing on your computer.

1. From the Start menu, select Settings, Control Panel, Add/Remove Programs.
2. The Add/Remove Programs screen appears. Locate and select Crystal Reports 7 (or lower).
3. Click Change/Remove. A screen appears, asking you to confirm you want this program removed.
   ![Seagate Crystal Reports Uninstallation](image)
   - Are you sure you want to uninstall Seagate Crystal Reports?
   - Yes
   - No
4. Click Yes. The uninstall process begins.
   - You may receive messages asking if you want shared files removed.
   ![Seagate Crystal Reports Uninstallation](image)
   - FG Editor is a shared component that may be needed by other applications. Are you sure that you want to have it removed?
     - Other applications may use this file and will not work if it is missing.
     - Yes
     - Yes to All
     - No
     - No to All
     - Cancel
5. Even if the message suggests the file may no longer be needed, we recommend saying No to All and not uninstalling any shared files. The deleting process continues.
   ![Please Wait](image)
   - Deleting installed files
A screen appears, telling you when the uninstall is complete.

6. Click **OK**. You return to the Add/Remove Programs screen.
7. To close the Add/Remove Programs screen, click **Close**.
8. You are now ready to install *Crystal Reports Professional 8.5*.

➢ **Installing Crystal Reports Professional 8.5**

1. Install the *Crystal Reports Professional* CD included with your *Information Edge* installation package. Set up should start automatically. If it does not, you can access the “setup.exe” from *Explore*.
2. The program searches your computer, trying to locate any existing versions of *Crystal Reports*.

If an existing version is found, the program recommends exiting the setup procedure and uninstalling the older version.
If no existing version is found, a screen appears welcoming you to the *Crystal Reports* for Blackbaud Installation Wizard.

3. Click **Next**. A screen appears displaying the License Agreement.
4. Select **I accept License Agreement** and click **Next**. A screen appears asking you to select an installation type.

5. Because **Typical** is the easiest and most common type of installation, select **Typical**.

6. In the **Destination Folder** frame, enter where on your computer you want to install **Crystal Reports**. You can accept the default location, or click **Browse** to map to a new location.

7. Click **Next**. A screen appears, asking you to confirm you are ready to install **Crystal Reports**.

For a detailed explanation of each installation type, see the **Crystal Reports** documentation, accessed from the company’s Web site www.crystaldecisions.com.
8. Click Next. The installation process begins. A screen appears, tracking the installation progress.

9. A screen appears, telling you when the installation process is complete.

10. Click Finish.

11. To open Crystal Reports, from the Start menu, click Programs, Crystal Reports for Blackbaud.
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