Fundraising 50

Installation Guide

abila™

Contents

Chapter 1: Getting Started

Thank you for choosing Fundraising 50. You are about to discover just how easy it is to manage this powerful fundraising software. This guide includes combined instructions for both new and upgrading users of Fundraising 50 in a Windows environment. Please thoroughly review this entire guide and keep it handy during the installation or upgrade process. Our goal is to make your experience during this process as smooth as possible. Please assist us in this goal by following the detailed instructions provided.

Note: You will need to have Administrator rights within your Windows environment in order to install the software.

System Recommendations

Before you begin the installation process, visit the AbilaFundraising 50 Solutions page at abila.com/solutions/fundraising-50. Click on the **System Requirements** tab (located near the bottom of the page) to view our system recommendations. Meeting, or exceeding, these current recommendations will ensure that your environment will properly support version 2014.

Important! The minimum recommended SQL Server version must be installed in Mixed Mode *before* installing Fundraising 50. In addition, the minimum required .NET Framework must be installed on your server and on *all* workstations *before* installing Fundraising 50. A more recent version than the minimum that is required is also acceptable.

If the minimum required SQL Server version is not yet installed on your server, the Fundraising 50 Installation Startup page includes the **SQL Server Express Installation** link to connect you to the Microsoft website so that you can download and install Microsoft® SQL Server® 2012 Express Edition with Advanced Services.

The minimum .NET Framework installation is done outside of the Fundraising 50 installation process.

Important! Support for Windows XP and Windows Server 2003 will discontinue with the *next* Fundraising 50 release.

Chapter 2: Installing the Windows Server

This chapter will cover the following:

- Directory Structure

- Before You Begin

- SQL Server Express Installation

- Installing Abila Auto Update

- Installing your Fundraising 50 Server

- Sharing the FR50 Share Directory

- Firewall Settings

Fundraising 50 must be installed on the database server before installing it on the workstations.

The Sage Exchange Module SDK is used to store credit card numbers. It will be installed as part of the Fundraising 50 Workstation installation. The Workstation installation for the database server will launch immediately after Fundraising 50 Server installation is complete.

Directory Structure

- When installing the Fundraising 50 Server, the data files and workstation share files are delivered to and stored on the computer that is functioning as the server.

- The Fundraising 50 Server executable (ServerSetup.exe) creates the FR50 Share directory.

- Details about the contents of the FR50 Share directory can be found in the *Establishing Rights/Permissions on the FR50 Share Directory* section of this chapter.

- The workstation installation will deliver the Fundraising 50 system and program files to each client computer.

- Details about the directory structure on each client computer can be found in *Chapter 3 - Installing the Workstation*, of this guide.

Important!

Upgrading users (only) - The Fundraising 50 version 2014 Server and Workstation installations will change the directory structure on the server and workstation computers.

- The Server installation will create the new FR50 Share directory and move contents in the Sage FR50 Share directory to the new FR50 Share directory.

- The Workstation installation on the server computer will create the new Abila Fundraising 50 directory in Program Files (or Program Files (x86) on 64-bit computers) on the server computer, and move contents in the Sage Fundraising 50 directory to the new Abila Fundraising 50 directory.

- The Workstation installation on a client computer will create the new Abila Fundraising 50 directory in Program Files (or Program Files (x86) on 64-bit computers) on the client computer, and move contents in the Sage Fundraising 50 directory to the new Abila Fundraising 50 directory.

What files and directories will the Server installation move/ copy?

Only the files that were *created and updated by Fundraising 50* will be moved to the new FR50 Share directory. The Server Installation will copy your database backups into the new FR50 Share directory, but it will not move or copy any directories and files that may have been *created by your organization*. These directories and files will remain in the Sage FR50 Share directory, and you must manually move/copy them over after the Server installation is complete.

What files and directories will the Workstation installation move/copy?

Only the files that were *created and updated by Fundraising 50* will be moved to the Abila Fundraising 50 directory. The Workstation installation will not move or copy directories or files that were *created by your organization*. Your customized .def and .csv files that are used with the Fundraising 50's Export to G/L functionality *will not* be copied over to the Abila Fundraising 50 directory. You must manually move your customized .def and .csv files to the Abila Fundraising 50/Import directory on each computer after the workstation installation on the computer is complete.

For safekeeping, *before* you install Fundraising 50 version 2014, please make backup copies of all files and directories that were not created or updated specifically by Fundraising 50. These steps are included in the *Before You Begin - Upgrading Users* section of this chapter.

Before You Begin

Review *Chapter 1 - Getting Started:*

1. Navigate to the current system recommendations (this link is provided in the *System Recommendations* section of *Chapter 1*) and review the current system requirements. Verify that your system meets or exceeds these current system requirements.

> **Important!** Verify that the minimum .NET framework is installed on your server and on all workstations *before* installing the Fundraising 50 server. A more recent version than the minimum that is required is also acceptable. This installation is done outside of the Fundraising 50 installation process.

New Users

If you are a new Fundraising 50 user:

1. Verify that your User Account Controls (UAC) are set to **Never Notify**.

2. Disable Windows Defender.

3. Disable SmartScreen if your operating system is Windows 8.

Upgrading Users

You must be on *version 8.2 (or later) to use this guide* to upgrade to version 2014.

If you are upgrading from a version prior to version 8.2, access the Knowledgebase and search for the installation article that pertains to your upgrade scenario - for examples: 8.1 to 2014, 8.0 to 2014.. To access the Knowledgebase, visit the Fundraising Support Resources page at abila.com/support and click **Support>Knowledgebase**. Registration is required to access the Knowledgebase.

If you are upgrading from the previous version of Fundraising 50, complete the following steps before beginning the upgrade process:

1. Review the contents of the Sage FR50 Share directory on the server computer for your organization-specific files and directories (these are files and directories that were not specifically created/updated by Fundraising 50). Copy them to a safe location - for example, into a directory that you create on the desktop for this specific purpose.

2. Copy the **Sage FR50 Share/Backup** folder to the safe location. This folder contains your Fundraising 50 database backups.

3. If the Fundraising 50 Workstation is installed on the server computer, review the contents of the **Program Files\Sage Fundraising 50 (Program Files (x86)\Sage Fundraising 50** on 64 bit computers) for your organization-specific files and directories (these are files and directories that were not specifically created/updated by Fundraising 50). These include the custom .def and .csv files that you use with the Fundraising 50 **Export to G/L** functionality). Copy these files to the safe location.

4. Remove **Sage Advisor Update PlugIn for Sage Fundraising 50** from the Fundraising 50 server computer. Also remove **Sage Advisor Update** if you do not own a Sage product.

   Note: Abila MIP (previously named Sage 100 Fund Accounting) is not a Sage product. SageSage E-marketing and Sage Payment Solutions are two examples of Sage products that you may currently own. If you own at least one Sage product, then *do not remove* **Sage Advisor Update**.

   a. Navigate to the **Programs and Features** screen (**Add or Remove Programs** screen for Windows XP).

      i. **Windows 8** - Open the Charms bar from either the Start screen or the Desktop (press Windows Key + C, or move your mouse to the top right corner of the screen). Click on **Search**, and then click on **Apps**. Enter Control in the search text box. Click on **Control Panel** in the Search Results on the left hand side. Select **Programs**.

      ii. **Windows 7** - **Start>Control Panel**. Select **Programs and Features**.

      iii. **Windows XP** - **Start>Settings>Control Panel**. Select **Add or Remove Programs**.

   b. Right-click **Sage Advisor Update PlugIn for Sage Fundraising 50** and select **Uninstall** (Windows XP - select **Sage Advisor Update Update PlugIn for Sage Fundraising 50** and click **Remove**).

   c. *If you do not own Sage products*: right-click **Sage Advisor Update** and select **Uninstall** (Windows XP - select **Sage Advisor Update** and click **Remove**).

Start

The following steps apply to both new users and upgrading users, as noted.

1. Log on to the computer that will function as the Fundraising 50 server.

2. To obtain the Fundraising 50 version 2014 installation files, access the Knowledgebase and download *KB article 7116*.

   To access the Knowledgebase, visit the Fundraising Support Resources page at abila.com/support and click **Support>Knowledgebase**. **New users** must be registered for the Abila Support website before they can access the Knowledgebase.

3. Double-click the **Fundraising 50 Version 2014** icon. The Installation will launch. Click the **Setup** tab (if it is not already selected).
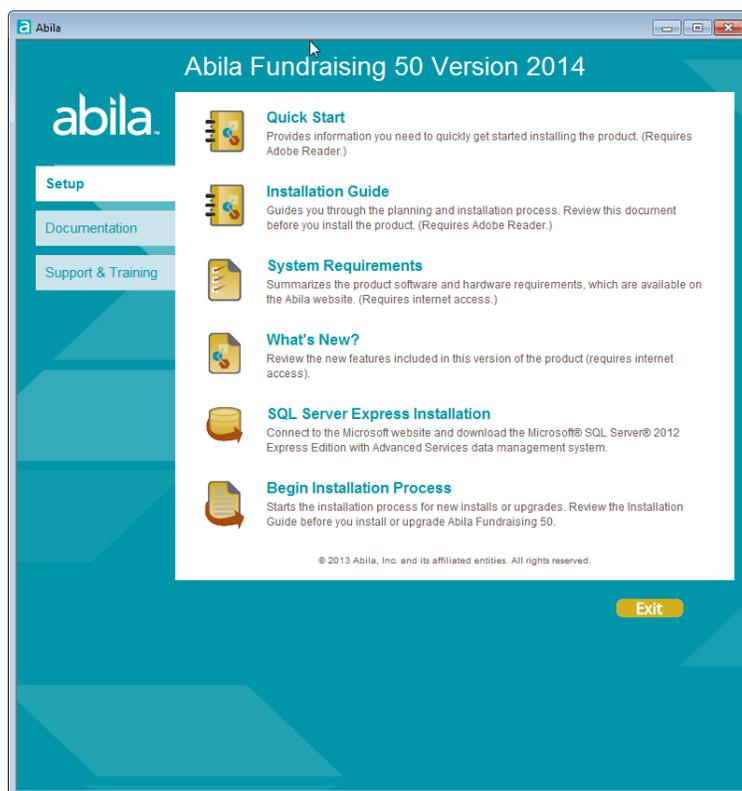
Installing SQL Server Express

If you do not have the minimum recommended version of SQL Server already installed on the computer that will function as the Fundraising 50 server, click **SQL Server Express Installation**. Follow the steps to download SQL Server Express from the Microsoft website. See *KB article 3156* for Microsoft SQL Express 2012 SP1 installation instructions.
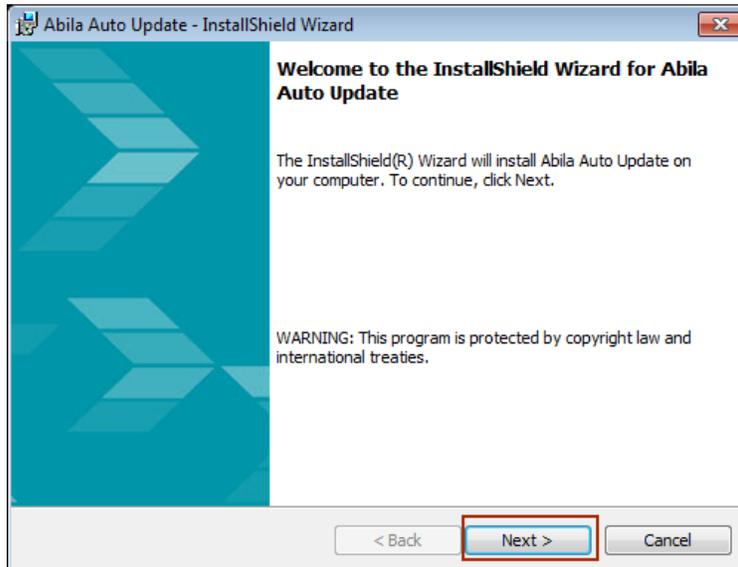
Installing Abila Auto Update

Abila Auto Update helps you keep your Fundraising 50 product up to date with the latest releases and updates. Abila Auto Update reviews the Abila products you have locally installed and lists the online updates that are available for those products. It is used to receive all future updates for Fundraising 50.

The Abila Auto Update is installed before the server and workstation installations. It is a part of the entire installation process for Fundraising 50.
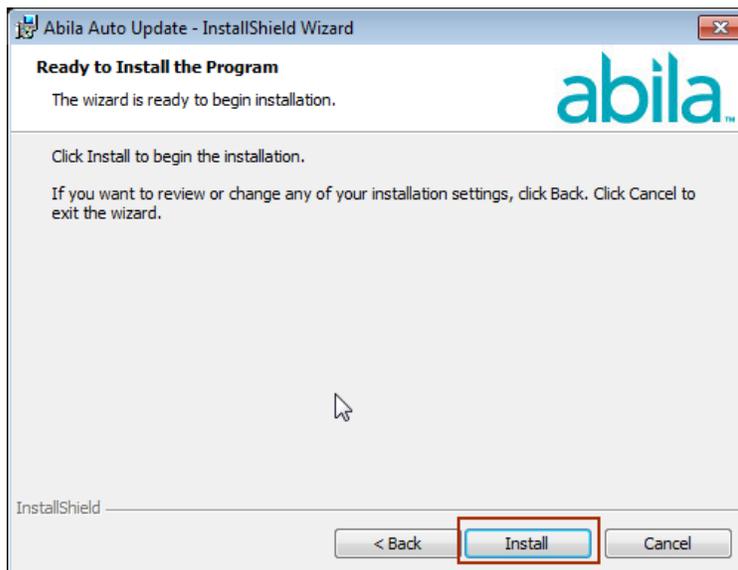
1. Click the **Begin Installation Process** item on the Installation start page.
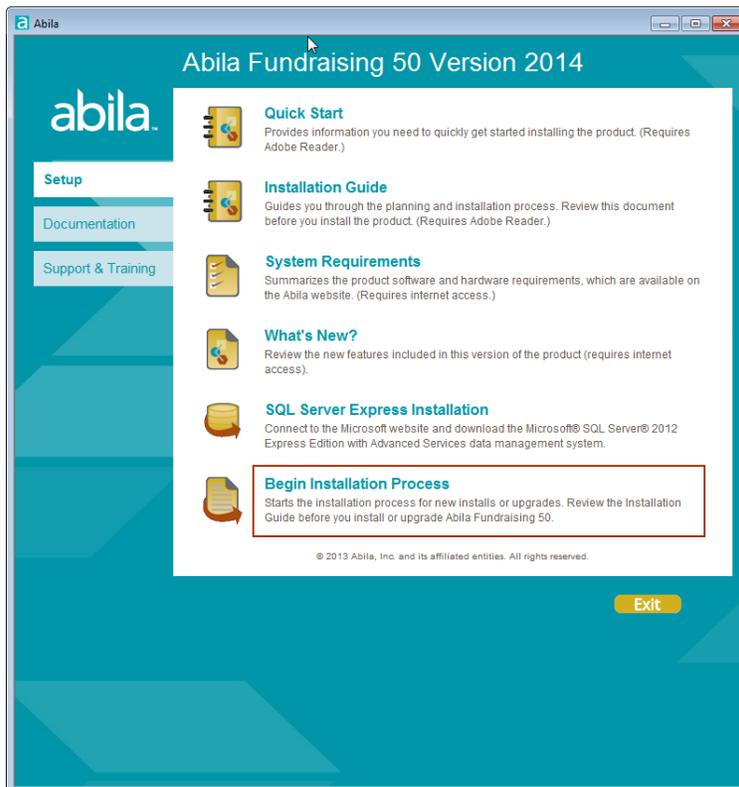
2. The **Abila Auto Update Installation Wizard** is shown. Click **Next**.

3. Click **Install** to begin the installation process. A progress bar will display to show installation progress.

4. Upon successful Abila Auto Update installation, the **Installation Wizard Completed** message displays. If you want to review the Windows Installer log, select **Show the Windows Installer log** and then click **Finish**. The log file will display and the Abila Auto Update installation wizard will close. If you do not want to review the log, click **Finish** to close the Abila Auto Update Installation wizard.
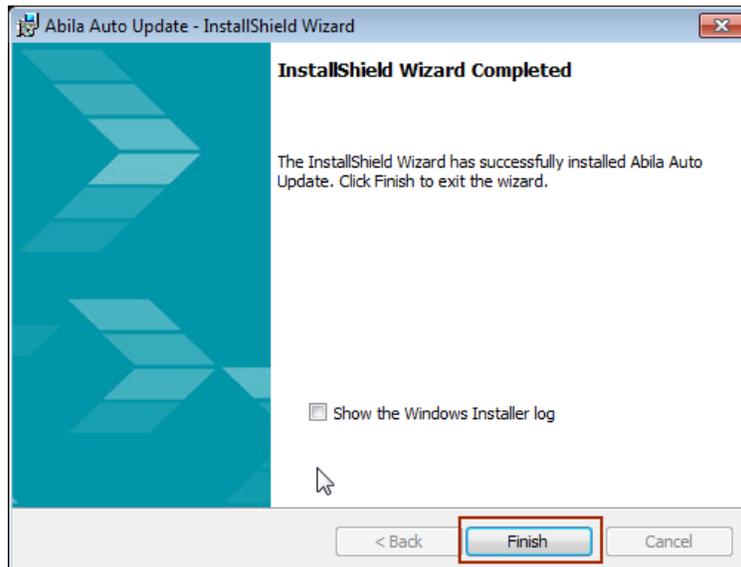
5. Continue the Fundraising 50 installation by using the "*Installing the Server*" instructions below.

Installing the Server

*The following steps apply to both new users and upgrading users, as noted.*

1. **New users** - after the Abila Auto Update has been installed, the **Product Registration** page displays. Enter the **Serial Number** and **Activation Code** (unlock key). This code is case sensitive, so it must be entered exactly as it appears on the notification included with the system. Click **Next**.

   Upgrading users - after the Abila Auto Update has been installed, click the **Begin Installation Process** link on the Installation start page (**Setup** tab).

2. The **Installation Wizard** is shown. Follow the instructions on the **Welcome** panel, and click **Next**.

3. Review the **End User License Agreement**. Scroll to view the entire agreement. Select the **I accept the license agreement** option and click **Next**.
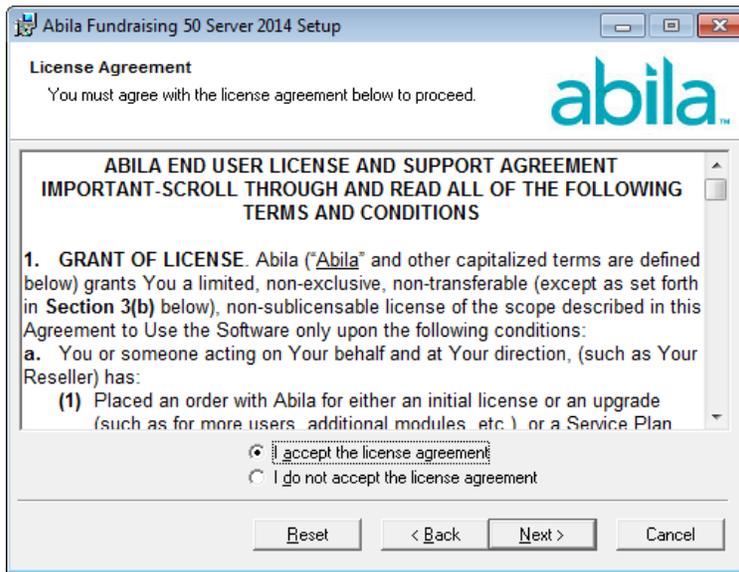
4. On the **SQL Server Connection** panel, you can accept the default **SQL Server Name**. If you are an Upgrading user, this name defaults to the name of your SQL Server instance. If you are a new user or if you have a new installation of instance of SQL Server (or SQL Server Express), enter the SQL Server name or use the **Browse** button to select the name of another existing SQL Server instance installed on this computer.
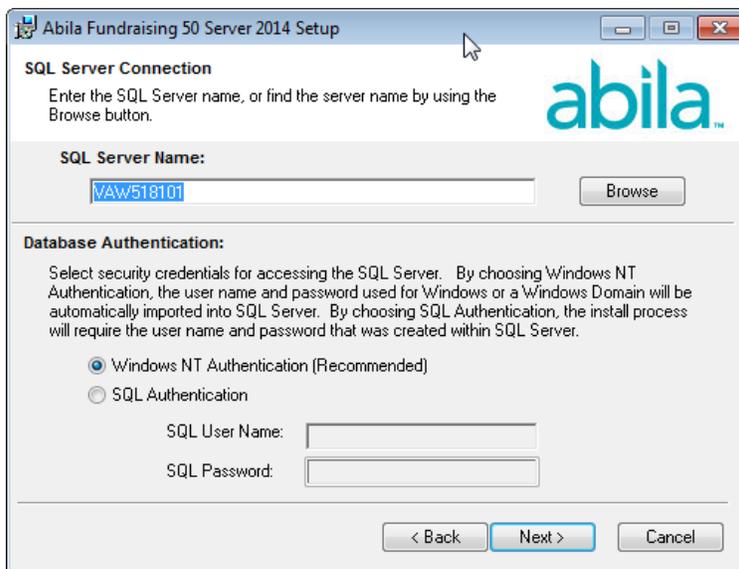
5. Select **Windows NT Authentication for Database Authentication** (if not already selected).

6. Click **Next**.

7. **New Users** - On the **Database Information** panel, enter a name for your new Fundraising 50 database. This database will be created during the installation process.

   Upgrading Users - On the **Database Information** panel, the **Database Name** will already display the name of your database
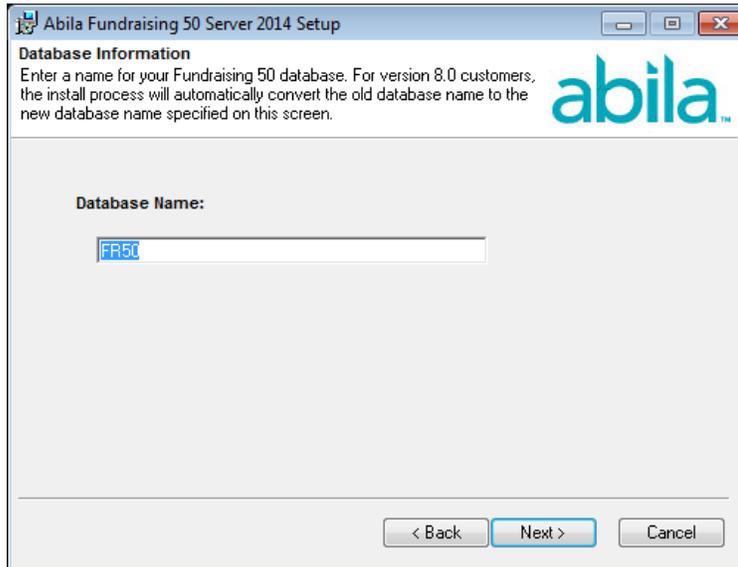
8. Click **Next**.

9. On the **Destination Folder** panel, review the default drive to determine if this is the location you would like the directory to install. The default destination folder is **C:\FR50 Share**. If you redirect this location by using the **Browse** button, it must be to a drive located on the same server.
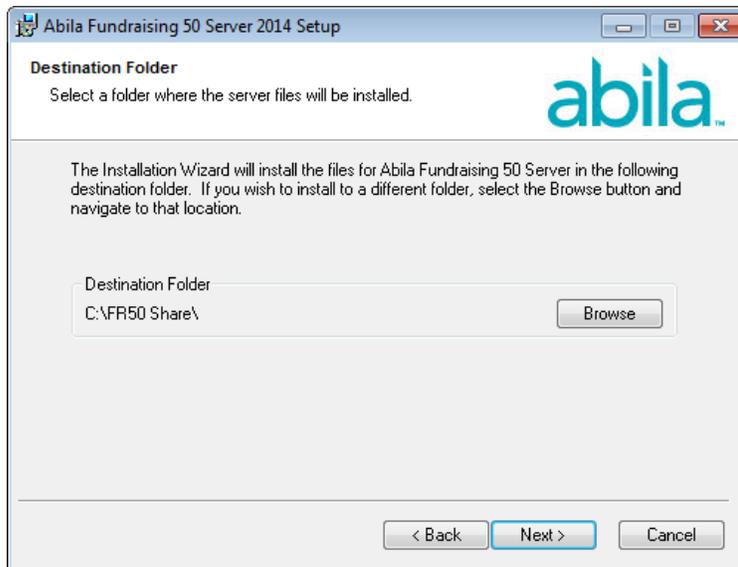
10. Click **Next**.

11. The Fundraising 50 Server 2014 setup proceeds. The **Updating System** panel displays with status bar to show the progress of the installation.
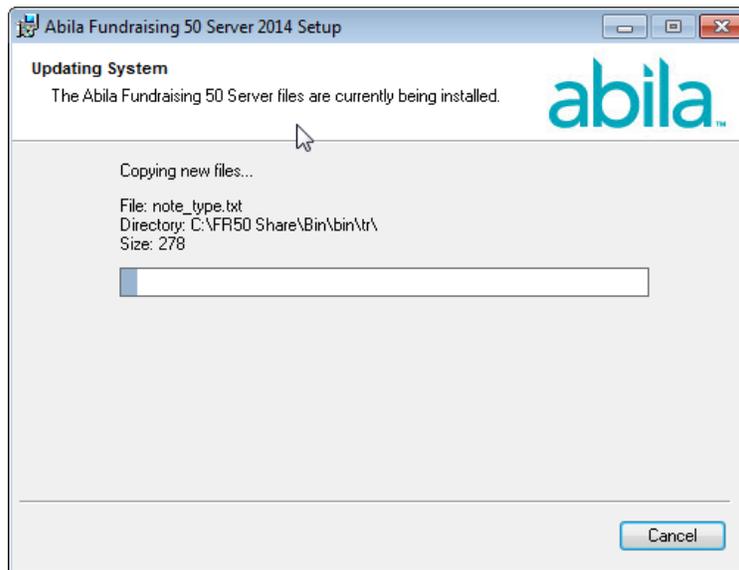
12. When the installation is complete, the **Fundraising 50 Server 2014 has been successfully installed** screen displays.
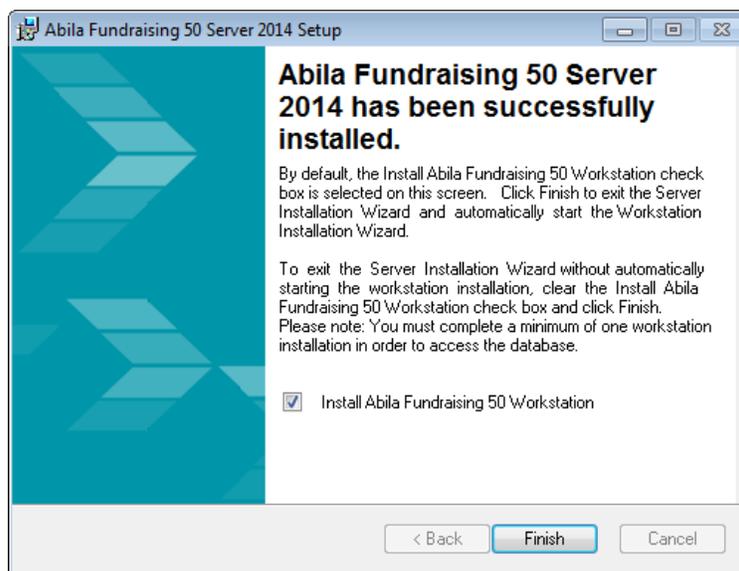
13. The **Install Fundraising 50 Workstation** check box will be selected by default. Click **Finish** to install the Workstation on the *Server* computer. Continue to install the Workstation on the Server computer by following the "*Workstation Installation Wizard*" instructions located in *Chapter 3*.

14. Click **Exit** to close.

15. **Upgrading users**, verify that your database backups have been copied over to the **FR50 Share/Backup** directory on the server computer.

16. **Upgrading users**, copy your organization-specific files and directories into the new **FR50 Share** on the server computer.

17. **Upgrading users**, if the Fundraising 50 workstation installation is installed on the server computer, verify that you have copied all organization-specific files and directories into the new **Abila Fundraising 50** directory on the server computer. This will include copying custom .def and .csv files into the **Abila Fundraising 50/Import** directory if your organization uses them to **Export to G/L**.

18. Share the **FR50 Share** directory with *Full* control permissions to *Everyone* by following the "*Establishing Rights/Permissions on the FR50 Share Directory*" instructions.

Establishing Rights/Permissions on the FR50 Share Directory

The FR50 Share directory was created by the Server installation and it contains the files necessary to install the Fundraising 50 program files on each workstation. It also serves as the network 'link' to the Fundraising 50 server. The FR50 Share directory must be shared so that the workstations will have access to it.

The FR50 Share directory contains the following folders:

* **Backup** - Stores database backup files for Fundraising 50 at the server. **Upgrading Users** - Unlike previous versions, all backups performed will be stored in this single central location. This is a Microsoft SQL requirement.

* **Bin** - Contains files necessary for the system to function properly.

* **Setup** - Contains files necessary to run the Fundraising 50 Workstation installation. Every client computer needs to access the Setup folder in order to install the Workstation component. **FR50Workstation.exe** in the setup folder launches the Fundraising 50 Workstation installation.

Important! Do not password protect the FR50 Share directory.

Sharing the FR50 Share Directory for Windows 8

To share the FR50 Share directory using Windows 8:

1. **Desktop view** - Right-click in the lower left corner, and then left-click on **File Explorer**.

   Metro view - On the Windows 8 Start screen, type in File Explorer. Click on **File Explorer** in Search Results on the left hand side.

2. Continue with the *Sharing the FR50 Share directory using Windows 7* instructions, but begin on **Step 2**.

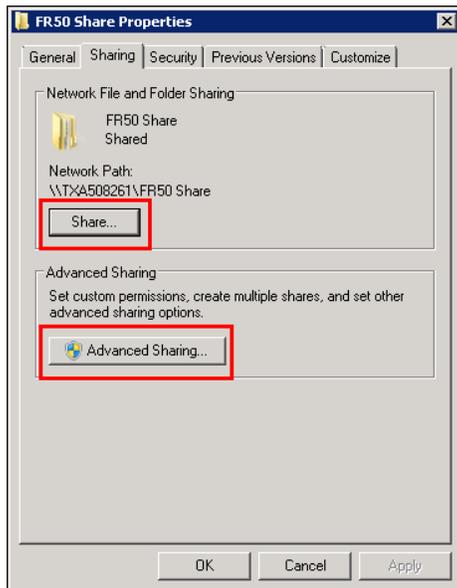## Sharing the FR50 Share Directory for Windows 7

To share the FR50 Share directory using Windows 7:

1. Right-click on the Start button and then left-click on **Open Windows Explorer**.

2. Navigate to the FR50 Share directory (for example, C:\FR50 Share).
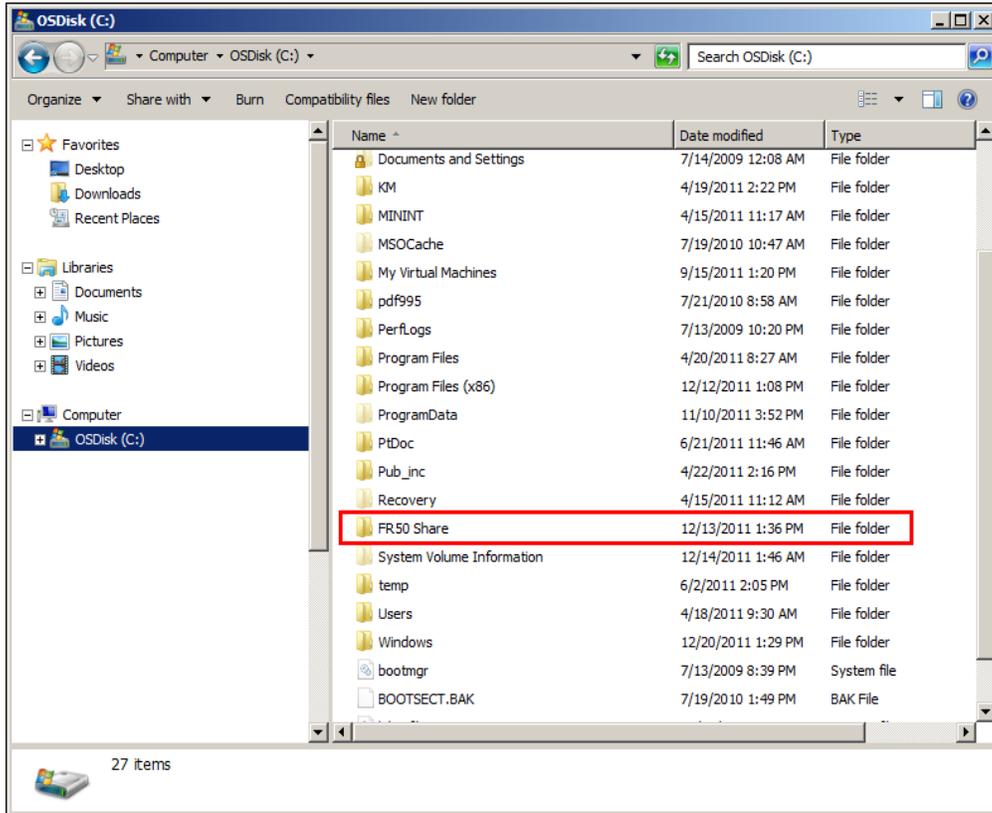
3. Right-click the **FR50 Share** directory at the server and select **Properties**.

4. Click the **Sharing** tab.

5. If the **Share** button is available:

    a. Ensure that **Full Control** permissions have been granted to the *Everyone* user group.

    b. Click **Share**.

    c. Click **Done** to apply these settings.

6. If the **Share** button is not available (grayed out):

    a. Click the **Advanced Sharing** tab.

    b. With FR50 Share selected in the Share name drop-down list, click the **Permissions** button, ensure **Full Control** permissions have been granted to the *Everyone* user group and click **OK**.

    c. Click **OK** to apply these settings.

7. Proceed to "*Firewall Settings*."

Sharing the FR50 Share Directory for Windows XP

Important! Support for the Windows XP operating system will discontinue with the *next* Fundraising 50 release.

To share the FR50 Share directory for Windows XP Operating System:

1. Right-click on the **Start** button and then left-click on **Explore**. Navigate to the FR50 Share directory (for example, **C:\FR50 Share**).

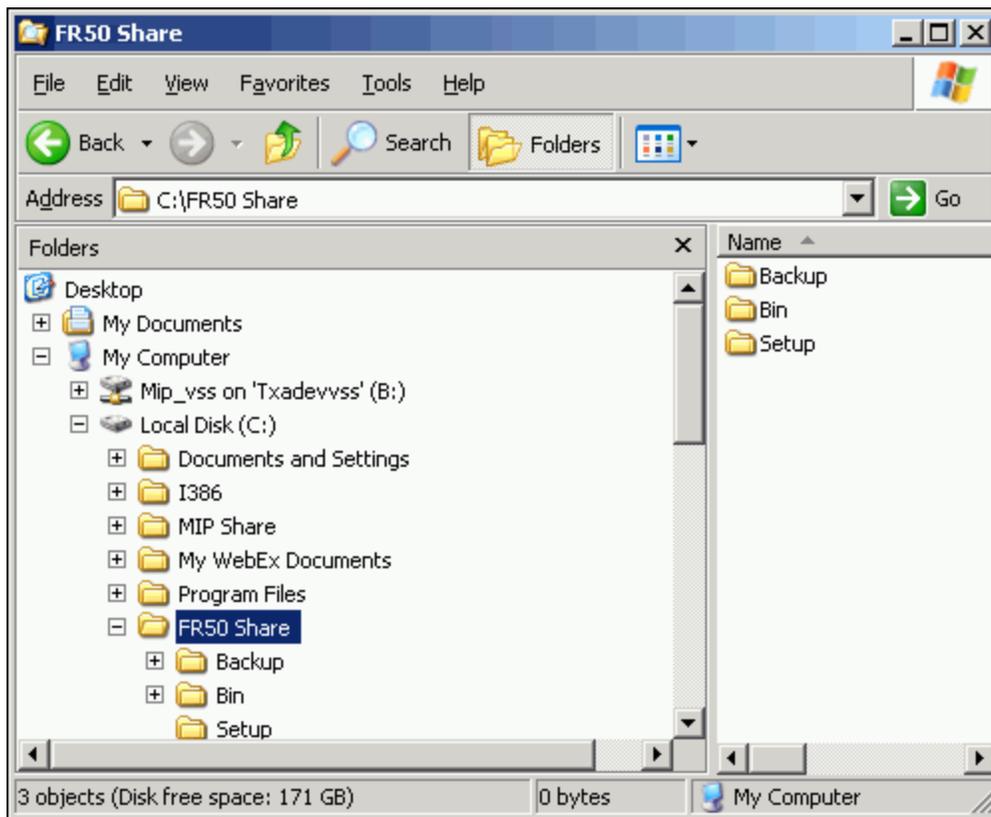2. Right-click the **FR50 Share** directory at the server and select **Sharing and Security**.

3. On the **Sharing** tab, click **Share this folder** – retain the default share name which is the same as the directory name.

4. Click the **Permissions** button. Ensure that **Full Control** permissions have been granted to the *Everyone* user group, and then click **OK**.

5. Click **OK** again to apply these settings.

Firewall Settings

To ensure the Fundraising 50 workstations can communicate (connect) with the Fundraising 50 Server, review Firewall settings *before* proceeding with the workstation installations on other computers.

As network security becomes an issue requiring greater control over network rights and access, in many cases it is now necessary to specifically allow Fundraising 50 to be broadcast on your network. This permission must be manually granted because of default Firewall settings.

Firewall Settings for Windows 8

Access the Allow apps to communicate through Windows Firewall display:

1. At the Server, open the **Charms** bar from either the Start screen or the Desktop (press Windows Key + C, or you can move your mouse to the top right corner of the screen).

2. Click on **Search**, and then click on **Settings**.

3. Enter Firewall in the search text box. Click on **Allow apps to communicate through Windows Firewall** in the Search Results on the left hand side. The **Allowed apps** form is shown.
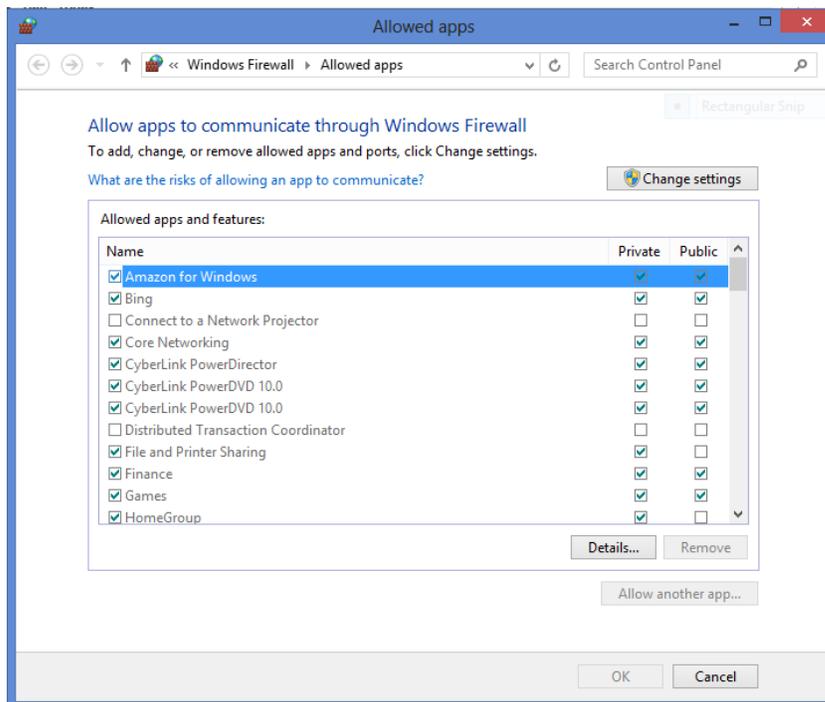
If you see **SQL Browser Service EXE** and **SQL Server Windows NT** in the **Allowed apps and features** listing, *stop* here. The firewall settings are correct, and you can now proceed to *"Chapter 3 - Installing the Workstation"*.

If you do not see SQL Browser Service EXE and SQL Server Windows NT in the Allowed apps and features listing, then complete the following steps:
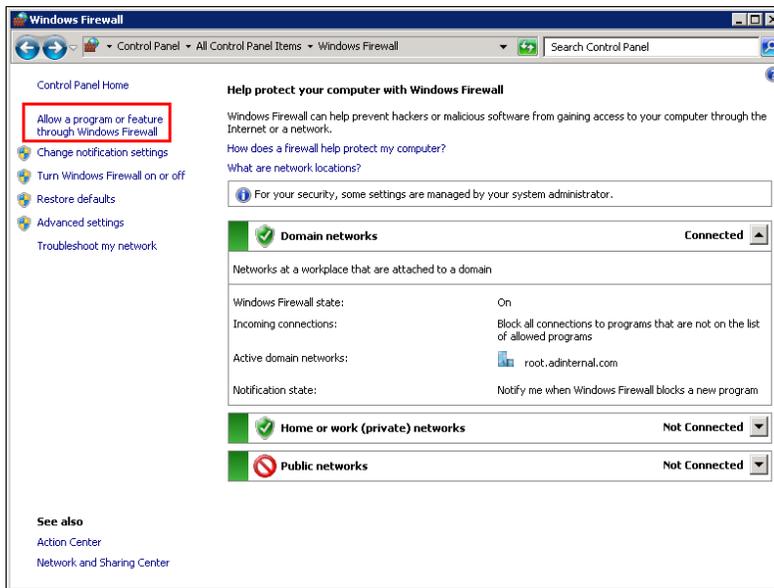
1. On the **Allowed apps** form, click the **Change settings** button.

2. Click the **Allow another app** button. The **Add an app** form is shown.

3. Click **Browse.**

4. Navigate to the **C:\Program Files\Microsoft SQL Server\90\Shared** directory (if installing to a 64-bit computer, the correct path is **C:\Program Files (x86)\Microsoft SQL Server\90\Shared**).

5. Select the **sqlbrowser.exe** file, and then click **Open**.

6. The **Add an app** form shows **sqlbrowser.exe** along with the path to the file. Click the **Add** button.

7. On the **Allow apps** form, click the **Allow another app** button *again* (to add the **sqlservr.exe** file).

8. On the **Add an app** form, click the **Browse** button.

9. Navigate to the **C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn directory** (if installing to a 64-bit computer, the correct path is **C:\Program Files (x86)\Microsoft SQL Server\MSSQL.1\MSSQL\Binn**).

10. Select the **sqlservr.exe** file, and then click **Open**.

11. The **Add an app** form displays **sqlservr.exe** along with the path to the file. Click the **Add** button.

12. The **Allow apps** form will now list both **SQL Browser Service EXE** (sqlbrowser.exe) and **SQL Server Windows NT** (sqlservr.exe). Click **OK**.

You have now allowed the Fundraising 50 Server to be broadcast and recognized on your network. You can now proceed to "*Chapter 3 - Installing the Workstation*".

Firewall Settings for Windows 7

Access the Allow programs to communicate through Windows Firewall display:

1. At the server, select the **Start button>Control Panel>Windows Firewall**. The **Windows Firewall** form displays.

2. Select **Allow a program or feature through Windows Firewall**.

If you see **SQL Browser Service EXE** and **SQL Server Windows NT** in the **Allowed programs and features** listing, *stop* here. The firewall settings are correct, and you can now proceed to *"Chapter 3 - Installing the Workstation"*.

If you do not see SQL Browser Service EXE and SQL Server Windows NT in the Allowed programs and features listing, then complete the following steps:

1. On the **Allow programs to communicate through Windows Firewall** display, click the **Change settings** button.
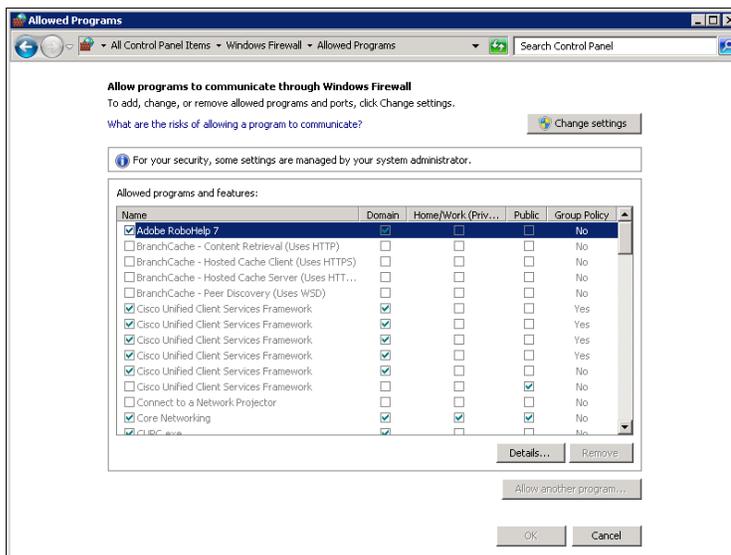
2. Click the **Allow Another Program** button.

3. On the **Add a Program** form, click **Browse.**

4. Navigate to the **C:\Program Files\Microsoft SQL Server\90\Shared** directory (if installing to a 64-bit computer, the correct path is **C:\Program Files (x86)\Microsoft SQL Server\90\Shared**).

5. Select the **sqlbrowser.exe** file, and then click **Open**.

6. The **Add a Program** form displays **sqlbrowser.exe** along with the path to the file. Click the **Add** button.

7. On the **Allow programs to communicate through Windows Firewall** display, click the **Allow another program** button *again* (to add the **sqlservr.exe** file).

8. On the **Add a Program** form, click the **Browse** button.

9. Navigate to the **C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn directory** (if installing to a 64-bit computer, the correct path is **C:\Program Files (x86)\Microsoft SQL Server\MSSQL.1\MSSQL\Binn**).

10. Select the **sqlservr.exe** file, and then click **Open**.

11. The **Add a Program** form displays **sqlservr.exe** along with the path to the file. Click the **Add** button.

12. The **Allow programs to communicate through Windows Firewall** will now list both **SQL Browser Service EXE** (sqlbrowser.exe) and **SQL Server Windows NT** (sqlservr.exe). Click **OK**.
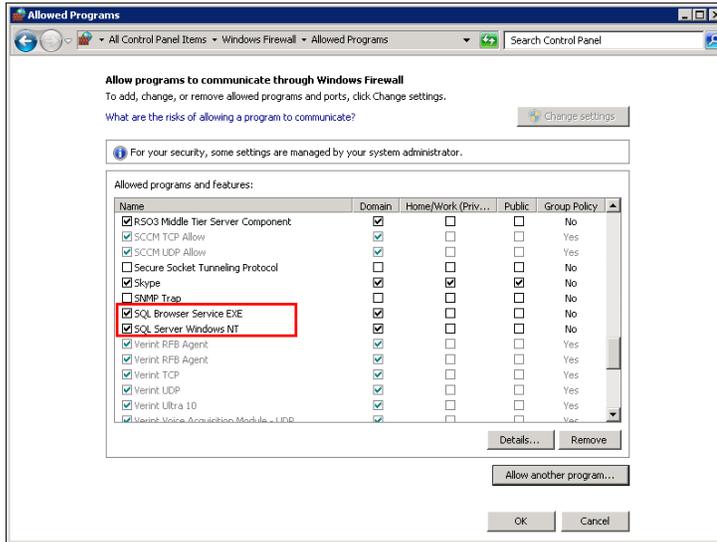
You have now allowed the Fundraising 50 Server to be broadcast and recognized on your network. You can now proceed to "*Chapter 3 - Installing the Workstation*".

Firewall Settings for Windows XP

Important! Support for the Windows XP operating system will discontinue with the *next* Fundraising 50 release.

Access the Windows Firewall form Exceptions tab:

1. At the server, select the **Start button>Settings>Control Panel>Windows Firewall**. The **Windows Firewall** form displays.
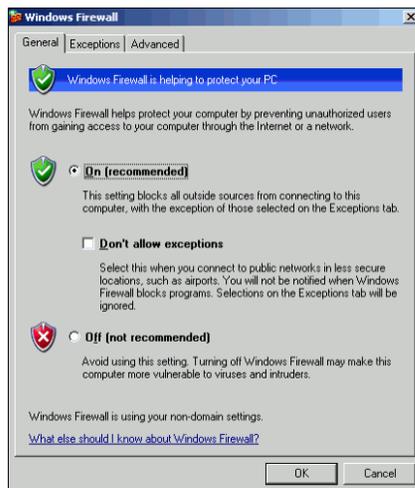
2. Select the **Exceptions** tab.

If **sqlbrowser.exe** and **sqlservr.exe** are listed in **Programs and Services**, *stop* here. The firewall settings are correct, and you can now proceed to *"Chapter 3 - Installing the Workstation"*.

If you do not see sqlbrowser.exe and sqlservr.exe in the Programs and Services listing, then complete the following steps:

1. On the **Windows Firewall** form, **Exceptions** tab, click the **Add Program** button. The **Add a Program** form displays.
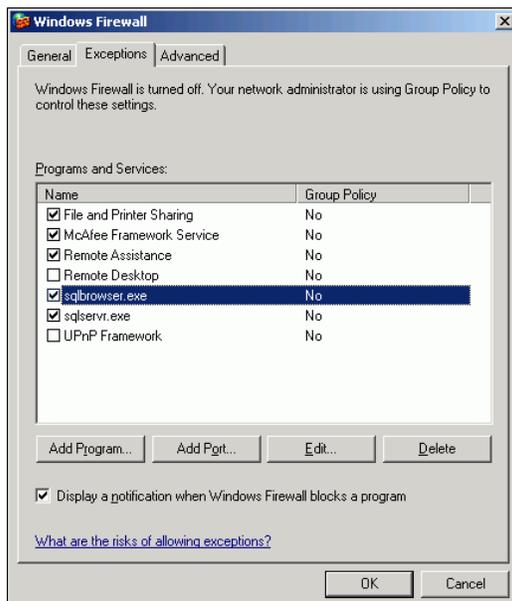
2. On the **Add a Program** form, click the **Browse** button.

3. Navigate to the **Program Files\Microsoft SQL Server\90\Shared** directory.

4. Select the **sqlbrowser.exe** file, and then click **Open**.

5. The **Add a Program** form displays **sqlbrowser.exe** along with the Path to the file. Click the **OK** button.

6. On **Windows Firewall** form, **Exceptions** tab, click the **Add Program** button *again* (to add the **sqlservr.exe** file).

7. On the **Add a Program** form, click the **Browse** button.

8. Navigate to the **Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn** directory.

9. Select the **sqlservr.exe** file, and then click **Open**.

10. The **Add a Program** form displays **sqlservr.exe** along with the Path to the file. Click the **OK** button.

11. The **Windows Firewall** form, **Exceptions** tab will now list both **sqlbrowser.exe** and **sqlservr.exe**. Click **OK**.

You have now allowed the Fundraising 50 Server to be broadcast and recognized on your network. You can now proceed to "*Chapter 3 - Installing the Workstation*".

Chapter 3: Installing the Workstation

This chapter describes installing the Fundraising 50 Workstation, from the **FR50 Share** directory, on local networked computers.

This chapter will cover the following:

- Before You Begin

- Directory Structure

- Install a Workstation from Shared Server Directory

- The Workstation Installation Wizard

- Granting Access to the Fundraising 50 System

Important! Installing the Workstation must be repeated for every computer from which you intend to run Fundraising 50.

Before you Begin

1. Complete the installation of the Fundraising 50 Server (described in *Chapter 2* of this guide)

2. If you are on a network, grant access to the **FR50 Share** directory.

3. Verify that you have the required .NET Framework, or higher, installed on every workstation that will be accessing Fundraising 50.

Network Rights

To ensure a user has full functionality within the Fundraising 50 product, the network user ID must be either:

- A local Admin on their computer *or*

- Granted Full Control rights to all directories created during the installation of Fundraising 50 on his or her computer/workstation.

Users have been granted the necessary rights on the server during the server installation. These rights granted access to the workstation setup files as well as the ability to perform backups.

Directory Structure

Users must be the local administrator of their workstation, or have full control rights to access the program files. When installing the Fundraising 50 Workstation, the system and program files are delivered to and stored on each computer.

The following directory structure is created (by default) for Fundraising 50:

- **My Documents (or Documents for Vista)\Abila Fundraising 50** - Stores files that you save while working in Fundraising 50. For example, when you save a report to a PDF or export file, it will be saved in this folder.

- **Program Files\Abila Fundraising 50 (Program Files (x86)\Abila Fundraising 50** on 64 bit computers) Stores the application files, help files, as well as specific *.DLL files required to run the system. The workstation user must have either Full Control rights to this directory or be a local Admin on his or her computer in order for Fundraising 50 to function properly.

  The Fundraising 50 workstation directory also contains the following folders:

  - **AMYUNI** - Stores the PDF driver.

  - **Demos** - Provides step-by-step instructions for you to watch on your desktop to help with the most frequently asked procedures in Fundraising 50.

  - **Import** - Stores some sample definition files.

  - **Product Guides** - Stores product documentation as PDF files.

  - **Samples** - Stores sample merge documents.

Important!
Upgrading users (only) - The Fundraising 50 version 2014 Workstation installation on the client computer will change the directory structure. On the client computer, the installation will create the new **Abila Fundraising 50** directory in **Program Files** (or **Program Files (x86)** on 64-bit computers) and move contents in the SageFundraising 50 directory to the new **Abila Fundraising 50** directory.

What files and directories will the Workstation installation move/copy?
Only the files that were *created and updated by Fundraising 50* will be moved to the **Abila Fundraising 50** directory. The Workstation installation will not move or copy directories or files that were *created by your organization*. Your customized .def and .csv files that are used with the Fundraising 50's **Export to G/L** functionality *will not* be copied over to the **Abila Fundraising 50** directory. You must manually move your customized .def and .csv files to the **Abila Fundraising 50/Import** directory after the workstation installation is complete.

Installing a Workstation from the FR50 Share Directory

Follow these instructions if you did not choose to install a workstation as part of the server installation, or if you are installing the Fundraising 50 workstation on the individual client computers.

You will be installing the Workstation component of Fundraising 50 directly from the Windows Server **FR50 Share** directory.

- This directory is already shared. It was shared after installing the Fundraising 50 Server component.

- This directory is located on the server computer on which the Server component of Fundraising 50 is installed (for example, **C:\FR50 Share**).

Before You Begin

Upgrading users, on the client computer, review the contents of the **Program Files\Sage Fundraising 50** (**Program Files (x86)\Sage Fundraising 50** on 64 bit computers) for your organization-specific files and directories (these are files and directories that were not directly created/updated by Fundraising 50). These files include custom .def and .csv files that are used with the Fundraising 50 **Export to G/L** functionality). Copy these files to a safe location - for example, into a directory that you create on the desktop for this specific purpose.

Accessing the Workstation Installation Wizard

Complete these steps at the <u>workstation</u> computer:

1. Log on as an Administrator.

2. Close any open applications, including Fundraising 50.

3. Disable any virus-detection utilities.

4. Using My Computer (Computer for Windows 7), Network Neighborhood, or My Network Places, browse your network to locate your server (for example, **\\Server Name\FR50 Share\Setup**).

5. Open the **FR50 Share\Setup** directory and then double-click **FR50Workstation.exe**. The file type is **Application**.
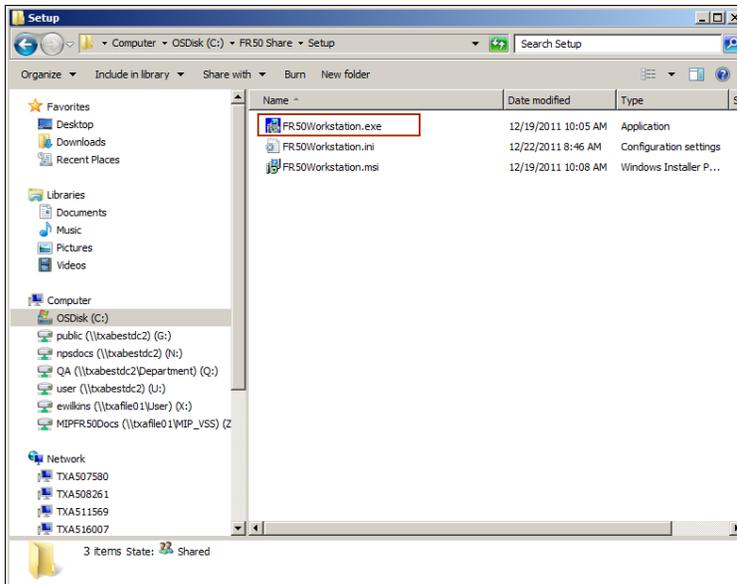

6. Continue the Fundraising 50 workstation installation by following the "*Using the Workstation Installation Wizard*" instructions below.

Using the Workstation Installation Wizard

1. Follow the instructions on the **Installation Wizard Welcome** panel, and click **Next**.
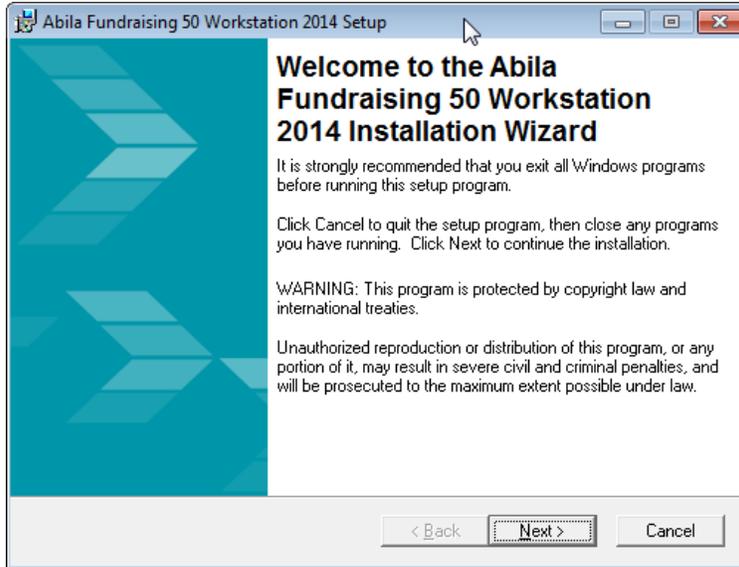

2. Review the **End User License Agreement**. Use the scroll bar on the right to view the entire agreement.
   Select the **I accept the license agreement** option and click **Next**.
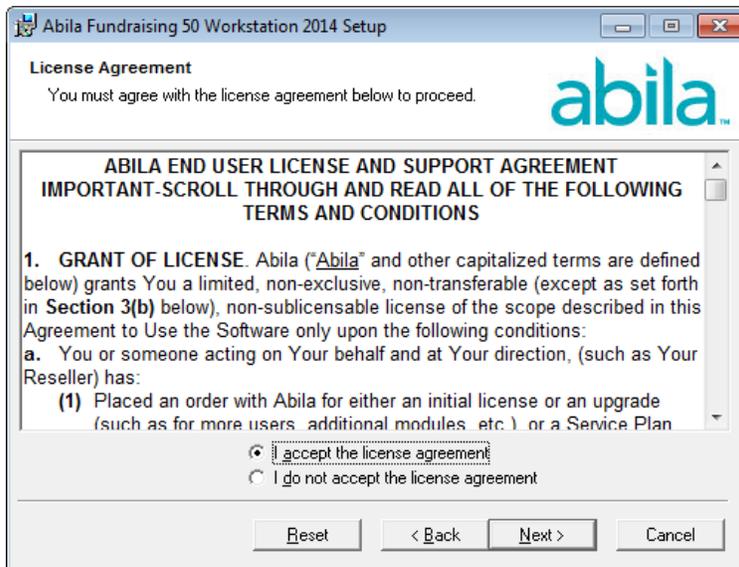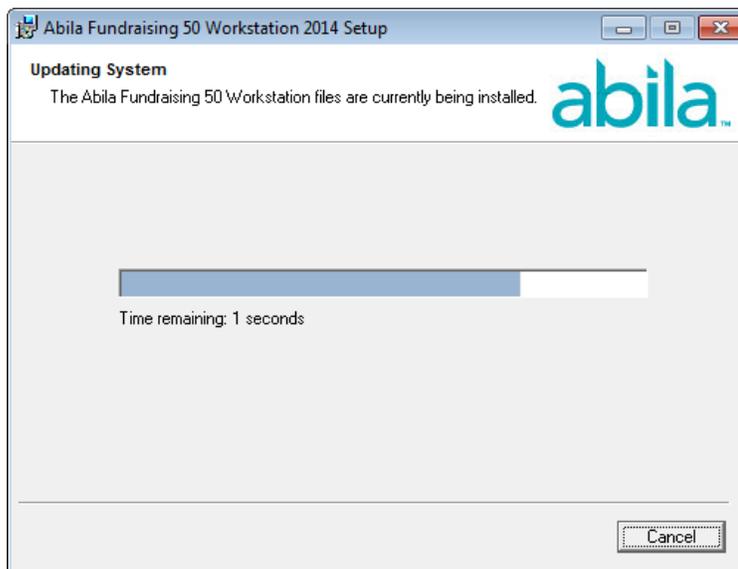
3. The system allows you to choose where to install the application. The default location is **C:\Program Files (x86)\Abila Fundraising 50**.

   Accept the default destination path (to avoid future upgrade installation issues) and click **Next**.
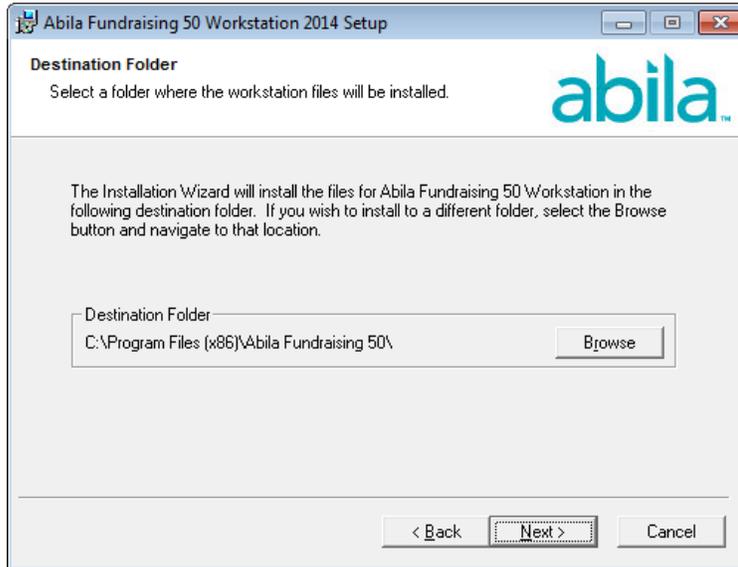

4. The **Updating System** panel is shown. A status bar displays the progress of the installation. This process may take several minutes.

5. When the installation is complete, the **Fundraising 50 Workstation 2014 has been successfully installed** screen displays. Click **Finish**.
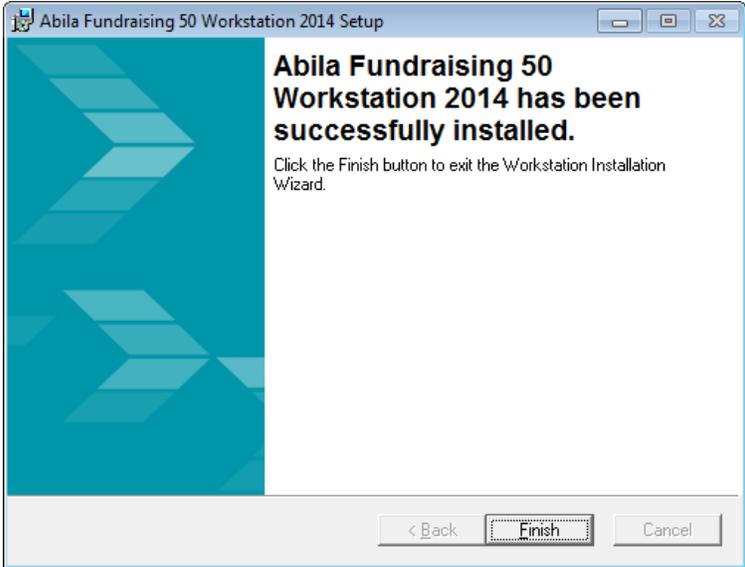
6. The Sage Exchange Installation is shown so that you can install the Exchange Module SDK components on the workstation (this module is used by Fundraising 50 to store credit card numbers).
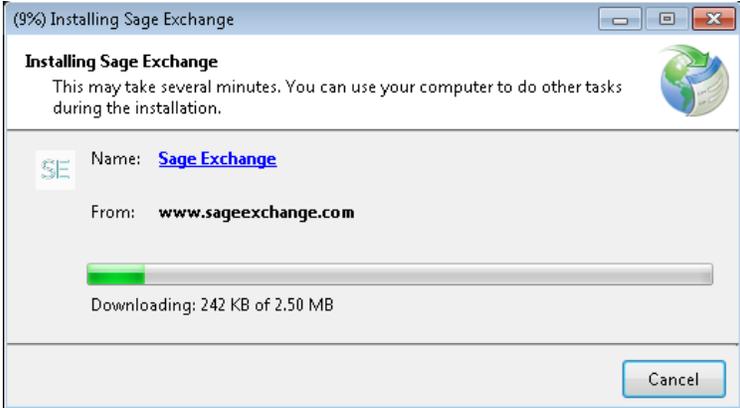
7. If you are installing the Fundraising 50 Workstation on to a client computer or if you are installing the Workstation on to the server computer by using the **FR50Workstation.exe** application, skip **Step 8**. The Workstation installation wizard has been closed and the Workstation installation is now complete.

8. If you are installing the Fundraising 50 Workstation on to the server computer as a part of the Fundraising 50 Server installation process, then you are returned to the original Setup screen. Click **Exit** to close.
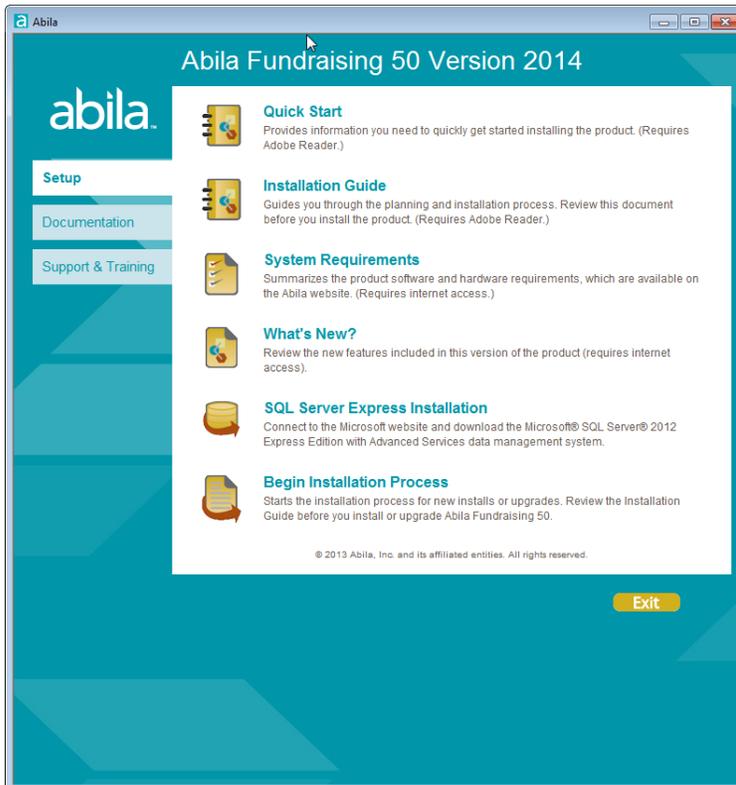
9. **Upgrading users**, copy all organization-specific files and directories into the new **Abila Fundraising 50** directory. This will include copying custom .def and .csv files into the **Abila Fundraising 50/Import** directory if your organization uses them to **Export to G/L**.

Granting Access to the Fundraising 50 System

The following steps apply to new users only.

After installing the product, complete the following steps to grant access to Fundraising 50 to your users:

1. Log on to Fundraising 50 (**Start>All Programs>Abila>Abila Fundraising 50>Abila Fundraising 50**).

2. Enter the **User ID** and **Password**. (Remember that the User Id and Password are now case sensitive.)

3. Support for Windows XP and Windows Server 2003 will discontinue with the *next* Fundraising 50 release. *If you are running either Windows XP or Windows Server 2003*, a warning message will display to tell you that Abila will not support these operating systems with the next release. If you do not want to see this warning every time that you log on to Fundraising 50 then click **Remind Me Later**, and you will be reminded again in one month. Click **OK** to close the warning message. If you are not running Windows XP or Windows Server 2003, then you will not see this warning message.

4. Select the database you want to access, and click **OK**.

5. Add users to a database by using **Administration>Security>Users and Passwords**.

6. Establish and review the security features for each security group by using **Administration>Security>Group Access**.

   - The Group Access feature allows you to set up custom access levels to features and functions for three established Security Groups (Administrator, Fundraising, and Mailing List) plus three different User Groups (User Group 1, User Group 2, and User Group 3) for a total of six Security Groups.

   - Each user ID must be assigned to one of these six Security Groups for this particular database.

Chapter 4: Uninstalling Fundraising 50 version 2014

If you need to uninstall version 2014, the following components must be uninstalled *in this order*:

1. Fundraising 50 Workstation

2. Fundraising 50 Server

Uninstalling Fundraising 50 only removes the files that the *Installation* process copied to your computer.

Fundraising 50 is uninstalled from the Windows **Programs and Features** screen. (**Add or Remove Programs** screen for Windows XP).

Before uninstalling, make a backup of the database; see *Appendix B: Backing Up and Restoring a Database* for more information.

To Remove Fundraising 50:

1. Navigate to the **Programs and Features** screen (**Add or Remove Programs** screen for Windows XP).

   - **Windows 8** - Open the Charms bar from either the Start screen or the Desktop (press Windows Key + C, or move your mouse to the top right corner of the screen). Click on **Search**, and then click on **Apps**. Enter Control in the search text box. Click on **Control Panel** in the Search Results on the left hand side. Select **Programs**.

   - **Windows 7** - **Start>Control Panel**. Select **Programs and Features**.

   - **Windows XP** - **Start>Settings>Control Panel**. Select **Add or Remove Programs**.

2. Select **Abila Fundraising 50 Workstation 2014**, and then click **Remove**.

3. Select **Abila Fundraising 50 Server 2014**, and then click **Remove**.

Appendix A: Fundraising 50 Quick Reference

We suggest you remove or copy this page from the Installation guide, then copy and place by each workstation that accesses Fundraising 50.

Customer Account Number: _____

Your Customer Account Number is the serial number for your installation and it is required to access Customer Support. You can find your serial number by logging on to Fundraising 50 and navigating to **Help>About Abila Fundraising 50**.

Customer Support: 1-800-945-3278

(Monday - Friday: 7:00 AM to 6:00 PM Central time with extended hours until 11 PM CT for Nonprofit Online system-down issues.)

Or, submit a support ticket, or chat with a Customer Support representative, by visiting the Fundraising Support Resources page at abila.com/support.

Resources

The following is a short list of resources that may expedite a resolution to your issue. You are welcome to contact Customer Support but we are taking this opportunity to remind you of other resources that are available 24/7.

Fundraising 50 Knowledgebase

- To access the Knowledgebase, visit the Fundraising Support Resources page at abila.com/support and click **Support>Knowledgebase**.

- Knowledgebase contents include recently discovered software issues, as well as more than 150 "How To," "Q & A," and "Symptom/Cause" type articles covering such topics as defined fields, importing, 3rd party backups, event setup, common error messages, and so forth

- The Knowledgebase is updated regularly to keep you informed and to assist with your use of Fundraising 50.

Fundraising 50 Product Guides

Access the Product Guides from within the Fundraising 50 application by using **Help>Product Guides**.

Report Samples

- Access from within the Fundraising 50 by using **Help>Contents** to display Fundraising 50 Help, and then navigate through the *Reports* book.

- Here you will find a detailed listing and sample of each type report in Fundraising 50, as well as report content and layout.

- You can also do a search in the help for specific report data (**Help>Contents** and **Index>Search**).

Appendix B: Backing Up and Restoring a Database

A database should be backed up on a regular basis, as well as just prior to making any significant changes to your data or your system.

It is important for you to have a disaster recovery strategy in place in the event of a system crash. When developing your recovery plan, you should consider the frequency of new data entry and how many days of lost work are acceptable. It is important to archive your backups so that more than one backup is available in the event a restore from backup becomes necessary. The number of recent backups archived at any given time should be addressed in your recovery plan.

✓ We recommend that all users exit the system prior to backing up or restoring a database.

To Back up a Database:

1. Open the File>Backup form.

2. Click the OK button. The system backs up the current database.

3. A message appears stating the backup was successful; click OK.

Note: All backup files are made to the server location. You cannot direct a backup to any other location. It is vital that you have been granted the proper rights on the server in order to perform a backup.

To Restore a Database Backup:

1. Backup the current database (File>Backup).

2. Open the File>Restore form.

3. The system displays the most recent backup file that was created by Fundraising 50. By default, this backup file will be restored. Click Browse to select another file.

4. Click the OK button.

5. A message appears asking if you want to proceed with the restore.

Caution! Restoring a database will permanently replace the current database.

6. Click **Yes** to continue. The system restores the database backup file.

7. A message appears stating the restore was successful; click **OK**.

For more information regarding backing up and restoring a database, refer to the *Administration* guide.