

# Universal Server Install Instructions

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The majority of Zeidman Development plug-ins require a server install before installing the client side portion of an application. You will only need to perform the server install once<sup>1</sup>, it will then work for all subsequent plug-ins from Zeidman Development. If you have a standalone version of The Raiser's Edge (a single user license of Raiser's Edge where everything is installed on one machine) then skip this server installation section and simply use the client installation instructions given in each product's user guide. You will need to run the server install for each Raiser's Edge database that you wish to use our products on.

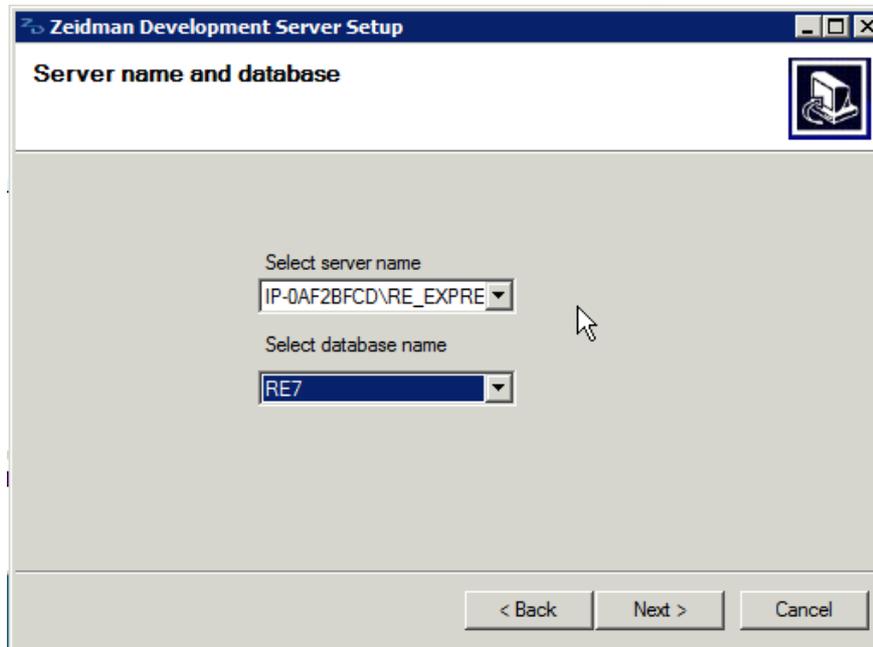
## Server Installation

Plug-ins require read only access to your Raiser's Edge database. In order to do this it is necessary to set up a user name and password. Note that this is **not** same as your Raiser's Edge login.

There are two methods for doing this.

1. The recommended method is to run the ZDServerInstall.exe application on database server. Ensure that you are logged in as a local admin user.

Select the name of the server and database on which you are installing it

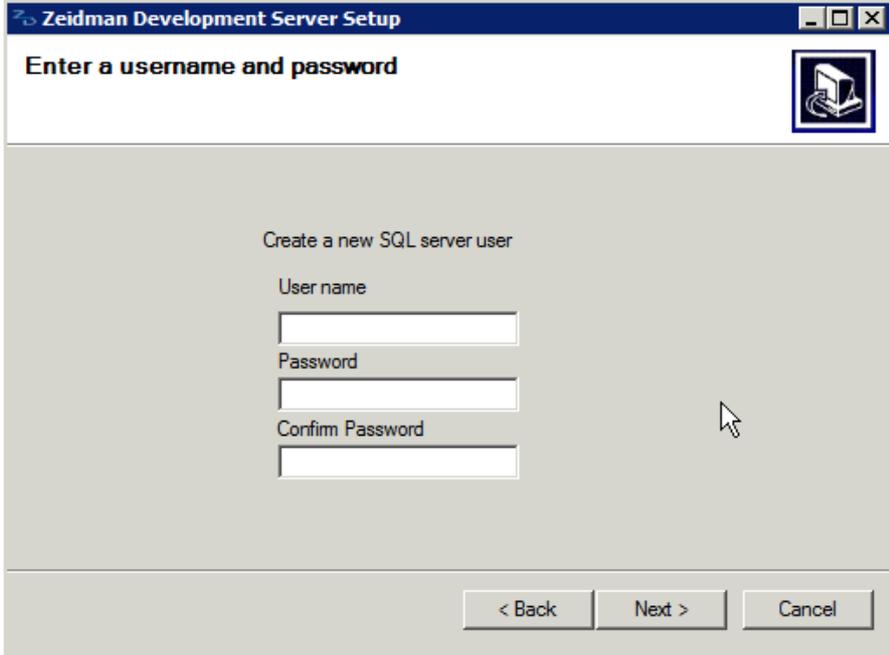


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<sup>1</sup> There is a separate server install needed for Audit Trail, please see the Audit Trail user guide for further details.



Then create a username and password that will be added to the database. **Make a note of the chosen username and password as this may need to be entered the first time you run the plug-in.**



The screenshot shows a Windows-style dialog box titled "Zeidman Development Server Setup". The main content area has the heading "Enter a username and password" and a sub-heading "Create a new SQL server user". Below the sub-heading are three text input fields labeled "User name", "Password", and "Confirm Password". At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

2. The alternative method is aimed at IT staff who are skilled in the use of SQL Server. The script in Appendix A shows the user that is set up and required for running a plug-in

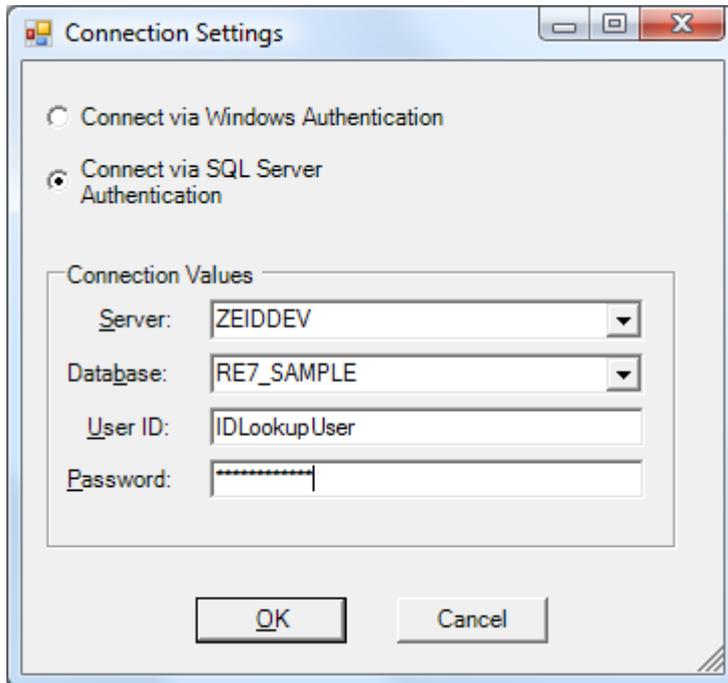
## Client Installation

When you download a plug-in from Zeidman Development you receive a zipped file consisting of one or more client installation files (the product setup .msi). On the workstation ensure that Raiser's Edge is installed. Then simply double click on the installation file. You will be guided through the simple installation of the plug-in.

The first time you start a plug-in it will attempt to connect to the database using your Windows credentials. If this works you can carry on using the application without issue.

If these credentials do not work you will be prompted to configure the database settings. This is where you need to enter the values that you entered from the server installation. This is shown below:





The form is prepopulated with the server and database values based on your current connection through The Raiser’s Edge. These values are per server and database and are stored in the database and will not need to be reentered for each client.

If you have a standalone version of The Raiser’s Edge then select “Connect via Windows Authentication”. The database should be as above for the sample database otherwise “RE7” or the name your IT staff have given your Raiser’s Edge production database. User id and password should be blank. The server uses the name of your machine which can be found by right clicking on My Computer, Properties, Computer Name tab and then Full Computer Name.

If all the details are correct and the script (for the server installation) has been run correctly then the plug-in will start. This step above only needs to be performed once per machine and per Raiser’s Edge database instance (e.g. once for the sample database and once for the production database).

## Contact

If you need any assistance in installing a plug-in then please do not hesitate to contact us: [development@zeidman.info](mailto:development@zeidman.info) or via our website <http://www.zeidman.info>



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## Appendix

The following is a sample script for setting up the user names on the database server. The same script is used in the server installer application. The text in bold will need to be changed.

This script sets up a SQL Server user with sufficient rights to read from the Raiser's Edge database. It also allows the user to execute a user function that splits the address lines from the address block

You should change the username (where it says "MY\_USERNAME"), password (where it says "MY\_PASSWORD") and change the name of the database that it works against (MY\_DATABASE).

```
if not exists (select * from master.dbo.syslogins where loginname = N'MY_USERNAME')
BEGIN
    declare @logindb nvarchar(132), @loginlang nvarchar(132)
    select @logindb = N'MY_DATABASE', @loginlang = N'us_english'

    if @logindb is null or not exists (select * from master.dbo.sysdatabases where name =
@logindb)

        select @logindb = N'master'
        if @loginlang is null or (not exists (select * from master.dbo.syslanguages
where name = @loginlang) and @loginlang <> N'us_english')
            select @loginlang = @@language

    exec sp_addlogin N'MY_USERNAME', 'MY_PASSWORD', @logindb, @loginlang
END
GO

if not exists (select * from dbo.sysusers where name = N'MY_USERNAME' and uid < 16382)
    EXEC sp_grantdbaccess N'MY_USERNAME', N'MY_USERNAME'
GO

CREATE ROLE [db_zd_lookup] AUTHORIZATION [dbo]
GO

GRANT SELECT ON SCHEMA :: dbo TO [db_zd_lookup]
GO

GRANT EXECUTE ON ADDRESSLINE TO [db_zd_lookup]
GO

exec sp_addrolemember N'db_zd_lookup', N'MY_USERNAME'
GO
```



