
Jenzabar CX

**Campaign Management
Installation and
Maintenance**



JENZABAR

Reference Guide

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JENZABAR, INC.
CAMPAIGN MANAGEMENT INSTALLATION AND MAINTENANCE REFERENCE GUIDE

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INTRODUCTION

Overview

Campaign Management is a 32-bit Windows program with a graphical user interface that Jenzabar, Inc. has developed for the CX product. It represents a new strategy in client/server architecture using Microsoft Windows® 95, Windows®98 or Windows NT® 4.0 Workstation.

You use Campaign Management to enter, track, and maintain information about constituents, campaigns, and gifts. You can also manage campaign staff/volunteer resources and generate a variety of reports.

Purpose of This Guide

This guide serves as a learning tool and reference guide for installing and maintaining the Campaign Management product. The information in this guide can help you install and maintain the Campaign Management files on a PC.

Intended Audience

This guide is primarily for use by the system users in your institution's computer center. System users include the Jenzabar coordinator, Jenzabar system administrator, and programmer/analyst. Also included is Development office user documentation covering new or enhanced functionality in this version of Campaign Management.

GETTING STARTED

Overview

Introduction

The following tasks provide important information you need to know before you begin to install Campaign Management.

Tasks Prior to Installation

You need to accomplish the following general tasks at your institution before you install Campaign Management:

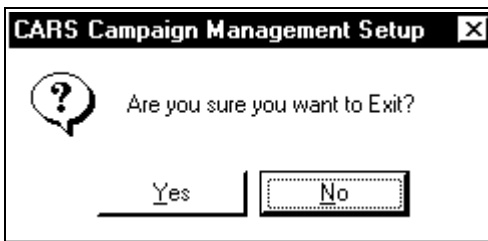
- Update your Windows® 95, 98 or NT installation with the appropriate Microsoft service packs. See the document titled *Preparing Windows PCs Installation Guide* (file name: *PCPrep*) for current requirements.
- Install the CX ODBC driver as instructed in the separate installation guide titled *CX ODBC Driver Installation Guide*. For optimum performance, also install the INFORMIX CLI ODBC driver. Installation documentation for the INFORMIX driver may be found in the readme for SMO 12550. Updated documentation for the CX ODBC driver may be found in the readme for SMO 12553.
- Close any applications you may have open, but do not exit Windows® 95, 98 or NT 4.0. The Campaign Management setup program cannot install system files or modify shared files if they are already in use. This includes any toolbars, such as the Microsoft Office® Toolbar. If installing on Windows® NT 4.0 Workstation, you must have Administrator logon privileges to ensure all files are properly installed.

Setup Program

Exiting from the Setup Program

You can exit from the Campaign Management setup program before completing the installation whenever the Exit button appears. Follow these steps to exit before completing the installation:

1. Click on **Exit**. A warning box appears, as illustrated in the following example. Other warning boxes will have similar wording.



2. Click on **Yes**. The application removal utility dialog box appears.



3. Click on **OK**. You have exited the setup program. Campaign Management will now automatically start the application removal utility. For information about this utility, see the section, *Uninstalling Campaign Management*.

Canceling the Installation

You can cancel the Campaign Management setup program during the copying of files whenever the Cancel button appears. If you select **Cancel**, the following warning box appears:



CAUTION: If you cancel the Campaign Management setup program, you must re-run the setup program to complete the installation of Campaign Management.

Uninstalling Campaign Management

If you cancel or exit the setup program after the initialization files have been copied, the Campaign Management application removal utility will begin automatically.

If you complete the installation, but later decide to remove the application, use the Add/Remove Programs applet from the Windows[®] 95, 98 or NT 4.0 Control Panel.

CAUTION: During the removal of the application, you will be prompted before a shared resource or file is removed. Removing a shared file may have unpredictable results in other applications that may use these files. If you are unsure whether a file is essential, it is recommended that you select **No** or **Keep** at such prompts to allow the shared resource to be retained.

Removal of any CX client/server Institutional Advancement application will remove common tools, including Scheduler, Spreadsheet, and Memo. After removal of a CX Institutional Advancement application, you must reinstall the applications you wish to keep to restore these common tools.

PC INSTALLATION

Overview

Introduction

This section provides information and procedures for end users to install Campaign Management on their PCs. The various installation options for users are explained first, followed by the procedure to install Campaign Management.

PC Hardware Requirements

An IBM-compatible PC with the following processor specifications:

Minimum: Pentium 75 MHz or greater

Recommended: Pentium 266 MHz or greater

Memory

The following Random Access Memory (RAM) configuration for the PC is:

Minimum: 64 MB

Recommended: 128MB

Hard-disk Storage Requirements (before installation)_

Minimum: 150 MB or greater of free disk space

Note: It is important to maintain at least 100MB of free Hard-disk space on the drive in which Windows is installed. This ensures that Windows has sufficient swap-file space while running Campaign Management.

Software Requirements

Microsoft Windows® 95, 98 or NT 4.0 Workstation operating system.

By installation default, the Cognos Impromptu® interactive reporting tool software must reside on the same PC as Campaign Management before you can use the Reports feature of Campaign Management. You must also install the Impromptu Institutional Advancement catalog in the default location defined by the CX Impromptu catalog setup program. You can customize these locations by altering the appropriate values in the CX config_table.

Recommended Graphics System

You need a graphics card that handles at least 256 colors to use Campaign Management. A minimum of 1 MB video ram is required and 2 MB or more is highly recommended. A SVGA monitor capable of at least 600 X 800 resolution is also required.

Database Connectivity

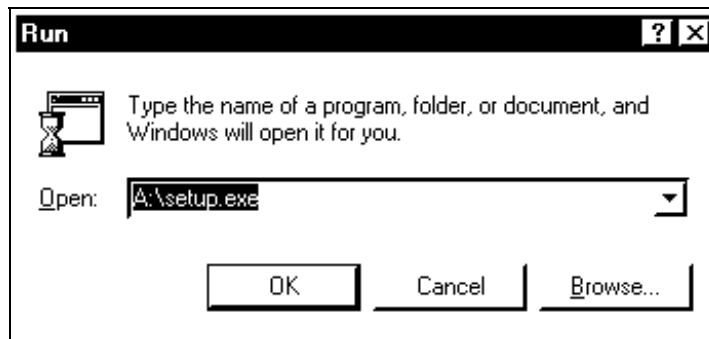
Campaign Management is a client/server application that runs in a Windows® 32-bit environment. The application uses a database server for data access, and the user's PC for the user interface. It complements and can be deployed with the Alumni/Development module. Assuming minimum memory requirements are satisfied, Campaign Management can be run simultaneously with the Alumni/Development module on the same PC.

Installing Campaign Management on a PC

How to Install on a PC

Follow these steps to install Campaign Management on an end user's PC using the Windows® 95, 98 or NT 4.0 Run facility.

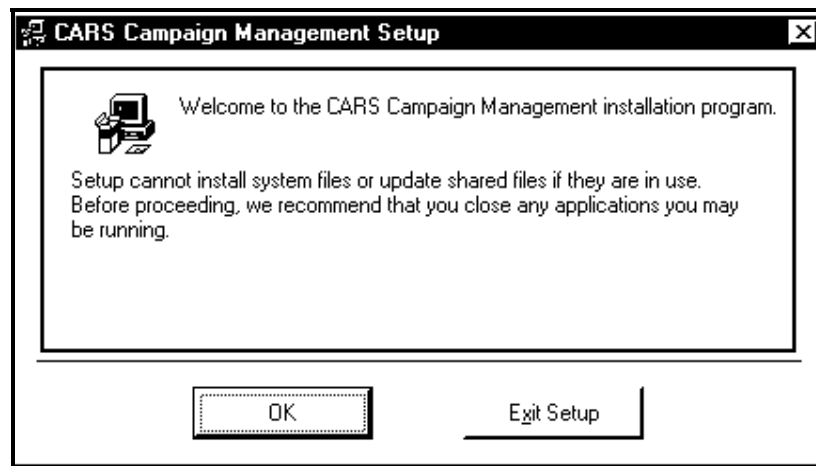
1. Start Windows® 95, 98 or NT 4.0.
2. Close any applications that are open (such as those that are opened by your Start Menu). This includes any toolbars that may be on your desktop, such as the Microsoft Office® Toolbar.
3. Click on **Start** from the Taskbar.
4. Click on **Run**. The Run box appears.



5. In the Run box on the Command Line, enter the path for the Campaign Management setup program.
 - If using a floppy disk installation, insert the disk marked Campaign Management #1 in your PC drive A (or B) and enter: **a:\setup.exe** (or **b:\setup.exe**).
 - If using the network installation, run **setup.exe** in the directory containing the installation files.

Click on **OK** to continue.

6. The message, "Copying initialization files appears, followed by the Campaign Management Setup screen.



7. Click on **OK**. The Designation Directory window appears. To continue the installation, click on the icon button.

Note: You may also use the Add/Remove Programs applet from the Windows Control Panel.

8. The setup program allows you to choose whether to install the Help and Template files along with the rest of the Campaign Management application. Buttons are checked by default. If you do not wish to install one or both of these files, click on the appropriate button(s) to remove the check mark(s). To continue the setup, click on **OK**.
9. Setup will also create three directories on your PC that are required by some features in the application. If these directories already exist, setup will not overwrite them. The default location for linked files is: C:\Program Files\CARS\IA\adocuments.
10. The Campaign Management setup program begins to install the files of Campaign Management. Messages appear identifying the source files on the installation diskettes and prompting you to insert the other installation diskettes.

Messages may appear letting you know the installation process is about to replace a pre-existing file. Select No at the Cancel Setup prompt if you want to continue.

Another message box may appear after you elect to continue the installation. Click on Yes if you want to continue.

Follow the instructions that display on your screen as the installation progresses. The installation diskettes are numbered, and you will be asked to insert them by number. Note that you may be asked to insert a given diskette more than one time during the installation.

Note: If you are running setup from your network (Campaign NetSetup), you will not be prompted to insert disks.

11. When the application is installed, the Setup Exit box appears. Click on **OK**. The Campaign Management setup program completes. Campaign Management now appears as a program item on your Windows[®] 95, 98 or NT 4.0 program list.
12. Click on the Campaign Management icon or select it from the program list to start the program.

Note: If problems occur, reboot the PC, disable any virus-checking software, and run **setup.exe** again.

Connecting for the First Time

When you run Campaign Management the first time, the application will load and display the SQL Data Sources dialog box if one or more ODBC drivers are found. If you have installed the CX and INFORMIX ODBC drivers (see ODBC documentation referenced on page 2 of this manual), the SQL Data Sources dialog box will display the CX and INFORMIX drivers. Select the datasource name that has been assigned to either the CX or INFORMIX CLI driver and click **OK**. (The CX and INFORMIX drivers must have unique names. The INFORMIX driver should yield greater performance. Use the CX driver instead if you encounter connect problems with the INFORMIX CLI driver.) On subsequent startups, Campaign Management will automatically default to the database to which you were connected during the previous session. If no ODBC drivers are found, the application will still successfully load and default to "offline" mode.

MAINTAINING CAMPAIGN MANAGEMENT

Introduction

This section contains supplemental information to help you use and maintain the Campaign Management product. It provides the following information:

- Procedures for linking and unlinking files
- Customizing Configuration Table Settings
- Installing and updating spreadsheet queries
- Using the Campaign Assignments feature

Note: Complete field descriptions and procedures for using Campaign Management are included in online help files that you use interactively with the product.

Linking and Unlinking Files

Campaign Management provides the ability to link PC files (WP documents, spreadsheets, scanned images, etc.) to specific rows in the CX Database. In Campaign Management, one file may be linked to each Contact Record row. Should there be a need to unlink a file, any individual with Shell access to the database can do so using the "senter2 " tool. The procedure is as follows:

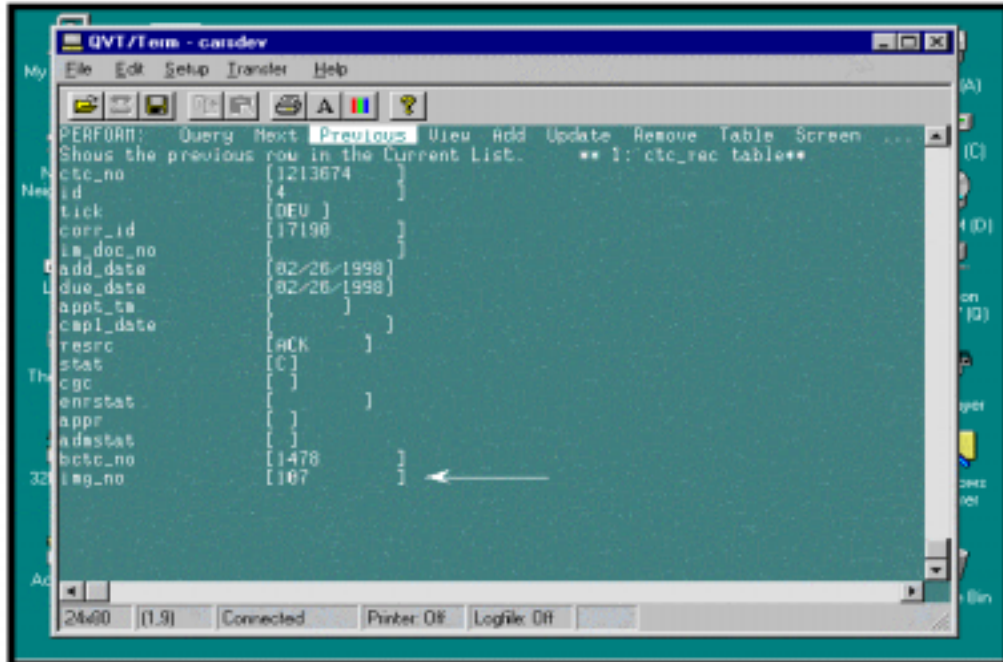
When files are linked to the contact record, three actions occur:

1. A copy of the linked file is saved to the C:\program files\iadocuments\contacts path (or a custom path defined at your site).
2. An entry is written to the record ctclink_rec (schema/common) which records the location of the linked file on a PC or network drive, assigns a link number (link_no field), and ties the entry to a constituent ID number.
3. The link number is written to the img_no field of the contact record (ctc_rec.img_no).

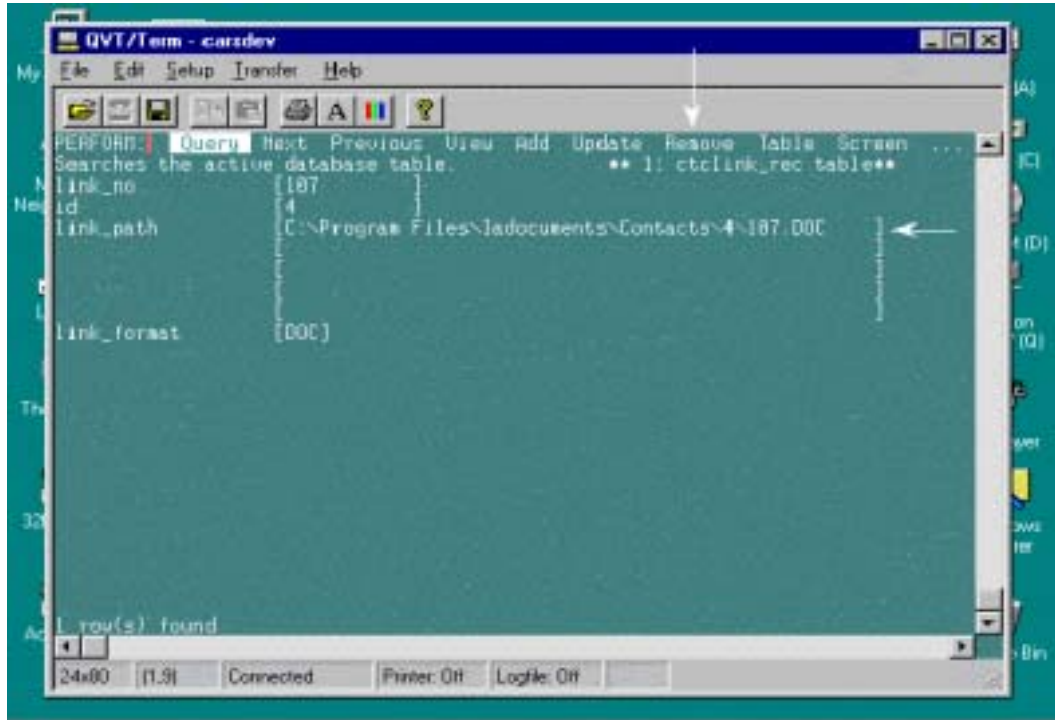
Unlinking a File

To unlink a file, reverse this process as follows:

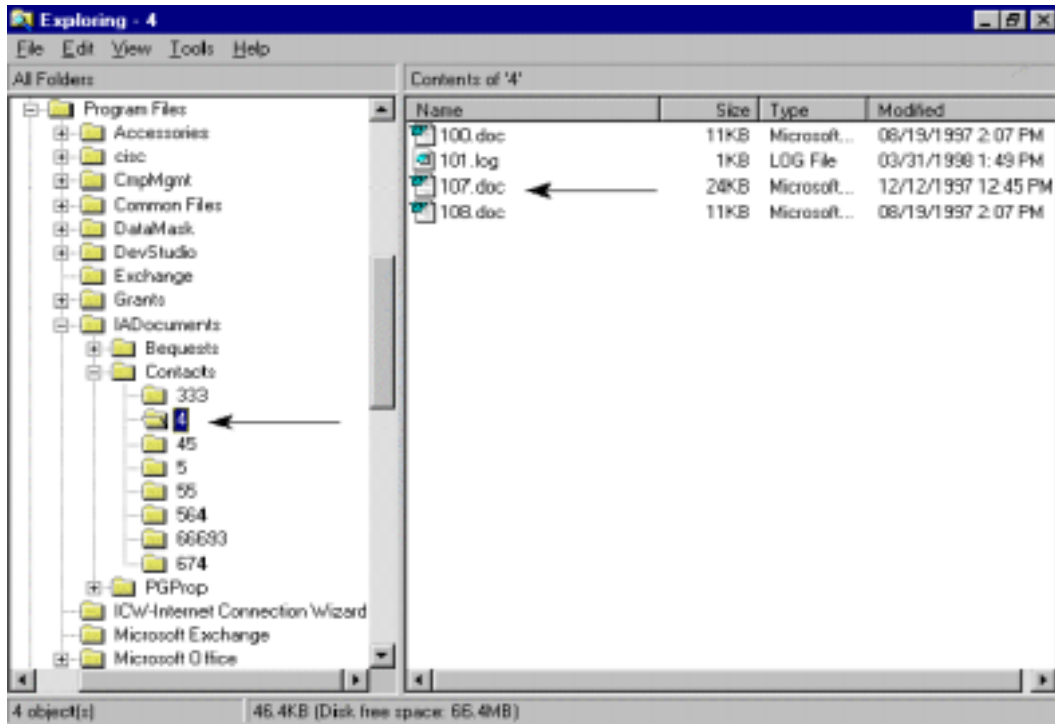
1. Unlink the file from the Contact record. First, make a note of the image number. Then, remove the link number from the `ctc_rec.img_no` field, as shown in the following example. This breaks the link.



2. If you have no further use for the image number entry in the ctclink_rec, delete the image record entry. First, make note of the PC/network path and filename assigned to the linked file. Then, delete the row from ctclink_rec with the same link number, as shown in the following example.



3. If desired, delete the linked file on the PC/network drive as defined in the ctclink_rec. Note that the file is stored in a directory named after the ID number located under the master path of <drive letter>:\iadocuments\contacts\. The file is named after the link number.



File Linking: Troubleshooting

To successfully link a file, you must ensure that you are selecting files that have a valid Windows link to an application. When Campaign Management links a file, it depends on the Windows System capability to launch a file that is associated with an application. This usually means that the file must have a filename extension recognizable by a specific application (.doc for MS Word, .xls for MS Excel, etc.). If your file does not have an application association under Windows, Campaign Management will successfully link the file; however, the linked file will not be retrievable within Campaign Management. To verify a valid application association, perform this test:

1. Launch Windows Explorer and locate the file.
2. Double click on the file.
3. Result: if double-clicking on the file launches an application with that file, there is a valid association. If the action instead launches a dialog box asking you to select an application to load the file, a valid association does not exist.

Note: Some files such .txt and .bmp are automatically associated with standard windows utilities; Notepad for .txt files and Paint (or Paintbrush) for .bmp files.

File Linking: Network Accessibility

When Campaign Management is initially installed, the default master path for storing linked files is C:\Program Files\ladocuments\... If you wish to share linked files with others, the storage path must be reset to a common network location. Do the following to set up network accessibility to linked files:

1. Close Campaign Management.
2. Create the directory "ladocuments" in the desired network path. Also create the directory "contacts" under "ladocuments". This is where files linked to contact records will be stored. Campaign Management will create a directory under "contacts" named for a constituent ID number the first time a file is linked for that constituent.
3. Change the default filelink path in the CX config_table by modifying the **value** data in the following row:

```
product [ALUM/DEV]
name [IMG_FILE_LOCATION]
value ["enter the new path here, ending with ...\ladocuments"]
```

Note: Step "3" should be done only by your computer center personnel.

Customizing Configuration Table Settings

Campaign Management relies on numerous configuration table values (schema/common/config_table) to read and write data correctly. Computer center personnel with shell access will have to make these modifications using the “senter2” tool. Below are the Campaign Management config_table values that are commonly customized for a client site.

You should modify the following config_table values with PC/network paths specific to your institution:

- CMP_CATALOG_NAME - indicates name and path to the IA Impromptu catalog
- CMP_DOCUMENTS_DIR - indicates location of Campaign Documents directory
- CMP_REPORTS_DIR - indicates default directory for Campaign Impromptu reports
- CMP_RPT_WRITER - indicates install path of Impromptu application
- CMP_TEMPLATES_DIR - indicates location of Campaign document Templates directory
- IMG_COMMON_DIR - denotes temporary directory to which open linked files are written. Default value is “C:\temp”... There is usually no need to change this.
- IMG_FILE_LOCATION - denotes path to the “IADOCUMENTS” directory, which is the topmost directory in the tree of storage locations for linked files. This will usually be changed to a network location secured for exclusive use by the Advancement office.

The following are new values added with this release of Campaign Management. Sample values are provided in the SMO for these.

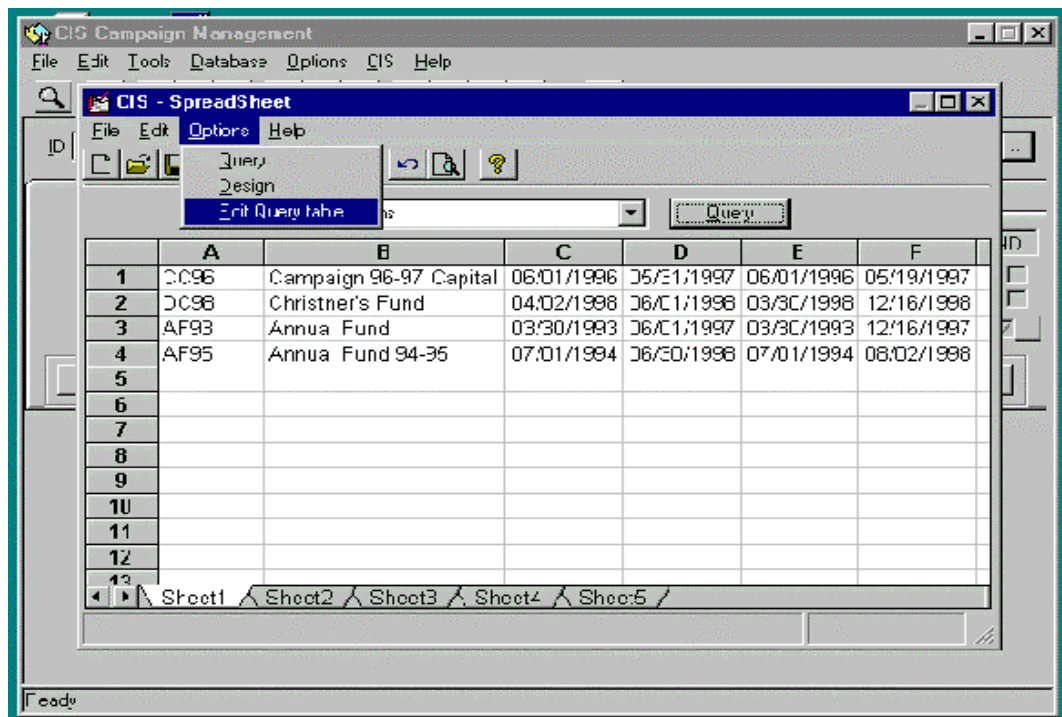
- CMP_VALID_TICK_CODES - identifies valid tick code(s) for the Campaign Contacts screen. You can enter multiple values separated by a vertical bar.
- CMP_PLDG_REM_TYPES_WITH_DESG - identifies valid Pledge reminder types for a specific designation. You should enter this value as code, description, ... If you load the samples provided, you do not need to enter these.

Installing and Updating Spreadsheet Queries

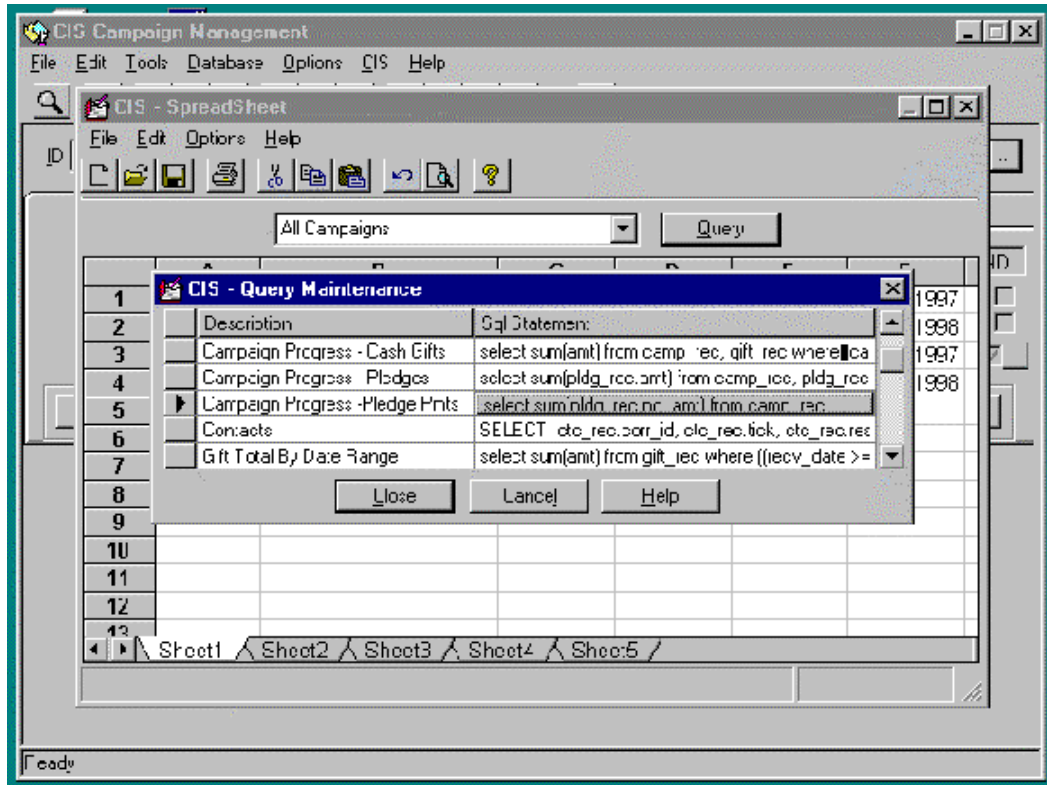
The Campaign Management integrated spreadsheet provides an Excel® compatible spreadsheet application with the ability to query the CX database. With this utility, you can easily import any CX data into a standard spreadsheet for further analysis, charting and presentation.

The Campaign Management Spreadsheet is distributed with several sample queries ready to run. You can modify these queries and add new queries to serve your specific needs. To update or insert queries, follow these steps:

1. Launch the Spreadsheet from the “Tools” menu of Campaign Management.
2. After you are in the spreadsheet, select **Options**, and then, **Edit Query Table**. This will load a Query Maintenance Form displaying the devquery_rec, as shown in the following example.



- To update an existing query, click on the row displaying the Description of the query you wish to change. To insert a new query, scroll to the bottom of the grid and click on the blank Description field marked by the “*”. Enter the new description, then click on (or tab over to) the SQL Statement field. Notice that the field becomes a button, as shown in the example below. Click on the button.



4. A text editor pops up displaying the current query. You may either edit the SQL statement manually, or copy the updated query into the Windows clipboard and paste over the older version of the query. If inserting a new query, the text editor will be blank. Enter or paste in the new query. Click **OK** to write the changes and close the text editor.



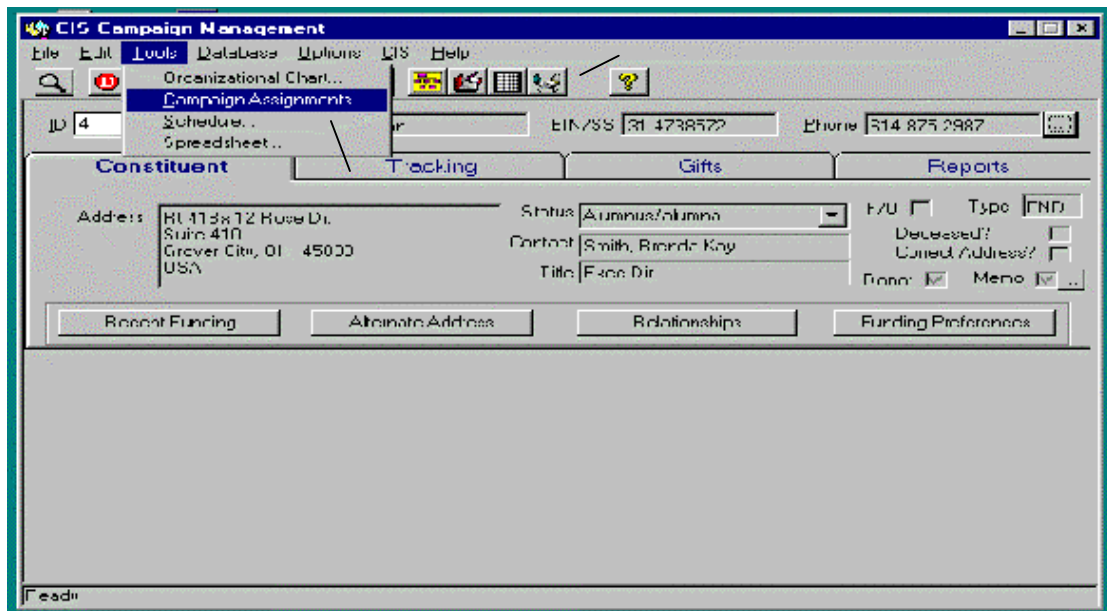
5. You may see a message box to "Make sure the SQL statement is correct." Click **OK** on this message box to complete the query add or update.

Using Campaign Assignments

Campaign Assignments has been enhanced with version 2.0 of Campaign Management. With Campaign Assignments you can track campaign solicitors (staff or volunteer), linking them to a specific campaign and campaign manager. You can also track the donor/prospects the solicitor is assigned to call upon. These prospect/solicitor relationships are specific to the solicitor's role in a particular campaign, reporting to a particular manager.

Loading the Campaign Assignments Form

To load the Campaign Assignments form, select **Campaign Assignments** from the Tools menu or the "handshake" icon from the toolbar.



The screenshot displays the CIS Campaign Management software interface. The window title is "CIS Campaign Management". The menu bar includes File, Edit, Tools, Database, Options, LIS, and Help. The Tools menu is open, showing options like Organizational Chart..., Campaign Assignments (highlighted), Schedule..., and Spreadsheet... The toolbar contains various icons, including a handshake icon. The main form area is divided into tabs: Constituent, Tracking, Gifts, and Reports. The Constituent tab is active, showing fields for ID (4), Address (RI 113x12 Rose Dr., Suite 410, Grover City, RI 04500, USA), Status (Alumnus/Alumna), Contact (Smith, Brenda Kay), Title (Exec Dir), F/U (checkbox), Type (FND), Deceased? (checkbox), Correct Address? (checkbox), Print (checkbox), and Menu (dropdown). Below the form are buttons for Recent Funding, Alternate Address, Relationships, and Funding Preferences. The status bar at the bottom shows "Feed".

Campaign Assignments loads in query mode unpopulated. You must query an existing Campaign Assignment Grouping to view or update data. (A Campaign Assignment Grouping is a solicitor associated with a single campaign code and manager. Multiple Solicitors can be linked to the same Manager and Campaign Code.) Once you have loaded a particular Campaign Assignment Grouping, multiple prospects may be associated to that Campaign Assignment Group. First double-click on a particular solicitor in the solicitor grid (middle of the screen). This action will activate the donor association grid (bottom of screen) for that particular solicitor. You may now view prospects assigned to be called upon by the selected solicitor. To add a new prospect to the solicitors list, click the add button and query/insert the ID number for the new prospect.

Campaign Staff

Camp. Code: Staff Title:

Manager: Staff Ctgry:

Staff/Volunteer: Begin Date:

End Date:

Campstaff grid - Staff assigned to this manager and campaign						
Manager ID	Staff ID	Camp Code	Title	Begin Date	End Date	
123	432	AF99	Development Dir.	05/18/1999	05/31/2000	
123	778	AF99	Team Captain	05/18/1999	05/31/2000	

Donor Association

Donor ID:

Begin Date:

End Date:

Donassoc grid - Donors assigned to the above manager, staff, and campaign group					
Donor ID	Name	Beg Date	End Date	Type	
4512	Boes, Donald Gene	05/18/1999		UnDefined	
7321	Coyle, Elizabeth Anne	05/18/1999	05/25/2001		
456	Ford, John Quincy	05/18/1999	05/22/2003	IND	
3498	Forman, Kenneth Carl	05/18/1999	10/10/2000		
8346	Hodgson, Mary S	05/18/1999	11/11/1999	UnDefined	

Adding a Campaign Assignments Group

To add a new group, follow these steps.

1. Click the add button on the Campaign Grouping section (top of screen) of the Campaign Assignments screen. (Notice that the donor association grid becomes disabled.)
2. Enter the new values. All fields must be populated to create a new group.
3. Click **OK** to record the new group. Once the new group is written, the donor association grid becomes enabled allowing for the assignment of prospects to the new group.

Campaign Assignment - Add Campstaff Record

Campaign Staff

Camp. Code: Staff Title:

Manager: Staff Ctrgy:

Staff/Volunteer: Begin Date: 06/01/1999

End Date:

Campstaff grid - Staff assigned to this manager and campaign

Manager ID	Staff ID	Camp Code	Title	Begin Date	End Date

Donor Association

Donor ID:

Begin Date:

End Date:

Donassoc grid - Donors assigned to the above manager, staff, and campaign group

Donor ID	Name	Beg Date	End Date	Type

Reports

F/O Type

Deceased?

Correct Address?

Donor Memo

ding Preferences

Updating a Campaign Assignments Group

To update an existing group, follow these steps.

1. Click the update button. The current group can now be updated with new values.
2. Click **OK** to record your changes. Once changes are written, the donor association grid once again becomes enabled.

The screenshot shows the 'Campaign Assignment' window. The 'Campaign Staff' section includes fields for Camp Code (AF99), Campaign Staff (Current Data), Manager (123, Mondon, Robert), Staff/Volunteer (432, Rehm, Marna Irene), Staff Title (Development Dir.), Staff Ctrgy (Volunteer), Begin Date (05/18/1999), and End Date (05/31/2000). Below these are buttons for Query, Clear, Add, Update, Delete, and Close. A table titled 'Campstaff grid - Staff assigned to this manager and campaign' contains the following data:

Manager ID	Staff ID	Camp Code	Title	Begin Date	End Date
123	778	AF99	Team Captain	05/18/1999	05/31/2000
▶ 123	432	AF99	Development Dir.	05/18/1999	05/31/2000

The 'Donor Association' section includes fields for Donor ID, Begin Date, and End Date, with buttons for Query, Clear, Add, Update, Delete, and Close. A table titled 'Donassoc grid - Donors assigned to the above manager, staff, and campaign group' is currently empty.

Deleting a Group

To delete a group, follow these steps.

1. Click the Delete button. A message box will ask you to confirm the deletion.
2. Click **Yes** to delete the Campaign Assignment Group and donor associations for the deleted group.

The screenshot shows the 'Campaign Assignment' dialog box with a confirmation message box titled 'CMPMGMT' overlaid on top. The confirmation message asks: 'Do you wish to delete the Current Staff Member from Campaign?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted.

Campaign Assignment

Campaign Staff

Camp. Code: AF99 Campaign Staff: Current Data All Data Staff Title: Development Dir.

Manager: 123 Mondon, Robert Staff Ctrgy: Volunteer

Staff/Volunteer: 432 Rehm, Marna Irene Begin Date: 05/18/1999 End Date: 05/31/2000

Query Clear Add Update Delete Close

Campstaff grid - Staff assigned to this manager and campaign

Manager ID	Staff ID	Camp Code	Title	Begin Date	End Date
123	778	AF99	Team Captain	05/18/1999	05/31/2000
▶ 123	432	AF99	Development Dir.	05/18/1999	05/31/2000

CMPMGMT

? Do you wish to delete the Current Staff Member from Campaign?

Donor Association

Donor ID: Begin Date: End Date:

Query Clear Add Update Delete Close

Donassoc grid - Donors assigned to the above manager, staff, and campaign group

Donor ID	Name	Beg Date	End Date	Type
----------	------	----------	----------	------

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