

Research Point

INSTALLING WEB SERVICES AND RE-INTEGRATING RESEARCH POINT WITH RE

As of 8/22/14, Research Point is now a Web Service that is installed within the Web Services console in RE. Once the Web Service is installed a key is generated. Only the built-in RE Supervisor account (which Concourse Hosting will maintain), can install the service. You will have to request that Concourse Hosting does this for your organization.

With the key, a Research Point **Admin** user can take it from here using the steps below:

1. Log into Research Point as a user who is a Research Point Admin
2. In ResearchPoint click Home
3. Click The Raiser's Edge integration
4. Click Configure Integration
5. Paste the RE Database key generated from installing Web Services
6. Click Test Connection to ensure the key was entered correctly
7. Click Save

Configure Fields to Integrate:

1. Click Configure Fields
2. Sync to Raiser's Edge tab
Select the ResearchPoint data to add to the Raiser's Edge
3. Sync from the Raiser's Edge tab
Select the Raiser's Edge data to add to ResearchPoint
4. View the Raiser's Edge data tab
Select the Raiser's Edge data to view in ResearchPoint
5. Click Save

For more information about the fields that integrate between the programs, please review: What fields integrate between ResearchPoint and The Raiser's Edge (BB709167)

The following steps will need to be completed by each user in ResearchPoint:

Set up the Raiser's Edge user account to integrate with:

1. Click Edit Credentials
2. Enter Raiser's Edge username and Raiser's Edge password

(It must have RE7 Authentication enabled - which means you may have to go into Raiser's Edge>Admin>Security> then choose a user. Make sure RE7 Authentication is checked. You can change the password to something new if you need to. (THIS WON'T EFFECT THE WINDOWS AUTHENTICATION you see below and the way they log into the Beyond Nines environment)

3. Click Test Credentials to ensure that the username was accepted
4. Click Save



