UNIVERSITY OF DAYTON ADVANCEMENT IT

RE DB View VDI Access Guide for Affinaquest Project


AUGUST 9, 2023

VERSION 1.4

Contents

Introduction

There are two ways to access the read-only version of Raiser's Edge on the VMWare Horizon VDI. The first method (recommended) is to access it by going to vdigateway.udayton.edu and accessing it through your web browser. This way is familiar although a bit more involved. The second method is to use the VMWare Horizon Client app on your computer. Use whichever method is most comfortable, and more importantly, the one that works best for you.
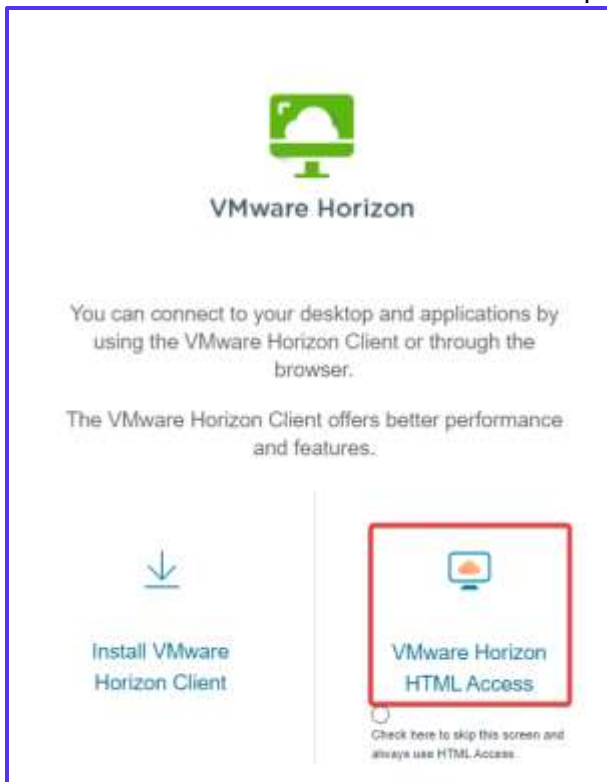
Method One (Recommended): Web Browser

Access Using UD VDI Gateway Website

1. Open your web browser of choice using whichever method you normally use

2. Type "vdigateway.udayton.edu" (without the quotes) into the address bar near the top left
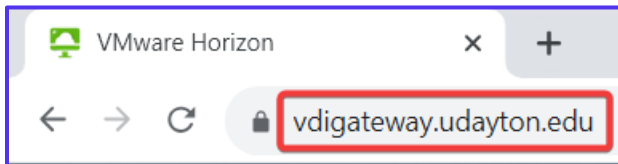
3. Click the **VMWare Horizon HTML Access** option

4. Enter your UD username and password

5. Click **Login**

6. Enter the number that corresponds to your method of two-factor authentication (typically "1" for push to your mobile device)
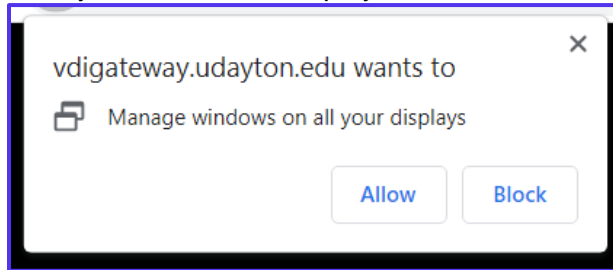
7. Click

8. Select the **Raiser's Edge** option
   *NOTE: Your options will most likely be different from the ones shown below.*

9. Screen option notifications:
   a. On the *Manage windows on all your displays*, select **Allow** to let the program utilize all of your connected displays or select **Block** to limit the program to just one screen


   b. On the *Fullscreen* pop-up, you can select **OK** to go full screen or select **Cancel** to keep the screen the way it is
   *NOTE: In order to get out of full screen, press and hold the **esc** key on your keyboard.*
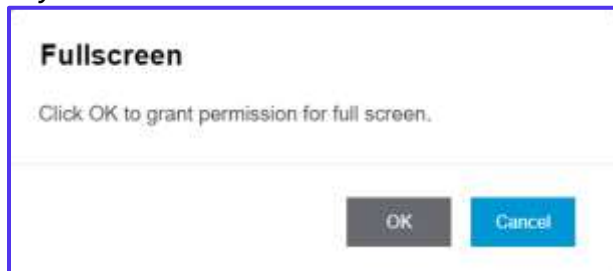
10. Log in to the VDI just like you were logging in to your UD laptop using your regular UD username and password. Press **Enter** on your keyboard or click the right-pointing arrow at the right end of the password field
*NOTE: It will take around a minute to log you in to the VDI desktop. Please be patient.*
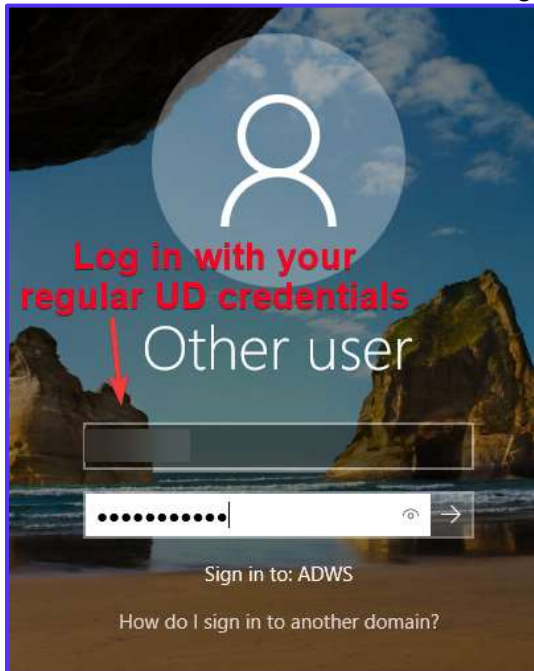
11. Once you have logged in, wait for the desktop to fully load and for the *Sign into Box* screen to pop up. You can opt to log in Box if you would like to utilize it, but it is recommended that you close out of the screen by clicking the "X" in the upper-right corner
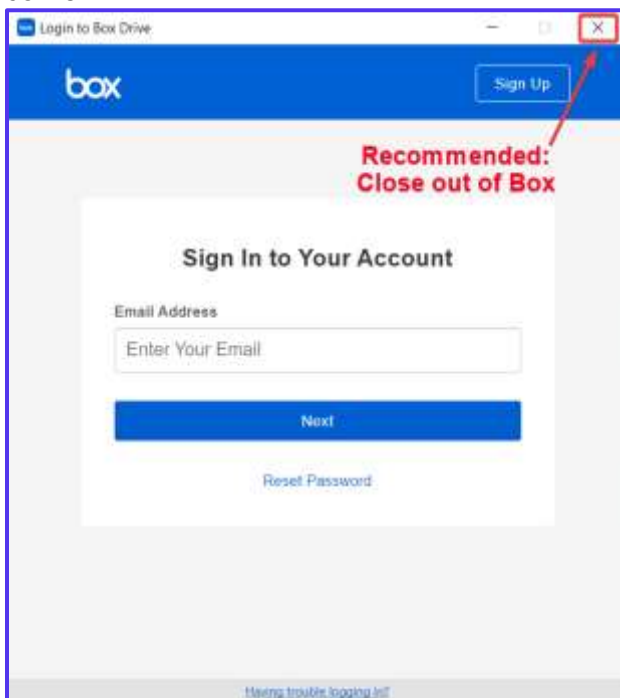
12. Double-click the orange RE icon on the desktop to launch Raiser's Edge
    NOTE: *This may take a moment or two for the screen to load. Please be patient.*

13. Once Raiser's Edge opens, you can proceed with using RE
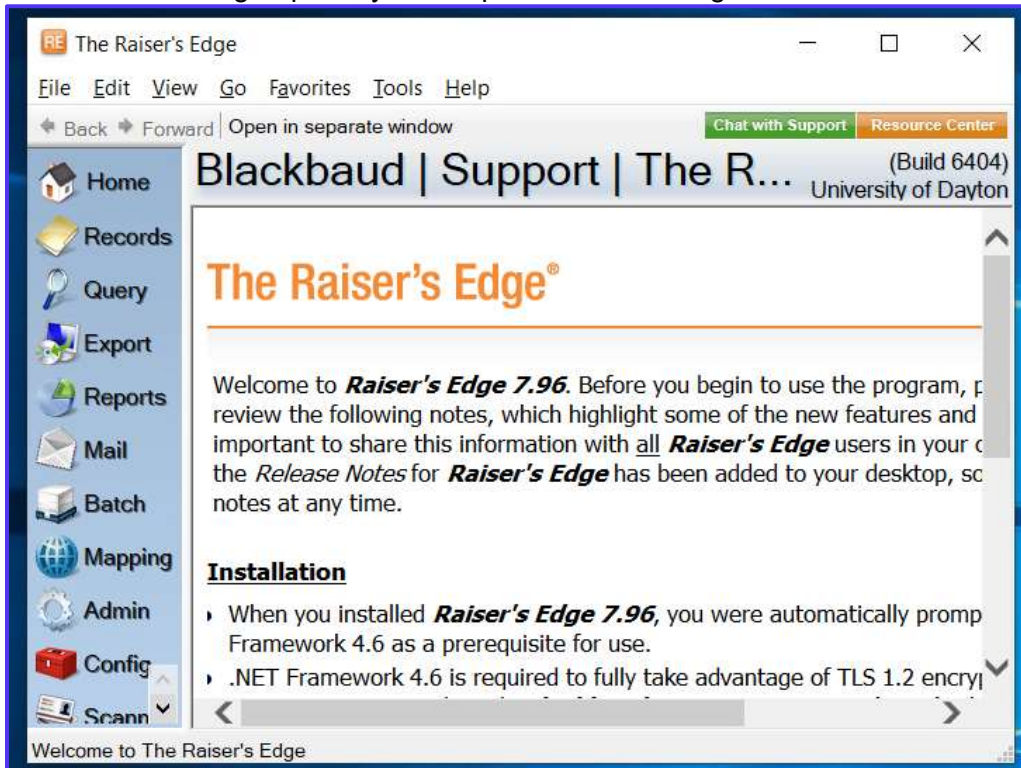
NOTE: *Your Raiser's Edge options along the left-hand side will look different than those in the screenshot above.*

Sign Out

It is **highly recommended** that you log out of the VDI instance in order to be a good steward of our limited available connections. To do this, follow these steps:

1. Right-click the start button in the lower left corner of the screen

2. Move the mouse up to *Shut down or sign out* and wait for the flyout menu to appear

3. Click **Sign out**
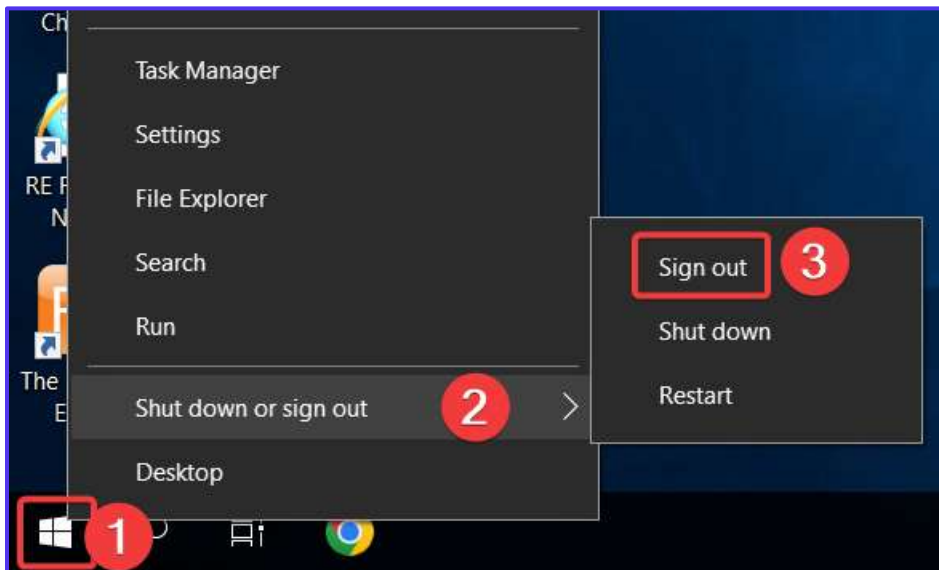
4. Once the VDI signs you out, click **Close** on the *Disconnected* pop-up and close your browser tab
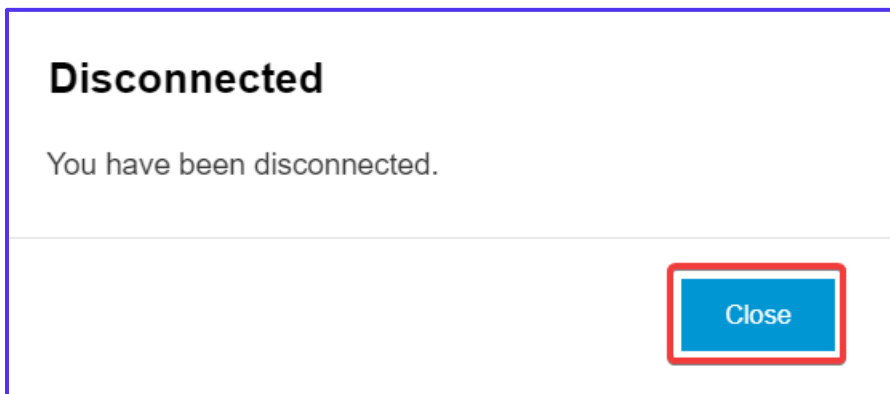
Method Two: Use the VMWare Horizon Client App

Verify VDI Client App Is Installed
The VDI Client application desktop icon looks like this:

If you do not already have the VMWare Horizon Client installed on your computer follow the instructions on how to install the VDI application below:

Install VMWare Horizon VDI Using Portal Manager

TIP: *The Ivanti Portal Manager allows you to download a variety of UD-approved software applications on a UD owned computer without an "administrator" password or assistance from the IT Service Center.*

1. Go to the Windows search bar and type "Portal"

2. The Portal Manager App appears in the Best Match section of the search results. Click on the **Portal Manager** link.
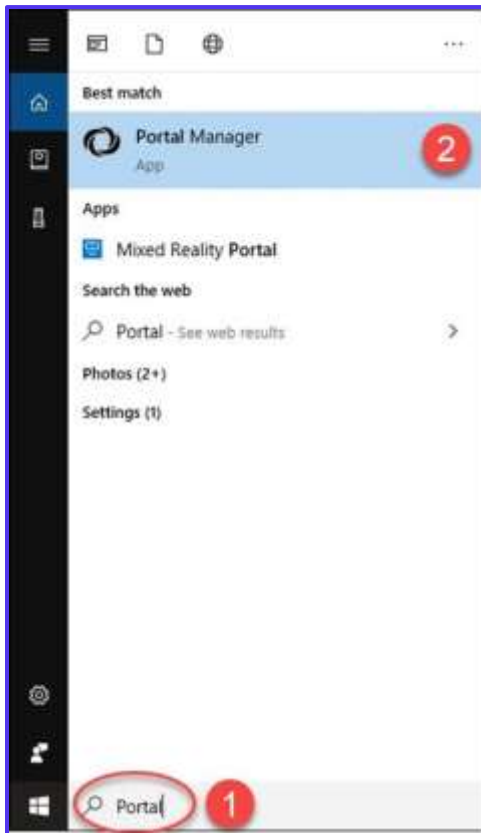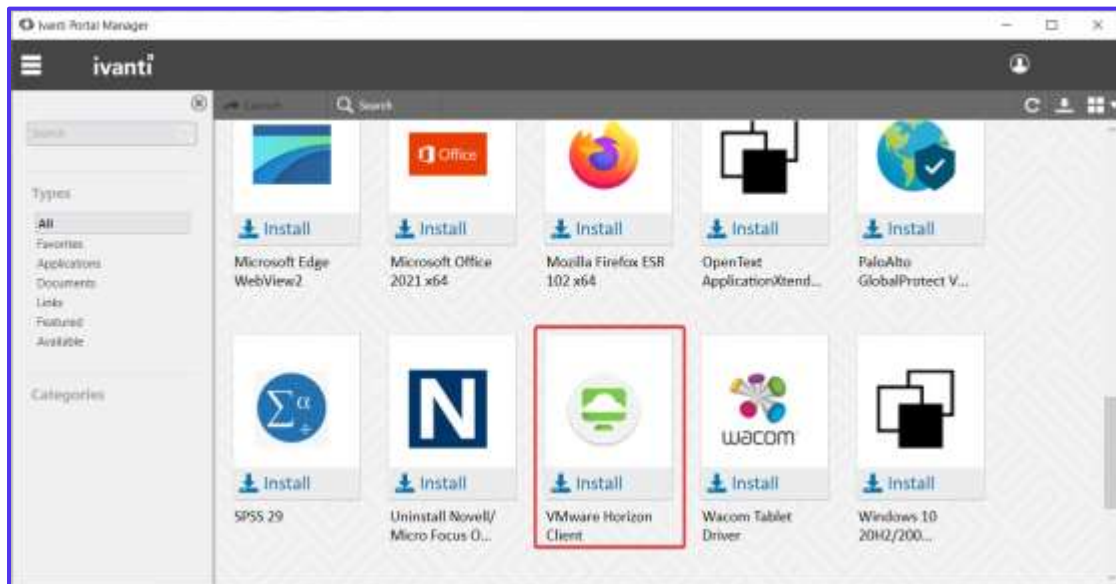
NOTE: *Mac users:*

1. *Use the SpotLight search function*

2. *Type "Portal" in the search bar*

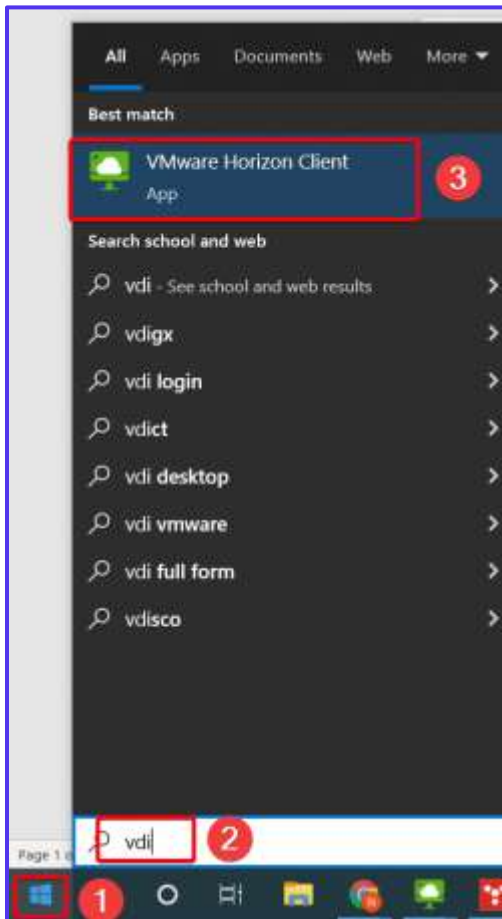3. *Click the **Portal Manager** link*
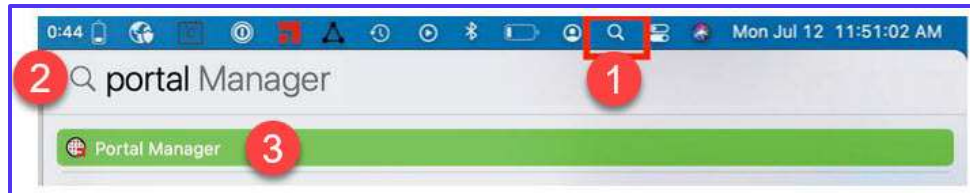
3. Scroll down through the list to *VMWare Horizon Client*, click the **Install** link, and follow the installation prompts.

Log In

1. After installing VDI click the "Windows icon"

2. Type "VDI"

3. Click **VMWare Horizon Client**
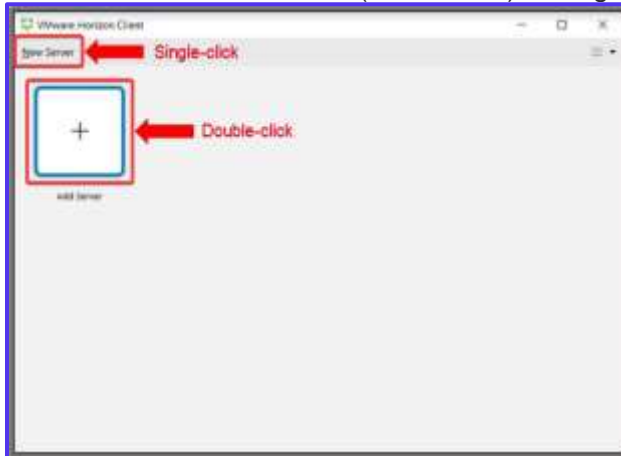
4. Double-click **vdigateway.udayton.edu**

> **NOTE:** If you don't see this option, follow the **Missing VDI Gateway Steps** below, otherwise, continue with Step 5 on the next page.
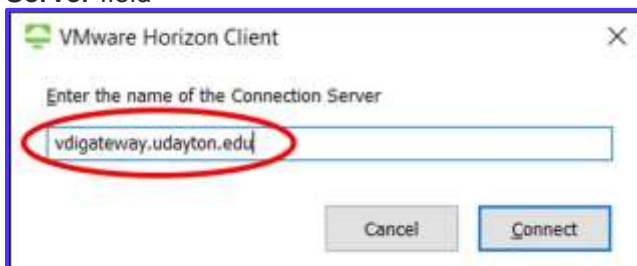

Missing VDI Gateway Steps (2 Steps)

Only follow these two steps if the VDI gateway is missing in VMWare Horizon Client. Otherwise, continue to step 5 on the next page.

1. Double-click the "**Plus**" icon (Add Server) or single-click the **New Server** link
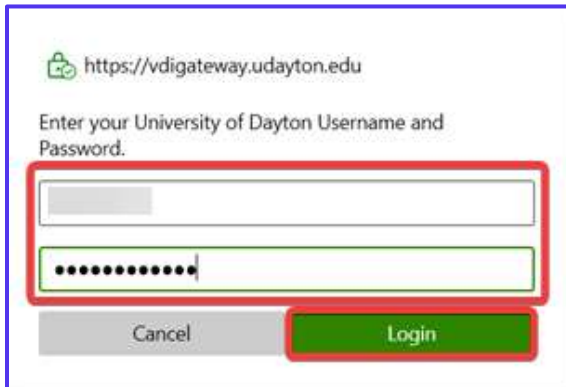

2. Copy and paste **vdigateway.udayton.edu** into the **Enter the name of the Connection Server** field

Return to step 4 (above) then continue to step 5 (next page).

Log In (continued from above)

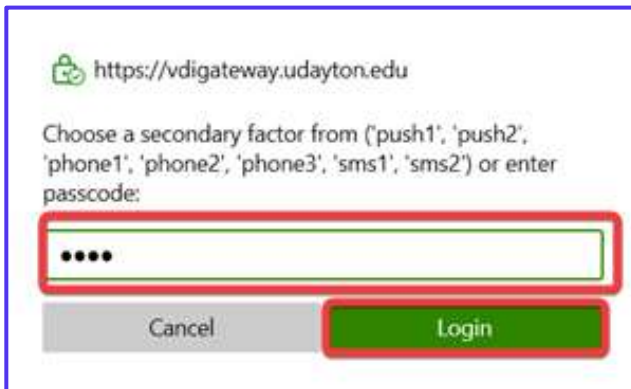5. Enter your standard UD username and password and click **Login**

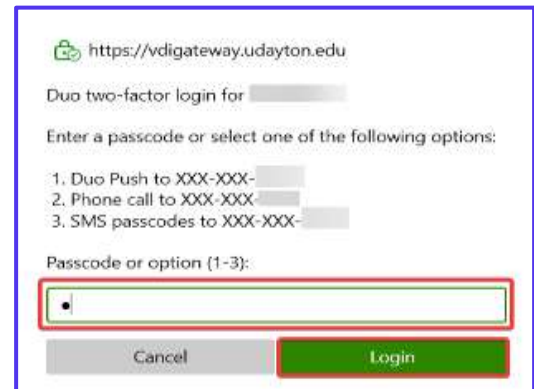6. Depending on how Duo is set up, you may have to enter "push" or "1" to receive the DUO Two-Factor push and click **Login**

7. Double-click **Raiser's Edge**

8. Log in with your regular UD username and password

NOTE: If you have trouble, you can also access this via https://vdigateway.udayton.edu in your Google Chrome browser.

9. Find the Raiser's Edge icon on the desktop and double-click it (see next section Exporting Reports for information regarding Box login)

A similar screen should appear, and you now have access to Raiser's Edge.

Exporting Reports

In order to save exported reports from Raiser's Edge, you should first log in to Box when the screen appears after you initially log in to the VDI. Follow these steps to log in to Box and then save the file to a location on Box. (*NOTE: This may be different that what you were initially instructed. Disregard that and log in to Box.*)

1. Upon first logging in to the VDI, the Box login prompt will appear. This may be before or after Raiser's Edge comes up depending upon how quickly you opened RE. Enter your UD email address in the *Email Address* field.
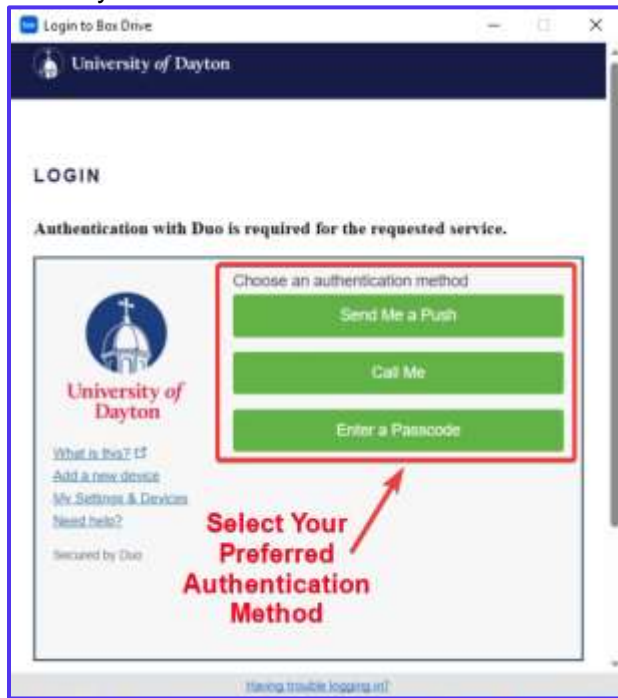
2. Click **Next**

3. Enter your UD username and password in the corresponding fields
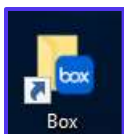
4. Click **Login**
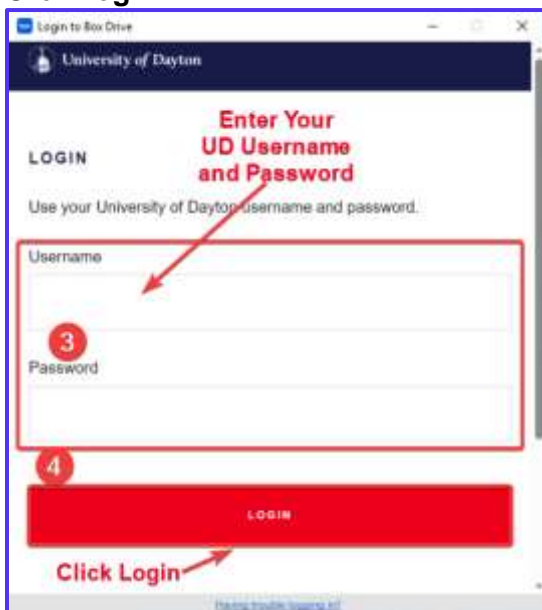
5. Select your Two-factor authentication method of choice

6. The *Welcome to Box Drive* screen will appear. Click the **X** in the upper-right corner (unless you would like to "Take the Tour" of all the wonderful features Box has)
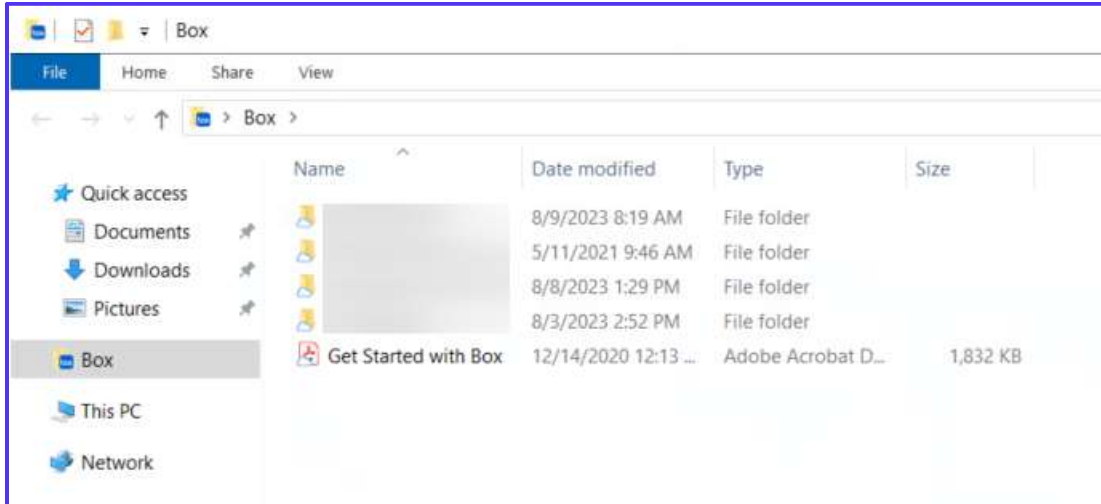

*NOTE: A **Box** icon will appear on the desktop:*

7. One you have closed the previous screen, a File Explorer window will open to display your Box folders

Export from RE VDI

Follow these steps to export a report, file, query, etc. from RE into a folder on Box.

1. With Raiser's Edge open, click **Export** on the left-hand column

2. Select the corresponding folder where the item you wish to export resides

   NOTE: A search option is available in the lower-right corner if you know the name of the item you are exporting.
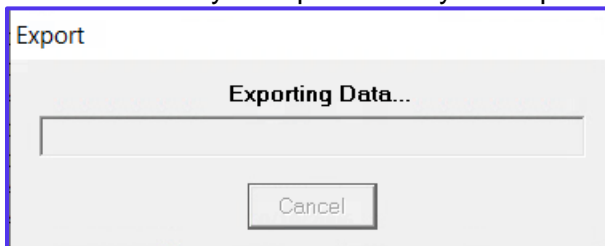
3. Select the item that you wish to export in the main field
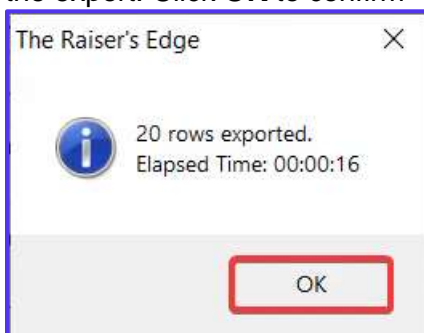
4. Click the **Export** button
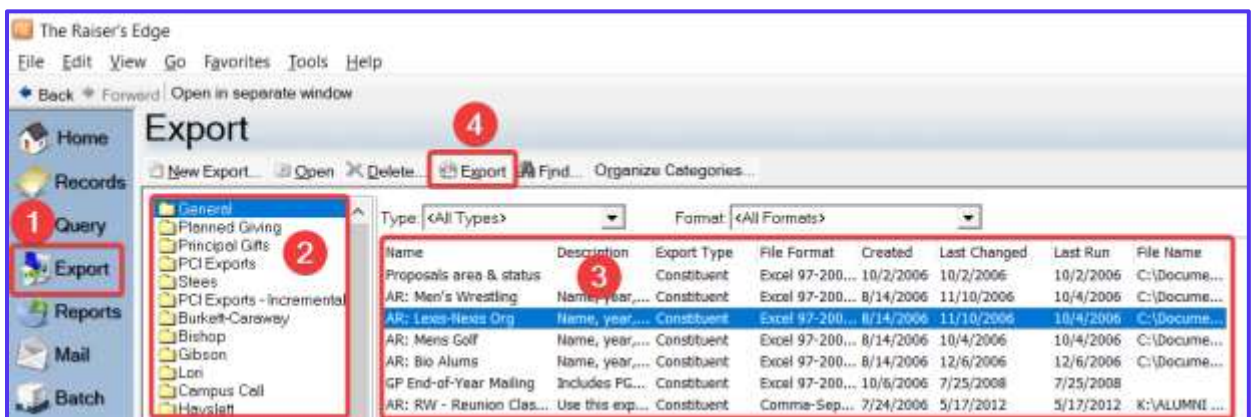
5. Select **Box** in the left-hand column

6. Browse to the location where you wish to save the export

7. Enter a name for the file

8. Click **Save**
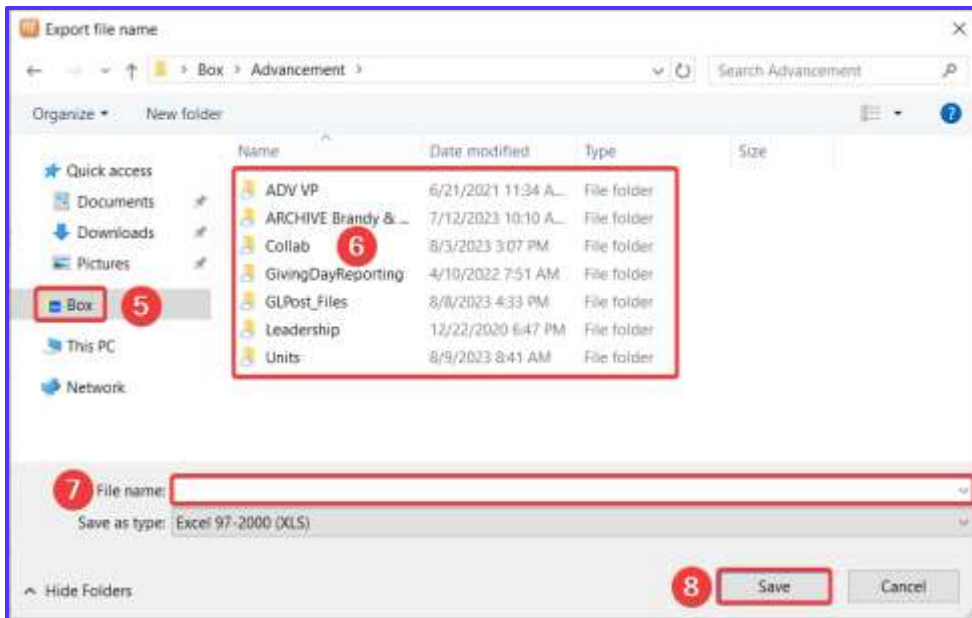
9. Wait while the system processes your request

10. When the system has completed the export, a similar screen displays information about the export. Click **OK** to confirm

11. On your laptop, you may access the exported file by browsing to the Box folder where you saved it

Approvals

Version	Date	Author	Comments	Status
1.0	6/7/2023	Sowder	Document created	Final
1.1	7/6/2023	Fremder	Updated screens, styles	Final
1.2	7/18/2023	Fremder	Document updated to new branding	Final
1.3	7/29/2023	Fremder	Changed to Two Methods, added "Install VDI" instructions, Web Method, styles, ToC, and Introduction	Final
1.4	8/9/2023	Fremder	Added Exporting files to Box (MAR)	Final