

# GiftMaker Pro & EventMaker Pro 8.2

## Update Installation Instructions

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Please be sure you have a working backup copy of your data file before proceeding.

To install any of the Pro Series version 8.2 (GiftMaker Pro, EventMaker Pro, Pro Utilities and/or the Campagne Data Facility), you will need your new Campagne and Omnis serial numbers.

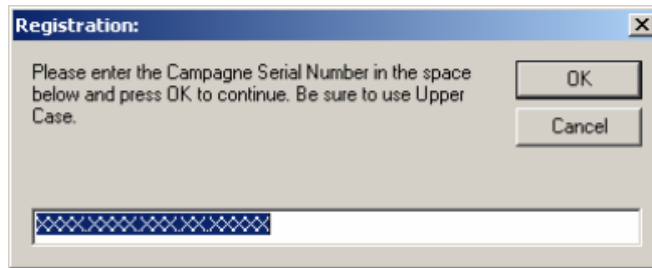
If you have GiftMaker Pro and/or EventMaker Pro installed on more than one workstation, please refer to the **Multi-User Update Installation** section later in this document.

### Windows

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Follow these steps to install the program(s) onto your Windows computer:

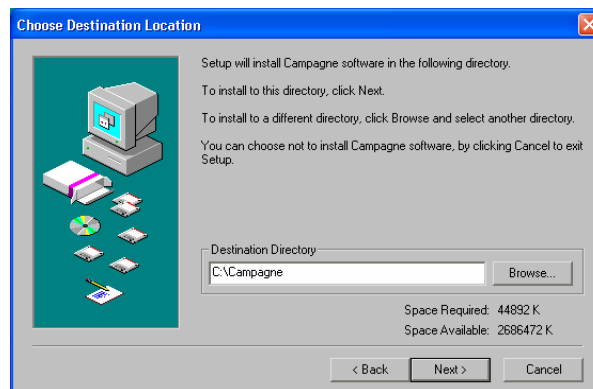
- 1) Download the setup file from the Campagne Associates website, saving it to your desktop for installation. Double-click the **82setup.exe** file to launch the installer.
- 2) In order to install the proper components, the program will require you to enter your **Campagne** serial number.



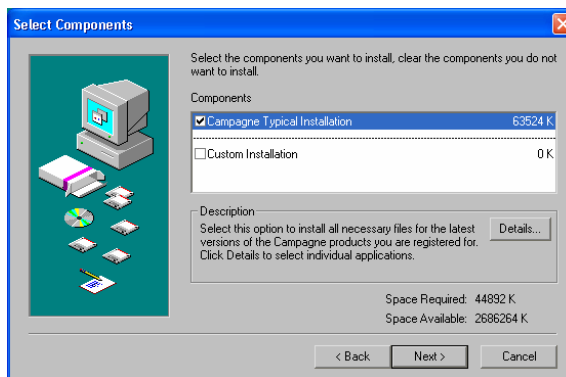
Enter the Campagne serial number exactly as shown on the shipping document using UPPER CASE for the alphabetic characters and "." where indicated. If the license Serial Number is entered incorrectly, you'll need to start over. Click OK to continue.

- 3) Review the **Welcome** screen and click **Next**.
- 4) Read the **License Agreement**. To agree to the terms and proceed with the installation, click on the **Yes** button.
- 5) On the **Choose Destination Location** window, the default is set for C:\Campagne.

Click **Next** to accept, or if you have your Campagne files located in a different directory name, it is important to select the other location using the **Browse** button. Select the top level of the Campagne directory, not the subsequent program directories.

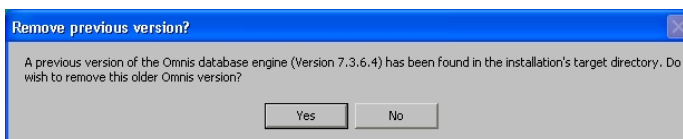


- 6) The **Select Components** window will open. The **Typical** option is pre-selected and automatically will install or update the items based on what you have installed currently. Click **Next**. Custom Installation allows you to install (or re-install) individual components of the update.

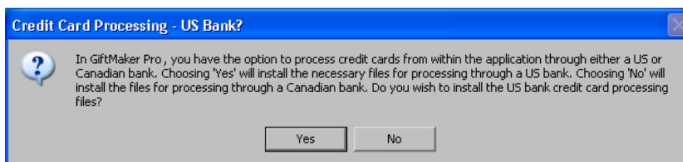


- 7) **Select Program Folder:** The default folder name is Campagne. This is the Start Menu/Programs Group for the shortcut to run the program. Accept the default by clicking **Next**. Shortcuts to the program(s) also will be placed on the desktop.
- 8) The **Ready to Install** window will give you a last chance to make any changes to your choices. Click **Next** to begin the installation/setup of the selected programs.
- 9) If you have a previous version of GiftMaker Pro installed (version 7.9 or prior), you will be prompted to remove a previous version of Omnis (the database engine for GiftMaker Pro). You do not need to overwrite your previous version of Omnis.

Select the **No** button to proceed.



- 10) Some installations will require identification of the banking system to be used for credit card processing. Even though you may not be using the credit card processing feature at this time, please select the proper country to avoid the need to reinstall at a later date.



Is your bank in the United States? If so click on **Yes**; if it is in Canada, click **No**. (Credit card processing functions are not operational until you complete a merchant agreement with IATS/Ticketmaster.)

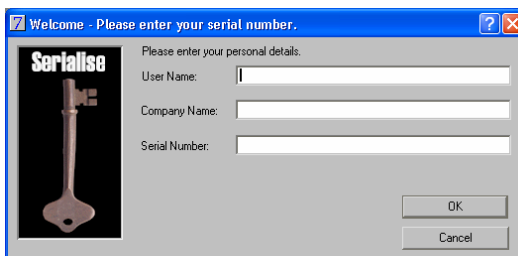
- 11) It is not required to restart your computer at this point. Select the **No** option and click the **Close** button.
- 12) From your Campagne directory, open GiftMaker Pro 8.2.

### Serialize Omnis 7

- 13) If you are upgrading from version 7.9 or earlier (or installing to a new workstation), you will need to serialize Omnis 7, which is the database engine for GiftMaker Pro and EventMaker Pro.

Version 8.0 and 8.1 users may proceed to the next step.

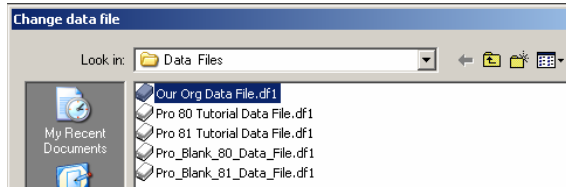
If you receive the Welcome/Serialize screen, enter your name, Organization name and Omnis serial number and click OK.



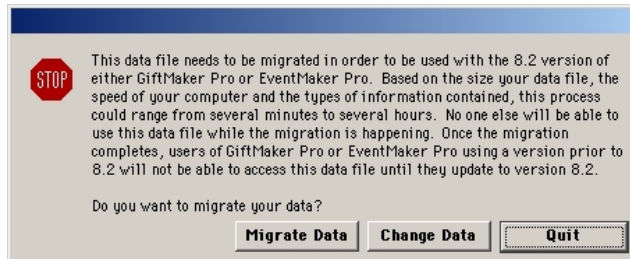
By all means, try to avoid canceling at this point. Canceling before serializing Omnis will mean that you will be working with a single user version of Omnis. If your license is for multi users, you will find problems when logging on while others are in the program.

### Migrate your data

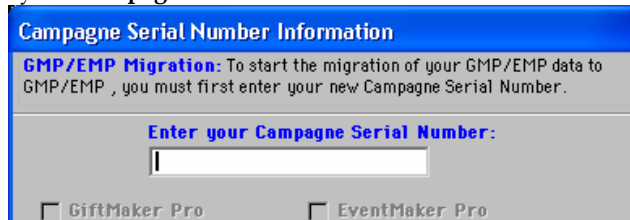
- 14) Now it's time to migrate your data over to version 8.2. Locate and select your data file from the **Change Data File** window.



- 15) The following window will confirm your data file selection. Select **Migrate Data**.



- 16) Once again, enter your **Campagne** serial number.



- 17) Last chance to confirm you have a working backup of your current data file! Click **Proceed** to continue (or **Quit** if you are unsure).

The processing time of the migration will vary depending on data file size, location of data file and other computer configurations. Most data file migrations should be complete within an hour.

- 18) The **Sign on** window will open. Sign on to the program, and enter your password, if required.
- 19) To take advantage of one of the new features added to v8.2, proceed directly to the **User Preferences** window for your user name. GiftMaker Pro users should begin by following the steps below to update toolbar preferences, making the **Command** buttons visible in this window. (EventMaker Pro users may skip directly to step #20 below.)

- Click the **User Preferences** button on your Dashboard, then choose the **User Preferences Window** option.
- Using the tabs to the right, switch to the **Toolbars** pane.
- Turn off the option to **Show commands toolbar**. (If it's already turned off, skip to the next bullet item.)
- Click the **Save** button. Your toolbars will be updated and the User Preferences window will close.
- Open the User Preferences window again, using the same steps as above to turn **on** the **Show commands toolbar** option, and save the change. Turning the **Commands** toolbar off/on will force the toolbar buttons to display properly throughout the various **User Preferences** windows.

- 20) Now you're ready to customize your new **User Defined Retrieval Processing** preferences to match the type of retrievals you perform most frequently.

- a. Click the **User Preferences** button on your dashboard, then choose the **User Preferences Window** option.
  - Using the tabs to the right, switch to the **Processing** pane.
  - Notice the section near the bottom of this window labeled **User defined retrieval processing**.
  - Six new checkboxes are available for customization. Each user should select options appropriate for the type of User Defined Retrievals they perform most frequently. The selections made in this window will become default settings for that particular user when setting up new User Defined Retrievals. Each user may alter his/her defaults again at any time, and the default selections always can be overridden as needed before processing each individual retrieval. For more information about this new feature, refer to the “82 New Features” document.
  - Click the **Save** button. The next time you start a new retrieval, your User Preferences will be used as default settings in the User Defined Data Selection window.
- 21) Other users should also sign on to GiftMaker Pro or EventMaker Pro and perform the same steps outlined above for their own sign-on name. Each user may have unique preferences for how to set the processing defaults most appropriate for their User Defined Retrievals.

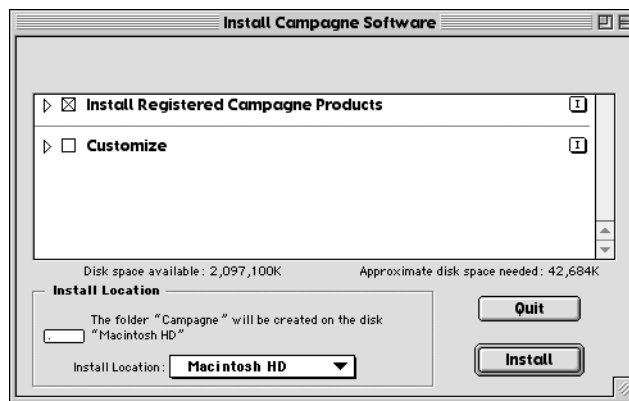
## Macintosh Installation

Follow these instructions to install GiftMaker Pro on a Macintosh system.

- 1) Download the setup file from the Campagne Associates website, saving it to your desktop for installation. Double-click the **82 Install Campagne Software** icon to begin the installation.
- 2) Read the **License Agreement**. Click on the **Accept** button to agree to the terms and proceed with the installation.

The Install Campagne Software window will open.

- 3) Click the **Install** button to proceed. The program will install all the necessary software as directed.



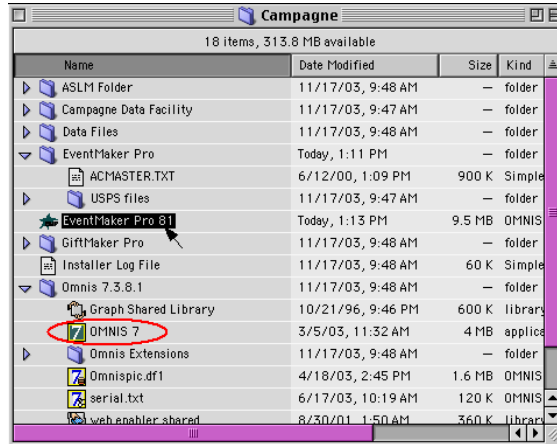
- 4) If you have a previous version of GiftMaker Pro installed (version 7.9 or prior), you will be prompted to remove a previous version of Omnis (the database engine for GiftMaker Pro). You do not need to overwrite your previous version of Omnis.

Click **No** to proceed.



- 5) At the “Installation was successful” message, click **Quit**.

- 6) From the Campagne folder, open the **Omnis 7.3.8.1** folder. Then open the GiftMaker Pro folder. Single click the **GiftMaker Pro 8.2** icon and drag it over the **OMNIS 7** icon. This will open the program.

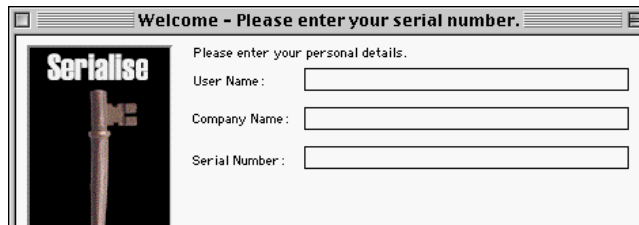


### Serialize Omnis 7

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Version 8.0 and 8.1 users may proceed to the next step.

*If you receive the Welcome/Serialize screen, enter your name, Organization name and Omnis serial number and click OK.*

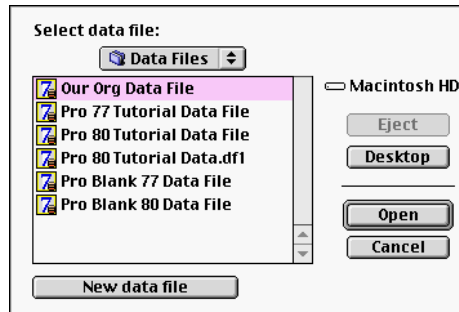


By all means, try to avoid canceling at this point. Canceling before serializing Omnis will mean that you will be working with a single user version of Omnis. If your license is for multi users, you will find problems when logging on while others are in the program.

### Migrate your data

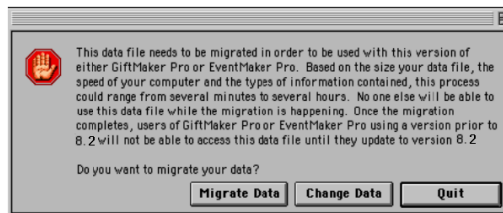
- 8) Now it's time to migrate your data over to version 8.2.

Locate and select your data file.

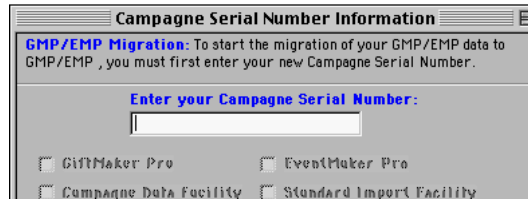


This window gives you a chance to confirm your data file selection.

Select **Migrate Data**.



- 9) Once again, you need to enter your Campaign serial number.



- 10) Last chance to confirm you have a working backup of your current data file! Click **Proceed** to continue or **Quit** if you are unsure.
- The processing time of the migration will vary depending on data file size, location of data file, and other computer configurations. Most data file migrations will be complete within an hour.
- 11) The **Sign on** window will open. Sign on to the program, and enter your password, if required.
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  - Click the **Save** button. Your toolbars will be updated and the User Preferences window will close.
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## Planning a Multi-User Update Installation

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If you have GiftMaker Pro and/or EventMaker Pro installed on more than one workstation, please consider the details below when installing this update. A typical network installation will have the program files installed on each workstation and the data file stored within a shared location on the server.

### Preparations

- Plan to perform the installation of all workstations at a time when all users can be off GiftMaker Pro and EventMaker Pro. Since there is a migration involved in bringing your database from a prior version into the current release of GMP/EMP, no users can be accessing the data while this stage of the installation is processing. Also, once the migration is complete, it must no longer be accessed by an older version of the software. So it's important to keep all users off the system until the upgrade of their workstation is complete.
- Print the Data File Status information from the File menu in GiftMaker Pro or EventMaker Pro. This report will outline the Data File Path and file name for your organization's current database. This information will be necessary during migration of the data file, and when you first launch the new release after installation.
- Create a current, reliable backup of the database before beginning the installation. There is no undo function for the migration utility, so the only way to return your database to its pre-upgrade condition, in the event you need to try again, is to restore a data backup. To ensure the correct file is included in the data backup, refer to the Data File Path printed from the Data File Status report described above for the exact location of your current, live database.

### Installation

- Using the steps outlined in the previous sections of this chapter for a Windows or Macintosh installation, install the new update release to one of the workstations in your office. You will need the current serial numbers assigned to your organization for this latest version of the software.
- As the installation completes, you will be prompted to migrate your database, updating its structure to match the new version of GiftMaker Pro and/or EventMaker Pro. This data migration will be necessary only once, regardless of how many workstations will be installed and regardless of how many add-on modules your organization uses. However, the installation of program files will be repeated for each workstation from which you intend to run GiftMaker Pro and/or EventMaker Pro.
- Once the installation and migration are complete, launch GiftMaker Pro or EventMaker Pro and sign on from this workstation. If you are prompted to navigate to the database, refer to the Data File Path printed from the Data File Status report described above. This path will be remembered for the next time you launch the software.
- Install to each of the other workstations that need to access GiftMaker Pro and/or EventMaker Pro. You will NOT be prompted to migrate the database again; you will be installing the program files only. Launch GMP/EMP from each workstation, connect to the database and sign on.

### Follow-up

- On each workstation, ensure all shortcuts/aliases point to only the latest, current version of the software and are functional. Remove any old shortcuts, since prior versions of the program no longer will be able to access the database once it has been migrated to the current release. Please note that the attempt to access a current database with a prior version of the software could result in data corruption and can be avoided by ensuring all workstations have been properly updated to the most current version before any users sign-on to the database.
- It also is important to ensure only one copy of the current database is available for access by end-users. Keep all backup copies on separate media, properly labeled for storage. Also retain a printed copy of the Data File Status report described above for future reference so users will know the correct path to the live database.
- Now you're ready for all the users to sign on to GiftMaker Pro or EventMaker Pro using the latest version of the software. You may want to set aside the pre-installation backup for awhile. Remember the only way to reverse a data migration is to restore the pre-migration data backup, should you need to return to the prior version for any reason.