Upgrade Overview

The following overview provides a "big picture" view of the various steps needed to complete all included upgrades, indicates which clients need to perform each step, and lists the order in which they should be done.

Detailed steps for each distinct upgrade step is found in each product's *Installation Guide*.

We recommend you review this document first, determining which steps in the following table you need to perform. Then you can follow the instructions in the installation guides knowing you're performing each upgrade in proper order.

	Step	Who needs to do this?
1	Download and Unzip the Setup Files	All clients who want to upgrade to any of the following: • GIFTS 6.6 • IGAM 6.0 • MyGIFTS and ReviewerCONNECT 3.6 • Plus Pack 5.2.2 (Please refer to the *GIFTS Plus Pack 5.2.2 Upgrade Guide* in the Doc\PlusPack522 folder for full details.)
2	Upgrade GIFTS and IGAM	Clients who want to upgrade to GIFTS 6.6 and IGAM 6.0. (A single upgrade process updates both GIFTS and IGAM.)
3	Upgrade to GCS 3.6 (MyGIFTS and/or ReviewerCONNECT)	**Clients who already have GCS 3.6 may skip this step.** Clients with an earlier version should perform this upgrade. The upgrade process will upgrade both MyGIFTS and ReviewerCONNECT. **NOTE:** Job Manager must be re-installed separately.
4	Upgrade to Plus Pack 5.2.2	Clients who currently have GIFTS Plus Pack 5.2.1 or earlier installed should perform this step. **NOTE:** Link Plus and Reminders Plus must also be re-installed separately. This will ensure all known issues fixed in this release are addressed.

For additional support, please contact the MicroEdge technical support team:

Phone: 1.877.704.3343
Email: helpdesk@microedge.com
Online: Click the Case tab at the top of your PowerME homepage, then click **Create New Case**.
Technical Support Hours: M-F, 8AM-8PM EST

Before You Begin

Determine your current version for GIFTS and IGAM(if installed) by logging into GIFTS and selecting **Help** > **About** from the main menu. The GIFTS version number and other product details will be displayed.

You must be currently using GIFTS 6.4 or later and IGAM 5 or 5.5 (if installed). This upgrade is not compatible with earlier versions of GIFTS or IGAM.

If you are not on version 6.4 or IGAM 5, you must upgrade to that version before you can perform *this* upgrade.

Step 1 – Download and Unzip the Setup Files

1. Refer to the Upgrade email sent to you by MicroEdge and follow the instructions for downloading the Upgrade Installation Files.
2. Save the downloaded file(s) to a location on your workstation or server that will be easy to find. For example, C:\Downloads or a similar folder.

The above steps are a prerequisite to upgrading your GIFTS system.

Before You Begin	You should perform this step at a GIFTS workstation. All upgrades which follow need to be performed at a GIFTS workstation, so it's most convenient to download the setup files to one.
Process	1. Right click the zip file(s) you downloaded and select **Extract All** from the menu. The Extraction Wizard welcome screen opens. 2. Click **Next**. The Select a Destination window opens. 3. Click **Browse**, select a folder on the workstation (e.g., you might create a folder called "GIFTS66 Upgrade"), and click **OK**. 4. Click **Next** to finish. 5. This will create a folder
Confirmation	The setup files will unzip and be extracted to the selected folder. Its contents should look similar to the following: You should also open the **Doc** folder (shown in the folder above) to access the different installation guides you need to complete the upgrade, as well as all the user documentation for the different GIFTS products.

Step 2 – Upgrade GIFTS and IGAM

NOTE: You must perform this step at a GIFTS Workstation.

Before You Begin	Determine your current version for GIFTS and IGAM(if installed) by logging into GIFTS and selecting **Help** > **About** from the main menu. The GIFTS version number and other product details will be displayed. You must be currently using GIFTS 6.4 or later and IGAM 5 or 5.5 (if installed). This upgrade is not compatible with earlier versions of GIFTS or IGAM. If you are not on version 6.4 or IGAM 5, you must upgrade to that version before you can perform *this* upgrade.
Process	To perform the upgrade, follow the detailed instructions found in the *GIFTS Installation and Technical Reference Guide*. This installation guide (GIFTS 6.6 INSTALLATION GUIDE.pdf) is included in the **Docs** folder of the unzipped files. The details of the upgrade process differ based on your GIFTS system. **System** — **Follow Steps in…** Stand-alone or file server (Microsoft Access) — Chapter 6 Client/server (SQL Server or Oracle) — Chapter 7 To determine which back-end you are using: 1. Log in to GIFTS. 2. From the main menu, select **Help** > **About**. The product details open. 3. Click the **System Info** button. The GIFTS Diagnostics window opens. The **Back-end** row will show which database your GIFTS system uses.
Confirmation	Once the upgrades to GIFTS and IGAM are complete, you can easily confirm a successful upgrade to each: Log in to GIFTS and IGAM in turn. In both modules, select **Help** > **About** from the main menu. The product details which open should show GIFTS 6.6 and IGAM 6.0, respectively.

Step 3 – Upgrade to GCS 3.6 (MyGIFTS and/or ReviewerCONNECT)

Once the upgrade of GIFTS and/or IGAM is completed, you should upgrade to GIFTS Connections 3.6 if not already on version 3.6..

NOTE: Job Manager must be re-installed separately.

Before You Begin	Prerequisites for upgrading or installing MyGIFTS and ReviewerCONNECT are found in the *MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*. As long as you've completed the upgrade to GIFTS 6.6, you should be ready to go.
Process	To perform the upgrade, follow the detailed instructions found in the *MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*. This installation guide (GCS36-Installguide.pdf) is included in the Docs folder of the unzipped setup files.
Confirmation	Once the upgrades to MyGIFTS and ReviewerCONNECT are complete, confirm the upgrade as follows: Open your web browser and go to the MyGIFTS login page, or go to either the external or internal reviewer login page for ReviewerCONNECT. The version number is shown on the login page should be 3.6 and you should be able to login.

Step 4 – Upgrade Plus Pack

Clients who currently have GIFTS Plus Pack 5.2.1 or earlier installed should perform this step.

NOTE: Link Plus and Reminders Plus must be re-installed separately.

Before You Begin	Before installing Plus Pack 5.2.2, you need to extract the zip files containing the setup files. 1. In the same **GIFTS 6.6.zip** file in which this document came, there is another Zip file called **Plus Pack 5.2.2.zip**. Right click this zip file and select **Extract All** from the menu. The Extraction Wizard welcome screen opens. 2. Click **Next**. The Select a Destination window opens. 3. Click **Browse**, select a folder on the workstation (e.g., you might create a folder called "Plus 5.2.2 Upgrade"), and click **OK**. 4. Click **Next** to finish. Other prerequisites for upgrading Plus Pack are detailed in the *GIFTS Plus Pack 5.2.2 Upgrade Guide*.
Process	To perform the upgrade, follow the detailed instructions found in *GIFTS Plus Pack 5.2.2 Upgrade Guide* which is included in the **Doc\PlusPack521** folder of the extracted GIFTS 6.6 upgrade.
Confirmation	If you are not sure you have successfully upgraded Plus Pack, contact MicroEdge Technical Support for assistance.

Step 5: Upgrading Link Plus and Reminders Plus

If you are upgrading to GIFTS Link Plus for use with Outlook 5.2.2, you must first make sure the previous version of GIFTS Link Plus has been completely uninstalled.

5.1 Completely Uninstalling Current Link Plus

Before You Begin:

- Both Outlook and GIFTS must be closed when you uninstall GIFTS Link Plus.
- Office 2003 and Office XP are no longer supported for GIFTS 6.6.

Uninstall Previous Link Plus and All Related Components:

Below is the recommended method for ensuring a complete uninstall of GIFTS Link Plus.

1. Close Outlook.
2. Go to **Start > Control Panel > Add** or **Remove Programs** (**Programs and Features** in Windows 7).
3. Uninstall GIFTS Link Plus or GIFTS Alta Link as needed.
4. Also uninstall the following Outlook Add-In items, if present:
    - Microsoft Office 2003/2007/2010 Primary Interop Assembly
    - Visual Studio 20xx Tools
5. Restart your computer.
6. After rebooting, open Outlook and make sure the above Add-Ins have been removed.
    - **Outlook 2007:** Tools > Trust Center > Add-Ins
    - **Outlook 2010/2013:** File > Options > Add-Ins
7. Close Outlook.
8. Continue to Step 3 below.

5.2 Installing GIFTS Link Plus for Use with Outlook 5.2.2

Before You Begin:

- Both Outlook and GIFTS must be closed when you install GIFTS Link Plus.
- **Install for Everyone Option:** This option during the install process allows Link to be available to anyone who logs in to the same workstation. It is only available to Office 2007 or 2010 users and you must be logged in as an Administrator during the installation process.
    - **Office 2007 Users:** If you wish to use the install for **Everyone** option, a Microsoft Hotfix must first be downloaded and installed. Please refer to http://support.microsoft.com/kb/976811.
- **All Citrix users:** Link will not work with Citrix unless Outlook is also accessed via Citrix.

To Install GIFTS Link Plus for Outlook:

1. From your GIFTS workstation browse to the **GIFTS Plus** sub folder, typically installed in the GIFTS directory (e.g., C:\GIFTS\GIFTS Plus), and open the **Link Plus Setup** folder.

NOTE: For Citrix users, browse from the Citrix server to the **Plus Pack** subfolder.

2. Open the Link Plus for use with Outlook 2007, 2010, or 2013 folder (depending on which version of Outlook you are using) and double-click **Setup.exe**. A message may appear informing you that Microsoft Office 2007/2010/2013 Primary Interop Assemblies will be installed on your machine.

3. Click **Install**. The GIFTS Link Plus Setup Wizard appears.
4. Click **Next**. The Select Installation Folder appears.

Note: If you do not have VSTO runtime installed, you will be prompted to install this first.

5. If you want to change the default GIFTS Link Plus folder location, click **Browse** and select the folder location.
6. At this stage, you also have the option in the lower left to make GIFTS Link Plus available to **Everyone** or **Just me** (Office 2007/2010 only). Selecting **Everyone** will allow anyone who logs into the workstation to have access to GIFT Alta Link in their Outlook.
7. Click **Next**. The Confirmation Installation screen appears.
8. Click **Next** to install GIFTS Link Plus. GIFTS Link Plus is installed.
9. Click **Close**.
10. If you installed the 64-bit version of GIFTS Link Plus and are using an Access database, please run the **AccessDatabaseEngine_x64.exe**.

NOTE: 64-bit Outlook users, the first time you attempt to 'Send to GIFTS', you will get a security prompt. Simply check the **Allow access for** box and set the time as needed to avoid future prompts.

Manually Installing the Other Outlook Add-Ins:

The following Outlook Add-ins should have been installed automatically with Link Plus installation.

- Microsoft Outlook 2007/2010/2013 Primary Interop Assembly
- Visual Studio 2005

Make sure the Outlook add-Ins were installed with GIFTS Alta Link by going to **Start > Control Panel > Add or Remove Programs**. If Microsoft Outlook 2007/2010/2013 Primary Interop Assembly or Visual Studio 2005 Tools is missing, install it manually from the subfolders in the setup folder:

1. Close Outlook.
2. Access the subfolder for each Add-In and run the installation file manually. (*.msi and *.exe)

5.3 Upgrading the GIFTS Plus Reminders Engine

The part of GIFTS Plus Pack that actually generates and sends the reminders is called the GIFTS Reminders Engine. Although you can create reminders from any GIFTS workstation, you can only schedule and send reminders from a workstation on which you have installed the Reminders Engine.

To upgrade the Reminders Engine:

1. Go to the GIFTS Plus folder, typically installed in the GIFTS directory (e.g., C:\GIFTS\GIFTS Plus), and open the **Reminder Setup** folder.
2. Double-click **Setup.exe**. The Reminders Engine Setup Wizard is displayed.
3. Click **Next**, and then **Next** again. The Reminders Engine files are installed on the workstation.
4. Click **Finish**. The Reminders Engine upgrade is complete.

NOTE: Currently scheduled reminder tasks and desktop shortcuts do not need to be updated.