MICRO EDGE®

VERSION 6.6

GIFTS® 6

Installation and Technical Reference Guide

NOTICE

The software described in this document is furnished under a license agreement. The software may be used or copied only in accordance with the terms of the agreement. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose without the express written permission of MicroEdge, LLC. Information in this document may be revised from time to time without notice.

Confidentiality: This document is provided by MicroEdge, Inc. with the understanding that its contents will not be divulged to any third party without the written consent of MicroEdge, LLC.

U.S. Government Users: *Use, duplication, or disclosure is subject to the restrictions as set forth in the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 subparagraph (c)(1)(ii), or the Commercial Computer Software -- Restricted Rights at CFR 52.227-19, subparagraphs (c)(1) and (2), as applicable. Manufacturer is MicroEdge, LLC. 619 W. 54th Street, New York, NY 10019.*

Copyright © 2014 by MicroEdge, LLC. All rights reserved.

Part number: GIFTS 6.6 Installation Guide

Publication date: December 2014

GIFTS, Essential GIFTS, GIFTS Connections, MyGIFTS, and ReviewerCONNECT are registered trademarks of MicroEdge, LLC. Other marks are those of their respective holders, and should be treated as such.

Printed on Recycled Paper.

Contents

Welcome to GIFTS 6.6 vi
Contents of the MicroEdge GIFTS 6.6 Download vii
Overview of the Installation or Upgrade Process ix
Conventions Used in This Manual xii
Using MicroEdge Documentation xiv
Using the Documentation xvi
Maintenance and Support Program xvii

1 Installation Options and Requirements 1
Configuration Options 2
GIFTS Storage Requirements 7
Calculating Your Storage Requirements 10
Hardware Configuration Guidelines 12
Performance Considerations 17
Software Considerations 18

2 New GIFTS Standalone or File Server Installation .21
Before You Begin 22
New Standalone Installation 24
File Server Installation 28

3 New Microsoft SQL Server Installation 35

Before You Begin 36
Overview of the GIFTS Installation Process 37
Step 1: Important Prerequisites 38
Step 2: Setting Up the GIFTS Database 41
Step 3: Installing GIFTS on Your File Server 46
Step 4: Populating the GIFTS Database 51
Step 5: Installing the GIFTS Workstations 52
Step 6: Logging in to GIFTS for the First Time 55

4 New Oracle Server Installation 57

Before You Begin 58
Overview of the Installation Process 60
Step 1: Important Prerequisites 61
Step 2: Setting Up the GIFTS Database 63
Step 3: Installing GIFTS on Your File Server 66
Step 4: Populating the GIFTS Database 72
Step 5: Installing the GIFTS Workstations 73
Step 6: Logging in to GIFTS for the First Time 77
Retrieving the Database Creation Scripts 78

5 New Installation of GIFTS with Citrix Presentation Server 79

Before You Begin 80
Citrix Installation Options 81
Option 1: Installing a GIFTS Workstation on Your Server 82
Option 2: Installing a Standalone System on Your Server 86

6 Upgrading a GIFTS Standalone Workstation or File Server 89

Before You Begin 90
Standalone Upgrade 93
File Server Upgrade 98

7 Upgrading GIFTS Client/Server Installations 105

Before You Begin 106
Step 1: Important Prerequisites 109
Step 2: Upgrading the File Server 111
Step 3: Upgrading the GIFTS Database 113
Step 4: Upgrading Your GIFTS Workstations 115

8 Upgrading GIFTS with Citrix Presentation Server 119

Before You Begin 120
Upgrading a GIFTS Workstation Running Citrix 123
Upgrading a Standalone System Running Citrix 126

9 Maintenance, Security, and Data Integrity 129

GIFTS Diagnostics Utility 130
Isolating System File Conflicts 131
Maintaining Your Database 132
Budget Diagnostics Utility 134
Security and Data Integrity 135
System Architecture 137

10 Expanding Your GIFTS System 139

Optional Modules and Components 140
GIFTS Connections 143
System Trade-up and Migration 144
Links to External Systems 146

11 Installation Impact Analysis 149

GIFTS 6.6 Impact Analysis 150

12 Custom Reports 161

Creating Custom Reports 162
How GIFTS Upgrades Affect Custom Reports 163
Compatibility with Crystal Reports 164
Upgrades to Crystal Reports 165

Welcome to GIFTS 6.6

This publication includes all the information you need to install or upgrade your GIFTS system—including optional modules like the Internet Grant Application Module™ and GIFTS Plus Pack

Clients who have purchased GIFTS Connections™ products like MyGIFTS™ and ReviewerCONNECT™ should also refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*.

In This Chapter

Contents of the MicroEdge GIFTS 6.6 Download ..... **vii**

Overview of the Installation or Upgrade Process..... **ix**

Conventions Used in This Manual ..... **xii**

Using MicroEdge Documentation..... **xiv**

Using the Documentation ..... **xvi**

Maintenance and Support Program..... **xvii**

Contents of the MicroEdge GIFTS 6.6 Download

Depending on your current GIFTS installation configuration, the MicroEdge download for GIFTS 6.6 can be used to install (or upgrade to) GIFTS 6.6, IGAM 6.0, GIFTS Connections 3.6, and/or GIFTS Plus Pack 5.2.2 These products are described as follows.

GIFTS 6.6

GIFTS is a robust system for tracking proposals and grants from the time requests are received through closure. You can retrieve and classify requests, generate letters, manage contacts, schedule and monitor activities, maintain complete organization histories, track payments, and much more. Additional modules allow you to expand your GIFTS system to track different kinds of data and giving.

GIFTS is the foundation of the other MicroEdge products described here.

Internet Grant Application Module 6.0

IGAM enables grantmakers to accept grant applications and proposals through the Internet and allows grantmakers to create requirement forms for grantee reporting. IGAM can increase the quality of the grant submissions you review and significantly reduce the work required to process them. It can save time and lower your operating costs.

GIFTS Connections 3.6

The GIFTS Connections server (GCS) makes it possible to access and edit GIFTS data through a web browser. The server retrieves information from your GIFTS database and formats it for display in a web page.

In turn, GCS can also receive data from users connecting through the Internet and save it to GIFTS. This allows users to connect to your GIFTS system from anywhere, while your organization maintains a single database.

GCS is the hub of the GIFTS Connections suite of products. With the server translating data to browser-ready form—and back again—GIFTS Connections products designed for specific audiences are ready to be added:

MyGIFTS MyGIFTS is designed to give members and employees of your organization convenient and versatile access to GIFTS from remote locations. Whether connecting through an intranet or over the Internet, your users have a way to interact with GIFTS through their web browser.

ReviewerCONNECT ReviewerCONNECT is designed to give reviewers convenient access to your proposals from remote locations. Internal and external reviewers can provide instant feedback on proposals by editing and submitting review data through their web browsers.

GIFTS Plus Pack 5.2.2

The GIFTS Plus Pack is a set of .NET add-on utilities that integrate seamlessly into GIFTS to offer extensive options for updating batches of records, verifying tax status information, verifying watchlist information, updating and adding organizations, batch requirement and payment scheduling, enhanced charting, and enhanced e-mail capabilities. The utilities are built on the Microsoft .NET platform, and are accessed from within GIFTS for a seamless user experience.

Overview of the Installation or Upgrade Process

Although the MicroEdge GIFTS Installation Disc (for new installs) or Upgrade Download will contain all of the data necessary to install these different systems, some products are installed in separate procedures. This section describes the order in which you must install these products.

Caution: Before upgrading, you should always make sure the backup of your database is up to date.

Part 1: Installing or Upgrading GIFTS and IGAM

The first part of the installation process is to install or upgrade GIFTS and the Internet Grant Application Module (if purchased). These two products are installed or upgraded simultaneously, along with optional GIFTS modules like the Budget Module and A/P Module.

Before installing or upgrading GIFTS and IGAM, you should read "Configuration Options" on page 2. This chapter details the GIFTS configuration options and describes the storage, performance, and installation considerations for each of these configurations.

If you're *installing* GIFTS for the first time, choose the chapter containing instructions for your standalone or network setup:

Chapter	Summary
"New GIFTS Standalone or File Server Installation" on page 21	Contains installation instructions for two different environments: a standalone system on a single computer, or a file server system with a GIFTS file server and one or more workstations.
"New Microsoft SQL Server Installation" on page 35	Describes how to install a multi-user GIFTS system with a Microsoft SQL Server database.
"New Oracle Server Installation" on page 57	Describes how to install a multi-user GIFTS system with an Oracle server database.

Chapter	Summary
"New Installation of GIFTS with Citrix Presentation Server" on page 79	Describes how to install GIFTS on a computer running Windows Terminal Services to provide user access to GIFTS through Citrix Presentation Server™.

If you're *upgrading* to GIFTS 6.6 from Version 6.4 or 6.5, follow the instructions from the appropriate chapter:

Chapter	Summary
"Upgrading a GIFTS Standalone Workstation or File Server" on page 89	Contains upgrade instructions for two different GIFTS setups: a standalone workstation, and a file server network.
"Upgrading GIFTS Client/Server Installations" on page 105	Describes how to upgrade GIFTS in the SQL Server or Oracle server environment.
"Upgrading GIFTS with Citrix Presentation Server" on page 119	Describes how to upgrade GIFTS on a computer running Windows Terminal Services, providing user access to GIFTS through Citrix Presentation Server™.

Caution: If you have a version of GIFTS earlier than GIFTS 6.4, please contact MicroEdge Technical Support. If you attempt to upgrade an earlier GIFTS system, your database upgrade will fail and you will have to restore your backup of the GIFTS system.

If your configuration DOES NOT include MyGIFTS or ReviewerCONNECT or the GIFTS Plus Pack, your installation is complete after following the instructions referenced above.

If your configuration includes MyGIFTS/ReviewerCONNECT, it must be version 3.6 or later to be compatible with GIFTS 6.6 and IGAM 6.0.

Caution: Use of a version of MyGIFTS/ReviewerCONNECT prior to 3.6 with GIFTS 6.6 and/or IGAM 6.0 will cause compatibility issues.

If you have an earlier version of MyGIFTS/ReviewerCONNECT, please upgrade to the GCS 3.6 version included with the GIFTS 6.6 upgrade download.

For information about installing or upgrading GIFTS Connections, please refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*.

Percentage Coding Requirements

If you plan to use the new Percentage Coding feature included in GIFTS 6.6, the following requirements must be met.

- If IGAM is installed, you must have IGAM 6.0
- If MyGIFTS and ReviewerCONNECT is installed, you must have version 3.6 or higher.
- If GIFTS Plus Pack is installed, you must have version 5.2.2 or higher.

Important: Percentage Coding does not require IGAM, GCS, or Plus Pack to be enabled. However, if you have any of these modules installed, they must be the proper versions for compatibility. If any of the above modules is not compatible, the Percentage Coding functionality will be disabled in GIFTS.

Conventions Used in This Manual

Before you read this manual, it is helpful to familiarize yourself with the conventions used within. Doing so will enhance the usefulness of the documentation.

Note that the name "GIFTS" is used generically to refer to any configuration of the system, including the Essential GIFTS configuration.

Procedural and Typographic Conventions

This manual uses the following conventions to clarify the procedures and tasks it describes:

- Important procedures are always given as a numbered set of tasks.
- Check marks indicate a checklist of general items or tasks.
- Characters given in this font are examples of data that you should enter, such as the directory path to a file.
- Data elements within the GIFTS system are presented with an Initial Capital Letter. For example, the word "request" is capitalized when it is used to refer to a Request record within GIFTS.

Different Types of Notes

When appropriate, notes provide additional information or warnings that may apply to you. This manual uses four types of notes. Each type of note serves a unique purpose:

Note: A note with this format and the heading "Note" provides information that applies to some users. Notes apply to special situations. For example, a Note might explain minor differences in setup procedures among network and standalone systems.

Important: A note with this format and the heading "Important" provides information that applies to all users. This type of note provides information that is essential to the completion of a task.

Caution: A note with this format and the heading "Caution" provides important information that applies to all users. Pay special attention to these notes.

Tip: A note with this format and the heading "Tip" provides useful information that applies to most users. Although Tips are not essential to the completion of a task, they provide alternative methods, shortcuts, or special applications relating to the procedures in the text.

Using MicroEdge Documentation

The GIFTS documentation provides step-by-step procedures and reference information on GIFTS features. These manuals assume you have a working knowledge of your operating system and its conventions, including how to use a mouse and standard menus.

Tip: The MicroEdge Solutions Knowledgebase, available on the MicroEdge website, provides quick and easy access to up-to-date technical information about MicroEdge products, including the information in your printed manuals.

GIFTS includes the following documentation:

GIFTS User's Guide Describes how to use GIFTS to manage your giving: how to enter data, search for data, run reports from the GIFTS Organizer, and other grantmaking tasks.

GIFTS Installation and Technical Reference Guide Contains system requirements and detailed installation/upgrade procedures.

Note: This is the only printed guide you will receive. The rest of the documentation is available in .pdf format only.

Using GIFTS Reports Describes how to run reports from the GIFTS Report Library. Includes a variety of sample reports for GIFTS and Employee GIFTS.

GIFTS Administrator's Guide Describes how to set up and maintain your GIFTS system. This manual, which also describes how to use the optional GIFTS Customizer, should be read by the person within your organization designated as the GIFTS Administrator.

Related Documentation

If you use optional GIFTS modules such as Employee GIFTS or the Internet Grant Application Manager, you will receive additional documentation in .pdf format.

GIFTS Plus Pack User's Guide Describes how to use the GIFTS Plus Pack .NET Extension utilities.

Internet Grant Application Manager User's Guide Describes how to review grant applications that have been submitted through the Internet and how to create requirement forms.

Import Module User's Guide Describes how to import data from external systems into GIFTS.

MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide

Includes system requirements and detailed installation/upgrade procedures.

MyGIFTS User's Guide Describes how to get the most out of your online GIFTS data access using MyGIFTS.

MyGIFTS Administrator's Guide Describes how to set up GIFTS Connections and MyGIFTS to give users online access to GIFTS data.

Reviewers Module and ReviewerCONNECT User's Guide Describes how to extend the functionality of the GIFTS Reviewers Module by granting reviewers online access to their reviews.

For more information on the resources available to you as a MicroEdge client, please refer to the MicroEdge *Client Resource Guide*.

Using the Documentation

MicroEdge includes the GIFTS documentation with your download in Portable Document Format (PDF). To view these files, you will need the Adobe® Reader, which is available for free from Adobe Systems, Inc. at *http://www.adobe.com*.

You can print out selected pages, sections, chapters, or the entire book. You can also install the files on your computer or network so you can access them online, and take advantage of features such as a "hot" table of contents, index, and cross-references within books.

Tip: You can also obtain the most up to date PDF copies of the documentation from the MicroEdge PowerME site's Content area.

Note: The Adobe Reader's other features are described in the Reader's online Help. Note that MicroEdge does not provide technical support for the Adobe Reader. We cannot assist you with the installation, configuration, or use of this product.

Maintenance and Support Program

Members of MicroEdge's Maintenance and Support Program receive unlimited telephone consultation on the use of the software, assistance in error isolation and correction, software updates, and prompt furnishing of any available problem solutions relating to the currently supported versions of GIFTS.

Our Technical Support staff are available Monday through Friday, 8:00 A.M. to 8:00 P.M. Eastern time. You may contact MicroEdge's Technical Support Specialists as follows:

Phone	1-877-704-3343
Fax	(212) 757-1784
Email	*helpdesk@microedge.com*
Internet	Login to PowerME and click Create New Case

Members may also search our library of documentation and technical bulletins on the GIFTS PowerME website. To access the Support Services webpage from GIFTS, choose Help ➤ MicroEdge on the Web ➤ MicroEdge Knowledgebase from the main menu.

For details about our support policies, please refer to the MicroEdge *Client Resource Guide*. If you have any questions regarding the Maintenance and Support Program, please contact our Client Administration Representative at 1-800-899-0890, option 6, then 2, who will be happy to assist you.

1 Installation Options and Requirements

This chapter details the standalone, file server, and client/server configuration options of GIFTS—and describes the storage, performance, and installation considerations for each of these configurations.

In This Chapter

Configuration Options 2
GIFTS Storage Requirements 7
Calculating Your Storage Requirements 10
Hardware Configuration Guidelines 12
Performance Considerations 17
Software Considerations 18

Configuration Options

The following implementations of GIFTS are available:

- A *standalone* version for a single workstation.
- A *file server* version for concurrent user access on a local area network (LAN).
- A high-performance *client/server* version for organizations with remote sites and a large number of concurrent users. The client/server versions are compatible with Microsoft SQL Server or Oracle server.

Note: With any of these configurations, you can install GIFTS on a computer running Windows® Terminal Services with Citrix® Presentation Server™ to make your GIFTS applications available from nearly any computer connected to your network or the Internet.

The following diagrams illustrate possible standalone, file server, and client/server configurations. These diagrams indicate the network location of the GIFTS program files, database, and templates—as well as the location of other supporting programs and files. Knowledge of this design facilitates troubleshooting on network systems.

Note: The number of concurrent users you may have is limited by the number of user licenses you have purchased.

In general, each box in these diagrams represents a computer, and lists the GIFTS components and supporting components resident on it. Possible exceptions or alternative configurations are listed with each example.

Standalone System

On standalone (local) systems, all GIFTS components reside on a single workstation.

Optional Setup: Using Windows Terminal Services with Citrix Presentation Server, you can provide multi-user access to a standalone system.

Sample File Server Configuration

On file server systems, the GIFTS database resides on a file server and is accessed by one or more GIFTS workstations. Please note the following:

- By default, the GIFTS program files (EXEs) are installed on the file server. It is also possible to install these files on your workstations for increased performance.
- This example shows computers that access a GIFTS workstation using Citrix Presentation Server. For information about the software required to connect through the Presentation Server, please refer to documentation provided by Citrix. MicroEdge cannot provide support for Citrix products.
- In file server systems running on a *peer-to-peer network*, a single computer can act as both the file server and as a workstation. This workstation/file server is known as the *master workstation*. For detailed instructions for installing GIFTS on a peer-to-peer network, please search for "peer-to-peer" in the MicroEdge Solutions Knowledgebase.

Sample Client/Server Configuration

In the following example of a client/server configuration, the GIFTS database resides on the database server and the GIFTS program files are installed on file servers and remote workstations. Specifically, the GIFTS components are installed as follows:

- **Database Server:** the GIFTS database.
- **File Servers:** GIFTS program files (EXEs), report templates, correspondence templates.
- **Headquarters & Field Workstations:** GIFTS system files, ODBC drivers (used to connect to the database).

- **Remote Workstations:** GIFTS program files (EXEs), report templates, ODBC drivers (used to connect to the database).

Note: The file server and database server may reside on the same computer.

As with the standalone and file server configurations, clients with a client/server system can provide access to GIFTS using Citrix Presentation Server.

Do I Need a Client/Server System?

Most GIFTS clients who use the product at a single site find that the file server version meets all of their requirements. MicroEdge recommends that you use the client/server version if any of the following apply to your system:

- a wide area network (WAN)
- more than 20 concurrent users
- a large volume of data (more than 30,000 grants)

Note: Clients who use the client/server version of the product are responsible for purchasing the Oracle or Microsoft SQL Server software, the client/server infrastructure, and support—including the services of a qualified Database Administrator.

MicroEdge makes no claims regarding improved performance. However, since the use of client/server technology transfers the task of processing queries from the workstation to the server, performance should be improved by eliminating the need to pass large amounts of data to the workstation for processing.

Logically, the larger the database, the larger the data sets used when running queries, so clients with large amounts of data should reap the most benefits. For the same reasons, this is the preferred approach for those who require remote database access.

Of the two available client/server options, the Microsoft SQL Server version is significantly easier to install, setup, and administer. Oracle server requires a higher degree of training and expertise. The primary reason that grantmakers choose Oracle is when it is their organization's corporate standard and the staff resources are readily available.

For more information about trading up to a client/server version of GIFTS, please refer to "System Trade-up and Migration" on page 144.

GIFTS Connections Configurations

For information about GIFTS Connections configurations that provide Internet access to GIFTS through MyGIFTS or ReviewerCONNECT, please refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*.

GIFTS Storage Requirements

This section details the amount of disk space you will need for the various components of GIFTS 6.6. Since there are many possible configurations of GIFTS, the space needed for each GIFTS component is provided separately. For information about system requirements for GIFTS Connections, please refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*.

Once you have determined which files you will be installing, you can use the guidelines in "Calculating Your Storage Requirements" on page 10 to calculate the requirements for each computer in your configuration.

GIFTS Directory Disk Space Requirements

This section details the contents of and the approximate amount of space needed for the GIFTS directory.

Note: The requirements indicated for your correspondence templates are an estimate based on typical usage; if you have a large number of templates or use graphics in your templates, you may need more space for your templates.

- **On a standalone workstation**, the GIFTS directory resides on the local hard drive and contains the following files.

Program Files (EXEs)	150 MB
GCS Setup Files (including Job Manager files) *(clients with GIFTS Connections only)*	50 MB
Other Setup Files (Crystal Reports, MDAC, and .NET, among others)	80 MB
Miscellaneous	20 MB
Report Templates	30 MB
Correspondence Templates	20 MB
Total	**350MB**

- **In network installations**, the GIFTS directory resides on the file server and includes all of the files installed for standalone systems, as well as the

setup files used to install GIFTS on your workstations and—for clients with GIFTS Connections—the files used to install GCS.

Program Files (EXEs)	150 MB
Miscellaneous	20 MB
Report Templates	30 MB
Correspondence Templates	20 MB
Workstation Setup Files	90 MB
GCS Setup Files (including Job Manager files) *(clients with GIFTS Connections only)*	40 MB
Other Setup Files (Crystal Reports, MDAC, and .NET, among others)	70 MB
Total	**420 MB**

In some cases, your system administrator may decide to locate the GIFTS program files on each workstation's hard drive instead of the file server to improve performance.

Note: The GIFTS directory also contains the IGAM folder used to store data for the optional Internet Grant Application Manager. If you use IGAM, be sure to add the IGAM requirements described in "IGAM Disk Space Requirements" on page 9 to your GIFTS directory total.

GIFTS Database Disk Space Requirements

This section details the amount of space needed for the GIFTS database:

- **If you have a standalone or file server installation**, the GIFTS database resides in your GIFTS directory. The database will start out quite small, about 2.5 megabytes, but will grow as you enter data. Make sure to anticipate the potential size of your database when calculating how much disk space you'll need. In general, you should allocate about 20 megabytes for each 1,000 grants in the database.

- **If you have a client/server installation**, your database resides on the Microsoft SQL or Oracle server (not on your network server, unless they are the same). When you create the database, you assign an appropriate size to the database.

A good rule of thumb is to allocate about 20 megabytes for each 1,000 grants in the database, with an additional 25% of the database size for the log file. You should consider historical data, current data, and reasonable growth over the next several years when you calculate the appropriate database size.

Workstation Disk Space Requirements

This section details the approximate amount of space needed for the system files, GIFTS online help files, and Crystal Reports installed on each GIFTS workstation.

System Files	260 MB
Help Files	110 MB
Crystal Viewer	60 MB
Total	**430 MB**

IGAM Disk Space Requirements

The IGAM directory located within your GIFTS directory stores global settings, application forms, form image files, applications, and application attachments used with IGAM. If you use IGAM, you should include these disk space requirements in your calculation of the GIFTS directory size.

The space required for IGAM depends on your use of it. As a general guideline, you should set aside about 10 MB of disk space for every 100 applications retrieved. Of course, if your application forms are designed with a large number of data fields—especially additional contacts and/or long text answers—your application size may increase considerably.

Another storage issue to consider is whether you accept file attachments from your applicants. If you accept attachments, you can adjust the attached file size limit for each form to help manage your projected storage capacity.

Calculating Your Storage Requirements

Use the following guidelines to calculate the requirements for your standalone, file server, or client/server system. The figures used are derived from the breakdown of requirements provided in the preceding section, "GIFTS Storage Requirements" on page 7.

If you intend to install a ***standalone*** GIFTS *system,* add the figures for the GIFTS directory, database, and workstation files. This is the amount of disk space required for you to install GIFTS on a single computer. For example:

GIFTS Directory		300 MB	
Database	+	40 MB	(for 2,000 records)
Workstation Files	+	250 MB	
Total Installation	**=**	**590 MB**	

If you intend to install GIFTS on a ***file server****,* add the figures for the GIFTS directory and your GIFTS database—the total is the amount of space required on your file server. Clients with IGAM should also include space needed to accommodate the growth of the IGAM directory. For example:

GIFTS Directory *(with workstation and GCS setup files)*		400 MB	
IGAM Directory	+	200 MB	(for 2,000 applications)
Database	+	100 MB	(for 5,000 records)
Total File Server	**=**	**700 MB**	

As detailed in "Workstation Disk Space Requirements" on page 9, each GIFTS workstation requires 105 MB of disk space for the GIFTS system files and online help files.

If you intend to install a ***client/server*** *version of GIFTS*, the amount of space indicated for the GIFTS directory—and the IGAM directory, if applicable—is required on your file server. The amount of disk space necessary on your

database server should be established using the calculations specified for a client/server database.

Here is an example of the space requirements for a client/server system that includes IGAM; hardware and software requirements for GIFTS Connections are described in the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*.

GIFTS Database		500 MB	(for 20,000 records)
GIFTS Database Log	+	30 MB	
GIFTS Database Server Total	**=**	**530 MB**	
GIFTS Directory *(with workstation and GCS setup files)*		400 MB	
IGAM Directory	+	200 MB	(for 2,000 applications)
GIFTS File Server Total	**=**	**600 MB**	
Each GIFTS Workstation	**=**	**430 MB**	

Hardware Configuration Guidelines

The following sections detail the configuration guidelines for GIFTS workstations, GIFTS file servers, and the database server for a client/server implementation of GIFTS.

The compatibility information in this section is current as of February 2009. Please refer to the "GIFTS Compatibility Fact Sheet" on the GIFTS PowerME site for the latest and most comprehensive compatibility information.

Important: MicroEdge provides configuration guidelines for planning purposes only. Because there is such a wide range of variables that affect the performance of your system, MicroEdge assumes no responsibility for hardware and software purchasing decisions. Please consult your systems consultant before making specific configuration decisions.

GIFTS Workstations (Standalone or Networked)

The following system configuration guidelines apply to standalone GIFTS workstations and to GIFTS workstations in a network environment.

Processor (CPU)	2.0 GHz Pentium® 4 (or equivalent) computer. For optimal performance, use the fastest available processor
Memory (RAM)	1Gb of RAM
Disk Capacity	Please refer to "GIFTS Storage Requirements" on page 7.
Operating Systems (32 or 64 bit with latest service pack available)	❖ Windows 8 ❖ Windows 7 ❖ Vista ❖ Windows XP Professional
Monitor	1280 x 720 resolution with small fonts
Input Device	Microsoft-compatible mouse.

Upgrade/ Installation download	GIFTS installation files are provided to clients in the form of a compressed zip file download which must be extracted to a location on the workstation or server. Once extracted, it is usually required to run a setup.exe file to begin the installation process. In a networked environment, you do not need a copy of the files on every workstation; as long as the files are copied/extracted to a shared folder on the network you can install GIFTS.

GIFTS File Servers

The following system configuration guidelines apply to the GIFTS file server on a local area network. The file server is the computer on which the GIFTS database, templates, reports, and other supporting files reside.

Note: On client/server systems, the GIFTS database is usually located on a separate database server.

Processor (CPU)	Contact your systems integrator to determine the appropriate processor needed to support GIFTS and all other file server applications. For optimal performance, use the fastest available processor.
Disk Capacity	Please refer to "GIFTS Storage Requirements" on page 7.
Memory (RAM)	Contact your systems integrator to determine the memory requirements for GIFTS and all other file server applications. More memory may improve performance or be required as your grants database grows.
Operating Systems (32 or 64 bit with the latest service pack available.)	–Windows 2003 Server (including R2) –Windows 2008 Server (including R2) –Windows 2012 Server
New Installation or Upgrade files	GIFTS installation files are provided to clients in the form of a compressed zip file download which must be extracted to a location on the workstation or server. Once extracted, it is usually required to run a setup.exe file to begin the installation process. In a networked environment, you do not need a copy of the files on every workstation; as long as the files are copied/extracted to a shared folder on the network you can install GIFTS. Must be accessible from either the server or on any network-connected workstation.

GIFTS Client/Server Database Server

For client/server systems only: the following system configuration guidelines apply to the Microsoft SQL or Oracle server on which the GIFTS database resides.

Processor (CPU)	Contact your systems integrator to determine the appropriate processor needed to support GIFTS and all other client/server applications. For optimal performance, use the fastest available processor.
Disk Capacity	Please refer to "GIFTS Storage Requirements" on page 7.
Memory (RAM)	Contact your systems integrator to determine the memory requirements for GIFTS and all other client/server applications. More memory may improve performance or be required as your grants database grows. Organizations running the client/server version of GIFTS as the exclusive application on their SQL server have typically installed either 128MB or 256MB of RAM on the server.
Client/Server Database Software	– Microsoft SQL Server 2000 to 2012 (including R2) –Oracle server 10g (Release 10.2) or 11.1 (Release 11.1)
New Installation or Upgrade files	GIFTS installation files are provided to clients in the form of a compressed zip file download which must be extracted to a location on the workstation or server. Once extracted, it is usually required to run a setup.exe file to begin the installation process. In a networked environment, you do not need a copy of the files on every workstation; as long as the files are copied/extracted to a shared folder on the network you can install GIFTS. Must be accessible from either the server or on any network-connected workstation.

IGAM Hardware Requirements

The GIFTS 6.6 installation program installs IGAM 6.0 for clients who have purchased it. IGAM is a Windows-based GIFTS module that requires an Internet connection to access applications that are stored on the MicroEdge IGAM server. The hardware requirements for managing your online application process through IGAM are:

GIFTS-configured workstation Since IGAM is a GIFTS module, it must be run from a GIFTS workstation. This allows IGAM to access the GIFTS database and utilize your existing GIFTS permissions and security settings.

Internet connection To activate an application form, its data must be uploaded to the MicroEdge IGAM server from your workstation through an active Internet connection. Completed applications are stored on the MicroEdge IGAM server and must be downloaded through your Internet connection. While any dial-up or broadband connection will work, keep in mind that a dial-up connection may be impractical if you expect to receive a large volume of applications and/or applications with attachments.

Ability to make outgoing connections through Port 80 Form and application data is transmitted to and from the MicroEdge server in XML format over HTTP. To upload form data and download application data, your firewall must allow outgoing HTTP traffic through Port 80, the industry standard configuration for web access.

Note: IGAM uses SSL encryption whenever possible to secure the data being transmitted over your Internet connection. To take advantage of SSL encryption, your firewall must allow outgoing HTTPS traffic over Port 443. If Port 443 is not available, please contact Technical Support.

Disk space Please refer to "IGAM Disk Space Requirements" on page 9 for information about the disk space requirements for IGAM.

Internet Access

MicroEdge clients with current Maintenance and Support contracts can access MicroEdge's full range of technical support services over the Internet. From MicroEdge's website (*http://www.microedge.com*), you can login to GIFTS PowerME to download the latest GIFTS maintenance releases and access technical information in the MicroEdge Solutions Knowledgebase.

In order to use these services, you need an Internet connection and browser.

GIFTS Upgrades

An Internet connection is required for the download of all GIFTS product upgrades which are in the form of a compressed zip file. The zip file is

extracted to a folder on a workstation or server and a setup.exe file is run to begin the installation process. Clients scheduled for an upgrade will receive specific download and installation instructions via email.

Performance Considerations

There are many factors that affect overall system performance. The factors that typically have the greatest impact on GIFTS performance include, but are not limited to:

- Workstation and/or server processor speed and memory
- Microsoft® Windows® configuration and optimization
- The size of your database
- Network topology, cable type, capacity, and traffic
- The number of concurrent GIFTS users
- The load that other applications place on your server or servers

Software Considerations

All software that interacts with GIFTS must be certified for use with GIFTS to ensure proper performance. For a complete list of compatible products, please refer to the "GIFTS 6.6 Compatibility Fact Sheet" on the PowerME website.

Please review and consider the following information about access rights, word processor version control, Crystal Reports, software backups, system files, and Oracle table names.

Server Access Rights

GIFTS requires that all users have full access rights to the GIFTS directory and all of its subdirectories.

Word Processor Version Control

GIFTS makes extensive use of Microsoft's OLE technology to enable the automated production of correspondence using compatible versions of Microsoft Word. However, different versions of Word may handle embedded merge fields differently.

Important: MicroEdge strongly recommends that you install the *same version* of Microsoft Word Professional on all GIFTS workstations and, if applicable, computers running the MyGIFTS Job Manager.

If you use GIFTS at different sites on a wide area network (WAN) and you have different versions of Word at each site, each site must use separate correspondence templates that are specific to the version of Word used at that site.

Be aware that users with different versions of Word *cannot share the letter and write-up templates used to create correspondence from GIFTS*. In addition, the use of more than one version of Word can *significantly* complicate the support and troubleshooting of your system.

When you upgrade Microsoft Word, you may have to update your GIFTS correspondence templates. There may be specific steps necessary to successfully "upgrade" your templates for continued compatibility with the

GIFTS mail merge functions. Whenever you plan to upgrade your word processing software, be sure to contact MicroEdge Technical Support for further information.

Crystal Reports Version Control

GIFTS uses a Business Objects™ Crystal Reports viewer to generate many of the standard reports provided with GIFTS. If you plan to install GIFTS on any computer that also runs Crystal Reports, or vice versa, please refer to "Compatibility with Crystal Reports" on page 164.

System Backups

MicroEdge strongly recommends that you take the following precautions to protect your grantmaking data:

- Back up your GIFTS system daily using high-capacity tape or other archival media.
- Store backups in secure locations, both on-site and at a remote location.
- Use industry-standard products that enable reliable and verified file backups and quick restores.
- Configure your backup software to back up open files. This ensures that the GIFTS database is backed up even if users are logged in while the backup processes are running.

For detailed information about backing up GIFTS, please search for "backups" in the MicroEdge Solutions Knowledgebase.

System Files

GIFTS has been designed to work with the compatible word processor, spreadsheet, email, and accounting software of your choice. In order for these products—and all other software on your computers—to work together properly, they need to be carefully installed, optimized, and tested. In some cases, conflicts between applications may require troubleshooting and resolution by your internal technical support staff.

Problems may occur when an application installs an older version of a system file (such as a DLL or OCX file) over a newer version used by another application. MicroEdge provides a diagnostic utility that identifies the system files installed by GIFTS and their current properties. For more information about this utility, please refer to "Maintenance, Security, and Data Integrity" on page 129.

Note: MicroEdge technical support staff can attempt to assist clients with Maintenance and Support contracts to identify and resolve GIFTS-related system file problems that affect more than one workstation. However, clients are responsible for resolving environmental issues. For more information about MicroEdge's support policy, please refer to the *MicroEdge Client Resource Guide*.

The "Installation Impact Analysis" on page 149 lists the system files installed for GIFTS. This valuable reference identifies the name, date, size, and location of each file, and can be used to identify potential conflicts or to troubleshoot system errors.

Oracle Database Tables and Names

The grants database on Oracle server versions of GIFTS may reside on a database applications server with other Oracle databases. Compatibility among these databases must be carefully considered if you plan to use a single database server for both GIFTS and other databases.

Important: Please contact Tech Support for the default LoginID/owner name and password. Ensure that no other objects (tables, aliases, etc.) on the database server have both the same *name* and the same *owner* as that of any GIFTS table. No conflicts occur if another table shares the same name or alias as a GIFTS table, but the two tables must have different owners.

Please refer to the *GIFTS 6.6 Database Schema* for a full list of the tables included in GIFTS 6.6.

2 New GIFTS Standalone or File Server Installation

This chapter describes the process for a new installation of GIFTS on a standalone workstation or a file server system with an Access database.

In This Chapter

Before You Begin 22
New Standalone Installation 24
File Server Installation 28

Before You Begin

The following important points should be addressed before you install GIFTS:

- Please read this entire chapter carefully. You should understand the entire installation process before you begin.
- If Crystal Reports is installed on any computer on which you plan to install GIFTS, please see "Compatibility with Crystal Reports" on page 164.
- GIFTS uses Microsoft Word to produce correspondence and write-ups. Please make sure that a compatible version of Microsoft Word has been correctly installed and is currently functioning without errors.
- Install the latest proven service packs for Windows and your device drivers (such as video drivers and printer drivers).
- If you use virus-protection software, please make sure that it is disabled before attempting to run the installation. An active virus-protection program may cause errors during the installation process.
- Read the following sections, "About the Standalone Installation Process"and "About the File Server Installation Process", to determine the type of installation that you need to perform.

The above points are vital towards insuring that your installation is successful. Please make sure that each issue has been thoroughly addressed before continuing.

About the Standalone Installation Process

This type of installation is for clients who have purchased a single-user version of GIFTS. It installs the entire GIFTS system on the local hard drive of a single workstation, and only this workstation will have access to GIFTS. To perform this type of installation, please follow the instructions in "New Standalone Installation" on page 24.

About the File Server Installation Process

This installation installs GIFTS on a network file server and one or more workstations. Please be aware that the number of concurrent users is limited by the number of user licenses you have purchased.

This installation includes two parts: a *Server Installation* process—which installs shared files, including the GIFTS database, on the server—and a *Workstation Installation*, which installs files to each workstation and connects each workstation to the GIFTS system on the server.

To perform this type of installation, please follow the instructions in "File Server Installation" on page 28.

System Files

For a complete list of the system files installed by the GIFTS setup process, please refer to the "Installation Impact Analysis" on page 149.

How to Obtain Technical Support

If you have any problems during your installation, please contact MicroEdge Technical Support.

- by submitting an electronic support request. Go to *http://www.microedge.com/support* and log in to the PowerME support website.
- by email at *helpdesk@microedge.com*
- by phone at (877) 704-3343
- by fax at (212) 757-1784

New Standalone Installation

This type of installation is for clients who have purchased a single-user version of GIFTS or Essential GIFTS. It installs the entire GIFTS system on the local hard drive of a single workstation; only this workstation will have access to GIFTS.

Step 1: Copying Your GIFTS Configuration File

This procedure describes how to copy the configuration file for your GIFTS system from your extracted GIFTS download to the proper location on your computer. This file must be available during the installation process.

1. Copy the gifts.cfg file to a convenient location on your hard drive. Make a note of this location: you will need to know it when you install GIFTS.
2. Right-click on your new copy of the gifts.cfg file and select **Properties**.
3. On the **General** tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)
4. Click **OK** to save the gifts.cfg properties.

Step 2: Installing GIFTS

Before You Begin: To avoid software conflicts, close all other applications on the workstation.

1. Access the Install subfolder of the extracted GIFTS files and run the Setup.exe. The GIFTS Welcome screen is displayed.

Note: Throughout the installation, you can click the **Next** button to continue, the **Back** button to return to the previous screen, or the **Cancel** button to cancel the installation.

2. Click **Next**. The Select Setup Type window opens.

3 Select the "Local Installation (single user)" option and click **Next**. The Choose Destination Location window indicates that GIFTS will be installed in C:\GIFTS, the recommended location.

Note: If you want to install GIFTS to a different location on your workstation, click **Browse** and select the destination folder.

4 Click **Next.** The Configuration window prompts you to specify the location of your GIFTS configuration file.

5 Click **Browse** and browse to the directory that contains your gifts.cfg file. Then, click **OK**. You are prompted to select the word processor you would like to use with GIFTS.

6 Select Microsoft Word, and click **Next**. You are prompted to choose where you want the GIFTS program icons to be displayed in the Windows Start menu.

7 Click **Next**. The **Start Copying Files** window displays a summary of the installation options you chose. The **Current Settings** field should indicate that a "Local GIFTS Installation" is to take place in the folder you specified.

8 If the options are correct, click **Next**. The installation begins.

9 If your computer is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 9.

10 When the installation is complete, you are notified. Click **Finish.**

GIFTS is now installed. Please proceed to the next section to complete your setup.

Step 3: Configuring Windows for Use with GIFTS

If you are going to use GIFTS to create correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS and Word can share data properly:

1. Open the Windows Explorer.
2. From the Explorer menu, choose **Tools ➤ Folder Options, View ➤ Folder Options, or View ➤ Options** (the name of the menu item is different for different versions of Windows).

   Note: In Microsoft Vista/7/8, from the Explorer menu, choose **Organize ➤ Folder and Search Options**.
3. Go to the **View** tab (if applicable).
4. Ensure that the "Hide file extensions for known file types" or "Hide MS-DOS file extensions for types that are registered" check box *is not selected*. Use of this option can interfere with the way in which Microsoft Word merges data from GIFTS.

Important: After installing GIFTS on any workstations running Windows Vista/7/8, and before logging into GIFTS, you should give the workstation user full permissions to the gifts.ini file in the C:\WINDOWS directory. If you do not do this and log into GIFTS, the updated gifts.ini file is stored in the following location: C:\Users\[user name]\AppData\Local\VirtualStore\Windows. If you need to make any changes to the gifts.ini file, do so from this location.

Your single-user installation of GIFTS or Essential GIFTS should now be complete: enjoy!

Logging in to GIFTS for the First Time

To ensure that your installation has been successful, you can log in to a GIFTS workstation by entering Admin as the Login ID. No password is required.

Important: The Admin login allows full access to all areas of the GIFTS system; be sure to set up Login IDs and passwords when you set up GIFTS for your organization, as described in the *GIFTS Administrator's Guide*.

File Server Installation

This type of installation installs GIFTS or Essential GIFTS on a network file server and one or more workstations. Note that the number of users that can log in to GIFTS at any given time cannot exceed the number of user licenses that you have purchased.

In a network environment, GIFTS must be installed on the file server first:

- **The *Server Installation*** procedure installs the database, program files, and report template files to the network directory that you specify. This part of the installation is *run only once* using the MicroEdge GIFTS Installation Disc, and can be run from any workstation.

  Note: The server installation also performs a workstation installation on the computer from which you run it. Run the server installation from a computer that you plan to use as a GIFTS workstation.

- Then, you can use the ***Workstation Installation*** procedure to install GIFTS on all other workstations that are to have access to GIFTS. This procedure installs the workstation files needed to run GIFTS.

Prerequisites for File Server Installations

Before beginning the file server installation, make sure that you have met the following prerequisites.

- Please make sure you have access to an in-house network administrator, or a consultant familiar with your network environment, who has full network administrative access rights.

- The user installing the system must have the access rights needed to create a directory on the target drive where GIFTS will be installed.

- All users of GIFTS must have full access rights to the network directory where the GIFTS system is to be installed.

- For clients using Novell network server, increase the *Record Locking Threshold per Connection* to 10,000. This will prevent the server from exceeding the maximum "record locking threshold" during the use of the GIFTS database.

For more information on increasing this Novell setting, please consult with your LAN administrator.

Once you have verified that these prerequisites have been met, you may proceed to the next section, "Copying Your GIFTS Configuration File".

Copying Your GIFTS Configuration File

This procedure describes how to copy the configuration file for your GIFTS system from your GIFTS files to your computer. This file must be available during the installation process.

1. Copy the gifts.cfg file to a convenient location on your file server's hard drive. Make a note of this location: you will need to know it when you install GIFTS.
2. Right-click on your new copy of the gifts.cfg file and select Properties.
3. On the **General** tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)
4. Click **OK** to save the gifts.cfg properties.

Installing GIFTS on Your File Server

In a network environment, you must first install the GIFTS database, program files, and template files on your file server. On any computer you plan to use as a GIFTS workstation, use the following procedure to install these files:

Before You Begin: To avoid software conflicts, close all other applications on the workstation.

1. Navigate to the location where you extracted the GIFTS 6.5 installation files and access the Install subfolder. Run the Setup.exe file. The GIFTS Welcome screen is displayed.

Note: If the GIFTS Welcome screen is not displayed, run the Setup.exe file located in the Install folder of the Installation Disc.

Throughout the installation, you can click **Next** to continue, Back to return to the previous screen, or Cancel to cancel the installation.

2 Click **Next.** The Select Setup Type window opens.

3 Select the "Network Installation" option and click **Next**. The Choose Destination Location window opens.

4 Click **Browse** and specify the location of the GIFTS directory. You should choose a network location that will be accessible to all the workstations that will run GIFTS.

Example: You want to install GIFTS on the P: drive of your network file server. Enter P:\GIFTS after clicking Browse. The GIFTS database, program files, correspondence templates, and report templates will be copied to that folder (the "GIFTS directory"). If prompted that this folder does not exist, click Yes to create it.

5 After specifying the location of the GIFTS directory, click **Next**. The Configuration window prompts you to specify the location of your GIFTS configuration file.

6 Click **Browse** and browse to the directory that contains your gifts.cfg file. Then, click **OK.** You are prompted to select the word processor you would like to use with GIFTS.

7 Select Microsoft Word, and click **Next**. You are prompted to choose where you want the GIFTS program icons to be displayed in the Windows Start menu.

8 Click **Next**. The Start Copying Files window displays a summary of the installation options you chose. The Current Settings field should indicate that a "GIFTS Server Installation" is to take place in the folder you specified.

9 If the options are correct, click **Next.** The installation begins.

10 If your file server is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are

prompted to install it. Click OK and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 10.

11 When the installation is complete, you are notified. Click **Finish**.

You are ready to proceed to the workstation installation procedure described in the next section.

Workstation Installation

After installing GIFTS on your file server, you must install GIFTS on each workstation that is to have access to GIFTS. Use this procedure *on each workstation* to install the files needed to run GIFTS.

Reminder: The workstation from which you ran the server installation is already set up as a GIFTS workstation.

As part of the Server Installation, the workstation setup program was installed in the GIFTS directory on your network; *be sure to run your workstation installations from the network, not from the Installation Disc*.

1 Run the Setup.exe file located within the GIFTS\Setup directory on your file server.

Example: If you designated P:\GIFTS as your GIFTS directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

The GIFTS Welcome screen is displayed.

2 Click **Next**. The Select Program Folder window opens.

3 In the **Select Program Folder** window, choose where you want the GIFTS program icons to be displayed in the Windows Start menu, then click **Next**. The **Start Copying Files** window opens.

4 Read the summary provided of the installation options you chose. The **Current Settings** field should indicate that a "GIFTS Workstation Installation" is to take place in the folder you specified.

If the options are correct, click **Next**. The installation begins.

5 If the workstation is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click OK and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 6.

6 When the installation is complete, you are notified. Click **Finish**.

GIFTS is now installed on the workstation. If you are going to use GIFTS to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS and Word can share data properly:

1 Open the Windows Explorer.

2 From the Explorer menu, choose Tools ➤ Folder Options, View ➤ Folder Options, or View ➤ Options (the name of the menu item is different for different versions of Windows).

Note: In Microsoft Vista, from the Explorer menu, choose Organize ➤ Folder and Search Options.

3 Go to the **View** tab (if applicable).

4 Ensure that the "Hide file extensions for known file types" or "Hide MS-DOS file extensions for types that are registered" check box *is not selected*. Use of this option can interfere with the way in which Microsoft Word merges data from GIFTS.

Important: Be sure to repeat the entire Workstation Installation process on *each workstation* that should have access to GIFTS. Ensure that all users have full access permissions for the GIFTS directory and all of its subdirectories.

Your installation of GIFTS or Essential GIFTS should now be complete: enjoy!

Logging in to GIFTS for the First Time

To ensure that your installation has been successful, you can log in to a GIFTS workstation by entering Admin as the Login ID. No password is required.

Important: The Admin login allows full access to all areas of the GIFTS system; be sure to set up Login IDs and passwords when you set up GIFTS for your organization, as described in the *GIFTS Administrator's Guide*.

3 New Microsoft SQL Server Installation

This chapter describes how to install GIFTS in the Microsoft SQL Server 2008/2012 environment.

In This Chapter

Before You Begin **36**

Overview of the GIFTS Installation Process **37**

Step 1: Important Prerequisites **38**

Step 2: Setting Up the GIFTS Database **41**

Step 3: Installing GIFTS on Your File Server **46**

Step 4: Populating the GIFTS Database **51**

Step 5: Installing the GIFTS Workstations **52**

Step 6: Logging in to GIFTS for the First Time **55**

Before You Begin

Please address the following important points before you install GIFTS:

- Please read this entire chapter carefully. You should understand the entire installation process before you begin.
- The installation process creates several network directories. Make sure that you have the necessary permissions to create these directories.
- GIFTS uses Microsoft Word to produce correspondence and write-ups. Please make sure that a compatible version of Microsoft Word has been correctly installed and is currently functioning without errors.
- If you use or intend to use Crystal Reports, make sure to read "Compatibility with Crystal Reports" on page 164.
- If you use virus-protection software, please make sure that it is disabled before attempting to run the installation. An active virus-protection program may cause errors during the installation process.

The above points are vital towards ensuring that your installation is successful. Please make sure that each issue has been thoroughly addressed before continuing.

System Files

For a complete list of the system files installed by the GIFTS setup process, consult the "Installation Impact Analysis" on page 149.

How to Obtain Technical Support

If you have any problems during your installation, please contact MicroEdge Technical Support.

- by submitting an electronic support request. Go to *http://www.microedge.com* and log in to the PowerME website.
- by email at *helpdesk@microedge.com*
- by phone at (877) 704-3343
- by fax at (212) 757-1784

Overview of the GIFTS Installation Process

The procedures outlined below will take you through the entire process of installing the GIFTS 6.6 client/server edition for Microsoft SQL Server. The installation consists of the following major steps; each step corresponds to a section in this chapter.

Please follow these steps in the order in which they are presented. Addressing the steps in any other order will prevent your installation from being successful.

Step 1: Important Prerequisites In this step, you are asked to verify that you have the appropriate staff necessary for the installation process and that your SQL Server has been configured to accommodate the GIFTS system. It also outlines prerequisites for your network environment.

Step 2: Setting Up the GIFTS Database This portion of the installation is used to create the GIFTS database on the Microsoft SQL Server. This requires the services of a trained SQL Server Administrator who is familiar with all aspects of setting up and administering Microsoft SQL Server.

Step 3: Installing GIFTS on Your File Server In this step, you will install the GIFTS program onto a network drive that is accessible to all workstations that will use GIFTS. This procedure also configures the workstation you're using as a GIFTS workstation.

Step 4: Populating the GIFTS Database This step creates the table definitions for the GIFTS database on the SQL Server, and populates that database with system-defined data necessary to the operation of GIFTS.

Step 5: Installing the GIFTS Workstations This step configures your other workstations to run GIFTS. (The workstation on which you performed Step 3 is already configured to be a GIFTS workstation.)

Step 6: Logging in to GIFTS for the First Time This step describes how to log in to GIFTS, verifying that your installation has been successful.

Step 1: Important Prerequisites

The following prerequisites must be met before you begin your GIFTS installation. Please note that MicroEdge Technical Support staff will only be able to assist you in troubleshooting your installation once all of these prerequisites have been met.

MicroEdge Technical Support staff can only assist you in matters related exclusively to the installation of GIFTS software. For matters relating to your hardware, network, and the installation of Microsoft SQL Server, please consult with the appropriate vendors.

Prerequisites for the SQL Server Environment

Please attend to the following before beginning your installation:

- ✔ Make sure you have access to the services of a trained SQL Server Administrator familiar with all aspects of setting up and administering the SQL Server environment. MicroEdge Technical Support personnel cannot provide advice or assistance related to the setup of your SQL Server software and/or hardware.

- ✔ Ensure that your Microsoft SQL Server is properly installed and connected to your network, and that all desired client workstations can connect to it using the SQL Server Management Studio.

- ✔ Ensure that all computers you plan to use with GIFTS have adequate storage space and hardware, as described in "GIFTS Storage Requirements" on page 7 and "Hardware Configuration Guidelines" on page 12.

- ✔ GIFTS requires an ODBC driver on each workstation to connect to the SQL Server. These drivers are installed by the GIFTS Setup program. Refer to the GIFTS 6.6 and GCS 3.6 Compatibility Fact Sheet on the PowerME website at *http://www.microedge.com* for a list of compatible drivers.

  To check the version of the ODBC driver installed on a workstation, you can use the "Data Sources (ODBC)" Control Panel.

- ✔ The maximum number of concurrent user connections allowed by the database server should be at least five times the number of GIFTS, MyGIFTS, and ReviewerCONNECT users. To adjust this setting:
  - ❖ In the SQL Server Management Studio, right-click on the server and select Properties. Then, go to the Connections page.
- ✔ Configure your SQL Server to allow SQL Server authentication:
  - ❖ In the SQL Server Management Studio, right-click on the server and select Properties. Then, go to the Security page and select the "SQL Server and Windows Authentication mode" option.

Prerequisites for Your Network Environment

Please attend to the following before beginning your installation:

- ✔ Make sure you have access to an in-house network administrator, or a consultant familiar with your network environment, who has full network administrative access rights.
- ✔ The user installing the system must have the permissions needed to create a directory on the target drive where the GIFTS file server will be installed.

Other Installation Considerations

Please consider the following while installing GIFTS:

- ✔ We recommend that you create your GIFTS database with the following Collation Name: SQL_Latin1_GENERAL_CP1_CI_AS.

  Be sure to specify this collation at both the database and table/field levels; queries may run slowly if there is a mismatch among the collation methods specified in your database. Also, if you are using SQL to migrate GIFTS data from one server to another, you should make sure that the new GIFTS database on the destination SQL server has the same collation settings as the GIFTS database from the source SQL server.

  If you choose a different Collation Name, you must use one that includes a character set that is a superset of the recommended Collation Name's

character set. If you use a character set that does not include all the characters the GIFTS database is programmed to use, your GIFTS system may not work properly. A different Collation Name may also include a different sort order.

Important: The Collation Name recommended above is the only one with which GIFTS has been tested and certified SQL Server 2008or later. We will support GIFTS when used with other Collation Names. However, be aware that if your choice creates issues in the GIFTS system, the only solution our support staff may be able to offer is to change to the recommended setting.

✔ To run GIFTS, all GIFTS users must have full access rights to the GIFTS directory that you install on your file server. Be sure to grant these rights as you set up your GIFTS workstations.

Once you have verified that these prerequisites have been met, you may proceed to "Step 2: Setting Up the GIFTS Database".

Step 2: Setting Up the GIFTS Database

This step creates a new SQL Server database and database login for GIFTS, and should be performed by a trained SQL Server Administrator familiar with all aspects of setting up and administering the SQL Server environment.

During the creation of your database, you define the initial size of your database and database log. In general, you should allocate about 20 MB for each 1,000 grants in the database, with an additional 25% of the database size for the log file. Take your historical data, current data, and projected growth over the next several years into consideration when you calculate the database size.

Example: If your organization processes 1,000 grant requests per year, and you have five years of historical data, you should allocate approximately 200 MB for your database device (100 MB for your historical data and 100 MB for the next five years).

During times of peak data entry, the database log can grow quite large and will eventually reach its size limit (if you establish a limit). The log should be monitored closely, backed up, and dumped on a regular basis, according to your SQL Server documentation.

Managing Database Recovery and the Transaction Log

GIFTS performs a dump of the transaction log prior to performing batch processes.

Note: If you are using SQL 2008 (or later) or want point of failure recovery, you must do the following:

- Manually uncheck the **Dump Transactions Log** option in the Administrator Module's **Preferences>General** settings.
- You will need to shrink the Transaction Logs manually on a regular basis if on Simple recovery mode. If using Full recovery mode, you will need to set the recovery mode to Simple, shrink the file, and then set the recovery mode back to Full.

Configuring the transaction log dump is part of managing your database recovery. The database recovery preference you choose determines how the transaction log is managed. The selection and management of this preference is entirely the responsibility of the client.

MicroEdge recommends choosing 'Simple' or 'Full' as your database recovery preference ('Full' is the SQL default).

- If you want your SQL server to automatically manage your transaction log, we recommend setting this preference to 'Simple.'
- If you want to manually manage your transaction log, choose 'Full.'

For more information about manually managing your transaction log, please consult your Microsoft SQL Server documentation.

To set your database recovery preference:

1. From your GIFTS database icon, right-click and select **Properties**.
2. Click the **Options** tab.
3. In the Recovery Model field drop-down menu, select ‘Simple’ or ‘Full.’

4. Click **OK**.

If you are using SQL 2008 or later, you must indicate to GIFTS that you want to turn off transaction log dumping. If you are using an earlier version of SQL and want point of failure recovery, you must also do this.

To turn off transaction log dumping:

1 From the Preferences Editor in the Administrator module, double-click Preferences in the System section.

2 At the bottom of the Preferences field, enter 'DumpTransactions=0.'

3 Click OK.

Creating the GIFTS Database and Login (for SQL Server 2008 or later)

The following procedures create the GIFTS database and database login for SQL Server 2008 or later systems.

Step 2a: Creating the GIFTS Login This step creates the Login ID used by the GIFTS system to connect to the GIFTS database. Note that the default Login ID and password *must* be used.

Note: If you want to change the password, you may do so after you install GIFTS. Note that when you change the password on the server, you must also update the database login information in the GIFTS.SYS or gifts.ini file.

For details on updating the Client/Server login ID and password in GIFTS, please refer to the *GIFTS Administrator's Guide*.

To create the Login ID:

1. Log in to the SQL Server Management Studio.
2. On the left panel of the Management Studio, click the plus sign to expand the server for which you wish to create the GIFTS login.
3. In the list that appears, click the plus sign to expand the Security folder.
4. Right-click the Logins folder and select New Login from the menu. The New Login window opens.
5. In the Login name field of the General page, enter the loginID
6. Select the SQL Server Authentication option.
7. De-select the "Enforce password policy" option, and verify that the "Enforce password expiration" and "User must change password at next login" options are also turned *off*.
8. Enter the password.

   Important: SQL Server 2008 passwords are case-sensitive.
9. Click OK to save the login.

Please continue to Step 2b to create the GIFTS database.

Step 2b: Create the GIFTS Database and Transaction Log This step creates the database named GIFTS and its transaction log.

1. Log in to the SQL Server Management Studio.
2. On the left panel of the Management Studio, click the plus sign to expand the server on which you wish to create the GIFTS database.
3. Right-click the Databases folder, and select New Database from the menu.
4. In the Database name field, enter your database name of GIFTS.
5. In the Owner field, enter the login that you created in Step 2a.

6 In the database files table, specify the initial size of the database and its transaction log, and enter the expansion settings.

7 Go to the Options page.

8 In the Collation list, select SQL_Latin1_GENERAL_CP1_CI_AS.

Important: Before continuing, record the specifics of the GIFTS database and store this information in a safe place. You may need this information to recreate the system in case of a server failure.

9 Click OK. The database is created.

Please continue to the next section to install GIFTS on your network file server.

Step 3: Installing GIFTS on Your File Server

In a network environment, program files and report template files for GIFTS must be installed on the file server first. This part of the installation is called the *Server Installation*, and is only run once.

Important: The workstation at which you perform the server installation is set up as a GIFTS workstation during the installation process. Perform this procedure from a workstation that you intend to use with GIFTS.

After installing the GIFTS software on your server, you need to create an ODBC data source for the workstation and to configure Windows to allow correspondence templates to work. Instructions for these two tasks follow the network server installation instructions.

Step 3a: Copying the GIFTS Configuration File

This procedure describes how to copy the configuration file from your GIFTS zip download to your computer. This file must be available during the installation process.

1. Copy the gifts.cfg file to a convenient location on your hard drive. Make a note of this location: you will need to know it when you install GIFTS.
2. Right-click on your new copy of the gifts.cfg file and select **Properties**.
3. On the **General** tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)
4. Click **OK** to save the gifts.cfg properties.

Please proceed to the next step to install the GIFTS server software.

Step 3b: Installing GIFTS on the File Server

Before You Begin: To avoid software conflicts, close all other applications on the workstation before you proceed.

1. Access the Install subfolder in the extracted GIFTS installation files and runt the Setup.exe file. The GIFTS Welcome screen is displayed.

   Note: If the GIFTS Welcome screen is not displayed, run the Setup.exe file located in the Install folder of the Installation Disc.

   Throughout the installation, you can click the **Next** button to continue, the **Back** button to return to the previous screen, or the **Cancel** button to cancel the installation.

2. Click **Next**. The Select Setup Type window opens.

3. Select the "Network Installation" option and click **Next**. The Choose Destination Location window opens.

4. Click **Browse** and specify the location of the GIFTS directory. You should choose a network location that will be accessible to all the workstations that will run GIFTS.

   Example: You want to install GIFTS on the P: drive of your network file server. Enter P:\GIFTS after clicking Browse. The GIFTS database, program files, and correspondence and report template files will be copied to that folder (the "GIFTS directory"). If prompted that folder does not exist, click **Yes** to create it.

5. After specifying the location of the GIFTS directory, click **Next**. The Configuration Disk window prompts you to specify the location of your GIFTS configuration file.

6. Click **Browse** and browse to the directory that contains your gifts.cfg file. Then, click **OK**. You are prompted to select the word processor you would like to use with GIFTS.

7. Select Microsoft Word, and click **Next**. You are prompted to choose where you want the GIFTS program icons to be displayed in the Windows Start menu.

8 Click **Next**. The Start Copying Files window displays a summary of the installation options you chose. The Current Settings field should indicate that a "GIFTS Server Installation" is to take place in the folder you specified.

9 If the options are correct, click **Next**. The installation begins.

10 If your file server is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 10.

11 When the installation is complete, you are notified. Click **Finish**.

Step 3c: ODBC Data Source Creation

Please perform the following steps to create the ODBC Data Source the workstation needs to communicate with the GIFTS database.

Important: Step 3b *must* be performed at the same workstation from which you ran step 3a above.

During the Server Installation, the MDAC installation program installed the ODBC driver that GIFTS uses to connect to your Microsoft SQL Server. In this procedure, you will create an ODBC Data Source named GIFTS, which GIFTS uses to connect to the GIFTS database. Please note that the user interface of the ODBC Administrator may vary.

1 In the Administrative Tools folder of the Windows Control Panel, double-click the "Data Sources (ODBC)" icon to open the ODBC Data Source Administrator.

2 On the System DSN tab, click **Add**. The Create New Data Source window is displayed.

3 From the list of drivers, choose SQL Server and click **Finish**. The ODBC SQL Server Setup window is displayed.

4 In the **Name** field, enter GIFTS.

5 Using the Server list, identify your SQL server. Click **Next**.

6 If there are options for specifying how SQL Server should verify the authenticity of the database login, select the option to verify using a login ID and password entered by the user.

7 Enter the server's login ID and password that you created in Step 2, and click **Next**.

8 If your version of the ODBC Administrator includes an option to "Use regional settings when outputting currency, numbers, dates, and times," ensure that this setting is turned off. Note that your version of the ODBC Administrator may not have this option. Otherwise, use default settings.

9 Click Finish to close the ODBC Administrator. You now have an ODBC Data Source.

Step 3d: Microsoft Windows Configuration

If you are going to use GIFTS to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS and Word can share data properly:

1 Open the Windows Explorer.

2 From the Explorer menu, choose Tools ➤ Folder Options, View ➤ Folder Options, or View ➤ Options (the name of the menu item is different for different versions of Windows).

Note: In Microsoft Vista/7/8, from the Explorer menu, choose Organize ➤ Folder and Search Options.

3 Go to the **View** tab (if applicable).

4 Ensure that the "Hide file extensions for known file types" or "Hide MS-DOS file extensions for types that are registered" check box *is not selected*. Use of this option can interfere with the way in which Microsoft Word merges data from GIFTS.

Tip: After installing GIFTS on any workstations running Windows Vista/7/8, and before logging into GIFTS, you should give the workstation user full permissions to the gifts.ini file in the C:\WINDOWS directory. If you do not do this and log into GIFTS, the updated gifts.ini file is stored in the following location: C:\Users\[user name]\AppData\Local\VirtualStore \Windows. If you need to make any changes to the gifts.ini file, do so from this location.

When you are finished with all three steps of the workstation installation, you can proceed to "Step 4: Populating the GIFTS Database" below.

Step 4: Populating the GIFTS Database

This process creates the SQL Server tables and system-defined data for a new GIFTS system. It must be run from the same workstation that you used in Steps 3a and 3b.

To populate the database:

1. Insert the MicroEdge GIFTS Installation Disc in the CD/DVD drive of the workstation.
2. Run the SQLINST.EXE program located in the Util directory of the Installation Disc. The Create SQL Database window opens.
3. Select the **Create Source Database on Target Server** option, then select the **Copy Source Data to Target Server** option.

   The Source should be displayed as the location of the GIFTS.MDB file installed on the network server by Step 3a.

   Example: P:\GIFTS\GIFTS.MDB

   This is a Microsoft Access version of the database; this process copies the database definitions to the GIFTS database on your SQL Server.
4. In the Target area, confirm that Database reads GIFTS and that the Data Source shows the network path to the database file. The Target area also displays the Login ID and Password for the GIFTS database.
5. Click **OK** to begin. A process monitor displays progress information. Save the process report for future reference; you may need it later.

The installation of your database is complete, and you are ready to set up your remaining workstations to use GIFTS.

Step 5: Installing the GIFTS Workstations

This step consists of running the GIFTS Workstation Installations and setting up the appropriate ODBC data source on each workstation.

Important: The GIFTS Workstation Installation must be run on every remaining workstation that is to have access to GIFTS.

Remember that the workstation used in "Step 3: Installing GIFTS on Your File Server" is already set up as a GIFTS workstation. To install GIFTS on your other workstations, you must complete the following procedures at each workstation:

- Run the GIFTS Workstation Installation.
- Set up the ODBC data source on the workstation.
- Ensure that Microsoft Windows is configured to work with the GIFTS Correspondence option.

Step 5a: Installing GIFTS

This process uses the GIFTS Setup program to install the files needed to run GIFTS from the workstation. The Server Installation installed the Setup program on the network; *be sure to run your workstation installations from the network, not from your MicroEdge GIFTS Installation Disc*.

1. Run the Setup.exe file located within the GIFTS\Setup directory on your file server.

   Example: If you designated P:\GIFTS as your GIFTS directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Welcome screen is displayed.

2. Click **Next.** The Select Program Folder window opens.

3. In the **Select Program Folder** window, choose where you want the GIFTS program icons to be displayed in the Windows Start menu, then click Next. The **Start Copying Files** window opens.

4 Read the summary provided of the installation options you chose. The Current Settings field should indicate that a "GIFTS Workstation Installation" is to take place in the folder you specified.

   If the options are correct, click **Next**. The installation begins.

5 If the workstation is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the MDAC installation.

   Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 6.

6 When the installation is complete, you are notified. Click **Finish**.

Step 5b: ODBC Data Source Creation

During the Step 5a, the MDAC installation program installed the ODBC driver that GIFTS uses to connect to your Microsoft SQL Server. In this procedure, you will create an ODBC Data Source named GIFTS. This data source is used by GIFTS to connect to the GIFTS database. Please note that the user interface of the ODBC Administrator may vary.

1 In the Administrative Tools folder of the Windows Control Panel, double-click the "Data Sources (ODBC)" icon to open the ODBC Data Source Administrator.

2 On the **System DSN** tab, click **Add**. The Create New Data Source window is displayed.

3 From the list of drivers, choose SQL Server and click **Finish**. The ODBC SQL Server Setup window is displayed.

4 In the **Name** field, enter GIFTS.

5 Using the Server list, identify your SQL server. Click **Next**.

6 If there are options for specifying how SQL Server should verify the authenticity of the database login, select the option to verify using a login ID and password entered by the user.

7 Enter the server's login ID and password that you created in Step 2, and click **Next**.

8 If your version of the ODBC Administrator includes an option to "Use regional settings when outputting currency, numbers, dates, and times," ensure that this setting is turned off. Note that your version of the ODBC Administrator may not have this option. Otherwise, use the default settings.

9 Click **Finish** to close the ODBC Administrator. You now have an ODBC Data Source named GIFTS.

Step 5c: Microsoft Windows Configuration

If you are going to use GIFTS to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS and Word can share data properly:

1 Open the Windows Explorer.

2 From the Explorer menu, choose Tools ➤ Folder Options, View ➤ Folder Options, or View ➤ Options (the name of the menu item is different for different versions of Windows).

Note: In Microsoft Vista, from the Explorer menu, choose Organize ➤ Folder and Search Options.

3 Go to the **View** tab (if applicable).

4 Ensure that the "Hide file extensions for known file types" or "Hide MS-DOS file extensions for types that are registered" check box *is not selected*. Use of this option can interfere with the way in which Microsoft Word merges data from GIFTS.

When you have installed GIFTS, created an ODBC Data Source, and configured Windows properly on each workstation, your GIFTS installation should be complete. Remember that to use GIFTS, users must have full access rights to the GIFTS directory on your file server.

Step 6: Logging in to GIFTS for the First Time

To ensure that your installation has been successful, you can log in to a GIFTS workstation by entering Admin as the Login ID. No password is required.

Important: The Admin login allows full access to all areas of the GIFTS system; be sure to set up Login IDs and passwords when you set up GIFTS for your organization, as described in the *GIFTS Administrator's Guide*.

4 New Oracle Server Installation

This chapter describes how to install GIFTS in the Oracle server environment.

In This Chapter

Before You Begin 58
Overview of the Installation Process 60
Step 1: Important Prerequisites 61
Step 2: Setting Up the GIFTS Database 63
Step 3: Installing GIFTS on Your File Server 66
Step 4: Populating the GIFTS Database 72
Step 5: Installing the GIFTS Workstations 73
Step 6: Logging in to GIFTS for the First Time 77
Retrieving the Database Creation Scripts 78

Before You Begin

The following important points should be addressed before you install GIFTS:

- Please read this entire chapter carefully. You should understand the entire installation process before you begin.
- If Crystal Reports is installed on any computer on which you plan to install GIFTS, please see "Compatibility with Crystal Reports" on page 164.
- The installation process creates several network directories. Make sure that you have the necessary permissions to create these directories.
- GIFTS uses Microsoft Word to produce correspondence and write-ups. Please make sure that a compatible version of Microsoft Word has been correctly installed and is currently functioning without errors.
- If you use virus-protection software, please make sure that it is disabled before attempting to run the installation. An active virus-protection program may cause errors during the installation process.

The above points are vital towards insuring that your installation is successful. Please make sure that each issue has been thoroughly addressed before continuing.

System Files

For a complete list of the system files installed by the GIFTS setup process, consult the "Installation Impact Analysis" on page 149.

How to Obtain Technical Support

If you have any problems during your installation, please contact MicroEdge Technical Support.

- by submitting a New Case request through PowerME. Go to *http://www.microedge.com* and log in to the PowerME website.
- by email at *helpdesk@microedge.com*
- by phone at (877) 704-3343
- by fax at (212) 757-1784

Overview of the Installation Process

The procedures outlined below will take you through the entire process of installing the GIFTS client/server edition for Oracle server. The installation consists of the following major steps; each step corresponds to a section in this chapter.

Step 1: Important Prerequisites In this step, you are asked to verify that you have the appropriate staff necessary for the installation process, and that your Oracle server has been configured correctly to accommodate the GIFTS system. It also outlines prerequisites for your network environment.

Step 2: Setting Up the GIFTS Database This portion of the installation is used to create the GIFTS database on the Oracle server. This requires the services of a trained Oracle Database Administrator who is familiar with all aspects of setting up and administering the Oracle server environment.

Step 3: Installing GIFTS on Your File Server In this step, you will install GIFTS onto a network drive that is accessible to all workstations that will use GIFTS. This step also includes the configuration of a single workstation, which is necessary for Step 4.

Step 4: Populating the GIFTS Database This step creates the table definitions for the GIFTS database on the Oracle server, and populates that database with system-defined data necessary to the operation of the GIFTS system.

Step 5: Installing the GIFTS Workstations This step configures your other workstations to run GIFTS. (The workstation on which you performed Step 3 is already configured to be a GIFTS workstation.)

Step 6: Logging in to GIFTS for the First Time This step describes how to log in to GIFTS, verifying that your installation has been successful.

Step 1: Important Prerequisites

The following prerequisites must be met before you begin your GIFTS installation. Please note that MicroEdge Technical Support staff will only be able to assist you in troubleshooting your installation once all of these prerequisites have been met.

MicroEdge Technical Support staff can only assist you in matters related exclusively to the installation of GIFTS software. For matters relating to your hardware, network, and the installation of the Oracle server, please consult with the appropriate vendors.

Prerequisites for the Oracle Environment

Please attend to the following before beginning your installation:

- ✔ Make sure you have access to the services of a trained Oracle Database Administrator familiar with all aspects of setting up and administering the Oracle environment. Please note that MicroEdge Technical Support personnel cannot provide advice or assistance related to the setup of your Oracle software and/or hardware.

- ✔ Ensure that Oracle server is properly installed, and ensure that all client workstations can connect to it using SQL Plus.

- ✔ GIFTS requires ODBC drivers on each workstation to connect to the Oracle server. These drivers are installed by the GIFTS Setup program. Refer to the GIFTS 6.6 and GCS 3.6 Compatibility Fact Sheet on the GIFTS PowerME webpage at *http://www.microedge.com* for a list of compatible drivers.

  To check the version of the ODBC drivers installed on a workstation, you can use the "Data Sources (ODBC)" Control Panel.

Prerequisites for Your Network Environment

Please attend to the following before beginning your installation:

- ✔ Make sure you have access to an in-house network administrator, or a consultant familiar with your network environment, who has full network administrative access rights.
- ✔ The user installing the system must have the permissions needed to create a directory on the target drive where the GIFTS file server will be installed.
- ✔ Ensure that all computers you plan to use with GIFTS have adequate storage space and hardware, as described in "GIFTS Storage Requirements" on page 7 and "Hardware Configuration Guidelines" on page 12.

Once you have verified that these prerequisites have been met, you may proceed to "Step 2: Setting Up the GIFTS Database" below.

Step 2: Setting Up the GIFTS Database

This step of the installation involves creating a new database on the Oracle server for GIFTS. This process requires the services of a trained Oracle Database Administrator familiar with all aspects of setting up and administering the Oracle environment.

Step 2a: Create the Database

The GIFTS database must be defined with an appropriate size to accommodate the growth of the system by normal data entry, as well as any data that may be imported into your system from another source. In general, you should allocate about 20 MB for each 1,000 grant requests in your database.

Example: If your organization processes 1,000 grant requests per year, and you have five years of historical data, you should allocate approximately 200 MB for your database device (100 MB for your historical data and 100 MB for the next five years).

In order to run GIFTS, we recommend that you create your GIFTS database with the following Character Set option:

- Character Set option = WE8ISO8859P1
- Sort Order option = binary

If you choose a different character set, make sure to choose one that is a superset of the recommended set. (If you use a character set that does not include all characters the GIFTS database is programmed to use, your GIFTS system may not work properly.) You can also use a different sort order.

Important: The character set and sort order recommended above are the only ones with which GIFTS has been tested and certified. We will support GIFTS when used with other character sets and sort orders. However, be aware that if your choices create issues in your GIFTS system, the only solution our support staff may be able to offer is to change to the recommended settings.

Note: The following steps are for Oracle Server 10g. The process in other versions may differ.

To create your GIFTS database:

1. Launch the Database Configuration Assistant. The Welcome screen opens.
2. Click **Next**. On the next page, select **Create a Database** and click **Next**.
3. Select **General Purpose** and click **Next**.
4. In the Global Database Name field, enter GIFTS. The SID field is automatically populated with GIFTS. Click **Next**.
5. On the Management Options page, click **Next**.
6. Enter the password for the default user accounts in both the Password and Confirm Password fields, then click **Next**.
7. Specify the desired Storage Options, then click **Next**.
8. Specify the desired Database File Locations, then click **Next**.
9. Specify the desired Recovery Configuration, then click **Next**, and then **Next** again.
10. Specify the desired Initialization Parameters (as discussed above), then click **Next**.
11. Specify the desired Database Storage parameters, then click **Next**.
12. Click **Finish**, then **OK**. The GIFTS database is created.

Step 2b: Create the GIFTS Login

A login user must be created for GIFTS in order for GIFTS to successfully connect to the database. Initially, you *must* use the default login ID and password.

Note: If you want to change the password, you may do so after you install GIFTS. Note that when you change the password on the server, you must also update the database login information in the GIFTS.SYS or gifts.ini file.

For details on updating the Client/Server login ID and password in GIFTS, please refer to the *GIFTS Administrator's Guide*.

The name and location of this utility will vary for other versions of Oracle. Note that the instructions below are for Oracle 10g.

To create the GIFTS login:

1. Log in to the Oracle Enterprise Manager Console.
2. Click **I agree**.
3. From the Administration tab, click Users in the Users & Privileges section.
4. Click **Create**.
5. In the **General** tab, enter your chosen login ID in the Name field, and the password in the Enter Password and Confirm Password fields.
6. In the same window, move to the Roles tab, click **Edit List**, and select **DBA**.
7. Click > to move DBA to the Selected Roles column, then click **OK**.
8. Select the Connect and DBA Admin Options, then click **OK**.
9. Specify any other desired login parameters, and click **OK**. The login is created.

Step 3: Installing GIFTS on Your File Server

In a network environment, the GIFTS program files and templates must be installed on the file server first. This part of the installation is called the *Server Installation*, and is only run once.

Important: The workstation at which you perform the server installation is set up as a GIFTS workstation during the installation process. Perform this procedure from a workstation that you intend to use with GIFTS.

After you install the GIFTS software on your file server, three more steps must be performed to complete network installation and the configuration of this GIFTS workstation: Oracle service creation, ODBC data source creation, and configuring Microsoft Windows. Instructions for these three tasks follow the network server installation instructions below.

Step 3a: Copying the GIFTS Configuration File

This procedure describes how to copy the configuration file for your GIFTS system to your computer. This file must be available during the installation process.

1. Copy the gifts.cfg file to a convenient location on your hard drive. Make a note of this location: you will need to know it when you install GIFTS.
2. Right-click on your new copy of the gifts.cfg file and select **Properties**.
3. On the **General** tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)
4. Click **OK** to save the gifts.cfg properties.

Please proceed to the next step to install the GIFTS server software.

Step 3b: Installing GIFTS on the File Server

Before You Begin: To avoid software conflicts, close all other applications on the workstation before you proceed.

1. Access the Install subfolder of the extracted GIFTS installation files and run the Setup.exe file. The GIFTS Welcome screen is displayed.

   Note: If the GIFTS Welcome screen is not displayed, run the Setup.exe file located in the Install folder of the Installation Disc.

   Throughout the installation, you can click Next to continue, Back to return to the previous screen, or Cancel to cancel the installation.

2. Click **Next**. The Select Setup Type window opens.

3. Select the "Network Installation" option and click **Next**. The Choose Destination Location window opens.

4. Click **Browse** and specify the location of the GIFTS directory. You should choose a network location that will be accessible to all the workstations that will run GIFTS.

   Example: You want to install GIFTS on the P: drive of your network file server. Enter P:\GIFTS after clicking Browse. The GIFTS database, program files, and correspondence and report template files will be copied to that folder (the "GIFTS directory"). If prompted that folder does not exist, click Yes to create it.

5. After specifying the location of the GIFTS directory, click **Next**. The Configuration Disk window prompts you to specify the location of your GIFTS configuration file.

6. Click **Browse** and browse to the directory that contains your gifts.cfg file. Then, click OK. You are prompted to select the word processor you would like to use with GIFTS.

7. Select Microsoft Word, and click **Next**. You are prompted to choose where you want the GIFTS program icons to be displayed in the Windows Start menu.

8. Click **Next.** The Start Copying Files window displays a summary of the installation options you chose. The Current Settings field should indicate

that a "GIFTS Server Installation" is to take place in the folder you specified.

9 If the options are correct, click **Next**. The installation begins.

10 If your file server is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click OK and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 10.

11 When the installation is complete, you are notified. Click **Finish**.

Step 3c: Oracle Service Creation

To establish Oracle Service for this GIFTS workstation:

1 Open the Oracle Net Configuration Assistant.

2 In the Welcome screen, select the "Local Net Service Name configuration" option and click **Next.** The Net Service Name Configuration window opens.

3 Select the "Add" option and click **Next.** The Net Service Name Configuration, Database Version window opens.

4 In the Service Name field, enter the desired name (usually the database name). Click **Next**. The Net Service Name Configuration, Select Protocols window opens.

5 From the list, select the protocol for your network (contact your network administrator if you are unsure). Click **Next**. The Net Service Name Configuration, [Selected Protocol] window opens.

6 Enter the Host name and select the port number (use either the standard port number, or enter another one). Click **Next.** The Net Service Name Configuration, Test window opens.

7 Here, you may choose to test the service before continuing:

- ❖ If you choose "No, do not test," click **Next** and skip to step 11.
- ❖ If you choose "Yes, perform a test," click **Next** and proceed to step 9.

8 After clicking **Next**, the test will either succeed or fail:

- ❖ If the test is a success, please skip to step 11.
- ❖ If the test fails, proceed to step 10.

9 Click the Change Login button. Enter the user name and the password, then click **OK**. The test will run again: ❖ If the

test is a success, click **Next** and proceed to step 11.

- ❖ If the test fails, contact your network administrator.

10 In the Net Service Name Configuration, Net Service Name window, enter the service name and click **Next.**

You are asked if you want to configure another net service name. Select No and click Next. The net service name configuration is complete.

Step 3d: ODBC Data Source Creation

In this step, you will create an ODBC Data Source named GIFTS. This data source is used by the Crystal Reports viewer included with GIFTS to connect to the GIFTS database on your Oracle server. GIFTS and GIFTS Connections use a different ODBC driver to connect to the database, but use the DSN information in this data source to locate your database.

Note: To complete this step, the Oracle ODBC drivers listed on the Compatibility Fact Sheet for your version of GIFTS must reside on the workstation. In most cases (as described in the fact sheet), these drivers were installed by the GIFTS Setup program.

To set up the workstation's data source:

1 In the Administrative Tools folder of the Windows Control Panel, double-click the "Data Sources (ODBC)" icon to open the ODBC Data Source Administrator.

2 On the System DSN tab, click **Add**. The Create New Data Source window is displayed.

3 From the list of ODBC drivers, choose CR Oracle ODBC Driver 5.0 and click Finish. The ODBC Oracle Driver Setup window is displayed.

4 In the Data Source Name field, enter GIFTS.

5 In the Server Name field, enter the name of the database server you are using with GIFTS.

6 Click OK and close the ODBC Administrator. You now have an ODBC Data Source named GIFTS.

Step 3e: Microsoft Windows Configuration

If you are going to use GIFTS to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS and Word can share data properly:

1 Open the Windows Explorer.

2 From the Explorer menu, choose Tools ➤ Folder Options, View ➤ Folder Options, or View ➤ Options (the name of the menu item is different for different versions of Windows).

Note: In Microsoft Vista, from the Explorer menu, choose Organize ➤ Folder and Search Options.

3 Go to the View tab (if applicable).

4 Ensure that the "Hide file extensions for known file types" or "Hide MS-DOS file extensions for types that are registered" check box *is not selected*. Use of this option can interfere with the way in which Microsoft Word merges data from GIFTS.

Tip: After installing GIFTS on any workstations running Windows Vista, and before logging into GIFTS, you should give the workstation user full permissions to the gifts.ini file in the C:\WINDOWS directory. If you do not do this and log into GIFTS, the updated gifts.ini file is stored in the following location: C:\Users\[user name]\AppData\Local\VirtualStore\Windows. If you need to make any changes to the gifts.ini file, do so from

this location. This is only necessary for workstations running Windows Vista.

When you are finished with all three workstation installation tasks, you can proceed to the following section.

Step 4: Populating the GIFTS Database

This process creates the tables and system data for a new GIFTS system. It must be run from a workstation that is already set up to run the client/server version of GIFTS.

Before You Begin: This process uses default parameters (like segment size) in the SQL Scripts it uses to create the database on your Oracle server. Your Database Administrator may wish to review these SQL Scripts and, if necessary, modify some of these parameters to improve performance. For more information, please refer to "Retrieving the Database Creation Scripts" on page 78.

1. Run the SQLINST.EXE program located in the Util directory of the Installation Disc.
2. Select the "Create Source Database on Target Server" option, then select the "Copy Source Data to Target Server" option.

   The Source area should display the location of the GIFTS.MDB database file installed on the network server by Step 3a of the installation process.

   Example: P:\GIFTS\GIFTS.MDB

   This is a Microsoft Access version of the database; this process copies the database definitions to the GIFTS database on your Oracle server.
3. In the Target area, confirm that Database reads GIFTS and that Data Source shows the network path to the database file. The Target area also displays the Login ID and Password for the GIFTS database.
4. Click **OK** to begin. A process monitor displays progress information. Save the process report for future reference; you may need it later.

The installation of your database is complete, and you are ready to set up your workstations to use GIFTS.

Step 5: Installing the GIFTS Workstations

This step consists of running the GIFTS Workstation Installation, creating Oracle service to the workstation, setting up the appropriate ODBC data source, and configuring Windows to use correspondence templates correctly. The Workstation Installation must be run on *every* remaining workstation that is to have access to GIFTS.

Important: To use GIFTS, all users must have full network access rights to the GIFTS directory on your file server.

Note: The GIFTS workstation from which you performed "Step 3: Installing GIFTS on Your File Server" is already configured as a GIFTS 6.6 workstation.

Step 5a: Perform the Workstation Installation

This process uses the GIFTS Setup program to install the files needed to run GIFTS from this workstation. The Server Installation installed the Setup program on the network; *be sure to run your workstation installations from the network, not from the Installation Disc*.

1. Run the Setup.exe file located within the GIFTS\Setup directory on your file server.

   Example: If you designated P:\GIFTS as your GIFTS directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Welcome screen is displayed.

2. Click **Next**. The Select Program Folder window opens.

3. In the Select Program Folder window, choose where you want the GIFTS program icons to be displayed in the Windows Start menu, then click **Next**. The Start Copying Files window opens.

4. Read the summary provided of the installation options you chose. The Current Settings field should indicate that a "GIFTS Workstation Installation" is to take place in the folder you specified.

   If the options are correct, click **Next**. The installation begins.

5 If your workstation is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 6.

6 When the installation is complete, you are notified. Click **Finish**.

Step 5b: Oracle Service Creation

To establish Oracle Service for this GIFTS workstation:

1 Open the Oracle Net Configuration Assistant.

2 In the Welcome screen, select the "Local Net Service Name configuration" option and click **Next**. The Net Service Name Configuration window opens.

3 Select the "Add" option and click **Next.** The Net Service Name Configuration, Database Version window opens.

4 Select the "Oracle 8i or later database or service" option and click **Next.** The Net Service Name Configuration, Service Name window opens.

5 In the Service Name field, enter the desired name (usually the database name). Click **Next.** The Net Service Name Configuration, Select Protocols window opens.

6 From the list, select the protocol for your network (contact your network administrator if you are unsure). Click **Next.** The Net Service Name Configuration, [Selected Protocol] window opens.

7 Enter the host name and select the port number (use either the standard port number, or enter another one). Click **Next**. The Net Service Name Configuration, Test window opens.

8 Here, you may choose to test the service before continuing:

- If you choose "No, do not test," click **Next** and skip to step 11.

- If you choose "Yes, perform a test," click Next and proceed to step 9.

9 After clicking **Next**, the test will either succeed or fail:

- If the test is a success, please skip to step 11.
- If the test fails, proceed to step 10.

10 Click the Change Login button. Enter the user name and the password, then click **OK**. The test will run again:

- If the test is a success, click **Next** and proceed to step 11.
- If the test fails, contact your network administrator.

11 In the Net Service Name Configuration, Net Service Name window, enter the service name and click **Next.**

You are asked if you want to configure another net service name. Select No and click **Next.** The net service name configuration is complete.

Step 5c: ODBC Data Source Creation

In this step, you will create an ODBC Data Source named GIFTS. This data source is used by the Crystal Reports viewer included with GIFTS to connect to the GIFTS database on your Oracle server. GIFTS and GIFTS Connections use a different ODBC driver to connect to the database, but use the DSN information in this data source to locate your database.

Note: To complete this step, the Oracle ODBC drivers listed on the Compatibility Fact Sheet for your version of GIFTS must reside on the workstation. In most cases (as described in the fact sheet), these drivers were installed when you installed GIFTS.

To create the data source:

1 In the Administrative Tools folder of the Windows Control Panel, double-click the "Data Sources (ODBC)" icon to open the ODBC Data Source Administrator.

2 On the System DSN tab, click Add. The Create New Data Source window is displayed.

3 From the list of ODBC drivers, choose CR Oracle ODBC Driver 5.0 and click Finish. The ODBC Oracle Driver Setup window is displayed.

4 In the Data Source Name field, enter GIFTS.

5 In the Server Name field, enter the name of the database server you are using with GIFTS.

6 Click OK and close the ODBC Administrator. You now have an ODBC Data Source named GIFTS.

Step 5d: Microsoft Windows Configuration

If you are going to use GIFTS to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS and Word can share data properly:

1 Open the Windows Explorer.

2 From the Explorer menu, choose Tools ➤ Folder Options, View ➤ Folder Options, or View ➤ Options (the name of the menu item is different for different versions of Windows).

Note: In Microsoft Vista, from the Explorer menu, choose Organize ➤ Folder and Search Options.

3 Go to the View tab (if applicable).

4 Ensure that the "Hide file extensions for known file types" or "Hide MS-DOS file extensions for types that are registered" check box *is not selected*. Use of this option can interfere with the way in which Microsoft Word merges data from GIFTS.

When you are finished with all three workstation installation tasks, your GIFTS installation should be complete. Remember that to use GIFTS, all users must have full access rights to the GIFTS directory on your file server.

Step 6: Logging in to GIFTS for the First Time

To ensure that your installation has been successful, you can log in to a GIFTS workstation by entering Admin as the Login ID. No password is required.

Important: The Admin login allows full access to all areas of the GIFTS system; be sure to set up Login IDs and passwords when you set up GIFTS for your organization, as described in the *GIFTS Administrator's Guide*.

Retrieving the Database Creation Scripts

Important: The information in this section applies only to users who wish to review or modify the scripts used by the SQLINST.EXE utility to populate the Oracle database (as described in "Step 4: Populating the GIFTS Database" on page 72).

To save the SQL Scripts used by the SQLINST.EXE utility as a text file:

1. Insert the MicroEdge GIFTS Installation Disc in the CD/DVD drive of your workstation.
2. Run the SQLINST.EXE program located in the Util directory of the Installation Disc.
3. Check the Create SQL Scripts option and choose where you wish the scripts to be saved.
4. Ensure that the "Create Source Database on Target Server" and "Copy Source Data to Target Server" options *are not* selected.
5. Click OK. The scripts are displayed and saved to the file you specified.

Important: When you create the database tables, ensure that you are logged in as the default user. If you do not, processes that identify the tables by their owner as well as their name—including the loading of converted data and the running of all GIFTS reports—will fail.

5 New Installation of GIFTS with Citrix Presentation Server

This chapter describes how to install GIFTS on a server running Windows® Terminal Services, allowing access to GIFTS through Citrix® Presentation Server™.

In This Chapter

Before You Begin **80**

Citrix Installation Options **81**

Option 1: Installing a GIFTS Workstation on Your Server ... **82**

Option 2: Installing a Standalone System on Your Server **86**

Before You Begin

The following important points should be addressed *before you install* GIFTS:

- Please make sure to read these instructions carefully. You should understand the entire installation process before you begin.
- Please make sure you have access to the services of a trained network administrator familiar with all aspects of setting up and administering the Microsoft Terminal Server and Citrix Presentation Server environments. MicroEdge Technical Support personnel cannot provide advice or assistance related to the setup of Terminal Server and Citrix.
- Ensure that your server operating system and Citrix software are compatible with GIFTS. To obtain the latest compatibility information for GIFTS, please go to *http://www.microedge.com* and log in to GIFTS PowerME.

The above points are vital towards ensuring that your installation is successful. Please make sure that each issue has been thoroughly addressed before continuing.

Citrix Installation Options

The instructions in this chapter describe two possible installation scenarios for using GIFTS with Citrix Presentation Server:

- **Installing GIFTS Workstation Software on Your Citrix Server** – this procedure describes how to install the GIFTS workstation software on a computer running Terminal Services with Citrix. This procedure may be used by clients with file server or client/server configurations of GIFTS, including clients who have already installed their GIFTS system on other computers. See "Option 1: Installing a GIFTS Workstation on Your Server" on page 82.

- **Installing a Standalone GIFTS System on Your Citrix Server** – this option is for clients who wish to install their entire GIFTS system on a single computer running Terminal Services with Citrix, and to make GIFTS available to other users through Citrix Presentation Server. See "Option 2: Installing a Standalone System on Your Server" on page 86.

To inquire about other possible options for installing GIFTS with Citrix, please contact MicroEdge Technical Support.

Option 1: Installing a GIFTS Workstation on Your Server

This procedure describes how to install the GIFTS workstation software on a computer running Windows Terminal Services to provide access to GIFTS through Citrix Presentation Server.

Step 1: Install Your GIFTS System

The first step is to install all parts of the GIFTS system *except* the workstation that you plan to use to provide access through Citrix Presentation Server. To install GIFTS, please follow the instructions for your system configuration:

- Clients with a file server system should refer to the instructions in "New GIFTS Standalone or File Server Installation" on page 21.
- Clients installing GIFTS in a SQL Server environment should follow the instructions in "New Microsoft SQL Server Installation" on page 35.
- Clients installing GIFTS in an Oracle server environment should follow the instructions in"New Oracle Server Installation" on page 57.

Note: If you wish to install GIFTS on a single computer only, please refer to "Option 2: Installing a Standalone System on Your Server" on page 86.

Step 2: Disabling Remote Logons

Note: MicroEdge does not provide support for Citrix Presentation Server or Microsoft Windows. The following steps are included as a guideline for performing steps necessary to the installation of GIFTS. The interface of Windows or Citrix may vary, as determined by the versions of the software that you are running.

Important: You must perform this step from the server console.

In this procedure, you will disable remote logons to your Citrix Presentation Server, which is a prerequisite to installing the GIFTS workstation software on your Terminal Server:

1. Log on to the server as a member of the local Administrators group.
2. Use the Windows Start menu to open the Presentation Server Console: select All Programs ➤ Citrix ➤ Management Consoles ➤ Presentation Server Console.
3. Highlight the server in the server list.
4. Ensure that there are no remote sessions running.
5. Right-click the server name, and select Properties from the menu. The server's properties are displayed.
6. In the left column, select Metaframe Settings.
7. In the right column, *turn off* the option to "Allow logons to this server."
8. Click **OK** to save the server properties.
9. Close the Management Console.

You can now proceed to the next step to install the GIFTS workstation software on your Presentation Server.

Step 3: Installing GIFTS on Your Presentation Server

Before You Begin: Please review the following important information regarding the installation of GIFTS with Citrix:

- You must launch the GIFTS Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you do not run GIFTS Setup from within the Control Panel, GIFTS will not run under Terminal Services.
- If you are prompted to restart the computer during the installation procedure, ***choose to restart later***. You must complete the entire GIFTS installation process and close the Add/Remove Programs utility before restarting the computer.

- At the conclusion of the GIFTS Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS installation is complete before closing the utility.

To install GIFTS on your server:

1. From the Windows Start menu, choose Control Panel ➤ Add or Remove Programs.
2. In the left column, click **Add New Programs**. The options for adding programs are displayed.
3. Click the **CD or Floppy** button.
4. **Browse** to and run the Setup program located in the GIFTS directory of your GIFTS file server.

   Example: If you designated P:\GIFTS as your GIFTS directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS installation process begins.
5. You may now install GIFTS, as described in the section that applies to your configuration:

   Important Reminder: You *must* run the GIFTS Setup program from within the Add/Remove Programs Control Panel.

   - **File server installations** – please refer to "Workstation Installation" on page 31.
   - **SQL Server installations** – please refer to "Step 5: Installing the GIFTS Workstations" on page 52.
   - **Oracle Server installations** – please refer to "Step 5: Installing the GIFTS Workstations" on page 73.

When you have finished installing the GIFTS workstation software (including the steps for configuring Microsoft Windows and, for client/server systems, creating an ODBC data source), you may proceed to the next step.

Step 4: Copying the GIFTS Help Files

This procedure describes how make the GIFTS help files available to users who access GIFTS through Citrix Presentation Server:

1. Using Windows Explorer, open the WINDOWS or WINNT folder of your Windows Terminal Server. For example:

   `M:\WINDOWS`

2. Copy the following GIFTS help files:

empadmin.chm	gfwbudget.chm
empgifts.chm	gfwgam.chm
gfw60.chm	gifts.chm
gfwadmin.chm	mesupp.chm
gfwap.chm	ChartFX_98_GUI.hlp

3. Paste the GIFTS help files to the virtual WINDOWS or WINNT directory of *each user* who uses GIFTS through Citrix. The locations of these virtual directories follow this pattern:

   `M:\Documents and Settings\[User Name]\WINDOWS`

   (where [User Name] *is the network name or login ID for each user)*

The GIFTS help files are now available to your users. Please continue to the next step to complete your installation.

Step 5: Completing Your Installation

To complete your installation, publish GIFTS on your Presentation Server according to your organization's policies and the instructions provided by Citrix. Then, just re-enable logons to your server and your installation of GIFTS with Citrix is complete!

Option 2: Installing a Standalone System on Your Server

This procedure describes how to install a standalone GIFTS system on a computer running Citrix Presentation Server to provide access to GIFTS through Citrix. Using this procedure, all components of GIFTS will be installed on the computer—including the GIFTS database. This option is not intended for client/server systems.

Step 1: Disabling Remote Logons

Before installing GIFTS, you should disable remote logons to your Citrix Presentation Server. To do so, please follow the instructions in "Step 2: Disabling Remote Logons" on page 82 and proceed to the next step.

Step 2: Copying Your GIFTS Configuration File

This procedure describes how to copy the configuration file for your GIFTS system to your Terminal Server. This file must be available during the installation process.

1. Copy the gifts.cfg file to a convenient location on your local hard drive. Make a note of this location: you will need to know it when you install GIFTS.
2. Right-click on your new copy of the gifts.cfg file and select Properties.
3. On the General tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)
4. Click **OK** to save the gifts.cfg properties.

Please proceed to the next step to install the GIFTS software.

Step 3: Installing GIFTS

Before You Begin: Please review the following important information regarding the installation of GIFTS with Citrix:

- You must launch the GIFTS Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you do not run GIFTS Setup from within the Control Panel, GIFTS will not run under Terminal Services.
- If you are prompted to restart the computer during the installation procedure, ***choose to restart later***. You must complete the entire GIFTS installation process and close the Add/Remove Programs utility before restarting the computer.
- At the conclusion of the GIFTS Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS installation is complete before closing the utility.

To install a standalone GIFTS system on your Terminal Server:

1. From the Windows Start menu, choose Control Panel ➤ Add or Remove Programs.
2. In the left column, click Add New Programs. The options for adding programs are displayed.
3. Click the "CD or Floppy" button.
4. Insert your MicroEdge GIFTS Installation Disc.
5. Click Next. The GIFTS installation process begins.

   Important Reminder: You *must* run the GIFTS Setup program from within the Add/Remove Programs Control Panel.

6. You may now continue with your GIFTS installation. To do so, please follow the steps in "New Standalone Installation" on page 24.

When you have finished installing GIFTS (including the steps for configuring Microsoft Windows), you may proceed to the next step.

Step 4: Copying the GIFTS Help Files

To make the GIFTS online help available to each user, please follow the instructions in "Step 4: Copying the GIFTS Help Files" on page 85. Then, proceed to the next step of this procedure to complete your installation.

Step 5: Completing Your Installation

To complete your installation, publish GIFTS on your Presentation Server according to your organization's policies and the instructions provided by Citrix. Then, just re-enable logons to your server and your installation of GIFTS with Citrix is complete!

6 Upgrading a GIFTS Standalone Workstation or File Server

This chapter describes how to upgrade GIFTS on a standalone system or a file server system.

In This Chapter

Before You Begin **90**
Standalone Upgrade **93**
File Server Upgrade **98**

Before You Begin

This process upgrades your GIFTS 6.4 or 6.5 system to GIFTS 6.6. To determine which version of GIFTS you have, choose Help > About from the menu of any Windows-based GIFTS program.

Caution: If you have a version of GIFTS earlier than GIFTS 6.4, please contact MicroEdge Technical Support. If you attempt to upgrade an earlier GIFTS system, your database upgrade will fail and you will have to restore your backup of the GIFTS system.

The following important points should be addressed before you upgrade GIFTS:

- Your GIFTS program files, database, reports, and template files are altered by this process. Please make a complete backup of your current GIFTS directory (including your database) before proceeding.
- All users must be logged out of GIFTS for the duration of your upgrade.
- Upgrading GIFTS can take a significant amount of time. If you use MyGIFTS or ReviewerCONNECT, you will have to upgrade to GIFTS Connections at the conclusion of your GIFTS upgrade. Please review the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide* and consider your upgrade of GCS when planning the time and resources needed to complete your upgrade.
- If you are using any virus-protection software, please disable it before you upgrade GIFTS. Virus-protection programs may cause errors during the upgrade process.
- If Crystal Reports is installed on your system, be sure to read "Compatibility with Crystal Reports" on page 164.
- Read the following sections, "About the Standalone Upgrade" and "About the File Server Upgrade", to determine which type of upgrade you need to perform.

The points above are vital to ensuring that your upgrade is successful. Please make sure that each issue has been thoroughly addressed before continuing.

About the Standalone Upgrade

This type of upgrade is for clients who have a single-user version of GIFTS or Essential GIFTS installed on a single workstation. To perform this type of upgrade, please refer to "Standalone Upgrade" on page 93.

About the File Server Upgrade

This upgrade is for systems where GIFTS or Essential GIFTS is installed on a network file server that is accessible from one or more GIFTS workstations.

This upgrade includes a *Server Upgrade* process—which upgrades the shared files and GIFTS database on the server—and a *Workstation Upgrade* which upgrades the files on each GIFTS workstation. To perform this type of upgrade, please refer to "File Server Upgrade" on page 98.

Note: If you have a Microsoft SQL Server or Oracle server backend, please refer to "Upgrading GIFTS Client/Server Installations" on page 105 for upgrade instructions.

System Files

For a complete list of the system files installed by the GIFTS upgrade, consult the "GIFTS 6.6 Impact Analysis" on page 150.

How to Obtain Technical Support

If you have any difficulties during this process, please contact MicroEdge Technical Support in one of the following ways:

- by creating a New Case on PowerME. Go to *http://www.microedge.com* and log in to the PowerME support website.
- by email at *helpdesk@microedge.com*
- by phone at (877) 704-3343

- by fax at (212) 757-1784

Standalone Upgrade

This type of upgrade is for clients who have purchased a single-user version of GIFTS or Essential GIFTS and who have installed the entire GIFTS system on the hard drive of a single workstation.

Step 1: Upgrading Your GIFTS Configuration File

If you received a new Configuration File from MicroEdge with your upgrade, perform the following procedure to update your configuration. If you do not update your configuration file, any new features that you purchased—such as MyGIFTS—will not be enabled.

Note: Only clients who purchase additional modules receive a Configuration File with their upgrade package; *most clients do not receive a new Configuration File*. If you did not receive a Configuration File, please skip to "Step 2: Upgrading Program Files".

To update your GIFTS configuration file:

1. Copy the gifts.cfg file to the \GIFTS directory on your workstation. A message warns that you are overwriting an existing file. Click **Yes** to continue.
2. In the \GIFTS directory, right-click on the gifts.cfg file and select **Properties**.
3. On the **General** tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)
4. Click **OK** to save the gifts.cfg properties.

Step 2: Upgrading Program Files

Before You Begin: To avoid software conflicts, please close all other applications on the workstation before proceeding.

To upgrade your standalone GIFTS workstation:

1. Refer to the Upgrade email sent to you by MicroEdge and follow the instructions for downloading the Upgrade Installation Files.

   Note: Save the downloaded file(s) to a location on your workstation or server that will be easy to find.

2. Once the download is complete, extract all files from the zip file(s).

3. Navigate to the *Master/Install* folder for GIFTS and double-click the *Setup.exe* file. Click **Run** at the Security Warning prompt.

4. At the MicroEdge GIFTS Installation Wizard window, click **Next**. The Select Setup Type window opens.

   Note: Throughout the upgrade, you can click **Next** to continue, **Back** to return to the previous screen, or **Cancel** to cancel the installation.

5. Select the "Local Installation (single user)" option and click **Next**. The Select Program Folder window opens.

6. In the **Select Program Folder** window, choose where you want the GIFTS program icons to be displayed in the Windows Start menu, and click **Next**. The **Start Copying Files** window opens.

7. Read the summary provided of the upgrade options you chose. The **Current Settings** field should indicate that a "Local GIFTS Installation" is to take place in the folder you specified; the following line should note that this is an "Upgrade of an existing installation."

   If the options are correct, click **Next** to begin the upgrade.

8 If your computer is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 9.

9 When the upgrade is complete, the Setup Complete window opens. In this window you are given the option to upgrade your GIFTS database.

Important: If the Setup Complete window with the message prompting you to perform the database upgrade does not appear, go to "Step 3: Manually Upgrading the Database" on page 96 and run the database upgrade manually.

If you want to run the database upgrade now, select the **Run GIFTS 6.6 Database Upgrade** check box and click **Finish**.

Tip: The database upgrade can take a significant amount of time to complete depending on the current size of your database.

Important: The database upgrade makes irreversible changes to your database. Before proceeding, make sure that you have a current backup of your database.

- If you have not backed up your current database, or want to perform the database upgrade later for any reason, clear the check box and click **Finish**. Use instructions found in "Step 3: Manually Upgrading the Database" on page 96 to run the upgrade yourself *after* backing up the database.

(If the message prompting you to perform the database upgrade does not appear, go to "Step 3: Manually Upgrading the Database" on page 96 and run the database upgrade manually.)

Congratulations! If you have performed the database upgrade, your upgrade is complete, and you may resume your use of GIFTS.

Step 3: Manually Upgrading the Database

Note: Upgrading the database can take a significant amount of time to complete. Please take this into consideration when scheduling your upgrade.

Follow the instructions below only if you did *not* upgrade the database at the end of the process described in "Step 2: Upgrading Program Files" on page 94.

Caution: The database upgrade makes irreversible changes to your GIFTS database. Before proceeding, make sure that you have a current backup of your database.

To upgrade your GIFTS database for use with version 6.6:

1. From the Windows Start menu, select **Run**.
2. **Browse** to locate the GIFTS Master/Install folder and double-click on the Setup.exe file. This will essentially run through the GIFTS install again.

3 When you reach the Setup Complete window, make sure the **Run GIFTS 6.6 Database Upgrade** check box is selected and and click **Finish** to run the upgrade.

4 A process log indicates the progress of the upgrade, and a message indicates when the upgrade has successfully completed. Click **OK** to continue.

   If you receive a message that the upgrade did not complete successfully, click **Print or Save As** to keep the log and fax it to MicroEdge Technical Support at (212) 757-1784 or email it to *helpdesk@microedge.com*.

Congratulations! Your GIFTS or Essential GIFTS upgrade is complete, and you may resume your use of GIFTS.

File Server Upgrade

This type of upgrade is for GIFTS or Essential GIFTS systems installed on a network file server and one or more GIFTS workstations.

In a network environment, the database, program files, and report and correspondence templates that reside on your file server must be upgraded first. This part of the upgrade is the *Server Upgrade*, and it is run only once. The server upgrade can be run from any GIFTS workstation using the MicroEdge GIFTS Upgrade Installation Files.

The Server Upgrade includes the following steps:

- "Step 1: Updating Your GIFTS Configuration File" on page 98
- "Step 2: Upgrading the GIFTS File Server" on page 99
- "Step 3: Manually Upgrading the GIFTS Database" on page 101
- "Step 4: Upgrading Other GIFTS Workstations" on page 102

Workstation upgrades are not performed using the MicroEdge GIFTS CD; the workstation setup program is placed on the file server during the server upgrade, and should be used for all workstation upgrades.

Step 1: Updating Your GIFTS Configuration File

If you received a new Configuration file from MicroEdge with your upgrade, perform the following procedure to update your configuration. If you do not update your configuration file, any new features that you purchased—such as MyGIFTS—will not be enabled.

Note: Only clients who purchase additional modules receive a Configuration file with their upgrade package; *most clients do not receive a new Configuration file*. If you did not receive a Configuration file, please skip to "Step 2: Upgrading the GIFTS File Server".

To update your GIFTS configuration file:

1. Copy the gifts.cfg file to the \GIFTS directory on your GIFTS file server. A message warns that you are overwriting an existing file. Click **Yes** to continue.

2 In the \GIFTS directory, right-click on the gifts.cfg file and select **Properties**.

3 On the **General** tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)

4 Click **OK** to save the gifts.cfg properties.

Step 2: Upgrading the GIFTS File Server

This process will upgrade your GIFTS file server and the workstation from which you run the upgrade process. The upgrade process also gives you the option to run the GIFTS database upgrade.

Important: This process must be performed from a workstation already configured to run GIFTS. Please be sure that the workstation has at least 25MB of available disk space for temporary files. The upgrade may not complete successfully if the workstation does not have sufficient disk space.

To upgrade your GIFTS file server and the current workstation:

1 Refer to the Upgrade email sent to you by MicroEdge and follow the instructions for downloading the Upgrade Installation Files.

   Note: Save the downloaded file(s) to a location on your workstation or server that will be easy to find.

2 Once the download is complete, extract all files from the zip file(s).

3 Navigate to the *Master/Install* folder for GIFTS and double-click the *Setup.exe* file. Click **Run** at the Security Warning prompt.

4 At the MicroEdge GIFTS Installation Wizard window, click **Next**. The Select Setup Type window opens.

   Note: Throughout the upgrade, you can click **Next** to continue, **Back** to return to the previous screen, or **Cancel** to cancel the installation.

5 Select the "Network Installation" option and click **Next**. The Select Program Folder window opens.

6 In the **Select Program Folder** window, choose where you want the GIFTS program icons to be displayed in the Windows Start menu, and click **Next**. The **Start Copying Files** window opens.

7 Read the summary provided of the installation options you chose. The **Current Settings** field should indicate that a "GIFTS Server Installation" is to take place in the folder you specified; the following line should note that this is an "Upgrade to an existing installation."

If the options are correct, click **Next** to begin the upgrade.

8 If your GIFTS workstation is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 9.

9 When the upgrade is complete, a message opens, indicating that you must run the **GIFTS 6.6 Database Upgrade** before you can use GIFTS.

Important: If the Setup Complete window with the message prompting you to perform the database upgrade does not appear, go to "Step 3: Manually Upgrading the GIFTS Database" on page 101 and run the database upgrade manually.

The database upgrade makes irreversible changes to your database. Before proceeding, make sure that you have a current backup of your database.

- If you have not backed up your current database, clear the check box and click **Finish**. Use instructions found in "Step 3: Manually Upgrading the GIFTS Database" on page 101 to run the upgrade yourself *after* backing up the database.
- If you want to run the database upgrade now, select the "Run GIFTS 6.6 Database Upgrade" check box and click **Finish** to run the upgrade.

Note: Note that the database upgrade can take a significant amount of time to complete.

Once the database upgrade is complete, you can proceed to "Step 4: Upgrading Other GIFTS Workstations" on page 102.

Step 3: Manually Upgrading the GIFTS Database

Important: This upgrade needs to be run only once: If you chose to upgrade your database at the end of the preceding step, you may skip this section and proceed to "Step 4: Upgrading Other GIFTS Workstations" on page 102.

This step updates the structure of your GIFTS database and performs data updates to make your database compatible with GIFTS 6.6. Users will not be able to log in to GIFTS 6.6 until the database is upgraded.

Note: Upgrading the database can take a significant amount of time to complete. Please take this into consideration when scheduling your database upgrade.

This process must be run on a workstation already configured for GIFTS 6.6. Either run it from the same workstation you used for "Step 2: Upgrading the GIFTS File Server", or upgrade a workstation according to the instructions in "Step 4: Upgrading Other GIFTS Workstations" on page 102, then use it to run the database upgrade following the directions in this section.

Caution: The database upgrade makes irreversible changes to your database. Before proceeding, make sure that you have a current backup of your database.

1. At the workstation you just upgraded in Step 3, open the Windows Start menu and select **Run**.
2. **Browse** to locate the GIFTS Master/Install folder and double-click on the Setup.exe file. This will essentially run through the GIFTS install again.
3. When you reach the Setup Complete window, make sure the **Run GIFTS 6.6 Database Upgrade** check box is selected and and click **Finish** to run the upgrade.A process log indicates the progress of the upgrade, and a

message indicates when the upgrade has successfully completed. Click **OK** to continue.

If you receive a message that the upgrade did not complete successfully, click Print or Save As to keep the log and fax it to MicroEdge Technical Support at (212) 757-1784 or email it to *helpdesk@microedge.com*.

Step 4: Upgrading Other GIFTS Workstations

The next step is to perform the Workstation Upgrade on your remaining GIFTS workstations. This process updates the workstation files needed to run GIFTS.

The GIFTS Workstation Upgrade must be *run on every workstation* that has access to GIFTS—except the GIFTS workstation used for "Step 2: Upgrading the GIFTS File Server" on page 99. That workstation was upgraded during the file server upgrade process.

Important: The workstation upgrade must be run from a network copy of the Setup program.

To upgrade a workstation:

1. Run the Setup.exe file located within the GIFTS\Setup directory on your file server.

   Example: If you designated P:\GIFTS as your GIFTS directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Welcome screen is displayed.

2. Click **Next**. The Select Program Folder window opens.

3. In the Select Program Folder window, choose where you want the GIFTS program icons to be displayed in the Windows Start menu, and click **Next**. The Start Copying Files window opens.

4. Read the summary provided of the installation options you chose. The Current Settings field should indicate that a "GIFTS Workstation Installation" is to take place in the folder you specified; the following line should note that this is an "Upgrade to an existing installation."

   If the options are correct, click **Next**. The upgrade begins.

5 If the workstation is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 6.

6 When the upgrade is complete, you are notified. Click **Finish**.

Congratulations! After performing upgrades to *all* GIFTS workstations, your GIFTS or Essential GIFTS upgrade is complete. You may resume your use of GIFTS.

Important: If you have MyGIFTS or ReviewerCONNECT, you now need to upgrade GIFTS Connections. Please refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide* for more information.

7 Upgrading GIFTS Client/Server Installations

This chapter describes how to upgrade a Microsoft SQL Server or Oracle server installation of GIFTS.

In This Chapter

Before You Begin.....106
Step 1: Important Prerequisites.....109
Step 2: Upgrading the File Server.....111
Step 3: Upgrading the GIFTS Database.....113
Step 4: Upgrading Your GIFTS Workstations.....115

Before You Begin

This process upgrades your GIFTS 6.4 or 6.5 system to GIFTS 6.6. To determine which version of GIFTS you have, choose Help > About from the menu of any GIFTS module.

Caution: If you have a version of GIFTS earlier than GIFTS 6.4, please contact MicroEdge Technical Support. If you attempt to upgrade an earlier GIFTS system, your database upgrade will fail and you will have to restore your backup of the GIFTS system.

The following important points should be addressed before you upgrade GIFTS:

- Your program, database, reports, and template files are altered by this process. Before proceeding, make a complete backup of your GIFTS database—as well as the GIFTS directory on your file server.
- All users must be logged out of GIFTS for the duration of the upgrade.
- Upgrading GIFTS can take a significant amount of time. If you use MyGIFTS or ReviewerCONNECT, you will have to upgrade to GIFTS Connections at the conclusion of the GIFTS upgrade. Please review the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide* and consider your upgrade of GCS when you make plans for the time and resources needed to complete your upgrade.
- If you are using any virus-protection software, please disable it before you upgrade GIFTS. Virus-protection programs may cause errors during the upgrade process.
- If Crystal Reports is installed on your system, be sure to read "Compatibility with Crystal Reports" on page 164.

The points above are vital to ensuring that your upgrade is successful. Please make sure that each issue has been thoroughly addressed before continuing.

System Files

For a complete list of the system files installed by the GIFTS setup process, consult the "Installation Impact Analysis" on page 149.

How to Obtain Technical Support

If you have any difficulties during this process, please contact MicroEdge Technical Support in one of the following ways:

- by creating a New Case on PowerME. Go to *http://www.microedge.com* and log in to the PowerME support website.
- by email at *helpdesk@microedge.com*
- by phone at (877) 704-3343
- by fax at (212) 757-1784

The procedures outlined below will take you through the process of upgrading the GIFTS client/server edition for Microsoft SQL Server or Oracle server.

Overview of the Upgrade Process

The upgrade process includes four major steps:

Step 1: Important Prerequisites The preparation steps are essential for ensuring that the upgrade process runs properly.

Step 2: Upgrading the File Server This process upgrades shared files on the network server, including the program and report files, and is *run only once*. The server upgrade must run from a GIFTS workstation.

Step 3: Upgrading the GIFTS Database This process upgrades the structure of the database on the database server, including the addition of new fields required by GIFTS 6.6. This part of the upgrade is run only once.

Step 4: Upgrading Your GIFTS Workstations This process upgrades your remaining workstations. This part of the upgrade must be run on every workstation that has access to GIFTS.

To complete the upgrade, you must complete these steps in the order in which they are presented.

Note: Clients with MyGIFTS or ReviewerCONNECT should upgrade GIFTS Connections after completing the GIFTS upgrade process. Please refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide* for more information.

Step 1: Important Prerequisites

Before beginning the upgrade, make sure your network environment and GIFTS configuration are ready.

Preparing Your Environment

Upgrading to GIFTS 6.6 alters your program, database, reports, and template files. The following important points should be addressed before you perform the upgrade:

- Make a complete backup of your current GIFTS directory and the GIFTS database on your Microsoft SQL or Oracle server.
- Microsoft SQL Server users should run the DBCC CHECKDB function (database consistency check) to locate and correct errors in the logical or physical consistency of the GIFTS database. For more information about this process, please consult your SQL Server documentation.
- Ensure that your database server is compatible with GIFTS 6.6. For a list of compatible server versions, please refer to the *GIFTS 6.6 and GCS 3.6 Compatibility Fact Sheet* available in the PowerME portal.
- GIFTS connects to the database server using ODBC drivers, which are installed during the upgrade process. Please refer to the GIFTS 6.6 and GCS 3.6 Compatibility Fact Sheet available in the PowerME portal for a list of certified drivers.

  To check the version of the ODBC driver installed on a workstation, you can use the "Data Sources (ODBC)" Control Panel.
- If you are using any virus-protection software, please make sure that it is disabled before you run the upgrade. An active virus-protection program may cause errors during the upgrade process.
- If you use or intend to use Crystal Reports, make sure to read "Compatibility with Crystal Reports" on page 164.
- GIFTS 6.6 requires a comparable amount of hard disk space to previous versions of GIFTS. Please refer to "GIFTS Storage Requirements" on page 7 for more information.

Important: The above points are vital to ensuring that your upgrade is successful. Please make sure that each issue has been thoroughly addressed before you continue.

Updating Your GIFTS Configuration File

If you received a new Configuration file from MicroEdge with your upgrade download, perform the following procedure to update your configuration. If you do not update your configuration file, any new features that you purchased—such as MyGIFTS—will not be enabled.

Note: Only clients who purchase additional modules receive a Configuration file with their upgrade package; *most clients do not receive a new Configuration file*. If you did not receive a Configuration File, please proceed to "Step 2: Upgrading the File Server" on page 111.

To update your GIFTS configuration file:

1. Copy the gifts.cfg file to the \GIFTS directory on your GIFTS file server. A message warns that you are overwriting an existing file. Click **Yes** to continue.
2. In the \GIFTS directory, right-click on the gifts.cfg file and select **Properties**.
3. On the **General** tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)
4. Click **OK** to save the gifts.cfg properties.

Step 2: Upgrading the File Server

You can run the file server upgrade process from any GIFTS workstation. The setup process uses the information contained in the workstation's gifts.ini file to determine the location of your current GIFTS system, and upgrades it accordingly.

Please note that the workstation from which you run the file server upgrade is also upgraded to a GIFTS 6.6 workstation during this process.

Before You Begin: Please be sure that the workstation from which you are running the server upgrade has at least 25MB of available disk space for temporary files. The server upgrade may not complete successfully if the workstation does not have sufficient disk space.

To upgrade your GIFTS file server and the current workstation:

1. Refer to the Upgrade email sent to you by MicroEdge and follow the instructions for downloading the Upgrade Installation Files.

   Note: Save the downloaded file(s) to a location on your workstation or server that will be easy to find.

2. Once the download is complete, extract all files from the zip file(s).

3. Navigate to the *Master/Install* folder for GIFTS and double-click the *Setup.exe* file. Click **Run** at the Security Warning prompt.

4. At the MicroEdge GIFTS Installation Wizard window, click **Next**. The Select Setup Type window opens.

   Note: Throughout the upgrade, you can click **Next** to continue, **Back** to return to the previous screen, or **Cancel** to cancel the installation.

5. Select the "Network Installation" option and click **Next**. The Select Program Folder window opens.

6. In the **Select Program Folder** window, choose where you want the GIFTS program icons to be displayed in the Windows Start menu, and click **Next**. The **Start Copying** Files window opens.

7 Read the summary provided of the installation options you chose. The **Current Settings** field should indicate that a "GIFTS Server Installation" is to take place in the folder you specified; the following line should note that this is an "Upgrade to an existing installation."

If the options are correct, click **Next**. The upgrade begins.

8 If your file server is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you are prompted to install it. Click OK and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 9.

9 When the upgrade is complete, the Setup Complete window opens. In this window you are given the option to upgrade your GIFTS database.

Important: If the Setup Complete window with the message prompting you to perform the database upgrade does not appear, go to "Step 3: Upgrading the GIFTS Database" on page 113 and run the database upgrade manually.

If you want to run the database upgrade now, select the **Run GIFTS 6.6 Database Upgrade** check box and click **Finish**.

Tip: The database upgrade can take a significant amount of time to complete depending on the current size of your database.

Important: The database upgrade makes irreversible changes to your database. Before proceeding, make sure that you have a current backup of your database.

- If you have not backed up your current database, or want to perform the database upgrade later for any reason, clear the check box and click **Finish**. Use instructions found in "Step 3: Upgrading the GIFTS Database" on page 113 to run the upgrade yourself *after* backing up the database.

  Once the database upgrade is complete, you can proceed to "Step 4: Upgrading Your GIFTS Workstations" on page 115.

Step 3: Upgrading the GIFTS Database

Important: This upgrade needs to be run only once: If you chose to upgrade your database at the end of the preceding section, skip this section and go to "Step 4: Upgrading Your GIFTS Workstations" on page 115.

This step updates the structure of your GIFTS database and performs data updates to make your database compatible with GIFTS 6.6.

Note: Upgrading the database can take a significant amount of time to complete. Please take this into consideration when scheduling your database upgrade.

This process must be run on a workstation already configured for GIFTS 6.6. Either run it from the same workstation you used for "Step 2: Upgrading the File Server", or upgrade a workstation according to the instructions in "Step 4: Upgrading Your GIFTS Workstations" on page 115 and use it to run the database upgrade following the directions below.

Caution: The database upgrade makes irreversible changes to your GIFTS database. Before proceeding, make sure that you have a current backup of your database.

To upgrade your GIFTS database:

1. At the workstation you upgraded in Step 2, open the Windows Start menu and select **Run**.
2. **Browse** to locate the GIFTS Master/Install folder and double-click on the Setup.exe file. This will essentially run through the GIFTS install again.
3. When you reach the Setup Complete window, make sure the **Run GIFTS 6.6 Database Upgrade** check box is selected and and click **Finish** to run the upgrade.

4 A process log indicates the progress of the upgrade, and a message indicates when the upgrade has successfully completed. Click **OK** to continue.

If you receive a message that the upgrade did not complete successfully, click **Print or Save As** to keep the log and fax it to MicroEdge Technical Support at (212) 757-1784 or email it to *helpdesk@microedge.com*.

Step 4: Upgrading Your GIFTS Workstations

The next step is to perform the Workstation Upgrade on your remaining workstations. This process updates the system files the workstations need to run GIFTS. Clients with Oracle server may also need to update the ODBC data source on each workstation.

Running the Workstation Upgrades

The GIFTS Workstation Upgrade must be run on *every* workstation that has access to GIFTS *except* the workstation used to run the file server upgrade. That workstation was updated during the file server upgrade process.

Important: The workstation upgrade must be run from a network copy of the Setup program.

To upgrade a GIFTS workstation:

1. Run the Setup.exe file located within the GIFTS\Setup directory on your file server.

   Example: If you designated P:\GIFTS as your GIFTS directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Welcome screen is displayed.

2. Click **Next**. The Select Program Folder window opens.

3. In the Select Program Folder window, choose where you want the GIFTS program icons to be displayed in the Windows Start menu, and click **Next**. The Start Copying Files window opens.

4. Read the summary provided of the installation options you chose. The Current Settings field should indicate that a "GIFTS Workstation Installation" is to take place in the folder you specified; the following line should note that this is an "Upgrade to an existing installation."

   If the options are correct, click **Next**. The upgrade begins.

5. If the workstation is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS, you

are prompted to install it. Click **OK** and follow the on-screen instructions to complete the MDAC installation.

Note: After the MDAC installation, a message may inform you that your computer must be restarted to continue. Agree to the restart. After the computer has restarted, the setup program continues at step 6.

6 When the upgrade is complete, you are notified. Click **Finish**.

7 If you have an Oracle server system, please refer to the procedure in the following section, "Updating the Data Source on Oracle Systems", for information about updating the ODBC data source on the workstation.

Repeat this procedure on each GIFTS workstation. Once you have upgrade all of your GIFTS workstations, your GIFTS upgrade is complete! You may now resume your use of GIFTS.

Important: If you have MyGIFTS or ReviewerCONNECT, you now need to upgrade GIFTS Connections. Please refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide* for more information.

Updating the Data Source on Oracle Systems

If you have an Oracle server system and are upgrading from GIFTS 6.4—or if you have an Oracle server system and did not update the ODBC data source on your GIFTS workstations when you upgraded—use the following procedure on each GIFTS workstation to update your ODBC data source.

Caution: If you have a version of GIFTS earlier than GIFTS 6.4, please contact MicroEdge Technical Support. If you attempt to upgrade an earlier GIFTS system, your database upgrade will fail and you will have to restore your backup of the GIFTS system.

This procedure updates the ODBC data source on the workstation to specify the certified Crystal Reports ODBC driver listed in the "Compatibility Fact Sheet" for GIFTS 6.6. This driver is required by the Crystal Reports viewer used in the GIFTS Report Library. GIFTS uses a different ODBC driver (as

specified in the fact sheet), but uses the information in this data source to locate the GIFTS database.

To update the data source for a GIFTS workstation:

1. In the Administrative Tools folder of the Windows Control Panel, double-click the "Data Sources (ODBC)" icon to open the ODBC Data Source Administrator.
2. Click the **System DSN** tab. The data sources for the workstation are listed.
3. Highlight the data source currently being used to connect to the GIFTS database (the default DSN name is GIFTS), and click **Remove**. The data source is removed.
4. On the **System DSN** tab, click **Add**. The Create New Data Source window is displayed.
5. From the list of ODBC Drivers, choose CR Oracle ODBC Driver 5.0 and click **Finish**. The ODBC Oracle Driver Setup window is displayed.
6. In the **Data Source Name** field, enter GIFTS (or the DSN that you use for your GIFTS database).
7. In the **Server Name** field, enter the name of the database server you are using with GIFTS.
8. Click **OK** and close the ODBC Administrator. You now have an ODBC Data Source named GIFTS.

8 Upgrading GIFTS with Citrix Presentation Server

This chapter describes how to upgrade GIFTS on computers running Windows® Terminal Services and Citrix® Presentation Server™.

In This Chapter

Before You Begin.....120
Upgrading a GIFTS Workstation Running Citrix.....123
Upgrading a Standalone System Running Citrix.....126

Before You Begin

This process upgrades your GIFTS 6.4 or 6.5 system to Version 6.6. To determine which version of GIFTS you have, choose Help > About from the menu of any GIFTS module.

Caution: If you have a version of GIFTS earlier than GIFTS 6.4, please contact MicroEdge Technical Support. If you attempt to upgrade an earlier GIFTS system, your database upgrade will fail and you will have to restore your backup of the GIFTS system.

The following important points should be addressed before you upgrade GIFTS:

- Your program, database, reports, and template files are altered by this process. Please make a complete backup of your current GIFTS directory before proceeding.
- All users must be logged out of GIFTS for the duration of the upgrade.
- If you are using any virus-protection software, please disable it before you upgrade GIFTS. Virus-protection programs may cause errors during the upgrade process.
- If Business Objects Crystal Reports is installed on your system, be sure to read "Compatibility with Crystal Reports" on page 164.
- Read the following sections, "Option 1: Citrix Workstation Upgrade" and "Options 2: Citrix Standalone Upgrade", to determine which type of upgrade you need to perform. If your configuration is not included among these options, please contact MicroEdge Technical Support for advice.

The points above are vital to ensuring that your upgrade is successful. Please make sure that each issue has been thoroughly addressed before continuing. The options that follow describe the different types of GIFTS installations that can be upgraded using the procedures in this chapter.

Option 1: Citrix Workstation Upgrade

This type of upgrade is for clients who have installed the GIFTS workstation software on a computer running Citrix, as described in "Option 1: Installing a GIFTS Workstation on Your Server" on page 82.

In this process, you will upgrade your GIFTS system—and then upgrade the workstation that is running Citrix Presentation Server. To perform this type of upgrade, please refer to "Upgrading a GIFTS Workstation Running Citrix" on page 123.

Options 2: Citrix Standalone Upgrade

This upgrade is for systems where the entire GIFTS system has been installed on a single computer running Citrix, as described in "Option 2: Installing a Standalone System on Your Server" on page 86.

In this process, you will simply upgrade the GIFTS system on that computer, as described in "Upgrading a Standalone System Running Citrix" on page 126.

Other Upgrade Options

If neither of the two preceding options applies to your GIFTS system, please contact MicroEdge Technical Support for advice regarding your upgrade of GIFTS with Citrix Presentation Server.

System Files

For a complete list of the system files installed by the GIFTS upgrade, consult the "Installation Impact Analysis" on page 149.

How to Obtain Technical Support

If you have any difficulties during this process, please contact MicroEdge Technical Support in one of the following ways:

- by submitting an electronic support request. Go to *http://www.microedge.com/support* and log in to the support website.

- by email at *helpdesk@microedge.com*
- by phone at (877) 704-3343
- by fax at (212) 757-1784

Upgrading a GIFTS Workstation Running Citrix

This procedure describes how to upgrade the GIFTS software on a GIFTS workstation running Windows Terminal Services with Citrix Presentation Server.

Step 1: Upgrade Your GIFTS System

The first step is to upgrade all parts of your GIFTS system *except* the workstation that you use to provide access through Citrix Presentation Server. To upgrade GIFTS, please follow the instructions for your system configuration:

- Clients with a file server system should refer to the instructions in "Upgrading a GIFTS Standalone Workstation or File Server" on page 89.
- Clients with a Microsoft SQL Server or Oracle server environment should follow the instructions in"Upgrading GIFTS Client/Server Installations" on page 105.

Note: If you wish to upgrade a standalone GIFTS system, please refer to "Upgrading a Standalone System Running Citrix" on page 126.

Step 2: Disabling Remote Logons

Before upgrading GIFTS, you should disable remote logons to your Citrix Presentation Server. To do so, please follow the instructions in "Step 2: Disabling Remote Logons" on page 82. Then, proceed to the next step.

Step 3: Upgrading GIFTS on Your Citrix Server

Before You Begin: Please review the following important information regarding the upgrade of GIFTS with Citrix:

- You must launch the GIFTS Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you do not run

GIFTS Setup from within the Control Panel, GIFTS will not run under Terminal Services.

- If you are prompted to restart the computer during the upgrade procedure, choose to ***Restart later***. You must complete the entire GIFTS upgrade process and close the Add/Remove Programs utility before restarting the computer.
- At the conclusion of the GIFTS Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS upgrade is complete before closing the utility.

To upgrade GIFTS on your Citrix Presentation Server:

1. From the Windows **Start** menu of the computer running Citrix, choose **Control Panel ➤ Add or Remove Programs**.
2. In the left column, click **Add New Programs**. The options for adding programs are displayed.
3. Click the **CD or Floppy** button.
4. **Browse** to and run the Setup program located in the GIFTS directory of your GIFTS file server.

   Example: If you designated P:\GIFTS as your GIFTS directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Setup process begins.
5. You may now upgrade GIFTS, as described in the section that applies to your configuration of GIFTS:

   Important Reminder: You *must* run the GIFTS Setup program from within the Add/Remove Programs Control Panel.

   - **File server installations** – please refer to "Step 4: Upgrading Other GIFTS Workstations" on page 102.
   - **SQL Server and Oracle installations** – please refer to "Step 4: Upgrading Your GIFTS Workstations" on page 115.

When you have finished upgrading the GIFTS workstation software, you may proceed to the next step.

Step 4: Copying the GIFTS Help Files

To make the GIFTS online help available to each user, this procedure describes how make the GIFTS help files available to users who access GIFTS through Citrix Presentation Server:

1. Using Windows Explorer, open the WINDOWS or WINNT folder of your Windows Terminal Server. For example:

   `M:\WINDOWS`

2. Copy the following GIFTS help files:

empadmin.chm	gfwbudget.chm
empgifts.chm	gfwgam.chm
gfw60.chm	gifts.chm
gfwadmin.chm	mesupp.chm
gfwap.chm	ChartFX_98_GUI.hlp

3. Paste the GIFTS help files to the virtual WINDOWS or WINNT directory of *each user* who uses GIFTS through Citrix. The locations of these virtual directories follow this pattern:

   `M:\Documents and Settings\[User Name]\WINDOWS`

   (where [User Name] *is the network name or login ID for each user)*

The GIFTS help files are now available to your users. Please continue to the next step to complete your upgrade.

Step 5: Completing Your Upgrade

To complete your upgrade, just re-enable logons to your server. Your upgrade of GIFTS with Citrix is complete!

Upgrading a Standalone System Running Citrix

This procedure describes how to upgrade a standalone GIFTS system on a computer running Citrix Presentation Server. Using this procedure, all components of GIFTS will be upgraded—including the GIFTS database. This option does not apply to client/server systems.

Step 1: Disabling Remote Logons

Before upgrading GIFTS, you should disable remote logons to your Citrix Presentation Server. To do so, please follow the instructions in "Step 2: Disabling Remote Logons" on page 82. Then, proceed to the next step.

Step 2: Update Your GIFTS Configuration File

If you received a new Configuration file from MicroEdge with your upgrade, perform the following procedure to update your configuration. If you do not update your configuration file, any new features that you purchased—such as MyGIFTS—will not be enabled.

Note: Only clients who purchase additional modules receive a Configuration tFile with their upgrade package; *most clients do not receive a new Configuration File*. If you did not receive a Configuration file, please skip to "Step 3: Upgrading GIFTS".

To update your GIFTS configuration file:

1. Copy the gifts.cfg file from your Configuration File to the \GIFTS directory on your server. A message warns that you are overwriting an existing file. Click **Yes** to continue.
2. In the \GIFTS directory, right-click on the gifts.cfg file and select **Properties**.
3. On the **General** tab of the properties window, clear the check box for the Read-only option. (If the Read-only option is already off, you do not need to make any changes.)
4. Click **OK** to save the gifts.cfg properties.

Step 3: Upgrading GIFTS

Before You Begin: Please review the following important information regarding the upgrade of GIFTS with Citrix:

- You must launch the GIFTS Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you do not run GIFTS Setup from within the Control Panel, GIFTS will not run under Terminal Services.
- If you are prompted to restart the computer during the upgrade procedure, ***choose to restart later***. You must complete the entire GIFTS upgrade process and close the Add/Remove Programs utility before restarting the computer.
- At the conclusion of the GIFTS Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS upgrade is complete before closing the utility.

To upgrade a standalone GIFTS system on your Terminal Server:

1. From the Windows **Start** menu, choose Control Panel ➤ Add or Remove Programs.
2. In the left column, click **Add New** Programs. The options for adding programs are displayed.
3. Click the **CD or Floppy** button.
4. Browse to the location of the GIFTS Upgrade files and run the *Setup* file.
5. Click **Next**. The GIFTS Setup process begins.

   Important Reminder: You *must* run the GIFTS Setup program from within the Add/Remove Programs Control Panel.
6. You may now continue with your GIFTS upgrade. To do so, please follow the steps in "Step 2: Upgrading Program Files" on page 94.
7. If you did not elect to upgrade your database during the previous step, please follow the instructions in "Step 3: Manually Upgrading the Database" on page 96 to do so.

When you have finished upgrading GIFTS, you may proceed to the next step.

Step 4: Copying the GIFTS Help Files

To make the GIFTS online help available to each user, this procedure describes how make the GIFTS help files available to users who access GIFTS through Citrix Presentation Server:

1. Using Windows Explorer, open the WINDOWS or WINNT folder of your Windows Terminal Server. For example:

   `M:\WINDOWS`

2. Copy the following files:

empadmin.chm	gfwbudget.chm
empgifts.chm	gfwgam.chm
gfw60.chm	gifts.chm
gfwadmin.chm	mesupp.chm
gfwap.chm	ChartFX_98_GUI.hlp

3. Copy the GIFTS help files to the virtual WINDOWS or WINNT directory of *each user* who uses GIFTS through Citrix. The locations of these virtual directories follow this pattern:

   `M:\Documents and Settings\[User Name]\WINDOWS`

   (where [User Name] *is the network name or login ID for each user)*

The GIFTS help files are now available to your users. Please continue to the next step to complete your upgrade.

Step 5: Completing Your Upgrade

To complete your upgrade, just re-enable logons to your Presentation Server. Your upgrade of GIFTS with Citrix is complete!

9 Maintenance, Security, and Data Integrity

This chapter describes the diagnostic and maintenance utilities provided for GIFTS, and the GIFTS security features. It also describes the products used to develop the GIFTS software.

In This Chapter

GIFTS Diagnostics Utility **130**

Isolating System File Conflicts **131**

Maintaining Your Database **132**

Budget Diagnostics Utility **134**

Security and Data Integrity **135**

System Architecture **137**

GIFTS Diagnostics Utility

The GIFTS Diagnostics utility is designed to assist MicroEdge's Technical Support staff in identifying and resolving problems in your GIFTS installation. By using these diagnostic tools, you can provide most of the information Technical Support needs to assist you, without the need to involve additional technical staff or consultants.

The utility includes the following features:

- **System Information:** indicates the type of database used by your installation of GIFTS, and provides a summary of system information like memory, available resources, and the current Windows Regional Settings.
- **GIFTS Information:** a summary of all of the GIFTS-related files, used to identify problematic versions or duplicate files. This can be used to list the system files installed with GIFTS, or to find specific files.
- **List System Files:** displays the contents of files that store system information, including the AUTOEXEC.BAT, CONFIG.SYS, gifts.ini, and GIFTS.SYS files.
- **Database Test:** used to verify that the workstation's connection to the database is valid.
- **Budget Verifier:** used to verify data used by the optional Budget Module.
- **Template Creation Test** and **Merge Letter Test:** used to test the ability of GIFTS to created merged correspondence with Microsoft Word.
- **IGAM Application Retrieval Test:** used to verify that the optional Internet Grant Application Module can connect to the IGAM server and retrieve online applications.

To access this utility:

1. Log in to any GIFTS application.
2. From the Main menu, select Help ➤ About GIFTS.
3. Click the System Info button.

Isolating System File Conflicts

You can use Microsoft's MSINFO utility to isolate the system files (such as DLLs and OCX files) that are running when errors occur. It also facilitates troubleshooting by identifying the different sets of files that are installed and running on workstations that either do, or do not, have problems.

Maintaining Your Database

The following sections describe the utilities and procedures available for maintaining your GIFTS database. Note that some responsibilities for maintaining your database depend on whether your system uses a Microsoft Access database or a client/server (Microsoft SQL Server or Oracle server) database.

File Server Database Maintenance

MicroEdge provides a Database Maintenance Tool for the maintenance and correction of the Microsoft Access database used by Essential GIFTS, standalone installations of GIFTS, and the file server version of GIFTS.

Caution: The MicroEdge Database Maintenance Tool should be used only under the direction of MicroEdge Technical Support personnel.

This tool includes the following functions:

- **Repair/Compact:** used to repair a corrupted database, and rearranges and minimizes the information to reduce fragmentation. The database may become corrupted if GIFTS quits unexpectedly (for example, if there is a power outage or a hardware malfunction). Most often, GIFTS detects and reports database corruption problems. However, MicroEdge Technical Support may recommend that you run this option to eliminate corruption as a cause for certain unexplained errors.
- **Copy into New Database Container:** MicroEdge Technical Support may recommend this option if you find the need to repair the database at frequent intervals and there is no apparent cause for corruption.
- **Zip Database:** compresses your GIFTS database in a Zip format that you can then provide to MicroEdge Technical Support for research purposes.

GIFTS users can use a task scheduler to regularly compact and repair their database.

Client/Server Database Maintenance

Users of all client/server systems (Microsoft SQL Server and Oracle) are responsible for regular maintenance and performance tuning of the GIFTS grants database. MicroEdge recommends the use of the latest versions of manufacturer-provided utility programs for this purpose.

This routine database maintenance should be performed by a trained Database Administrator (DBA) in accordance with the client/server database manufacturer's recommendations.

Important: Please make sure that your DBA is trained as a Microsoft SQL Server or Oracle Server Administrator, and is familiar with all aspects of setting up and administering the SQL Server or Oracle server environment. MicroEdge Technical Support personnel cannot provide advice or assistance related to the setup of your SQL Server or Oracle server software and/or hardware.

Recalculating Summary Data

GIFTS maintains summary data—such as the balance of a grant or the total number of payments for a grant—to maximize the speed of queries and reports. Occasionally, as users work in GIFTS, this data is not properly synchronized. This can happen for a variety of reasons, including network communication errors and hardware problems.

If you suspect that the calculations of summary data and totals in GIFTS are not synchronized, MicroEdge Technical Support may recommend that you use the Recalculate Utility to synchronize your data.

Consolidating Duplicate Records

Data entry errors can result in there being duplicate Organization or Contact records in your database. Using the GIFTS Administrator Module, you can identify duplicate records and consolidate the links to the Requests and Contacts associated with the duplicates into one record. Please refer to the *GIFTS Administrator's Guide* for more information.

Budget Diagnostics Utility

The Budget Module Diagnostics Utility helps MicroEdge Technical Support locate any problems you may encounter with data for the optional Budget Module.

Security and Data Integrity

This section discusses the security and integrity of your data in the GIFTS environment. GIFTS Connections administrators face additional data security considerations, especially if they have MyGIFTS and/or ReviewerCONNECT users accessing GIFTS data over the Internet. For information about GIFTS Connections data security considerations, please refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*.

Security Levels

GIFTS has advanced security features that allow multi-level program access based on the rights assigned to an individual or a specified group of users. This security is established and maintained by the GIFTS Administrator.

Password Security

GIFTS provides for the creation and maintenance of unique User IDs and passwords. GIFTS also supports Windows NT integrated security, which permits grantmakers who use Windows servers to skip the GIFTS login process: each user's Windows login ID is automatically read and used by GIFTS. Similar login integration is provided for Microsoft SQL Server and Oracle databases. For more information, please refer to the *GIFTS Administrator's Guide*.

Rollback Recovery

GIFTS offers the highest level of reliability and data-integrity possible in both its file server and client/server configurations by utilizing engine-level "transaction commit and rollback" technology. This means that if your computer is halted in the middle of a GIFTS fund transfer between two budget categories, *there is no data corruption* since GIFTS only *commits* the changes once the *entire* transaction is completed successfully.

Audit Trail

GIFTS maintains a log of the last date of user input for all database records, as well as a detailed record of all critical system transactions by user, date, and time.

File Server Access Rights

GIFTS requires that all users have full access rights to the network directory and subdirectories where GIFTS is installed.

Client/Server Access Security

GIFTS provides its own internal login security, and does not handle security for Microsoft SQL Server and/or Oracle server. While both SQL and Oracle have complex security features, GIFTS does not interact with them. The GIFTS login used for SQL or Oracle must be the "owner" of the database or tables, and therefore has all of the permissions of an "owner."

Database Backup and Recovery

It is the client's responsibility to conduct nightly verified backups of all system data, to rotate media appropriately, and to replace tapes on the schedule that is recommended by the manufacturer. We also recommend that this essential data be stored both on and off site in secure fireproof and waterproof media safes.

For detailed information about backing up your GIFTS system, please search for "backups" in the MicroEdge Solutions Knowledgebase.

System Architecture

GIFTS has been designed following the principles specified in the *Microsoft Windows Interface Application Design Guide* and the *Microsoft Windows Software Development Kit*.

GIFTS 6.6 uses a Microsoft Access database for the standalone and file server editions. This database is stored in a standard .MDB file that can be read using the Microsoft Access application.

Caution: Never open the production copy of your database with Microsoft Access. If an experienced Access user wants to run queries or use other Access functions to analyze your data, create a copy of your database for these purposes. As described in the *Client Resource Guide*, MicroEdge will not support your GIFTS software if data is entered or modified through any means except the application software provided by MicroEdge.

For the client/server editions, the database is either a Microsoft SQL Server or Oracle server database that adheres to industry standards and an open architecture. All GIFTS databases are compatible with the version or versions of Business Objects Crystal Reports listed in the GIFTS Compatibility Fact Sheet on the GIFTS PowerME website (The Professional edition of Crystal Reports is required for client/server systems.)

Note that all editions of GIFTS provide the same user interface and functionality regardless of the database used. GIFTS makes extensive use of OLE and DDE links to launch compatible word processing and spreadsheet applications. It also adheres to the MAPI, VIM, and SMTP/POP standards for its links to compatible email packages. For a complete list of compatible applications, please refer to the latest version of the GIFTS Compatibility Fact sheet on the GIFTS PowerME website.

10 Expanding Your GIFTS System

This chapter describes how you can expand the functionality of GIFTS with optional modules, customizations, trade-ups, migration, or by linking GIFTS to an external system.

In This Chapter

Optional Modules and Components 140
GIFTS Connections 143
System Trade-up and Migration 144
Links to External Systems 146

Optional Modules and Components

The following optional modules and add-ons can be used with any GIFTS installation.

Internet Grant Application Manager

The Internet Grant Application Manager (IGAM) enables GIFTS to receive grant applications and requirements through the Internet. Incoming applications are stored separately from the main GIFTS database, and applications can be rejected or transferred to GIFTS for further review. After retrieval, requirements directly update GIFTS records. IGAM also includes a Forms Manager and Internet Hosting Service that you can use to create, post, and manage application and requirement forms.

GIFTS Plus Pack .NET Extension

The GIFTS Plus Pack .NET Extension is the foundation of the GIFTS Plus Pack add-on utilities, which extend the capabilities of GIFTS features like batch processing, charting, and requirement scheduling.

Employee GIFTS

Employee GIFTS can be used to administer matching gifts and volunteer gifts programs:

- Matching GIFTS streamlines the management and administration of corporate matching gifts programs. You can reduce the amount of time you spend entering match requests, checking eligibility, and making payments.
- Volunteer GIFTS streamlines the management and administration of gifts given for your employees' volunteer projects.

Information about your gifts, payments, and employee donors is integrated into the main GIFTS system and becomes part of your overall grants-tracking data.

Check Writer

You can use the GIFTS Check Writer to print checks directly from GIFTS. The Check Writer prints GIFTS data—such as the grantee Organization Name, Project Title, and Payment Amount—on your checks and maintains a detailed check register for each bank account from which you draw funds.

Accounts Payable Links

You can use A/P links to generate export files that contain your payment data. These files can be imported into your accounting software, which is used to generate invoices and checks. After your checks have been cut, you can import your check data back to GIFTS.

Specific links are available for many popular accounting packages, including Blackbaud Accounts Payable, Quicken®, and QuickBooks®.

Document Manager

The Document Manager takes grantmakers a step closer to the "paperless office." This sophisticated file management system allows you to link externally created documents and other files to their associated grantee Organization, Contact, or Request.

Reviewers Module

The GIFTS Reviewers Module allows you to schedule reviews, gather feedback, interact with reviewers, and make decisions on proposals. You can use it to process review packets for external reviewers, or to set up an internal review process among your staff members. If you would like your reviewers to have access to the system through the Internet, please refer to "ReviewerCONNECT" on page 143 for more information.

GIFTS Customizer

The GIFTS Customizer enables you to design additional data entry tabs for GIFTS records. In these additional tabs you can display fields containing information that is unique to your organization. The custom data entry

fields can contain text, numeric, currency, date, or coded values—as well as data calculated from other fields in your system, or even live web content.

These custom tabs can be added to Organizations, Contacts, Activities, Affiliations, Requirements, Payments, and Requests—in fact, you can set up a different custom tab for each Request Type. If you use the optional Reviewers Module, you can also customize Review records.

Branch Security

Branch Security is an option that allows grant makers with multiple sites or branches and separate giving programs to capture all of their information in a centralized database, while preventing users from different branches from editing (or viewing, if desired) each other's data. This security is established and maintained from within the GIFTS Administrator Module.

Budget Module

The Budget Module provides up-to-the-minute financial information about budgeted, committed, and paid funds, as well as current budget balances.

Import Module

The standard GIFTS product includes a Matching Gifts Summary import, and Employee GIFTS includes a Donor import. If these imports do not meet your needs, the Import Module expands your options for importing data from external systems into GIFTS. This module includes Detailed Request, Detailed Matching Gifts, Organization, Contact, and Grant Summary imports.

GIFTS Connections

GIFTS Connections makes it possible to access and edit data in your GIFTS database through a web browser. The GIFTS Connections Server (GCS) retrieves data from your GIFTS database and formats it using HTML for display in a web page.

In turn, GCS can also receive data from users connecting through the web interface and save it to GIFTS. This allows users the flexibility to connect to your GIFTS system from anywhere while your organization maintains a single database.

The GIFTS Connections Server is the hub of the GIFTS Connections suite of products. With the server translating data to browser-ready form—and back again—GIFTS Connections modules designed for specific audiences are ready to be added. Two modules have so far been released:

MyGIFTS

MyGIFTS is designed to give members and employees of your organization convenient and versatile access to your GIFTS database from remote locations. Whether connecting through an intranet or over the Internet, your users have a way to interact with GIFTS through their web browsers.

MyGIFTS administrators can customize user access and permissions, making MyGIFTS a perfect tool for program officers, executives, and casual users who need limited, easy-to-use access to GIFTS.

ReviewerCONNECT

If you have the GIFTS Reviewers Module, ReviewerCONNECT gives your proposal reviewers convenient and versatile access to your proposals from remote locations. Whether connecting through an intranet or over the Internet, your reviewers have a way to access, edit, and submit reviews through their web browsers.

System Trade-up and Migration

Trading Up from Essential GIFTS to GIFTS

You can upgrade from Essential GIFTS to the standalone or file server version of GIFTS by simply installing a new system configuration file. Once provided by MicroEdge and properly installed, the upgrade occurs automatically. All existing grant data, codes, document templates, and reports continue to operate as before. No database conversion is required.

Trading Up from Standalone to File Server

To upgrade a standalone GIFTS system to a network file server version, you can obtain a new configuration file from MicroEdge and then re-install GIFTS with the new configuration. All existing grant data, codes, document templates, and reports continue operate as before. No database conversion is required.

Trading Up to Microsoft SQL Server or Oracle Server

The following points describe how clients can upgrade from a standalone or file server version of GIFTS (that uses a Microsoft Access database) to a client/server system.

Important: When upgrading from an Access system to either Microsoft SQL Server or Oracle server, there may be a significant impact on modified standard reports and custom reports. Consider this very carefully before upgrading.

- **Database Conversion:** When you purchase a client/server license from MicroEdge, you'll receive a reconfiguration package that includes a utility you can use to copy your data from the Access database to the SQL or Oracle database.
- **Impact on Standard Reports:** All Access-compatible standard reports are replaced by client/server-compatible reports during the reconfiguration process. No standard reports are lost; however, since all reports are

overwritten, any changes that have been made to the standard reports are lost.

- **Impact on Custom Reports:** Business Objects Crystal Reports allows you to change the database type for your report. Although this feature can be used to convert your reports, it is an advanced feature and is not supported by MicroEdge Technical Support. If you need assistance with this process, please contact Business Objects directly.

  Custom reports created for Microsoft Access systems by MicroEdge are not compatible with the client/server systems, and will have to be re-created. This is a billable service, and the conversion of any critical reports should be scheduled well in advance of the "live" date.

- **Impact on the Crystal Reports:** If you use Crystal Reports on any computer that is also running GIFTS, please note that for client/server systems you must use the Professional version of Crystal Reports.

Migrating Server or Server Operating System

Upon installation, GIFTS creates configuration files that store the location of the GIFTS programs, data, and document templates. When you migrate your GIFTS system to another file server, or if you upgrade the operating system on your file server, you should ensure that these components can be found by GIFTS. For more information about migrating GIFTS to a new file server, please contact MicroEdge Technical Support.

Important: When migrating to another server or when upgrading to a new server operating system, be sure to map the upgraded system's drive to the same drive letter used by the previous system.

If you use the optional GIFTS Document Manager and change the directory name or mapped drive letter that externally attached documents are stored in, their links to GIFTS must be updated to reflect the new drive mapping.

Links to External Systems

For a complete list of compatible external programs, please refer to the Compatibility Fact Sheet by going to *http://www.microedge.com* and loggig in to the GIFTS PowerME website.

OLE Links

MicroEdge provides OLE links to Microsoft Word and Microsoft Excel. When these products are properly installed, GIFTS can—at the click of a button—automatically launch these companion products, export data, and run routine tasks such as merging GIFTS data into correspondence.

Commercial Accounting Systems

The GIFTS A/P Module provides built-in links to many popular commercial accounting and check writing programs by exporting and importing data using ASCII files suitable for use with the supported accounting systems. In addition, there is a link with BlackBaud's Accounts Payable.

Custom Accounting Systems

MicroEdge offers clients the capability to contract with MicroEdge for the development of a custom export from GIFTS to any in-house or new commercial accounting package. The link will create an ASCII file that contains the data that you wish to import into the accounting system. Please contact your MicroEdge representative for information about these services.

Note: MicroEdge Product Specialists can help you define the data elements to be exported from and imported into GIFTS. We recommend that you consider budgeting for this service.

You may also choose to arrange for the development of an export link from your accounting system to GIFTS in order to automate the entry of the Check Number and Check Date generated by your accounting system. It is the client's responsibility to contract with the developer of the accounting system or a skilled programmer to develop and document this export link in

accordance with MicroEdge's published import specifications. MicroEdge does not provide this service.

In some cases, custom accounting links must be reviewed and updated when you upgrade your accounting software. If this needs to be done, MicroEdge can provided these consulting services for a fee.

Exporting Data

Users can export data from the GIFTS Organizer to Microsoft Excel or an HTML file. In addition, the report viewers used by GIFTS for ad hoc reports, standard reports, and custom reports enable you to export data to the data formats listed in the GIFTS Compatibility Fact Sheet on the GIFTS PowerME website.

As with any type of export, some formatting may be lost during the export process.

Linking to Other Products

All versions of GIFTS can be linked in *read-only mode* to other third party products. Clients are responsible for the development, testing, documentation, and ongoing support of such links. Clients are also responsible for updating such links if MicroEdge modifies database structures in future releases of GIFTS.

Caution: When linking to other systems, ensure that GIFTS data *is not* modified by any application other than GIFTS. The GIFTS database can be corrupted if another application modifies it. As described in the *Client Resource Guide*, MicroEdge will not support your GIFTS software if data is entered or modified through any means except the application software provided by MicroEdge.

11 Installation Impact Analysis

The following impact analyses detail the system files that are installed with each MicroEdge application included on the installation download. Files are listed according to the directory where they will be installed.

Note: The GIFTS Setup process overwrites existing system files only when the file to be installed is dated later than the existing file.

In This Chapter

GIFTS 6.6 Impact Analysis **150**

GIFTS 6.6 Impact Analysis

The following tables detail the system files that are installed with GIFTS 6.6 and Essential GIFTS 6.6. The files are listed according to the directory where they will be installed. If no version number is listed for a file, its manufacturer did not assign a version number to it.

In cases where the directories differ for computers running different versions of Windows, the appropriate directories for each version are noted.

Windows Directory – GIFTS Workstations

This file is installed to the \Windows directory on Windows workstations.

Filename	Version	File Date	Size (in Kb)
GiftsCst.DCT		6/14/2000	1

System32 Directory – GIFTS Workstations

On Windows workstations, these are installed to the \Windows\System32 directory.

Self-Registering Files

Filename	Version	File Date	Size (in Kb)
AniGIFV6.ocx	2.0.0.19	4/3/2002	36
arpro2.dll	2.3.2264	1/21/2005	1,793
ARVIEW2.OCX	2.3.2264	1/21/2005	599
Atl.dll	3.0.8168.0	6/16/1998	68
c1sizer.ocx	8.0.20071.39	10/2/2006	352
Cfx4032.ocx	4.0.21.0	2/1/2001	557
COMCAT.DLL	5.1.2181.1	7/26/2000	4
Comctl32.ocx	6.0.81.5	5/22/2000	595
Comdlg32.ocx	6.0.84.18	5/7/1999	137
CRYSTL32.OCX	8.0.0.4	12/10/1999	828
DSSOCK32.OCX	1.65.1.1	2/17/1996	48
dzocx32.ocx	1.0.0.5	11/18/1996	72
exclexpt.dll	2.3.2264	1/21/2005	350

Filename	Version	File Date	Size (in Kb)
htmlexpt.dll	2.3.2264	1/21/2005	542
https62.ocx	6.2.0.3071	5/29/2008	219
IGToolBars50.ocx	5.0.1.6	3/6/2002	482
ipdaems62.ocx	6.2.0.3071	5/29/2008	169
ipports62.ocx	6.2.0.3071	5/29/2008	165
MEDate.ocx	1.0.0.0	9/30/2004	120
meEmail.dll	1.1	3/22/2006	120
mem32x30.ocx	3.00.38	9/4/2007	320
METCPCommunications.dll	1.0.0.0	10/18/2002	184
METimer.dll	1.0.0.0	10/18/2002	28
MFC40.DLL	4.1.0.6140	7/26/2000	903
MFC42.DLL	6.0.8665.0	7/26/2000	973
Mmail32.ocx	5.1.0.7	2/2/2000	99
MSADODC.OCX	6.0.88.4	5/22/2000	117
MSBIND.DLL	6.0.88.62	7/15/2000	76
mscomctl.ocx	6.00.88.62	5/22/2000	1,042
mshtml.dll	6.0.2800.1170	2/24/2003	2,723
msoutl32.ocx	4.0.29.22	10/6/1999	77
msscript.ocx	1.0.0.7615	8/29/2002	105
MSVBVM50.DLL	5.2.82.44	12/6/1999	1,324
MSVBVM60.DLL	6.0.88.77	5/26/2000	1,356
MSWINSCK.OCX	6.0.89.88	12/6/2000	107
NPO_IGAM_Component.ocx	1.0.0.0	11/22/2002	804
OC30.DLL	3.20.0.0	5/22/1995	626
oleaut32.dll	2.40.4514.1	7/26/2000	601
OLEPRO32.DLL	5.1.4514.1	7/26/2000	161
OUTSIDEX.OCX	8.1.9.4408	2/20/2007	200
pdfexpt.dll	2.3.2264	1/21/2005	366
Richtx32.ocx	6.0.88.4	5/22/2000	200
rtfexpt.dll	2.3.2264	1/21/2005	206
sccanno.dll		12/8/2006	45
scrrun.dll	5.1.0.5010	7/22/2002	145
SfxBar.dll	1.0.15.1	1/19/2001	127
shdocvw.dll	6.0.2800.1170	2/24/2003	1,309
smtps62.ocx	6.2.0.3071	5/29/2008	189

Filename	Version	File Date	Size (in Kb)
soaps62.ocx	6.2.0.3071	5/29/2008	247
Spell8.ocx	8.0.20071.65	10/2/2006	291
ssdw3bo.ocx	3.1.3.4	3/19/2001	865
SSLstBar.ocx	1.0.2.5	3/29/1999	253
ssmedt32.dll	1.0.0.38	10/26/1998	71
ssprn32.dll	1.0.0.34	5/6/1998	71
ssr2c.dll	1.0.2.14	3/8/2001	96
Tab32x30	3.1.0.0	5/30/2000	430
textexpt.dll	2.3.2264	1/21/2005	126
THREED20.OCX	2.0.1.15	7/1/1997	324
tidate8.ocx	8.0.20071.24	12/20/2006	369
tiffexpt.dll	2.3.2264	1/21/2005	254
tishare8.dll	8.0.20071.24	12/20/2006	131
titime8.ocx	8.0.20071.24	12/20/2006	344
TList7.ocx	7.52	12/29/2004	905
Vsflex8.ocx	8.0.20071.237	12/19/2006	631
vsprint8.ocx	8.0.20071.130	12/5/2006	459
vsvport8.ocx	8.0.20071.130	12/5/2006	233
webuploads62.ocx	6.2.2286.0	4/5/2006	227
webupls62.ocx	6.2.0.3071	5/29/2008	239
XceedSco.dll	1.0.80	6/26/2001	241
XceedZip.dll	4.2.20.61	1/9/2001	316

Other Files

Filename	Version	File Date	Size (in Kb)
apigid32.dll	4.0.0.0	10/6/1999	111
ASYCFILT.DLL	2.40.4514.1	7/26/2000	141
comctl32.dll	5.81.4807.2300	7/23/2001	541
compobj.dll	2.10.35.35	11/29/2000	30
crbas19.dll	4.20.0.12	7/25/2003	372
crbas19r.dll	4.20.0.12	7/25/2003	40
cror818.dll	4.10.0.4	4/9/2002	212
cror818r.dll	4.10.0.4	4/9/2002	20
cror818s.dll	4.10.0.4	4/9/2002	52
cror819.dll	4.20.0.12	8/6/2003	224
cror819r.dll	4.20.0.12	8/6/2003	20

Filename	Version	File Date	Size (in Kb)
cror819s.dll	4.20.0.12	8/6/2003	52
crora18.dll	4.10.0.4	4/9/2002	280
crora18r.dll	4.10.0.4	4/9/2002	24
crora18s.dll	4.10.0.4	4/9/2002	52
CRPE32.DLL	8.0.0.441	6/5/2000	5,216
crutl19.dll	19.0.0.7	8/6/2003	376
crutl19r.dll	19.0.0.7	8/6/2003	24
CTL3D32.DLL	2.31.0.0	9/16/1995	27
cxlibw-1-6.dll	10.0.0.388	12/9/2003	1,221
dzip32.dll	3.0.0.15	4/14/1997	122
Edt32x30.ocx	3.0.0.38	9/4/2007	1,300
GAPI32.DLL	5.5.2803.0	12/1/1999	96
gdiplus.dll	5.1.3102.1360	5/4/2004	1,607
idsnotes.dll	1.0.0.1	10/18/1999	44
IMM32.DLL	5.1.2180.1	7/26/2000	94
MFCANS32.DLL	3.2.2.0	10/6/1999	131
mshtml.tlb	6.0.2800.1106	8/29/2002	1,319
Msldbusr.dll	1.0.0.0	11/9/1998	19
msvcirt.dll	4.20.0.6201	8/3/1996	73
msvcp60.dll	6.0.8168.0	2/1/2000	393
msvcrt.dll	6.1.8637.0	7/26/2000	289
msvcrt20.dll	2.12.0.0	7/26/2000	248
msvcrt40.dll	4.2000.0.6201	7/26/2000	64
ole2.dll	2.10.35.35	11/29/2000	39
ole2disp.dll	2.10.3050.1	11/29/2000	166
ole2nls.dll	2.10.3050.1	11/29/2000	150
OLEDLG.DLL	5.1.2134.1	7/26/2000	116
qecr.lic		3/31/1998	1
RICHED20.DLL	5.30.23.1203	7/26/2000	422
RICHED32.DLL	5.1.2134.1	7/26/2000	4
shlwapi.dll	6.0.2800.1106	8/29/2002	393
ssdw3b32.ocx	3.1.3.4	3/19/2001	865
STDOLE2.TLB	2.40.4514.1	7/26/2000	17
storage.dll	2.10.35.35	11/29/2000	5
tibase8.dll	8.0.20071.24	12/20/2006	549
typelib.dll	2.10.3029.1	11/29/2000	174
unicows.dll	1.0.4018.0	4/21/2003	240

Filename	Version	File Date	Size (in Kb)
usp10.dll	1.409.2600.1106	8/29/2002	332
VBAMAP32.DLL	2.1.0.0	8/11/1995	15
winsock.dll	3.10.0.103	8/23/2001	3

Outside In™ Files – GIFTS Workstations

These files are related to the Outside In viewer installed with GIFTS. They are installed to the \Windows\OutsideIn or \WINNT\OutsideIn directory, but can be moved to a different directory in the workstation's system path.

Filename	Version	File Date	Size (in Kb)
adinit.dat		12/8/2006	260
CMMAP000.BIN		12/8/2006	364
DEBMP.DLL	8.1.9.4389	2/20/2007	77
DEHEX.DLL	8.1.0.4037	12/8/2006	25
DEMET.DLL	8.1.9.4418	2/20/2007	237
DESS.DLL	8.1.9.4418	2/20/2007	145
DETREE.DLL	8.1.5.4266	12/8/2006	77
DEWP.DLL	8.1.9.4418	2/20/2007	213
IBFPX2.FLT		12/8/2006	77
IBGP42.FLT	8.1.0.4037	12/8/2006	37
IBJPG2.FLT	8.1.0.4037	12/8/2006	61
IBPCD2.FLT	8.1.0.4037	12/8/2006	125
IBPSD2.FLT	8.1.0.4037	12/8/2006	37
IBXBM2.FLT	8.1.0.4037	12/8/2006	33
IBXPM2.FLT	8.1.0.4037	12/8/2006	53
IBXWD2.FLT	8.1.0.4037	12/8/2006	37
IMCD32.FLT	8.1.0.4037	12/8/2006	93
IMCD42.FLT	8.1.0.4037	12/8/2006	109
IMCD52.FLT	8.1.0.4037	12/8/2006	109
IMCD62.FLT	8.1.0.4037	12/8/2006	125
IMCD72.FLT	8.1.0.4037	12/8/2006	189
IMCD82.FLT	8.1.0.4037	12/8/2006	189
IMCDR2.FLT	8.1.0.4044	12/8/2006	33
IMCM52.FLT	8.1.0.4037	12/8/2006	53
IMCM72.FLT	8.1.0.4037	12/8/2006	97
IMCMX2.FLT	8.1.0.4037	12/8/2006	33

Filename	Version	File Date	Size (in Kb)
IMDSF2.FLT	8.1.0.4037	12/8/2006	101
IMFMV2.FLT	8.1.0.4037	12/8/2006	61
IMGDF2.FLT	8.1.0.4037	12/8/2006	61
IMGEM2.FLT	8.1.0.4037	12/8/2006	45
IMIGS2.FLT	8.1.0.4037	12/8/2006	93
IMMET2.FLT	8.1.0.4037	12/8/2006	93
IMPIF2.FLT	8.1.0.4037	12/8/2006	57
IMPS_2.FLT	8.1.0.4044	12/8/2006	97
IMPSI2.FLT	8.1.0.4410	2/20/2007	517
IMPSZ2.FLT	8.1.0.4037	12/8/2006	33
IMRND2.FLT	8.1.0.4037	12/8/2006	37
ISGDI32.DLL	8.1.0.4037	12/8/2006	1,133
LTSCSN10.DLL	1.2.7.82	12/8/2006	103
LWPAPIN.DLL		12/8/2006	1,531
LWPAPIPN.DAT		12/8/2006	183
OSWIN32.DLL	8.1.9.4407	2/20/2007	41
SCCANNO.DLL	8.1.5.4149	12/8/2006	45
SCCCA.DLL	8.1.5.4266	12/8/2006	33
SCCCH.DLL	8.1.9.4389	2/20/2007	73
SCCDU.DLL	8.1.9.4422	2/20/2007	261
SCCFA.DLL	8.1.9.4419	2/20/2007	93
SCCFI.DLL	8.1.9.4421	2/20/2007	89
SCCFMT.DLL	8.1.5.4189	12/8/2006	53
SCCFUT.DLL	8.1.9.4418	2/20/2007	205
SCCIND.DLL	8.1.9.4418	2/20/2007	53
SCCLO.DLL	8.1.9.4077	2/20/2007	129
SCCOLE.DLL	8.1.9.4389	2/20/2007	29
SCCTA.DLL	8.1.5.4204	12/8/2006	29
SCCUT.DLL	8.1.9.4421	2/20/2007	405
SCCVW.DLL	8.1.9.4407	2/20/2007	205
VSACAD.DLL	8.1.5.4287	12/8/2006	1,397
VSACS.DLL	8.1.0.4037	12/8/2006	41
VSAMI.DLL	8.1.0.4051	12/8/2006	69
VSBDR.DLL	8.1.0.4037	12/8/2006	29
VSBMP.DLL	8.1.9.4407	2/20/2007	37
VSCGM.DLL	8.1.0.4037	12/8/2006	49
VSDBS.DLL	8.1.0.4037	12/8/2006	29

Filename	Version	File Date	Size (in Kb)
VSDEZ.DLL	8.1.0.4037	12/8/2006	33
VSDIF.DLL	8.1.0.4037	12/8/2006	29
VSDRW.DLL	8.1.0.4037	12/8/2006	37
VSDX.DLL	8.1.0.4037	12/8/2006	33
VSDXF.DLL	8.1.9.4389	8/21/2002	73
VSEMF.DLL	8.1.0.4037	2/20/2007	57
VSEN4.DLL	8.1.0.4037	12/8/2006	33
VSENS.DLL	8.1.0.4037	12/8/2006	33
VSENW.DLL	8.1.9.4389	12/8/2006	33
VSESHR.DLL	8.1.0.4037	2/20/2007	157
VSEXE2.DLL	8.1.5.4204	12/8/2006	49
VSFAX.DLL	8.1.9.4389	2/20/2007	29
VSFCD.DLL	8.1.0.4037	12/8/2006	33
VSFCS.DLL	8.1.5.4234	12/8/2006	37
VSFFT.DLL	8.1.0.4037	12/8/2006	33
VSFLW.DLL	8.1.5.4234	12/8/2006	109
VSFWK.DLL	8.1.0.4037	12/8/2006	41
VSGDSF.DLL	8.1.9.4429	2/20/2007	77
VSGIF.DLL	8.1.5.4234	12/8/2006	33
VSGZIP.DLL	8.1.5.4226	12/8/2006	37
VSHGS.DLL	8.1.0.4037	12/8/2006	49
VSHTML.DLL	8.1.9.4417	2/20/2007	93
VSHWP.DLL	8.1.9.4421	2/20/2007	77
VSHWP2.DLL	8.1.9.4259	12/8/2006	73
VSICH6.DLL	8.1.0.4037	12/8/2006	57
VSICH.DLL	8.1.9.4423	2/20/2007	89
VSIMG.DLL	8.1.0.4037	12/8/2006	29
VSIWP.DLL	8.1.0.4037	12/8/2006	33
VSJBG2.DLL	8.1.9.4389	2/20/2007	33
VSJW.DLL	8.1.0.4037	12/8/2006	33
VSLEG.DLL	8.1.0.4037	12/8/2006	37
VSLWP.DLL	8.1.9.4407	2/20/2007	137
VSLZH.DLL	8.1.0.4037	12/8/2006	41
VSM11.DLL	8.1.0.4037	12/8/2006	33
VSMANU.DLL	8.1.0.4037	12/8/2006	41
VSMCW.DLL	8.1.0.4037	12/8/2006	41
VSMIF.DLL	8.1.9.4389	2/20/2007	185

Filename	Version	File Date	Size (in Kb)
VSMIME.DLL	8.1.9.4077	2/20/2007	81
VSMM.DLL	8.1.0.4037	12/8/2006	37
VSMM4.DLL	8.1.0.4037	12/8/2006	37
VSMMFN.DLL	8.1.0.4037	12/8/2006	33
VSMP.DLL	8.1.0.4037	12/8/2006	33
VSMPP.DLL	8.1.5.4282	12/8/2006	125
VSMSG.DLL	8.1.9.4389	2/20/2007	65
VSMSW.DLL	8.1.5.4234	12/8/2006	45
VSMWKD.DLL	8.1.9.4389	2/20/2007	29
VSMWKS.DLL	8.1.9.4389	2/20/2007	29
VSMWP2.DLL	8.1.0.4037	12/8/2006	45
VSMWPF.DLL	8.1.0.4037	12/8/2006	37
VSMWRK.DLL	8.1.0.4037	12/8/2006	33
VSOW.DLL	8.1.0.4037	12/8/2006	29
VSPBM.DLL	8.1.0.4037	12/8/2006	29
VSPCL.DLL	8.1.0.4037	12/8/2006	29
VSPCX.DLL	8.1.5.4234	12/8/2006	33
VSPDF.DLL	8.1.9.4427	2/20/2007	157
VSPDFI.DLL	8.1.9.4417	2/20/2007	33
VSPDX.DLL	8.1.0.4037	12/8/2006	33
VSPFS.DLL	8.1.0.4037	12/8/2006	41
VSPGL.DLL	8.1.0.4037	12/8/2006	57
VSPIC.DLL	8.1.0.4037	12/8/2006	29
VSPICT.DLL	8.1.9.4427	2/20/2007	53
VSPNG.DLL	8.1.9.4389	2/20/2007	45
VSPNTG.DLL	8.1.0.4037	12/8/2006	29
VSPP12.DLL	8.1.9.4417	2/20/2007	73
VSPP2.DLL	8.1.9.4077	2/20/2007	65
VSPP7.DLL	8.1.9.4389	2/20/2007	73
VSPP97.DLL	8.1.9.4417	2/20/2007	145
VSPPL.DLL	8.1.0.4037	12/8/2006	37
VSPSP6.DLL	8.1.0.4037	12/8/2006	157
VSPST.DLL	8.1.5.4282	12/8/2006	69
VSPSTF.DLL	8.1.5.4149	12/8/2006	37
VSQA.DLL	8.1.0.4037	12/8/2006	33
VSQAD.DLL	8.1.0.4037	12/8/2006	37
VSQP6.DLL	8.1.0.4037	12/8/2006	49

Filename	Version	File Date	Size (in Kb)
VSQP9.DLL	8.1.9.4417	2/20/2007	65
VSRAS.DLL	8.1.0.4037	12/8/2006	29
VSRBS.DLL	8.1.0.4037	12/8/2006	33
VSRFT.DLL	8.1.0.4037	12/8/2006	33
VSRFX.DLL	8.1.0.4037	12/8/2006	33
VSRTF.DLL	8.1.9.4417	2/20/2007	145
VSSAM.DLL	8.1.0.4037	12/8/2006	33
VSSC5.DLL	8.1.5.4247	12/8/2006	37
VSSDW.DLL	8.1.0.4037	12/8/2006	33
VSSHW3.DLL	8.1.5.4247	12/8/2006	41
VSSMD.DLL	8.1.0.4037	12/8/2006	29
VSSMS.DLL	8.1.0.4037	12/8/2006	33
VSSMT.DLL	8.1.0.4037	12/8/2006	33
VSSNAP.DLL	8.1.0.4037	12/8/2006	33
VSSO6.DLL	8.1.9.4417	2/20/2007	177
VSSOC.DLL	8.1.6.4351	12/8/2006	37
VSSOI.DLL	8.1.5.4266	12/8/2006	37
VSSOI6.DLL	8.1.5.4259	12/8/2006	165
VSSOW.DLL	8.1.0.4037	12/8/2006	33
VSSPT.DLL	8.1.0.4037	12/8/2006	33
VSSWF.DLL	8.1.5.4247	12/8/2006	33
VSTAZ.DLL	8.1.0.4037	12/8/2006	37
VSTEXT.DLL	8.1.9.4389	2/20/2007	33
VSTGA.DLL	8.1.5.4234	12/8/2006	29
VSTIF6.DLL	8.1.9.4417	2/20/2007	69
VSTW.DLL	8.1.0.4037	12/8/2006	37
VSTXT.DLL	8.1.0.4037	12/8/2006	37
VSVCRD.DLL	8.1.0.4037	12/8/2006	65
VSVISO.DLL	8.1.5.4282	12/8/2006	141
VSVW3.DLL	8.1.0.4037	12/8/2006	33
VSW12.DLL	8.1.9.4417	2/20/2007	129
VSW6.DLL	8.1.9.4389	2/20/2007	117
VSW97.DLL	8.1.9.4417	2/20/2007	149
VSWBMP.DLL	8.1.0.4037	12/8/2006	29
VSWG2.DLL	8.1.0.4037	12/8/2006	45
VSWK4.DLL	8.1.5.4234	12/8/2006	85
VSWK6.DLL	8.1.5.4204	12/8/2006	113

Filename	Version	File Date	Size (in Kb)
VSWKS.DLL	8.1.5.4247	12/8/2006	45
VSWM.DLL	8.1.0.4037	12/8/2006	33
VSWMF.DLL	8.1.9.4417	2/20/2007	41
VSWML.DLL	8.1.0.4037	12/8/2006	57
VSWORD.DLL	8.1.9.4417	2/20/2007	77
VSWORK.DLL	8.1.9.4389	2/20/2007	37
VSWP5.DLL	8.1.9.4389	2/20/2007	69
VSWP6.DLL	8.1.9.4417	2/20/2007	89
VSWPF.DLL	8.1.0.4037	12/8/2006	33
VSWPG2.DLL	8.1.9.4417	2/20/2007	57
VSWPG.DLL	8.1.0.4037	12/8/2006	49
VSWPL.DLL	8.1.0.4037	12/8/2006	37
VSWPW.DLL	8.1.0.4037	12/8/2006	57
VSWS.DLL	8.1.0.4037	12/8/2006	37
VSWS2.DLL	8.1.0.4037	12/8/2006	33
VSXL12.DLL	8.1.9.4422	2/20/2007	149
VSXL5.DLL	8.1.9.4417	2/20/2007	181
VSXML.DLL	8.1.9.4389	2/20/2007	29
VSXY.DLL	8.1.0.4037	12/8/2006	37
VSYIM.DLL	8.1.0.4044	12/8/2006	33
VSZIP.DLL	8.1.0.4037	12/8/2006	37
WVCORE.DLL	8.1.5.4149	12/8/2006	65

Crystal Reports Files – GIFTS Workstations

The self-registering Crystal files listed below are installed to the following directory on each workstation: C:\Program Files\Common Files\Crystal Decisions\3.0\bin.

Filename	Version	File Date	Size (in Kb)
crviewer.dll	11.0.0.2385	2/12/2007	13007
craxdrt.dll	11.0.0.2381	2/8/2007	8213

Other Crystal files are installed here: C:\Windows\Crystal.

Filename	File Date	Size (in Kb)
u25total.dll	03/31/1998	60
U2fdif.dll	12/07/1999	37
U2fhtml.dll	01/06/2000	33
U2frtf.dll	01/26/2000	123
U2fwks.dll	12/07/1999	41
U2fwordw.dll	12/07/1999	106
U2fxls.dll	01/26/2000	209
u2lsamp1.dll	12/07/1999	25
U2LSTR.DLL	09/06/1995	33
U2LSTRNG.DLL	11/06/1995	27
u2ltec1.dll	09/06/1995	29

12 Custom Reports

This chapter applies only to users who use or intend to use Business Objects® Crystal Reports or another third-party report writer to create custom reports for GIFTS. If you do not intend to use Crystal Reports or another report writer, you may ignore this chapter.

In This Chapter

Creating Custom Reports.....**162**

How GIFTS Upgrades Affect Custom Reports.....**163**

Compatibility with Crystal Reports **164**

Upgrades to Crystal Reports **165**

Creating Custom Reports

To meet your reporting needs, the GIFTS Report Library includes more than 300 standard reports. For a complete list of these reports, please refer to *Using GIFTS Reports*.

You can also generate ad hoc reports from the GIFTS Organizer, as described in the *GIFTS User's Guide*. The ad hoc reporting feature was significantly upgraded with the release of GIFTS 6, including enhanced options for formatting, sorting, and grouping data in reports—as well as an expanded scope of fields that you can report on.

If you need additional reports, you can use any third party report designer package to create GIFTS reports. MicroEdge can support your use of these products by providing detailed documentation of the GIFTS database structures and by answering questions related to that document.

MicroEdge also offers a fee-based service to develop custom reports and to upgrade client-modified reports. You should schedule the creation or conversion of any critical reports well in advance of the "live" date. For detailed information about our support policies and programming services, please refer to the *Client Resource Guide*.

Note: If you want to modify the standard reports provided in the GIFTS Report Library, you must use Crystal Reports. Please refer to "Compatibility with Crystal Reports" on page 164 for compatibility information.

How GIFTS Upgrades Affect Custom Reports

When you upgrade any GIFTS or Essential GIFTS product, there is the potential for incompatibilities with custom reports and/or standard reports that have been modified by Crystal Reports.

Impact on All Custom Reports

Changes to the functionality and database structure of GIFTS may necessitate changes to your custom reports. To determine whether database changes to GIFTS will impact your custom reports, review the *Database Schema* document for the version of GIFTS to which you plan to upgrade.

Note: The *Database Schema* is currently not available in electronic format. Please contact MicroEdge Technical Support to request this document.

Impact on Crystal Reports Users

The version of Crystal Reports you are using must always be supported by your GIFTS installation. GIFTS 6.6 is compatible with the versions of Crystal Reports listed in the Compatibility Fact Sheet available on the GIFTS PowerME website. Be sure to choose the appropriate version of Crystal Reports when you upgrade GIFTS.

New versions of GIFTS often include new standard reports or updates to existing standard reports. If you have modified standard reports, ensure that the modified version does not have the same filename as the original template. If you do not use a new filename, the installation process may overwrite your custom report as it updates your standard reports.

Compatibility with Crystal Reports

This section applies to clients who either:

- Plan to install both Crystal Reports and GIFTS on the same workstation
- Plan to use Crystal Reports to create or modify reports

All other clients can skip this section.

The GIFTS installation process installs Crystal Reports viewer to run many of the standard reports in the GIFTS Report Library. Due to the presence of this viewer, GIFTS is not compatible with versions of Crystal Reports that are not listed on the GIFTS 6.6 Compatibility Fact Sheet by going to the GIFTS PowerME website.

Caution: The presence of an incompatible version of Crystal Reports on a GIFTS workstation will interfere with the proper performance of both GIFTS and Crystal Reports.

MicroEdge recommends the Standard Edition of Crystal Reports for use with standalone and file server versions of GIFTS. The Professional Edition is required for clients using the client/server version of GIFTS.

When a new version of Crystal Reports becomes available, MicroEdge schedules a thorough quality assurance testing cycle to ensure that GIFTS and the GIFTS standard reports are compatible with the new version.

In some cases, the upgrade requires adjustments to the standard reports; in addition, technical problems may be identified, researched, and resolved in coordination with Business Objects.

Note that there is often a reasonable delay between the release of a Crystal Reports upgrade and its certification by MicroEdge. This is the time needed to complete quality assurance testing with the standalone, file server, Microsoft SQL Server, and Oracle server versions of GIFTS.

Upgrades to Crystal Reports

This section applies to clients who use Crystal Reports to create or modify reports, and who wish to upgrade their Crystal Reports software to a newer version. All other clients can skip this section.

When you upgrade Crystal Reports, there is the potential for incompatibilities with your custom reports and standard reports that you have modified. Reports may have formatting problems, calculation errors, or other problems.

Important: Be sure to thoroughly review the Compatibility Fact Sheet for your version of GIFTS, and the information in this section, to determine the impact on your operation before upgrading. Do not upgrade to a new version of Crystal Reports without first ensuring that it is fully tested and certified as compatible with GIFTS.

MicroEdge's experience to date has been that most custom reports convert without any problems. When report adjustments are required, they have proven to be relatively simple when made by technical staff with expertise in Crystal Report design and testing. Examples of these differences include skipping blank lines and the omission of totals.

Important: Be sure to review and test all of your custom reports when you upgrade to a new version of Crystal Reports. You should also test all custom or modified reports created by MicroEdge.

Index

A

accounting system links
    custom 146
    standard 141, 146
audit trail 136

B

backups 19, 136
Blackbaud Accounts Payable 141
branch security 142
Budget Diagnostics report 134
Budget Module 142

C

character set, for Oracle servers 63
check writing 141
Citrix Presentation Server
    installing GIFTS on 79
    sample configuration 3
    upgrading GIFTS on 119
client/server systems
    considerations and benefits 5
    installing GIFTS on 35, 57
    sample configuration 4
    upgrading 105
collation name, for SQL Server 39
compatibility level, of SQL databases 40
configuration guidelines
    database servers 14
    file servers 13
    workstations 12
configuration options
    GIFTS 2-5
    GIFTS Connections 6-7
consolidating duplicate records 133
Crystal Reports
    compatibility with GIFTS 164
    upgrading 165
custom reports
    and GIFTS upgrades 163
    report writers 162
customization module 141

D

database
    corruption 132
    creation scripts 78
    disk space requirements 8
    list of tables 20
database maintenance
    client/server 133
    file server 132
diagnostic utility, for GIFTS 130
disk space requirements
    GIFTS 7
    GIFTS database 8
    IGAM 9
    workstations 9
DLL conflicts 19, 131
Document Manager 141
documentation
    conventions xii-xiii
    on CD xvi
    Solutions Knowledgebase xvii
    using the documentation set xiv-xv
duplicate records, in database 133

E

employee gifts 140
exporting data 147

F

file server systems, GIFTS
- installation 21
- sample configuration 3
- upgrading 89

G

GIFTS Connections
- product description 143
- sample configuration 6–7

H

hardware recommendations 12

I

IGAM
- disk space requirements 9
- hardware requirements 14
- ports used by 15
- test utility 130

Import Module 142
installation
- configuration examples 2–5
- file server systems 21
- on Microsoft SQL Server 35
- on Oracle server 57
- overview of procedures ix
- standalone systems 21
- with Citrix Presentation Server 79

Internet access to GIFTS 143

L

links
- accounting 146
- OLE 146
- to third-party products 147

M

maintenance
- of client/server databases 133
- of file server databases 132
- utilities for GIFTS 130

maintenance and support program xvii
matching gifts 140
memory requirements 12
MicroEdge Solutions Knowledgebase xvii
Microsoft SQL Server
- collation name 39
- concurrent connections required 38, 39
- database compatibility level 40
- installation 35
- prerequisites to installation 38
- transaction log 41
- upgrading GIFTS on 105

Microsoft Word 18
migrating GIFTS to another server 145
MSINFO utility 131
MyGIFTS
- product description 143

O

ODBC data source
- Oracle workstations 69
- SQL workstations 53

OLE links 146
Oracle server
character set 63
database table names 20
database tables 20
installation 57
installation prerequisites 61
installing GIFTS on 57
upgrading GIFTS on 105
owner, of Oracle tables 20

P

passwords 135
peer-to-peer network 3
performance, of system 17
permissions, required to run GIFTS 18
Plus Pack .NET Extension 140
ports
for IGAM traffic 15

Q

Quickbooks 141
Quicken 141

R

recalculating summary data 133
repair, of Access databases 132
reporting, custom 162
ReviewerCONNECT
product description 143
rollback recovery 135

S

scripts, for database creation 78
security
GIFTS program access 135
passwords 135
software, compatibility with GIFTS 18
Solutions Knowledgebase xvii
sort order, for Oracle servers 63
speed, of system 17
SQL Server
See Microsoft SQL Server
standalone systems, GIFTS
example 3
installation 21
upgrading 89
storage requirements
GIFTS 7
IGAM 9
workstations 9
system files
comprehensive list of 149
conflicts 19
isolating conflicts 131

T

tables, list of 20
trade-up
Essential GIFTS to GIFTS 144
file server to client/server 144
standalone to file server 144
transaction commit recovery 135
transaction log, SQL 41
troubleshooting
database problems 132
GIFTS utilities for 130

U

upgrades, *See also* trade-up 144
upgrading
and custom reports 163

client/server systems 105
Crystal Reports 165
file server systems 89
on Citrix Presentation Server 119
overview of procedures x
standalone systems 89

V

volunteer gifts 140

W

wide area network 5
Windows Terminal Server
See Citrix Presentation Server
word processor version control 18