MicroEdge

GIFTS® Alta

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: GIFTSAlta-InstallationGuide

Publication date: December 2014

GIFTS Alta, Internet Grant Application Module, 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 Alta viii

Contents of the MicroEdge GIFTS Alta Download ix

Overview of the Installation or Upgrade Process xi

Conventions Used in This Manual xiv

Using MicroEdge Documentation xvi

Using the Documentation xviii

Maintenance and Support Program xix

1 Installation Options and Requirements 1

Configuration Options 2

GIFTS Alta Storage Requirements 7

Calculating Your Storage Requirements 10

Hardware Configuration Guidelines 12

Performance Considerations 17

Software Considerations 18

2 New GIFTS Alta Standalone or File Server Installation 23

Before You Begin 24

New Standalone Installation 26

File Server Installation 30

3 New Microsoft SQL Server Installation 37

Before You Begin 38
Overview of the GIFTS ALTA Installation Process 39
Step 1: Important Prerequisites 40
Step 2: Setting Up the GIFTS ALTA Database 43
Step 3: Installing GIFTS ALTA on Your File Server 48
Step 4: Populating the GIFTS ALTA Database 53
Step 5: Installing the GIFTS Alta Workstations 54

4 New Oracle Server Installation 59

Before You Begin 60
Overview of the Installation Process 62
Step 1: Important Prerequisites 63
Step 2: Setting Up the GIFTS Database 65
Step 3: Installing GIFTS ALTA on Your File Server 68
Step 4: Populating the GIFTS ALTA Database 74
Step 5: Installing the GIFTS Alta Workstations 75
Step 6: Logging in to GIFTS ALTA for the First Time 80
Retrieving the Database Creation Scripts 81

5 New Installation of GIFTS Alta with Citrix Presentation Server 83

Before You Begin 84
Citrix Installation Options for Your Server 85
Option 1: Installing a GIFTS Alta Workstation 86
Option 2: Installing a Standalone System 90

6 New Installation of GIFTS Alta with Terminal Server 93

Before You Begin 94

Installing GIFTS Alta on Your Terminal Server 95

7 Upgrading a GIFTS Alta Standalone Workstation or File Server 99

Before You Begin 100

Standalone Upgrade 103

File Server Upgrade 107

8 Upgrading GIFTS Alta Client/Server Installations 113

Before You Begin 114

Step 1: Important Prerequisites 117

Step 2: Upgrading the File Server 119

Step 3: Manually Upgrading the GIFTS Alta Database 122

Step 4: Upgrading Your GIFTS ALTA Workstations 124

9 Upgrading GIFTS Alta with Citrix Presentation Server 127

Before You Begin 128

Upgrading a GIFTS Alta Workstation Running Citrix 131

Upgrading a Standalone System Running Citrix 134

10 Upgrading GIFTS Alta on Terminal Server 137

Before You Begin 138
Upgrading a GIFTS Alta Workstation Running Citrix 140
Upgrading a Standalone System Running Citrix 143

11 GIFTS Alta Extensions: Link and Reminders Engine 147

Installing GIFTS Alta Extensions 148
Overview of the Setup and Installation Process 149

12 Maintenance, Security, and Data Integrity 155

GIFTS Alta Diagnostics Utility 156
Isolating System File Conflicts 157
Maintaining Your Database 158
Budget Diagnostics Utility 160
Security and Data Integrity 161
System Architecture 163

13 Expanding Your GIFTS Alta System 165

Optional Modules and Components 166
GIFTS Connections 169
System Trade-up and Migration 170
Links to External Systems 172

14 Installation Impact Analysis 175

GIFTS Alta Impact Analysis 176

15 Custom Reports 181

Creating Custom Reports 182

How GIFTS ALTA Upgrades Affect Custom Reports 183

Compatibility with Crystal Reports 184

Upgrades to Crystal Reports 186

Welcome to GIFTS Alta

This publication includes all the information you need to install or upgrade your GIFTS Alta system—including optional modules like the Internet Grant Application Module™ 5.

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 Alta Download ..... **ix**

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

Conventions Used in This Manual ..... **xiv**

Using MicroEdge Documentation..... **xvi**

Using the Documentation ..... **xviii**

Maintenance and Support Program..... **xix**

Contents of the MicroEdge GIFTS Alta Download

Depending on your current GIFTS Alta installation configuration, the MicroEdge download for GIFTS Alta can be used to install (or upgrade to) GIFTS Alta 1.7, IGAM 6.0, and GIFTS Connections 3.6. These products are described as follows.

GIFTS Alta 1.7

GIFTS Alta 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 Alta system to track different kinds of data and giving.

GIFTS Alta 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 Alta data through a web browser. The server retrieves information from your GIFTS Alta 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 Alta. This allows users to connect to your

GIFTS Alta 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 Alta from remote locations. Whether connecting through an intranet or over the Internet, your users have a way to interact with GIFTS Alta 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.

Overview of the Installation or Upgrade Process

Although the MicroEdge GIFTS Alta Installation 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 Alta and IGAM

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

Before installing or upgrading GIFTS Alta and IGAM, you should read "Installation Options and Requirements" on page 1. This chapter details the GIFTS Alta configuration options and describes the storage, performance, and installation considerations for each of these configurations.

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

Chapter	Summary
"New GIFTS Alta Standalone or File Server Installation" on page 23	Contains installation instructions for two different environments: a standalone system on a single computer, or a file server system with a GIFTS Alta file server and one or more workstations.
"New Microsoft SQL Server Installation" on page 37	Describes how to install a multi-user GIFTS Alta system with a Microsoft SQL Server database.

Chapter	Summary
"New Oracle Server Installation" on page 59	Describes how to install a multi-user GIFTS Alta system with an Oracle server database.
"New Installation of GIFTS Alta with Citrix Presentation Server" on page 83	Describes how to install GIFTS Alta on a computer running Windows Terminal Services to provide user access to GIFTS Alta through Citrix Presentation Server™.

If you're *upgrading* to GIFTS Alta from GIFTS 6.4 or later, or a previous version of Alta, follow the instructions from the appropriate **Upgrade** chapter:

Chapter	Summary
"Upgrading a GIFTS Alta Standalone Workstation or File Server" on page 99	Contains upgrade instructions for two different GIFTS Alta setups: a standalone workstation, and a file server network.
"Upgrading GIFTS Alta Client/ Server Installations" on page 113	Describes how to upgrade GIFTS Alta in the SQL Server or Oracle server environment.
"Upgrading GIFTS Alta with Citrix Presentation Server" on page 127	Describes how to upgrade GIFTS Alta on a computer running Windows Terminal Services, providing user access to GIFTS Alta 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, 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 Alta 1.7 and IGAM 6.0.

Caution: Use of a version of MyGIFTS/ReviewerCONNECT prior to 3.6 with GIFTS Alta 1.7 and/or IGAM 6.0 may cause compatibility issues.

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

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

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 Alta" is used generically to refer to any configuration of the system.

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 Alta 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 Alta.

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 Alta documentation provides step-by-step procedures and reference information on GIFTS Alta 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 PowerME portal, 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 Alta includes the following documentation:

GIFTS Alta Quick Starter Guide This guide is meant for previous users of GIFTS who wish to learn about the new features of GIFTS Alta. It assumes working knowledge of basic GIFTS functionality.

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

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

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

Related Documentation

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

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

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

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 Alta data.

Reviewers Module and ReviewerCONNECT User's Guide Describes how to extend the functionality of the GIFTS Alta 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 Alta 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 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 resolution of any available problem solutions relating to the currently supported versions of GIFTS Alta.

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 Cases

Members may also search our library of documentation and technical bulletins on the MicroEdge PowerME portal.

http://microedge-powerme-portal.force.com/Login

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 call 1-800-899-0890 and ask for a Client Account Representative.

You can also access our list of Account Representatives directly on our website to contact them directly.

http://www.microedge.com/About/ContactUs/AccountReps.aspx

1 Installation Options and Requirements

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

In This Chapter

Configuration Options 2
GIFTS Alta 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 Alta 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 Alta on a computer running Windows® Terminal Services with Citrix® Presentation Server™ to make your GIFTS Alta applications available from nearly any computer connected to your network or the Internet.

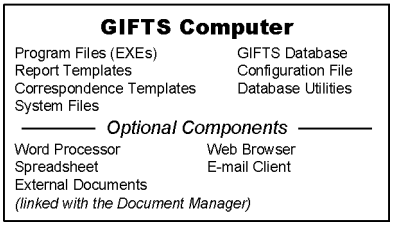
The following diagrams illustrate possible standalone, file server, and client/server configurations. These diagrams indicate the network location of the GIFTS Alta program files, database, and templates—as well as the location of other supporting programs and files. Knowledge of this design facilitates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

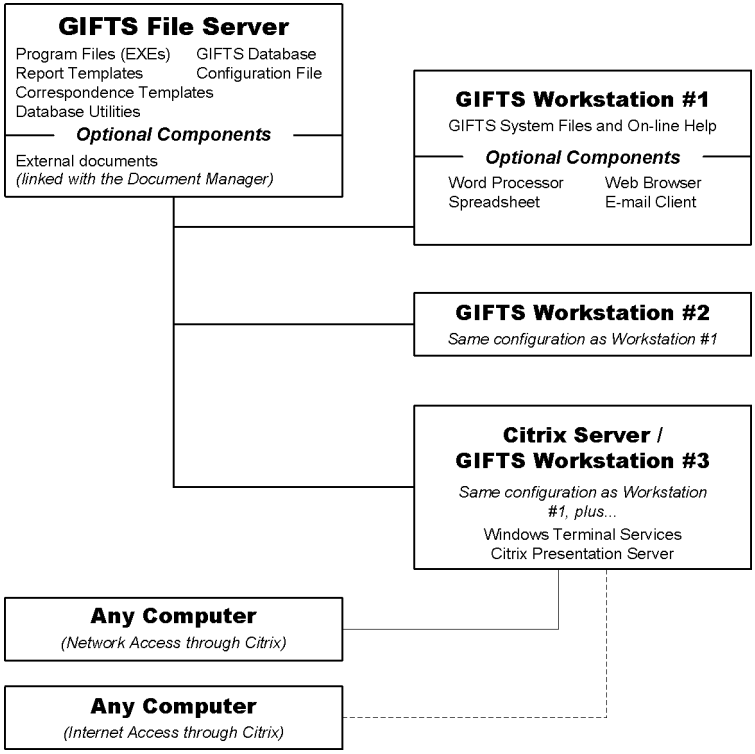


Optional Setup: Using Windows Terminal Services with Citrix Presentation Server, you can provide multi-user access to a standalone system.

Sample File Server Configuration

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

- By default, the GIFTS Alta 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 Alta 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 Alta on a peer-to-peer network, please search for "peer-to-peer" in the MicroEdge PowerME portal.



Sample Client/Server Configuration

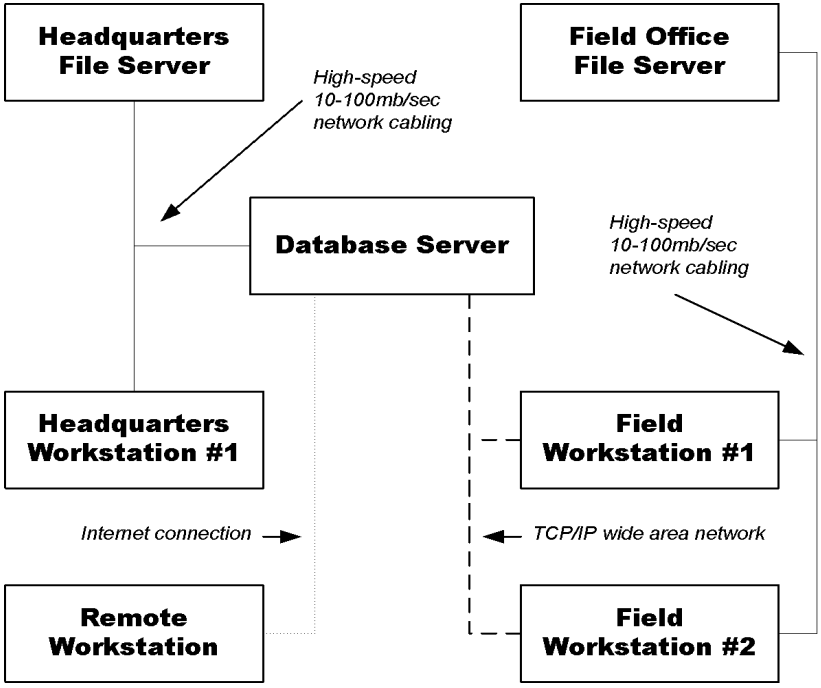
In the following example of a client/server configuration, the GIFTS Alta database resides on the database server and the GIFTS Alta program files are installed on file servers and remote workstations. Specifically, the GIFTS Alta components are installed as follows:

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

- **Remote Workstations:** GIFTS Alta 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 Alta using Citrix Presentation Server.



Do I Need a Client/Server System?

Most GIFTS Alta 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 local area network (LAN)
- 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 upgrading up to a client/server setup for GIFTS Alta, please refer to "System Trade-up and Migration" on page 170.

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 Alta Storage Requirements

This section details the amount of hard disk space you will need for the various components of GIFTS Alta. Since there are many possible configurations of GIFTS Alta, the space needed for each GIFTS Alta 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 Alta Directory Disk Space Requirements

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

Note: The requirements indicated for your correspondence and reports 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 Alta directory resides on the local hard drive and will contain the following files.

Program Files (EXEs)	121 MB
GCS Setup Files (including Job Manager files) *(clients with GIFTS Connections only)*	41 MB
Other Setup Files (AltaLink, AltaReminder, Crystal Reports, MDAC, and .NET, among others)	243 MB
Miscellaneous(including PDF files)	50 MB
Report Templates	30 MB
Correspondence Templates	20 MB
Total	**~500 MB**

- **In network installations**, the GIFTS Alta 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 Alta on your workstations and—for clients with GIFTS Connections—the files used to install GCS.

Program Files (EXEs)	121 MB
Miscellaneous (including PDF files)	50 MB
Report Templates	30 MB
Correspondence Templates	20 MB
Workstation Setup Files	105 MB
GCS Setup Files (including Job Manager files) *(clients with GIFTS Connections only)*	41 MB
Other Setup Files (Crystal Reports, MDAC, and .NET, among others)	243 MB
Total	**~650 MB**

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

Note: The GIFTS Alta 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 Alta directory total.

GIFTS Alta Database Disk Space Requirements

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

- **If you have a standalone or file server installation**, GIFTS Alta uses an Access database which resides in your GIFTS Alta directory. The database will start out quite small, about 6.5 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 Alta online help files, and Crystal Reports installed on each GIFTS Alta workstation.

System Files	100 MB
Help Files	20 MB
Crystal Viewer	130 MB
Total	**250 MB**

IGAM Disk Space Requirements

The IGAM directory located within your GIFTS Alta 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 Alta 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 Alta Storage Requirements" on page 7.

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

GIFTS Directory		500 MB	
Database	+	40 MB	(for 2,000 records)
Workstation Files	+	250 MB	
Total Installation	**=**	**790 MB**	

*If you intend to install GIFTS Alta on a **file server***, add the figures for the GIFTS Alta directory and your GIFTS Alta 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)*		650 MB	
IGAM Directory	+	200 MB	(for 2,000 applications)
Database	+	100 MB	(for 5,000 records)
Total File Server	**=**	**950 MB**	

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

*If you intend to install a **client/server** version of GIFTS Alta*, the amount of space indicated for the GIFTS Alta 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		400 MB	(for 20,000 records)
GIFTS Database Log	+	25 MB	
GIFTS Database Server Total	**=**	**425 MB**	
GIFTS Directory *(with workstation and GCS setup files)*		650 MB	
IGAM Directory	+	200 MB	(for 2,000 applications)
GIFTS File Server Total	**=**	**850 MB**	
Each GIFTS Workstation	**=**	**250 MB**	

Hardware Configuration Guidelines

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

The compatibility information in this section is current as of October 2013.

Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

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 Alta Workstations (Standalone or Networked)

The following are minimum system configuration guidelines for standalone GIFTS Alta workstations and to GIFTS Alta workstations in a network environment.

Processor (CPU)	Intel® Core™2 Duo CPU (or equivalent) computer. For optimal performance, use the fastest available processor
Memory (RAM)	2GB of RAM **NOTE:** If available on your computer(s), MicroEdge recommends using matched memory sticks to enable dual-channel or triple-channel memory support. For more details, see http://en.wikipedia.org/wiki/Multi-channel_memory_architecture.
Disk Capacity	Please refer to "GIFTS Alta Storage Requirements" on page 7.
Operating Systems	❖ Windows 7 or 8 (32 or 64-bit) ❖ Windows XP Professional SP-3
Monitor	1280 x 720 resolution with small fonts

Input Device	Microsoft-compatible mouse.
New Installation and Upgrade/ Maintenance downloads	GIFTS Alta installation and upgrade/maintenence releases are always 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 upgrade 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 update GIFTS Alta. For upgrades, please refer to the Upgrade Installation Instructions emailed to you for specific details.

GIFTS Alta File Servers

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

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

Processor (CPU)	Contact your systems integrator to determine the appropriate processor needed to support GIFTS Alta and all other file server applications. For optimal performance, use the fastest available processor.
Disk Capacity	Please refer to “GIFTS Alta Storage Requirements” on page 7.
Memory (RAM)	Contact your systems integrator to determine the memory requirements for GIFTS Alta and all other file server applications. More memory may improve performance or be required as your grants database grows.
Operating Systems	–Windows 2003 Server R2 –Windows 2008 Server R2 (64-bit)
Installation files	Either on the server or on any network-connected workstation. Needed for installations and upgrades.

GIFTS Alta 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 Alta database resides.

Processor (CPU)	Contact your systems integrator to determine the appropriate processor needed to support GIFTS Alta and all other client/server applications. For optimal performance, use the fastest available processor. Note: Different versions of Microsoft SQL Server have limits in how they utilize processors and memory (Microsoft SQL Server Express, for example). Please consult your selected database technical documentation for best utilization of processors and memory.
Disk Capacity	Please refer to "GIFTS Alta Storage Requirements" on page 7.
Memory (RAM)	Contact your systems integrator to determine the memory requirements for GIFTS Alta and all other client/server applications. More memory may improve performance or be required as your grants database grows. Note: Different versions of Microsoft SQL Server have limits in how they utilize processors and memory (Microsoft SQL Server Express, for example). Please consult your selected database technical documentation for best utilization of processors and memory.
Client/Server Database Software	–Microsoft SQL Server 2008 (32 and 64-bit) –Microsoft SQL Server 2012 (64-bit)
Installation files	Either on the server or on any network-connected workstation. Needed for installation, upgrades, and maintenance releases.

IGAM Hardware Requirements

The GIFTS Alta installation program installs the latest version of IGAM 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 Alta-configured workstation Since IGAM is a GIFTS module, it must be run from a GIFTS Alta workstation. This allows IGAM to access the GIFTS Alta database and utilize your existing 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 and 443 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. Port 443 is required for encrypted HTTPS (SSL) traffic during the publishing and retrieving of applications and requirements. 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 Alta maintenance releases and access technical information in the MicroEdge PowerME portal.

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

GIFTS Alta Upgrades

An Internet connection is required for the download of all GIFTS Alta 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 Alta 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 Alta users
- The load that other applications place on your server or servers

For more information about optimizing the performance of a GIFTS Alta system, please search for "performance" in the GIFTS PowerME portal.

Software Considerations

All software that interacts with GIFTS Alta must be certified for use with GIFTS Alta to ensure proper performance.

Please refer to the most recent GIFTS Alta Compatibility Fact Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

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

Word Processor Version Control

GIFTS Alta 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 on all GIFTS Alta workstations and, if applicable, computers running the MyGIFTS Job Manager.

If you use GIFTS Alta at different sites on a network 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 Alta*. 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 Alta mail merge functions. Whenever you plan to upgrade your word processing software, be sure to contact MicroEdge Technical Support for further information.

Microsoft Word 2010 Trusts

Microsoft introduced the Trust Center functionality in Office 2010. This requires special configuration on each workstation installed with Office 2010 in order to properly use GIFTS Alta correspondence templates.

Please follow the steps below:

1. Open Microsoft Word 2010 and go to **File > Options > Trust Center**
2. Click the **Trust Center Settings...** button
3. Click **Trusted Locations** on the left panel
4. Check **Allow Trusted Locations on my network** option
5. Click **Add new location...**
6. Add the GIFTS folder as a new location (usually C:\GIFTS)
7. Check the box for **Subfolders of this location are also trusted**.

If the above does not resolve the issue, in the Trust Center window, click **File Block Settings** in the left panel. Some settings that dictate what files the Trust Center will block may need to be unchecked as well.

Crystal Reports Version Control

GIFTS Alta uses an SAP Crystal Reports viewer to generate many of the standard reports provided. If you plan to install GIFTS Alta on any computer that also runs Crystal Reports, or vice versa, please refer to "Compatibility with Crystal Reports" on page 184.

System Backups

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

- Back up your GIFTS Alta system daily using high-capacity 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 Alta database is backed up even if users are logged in while the backup processes are running.

For detailed information about backing up GIFTS Alta, please search for "backups" in the MicroEdge PowerME portal.

System Files

GIFTS Alta 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 Alta and their current properties. For more information about this utility, please refer to "Maintenance, Security, and Data Integrity" on page 155.

Note: MicroEdge Technical Support staff can attempt to assist clients with Maintenance and Support contracts to identify and resolve GIFTS Alta-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 "GIFTS Alta Impact Analysis" on page 176 lists the system files installed for GIFTS Alta. 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 Alta 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 Alta and other databases.

Important: 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 Alta table. (Contact Tech Support for the default owner of the GIFTS Alta tables.) No conflicts occur if another table shares the same name or alias as a GIFTS Alta table, but the two tables must have different owners.

The GIFTS Alta database tables are:

Account_Transactions	Acct_Info	Activities
Activities_Ext	Addresses	Affiliations
Affiliations_ext	Applications	Bank_Accounts
Binary_Store	Budget_Adjustments	Budget_Auth_Users
Budget_Details	Budget_Years	Check_Details
Check_Requisitions	Check_Templates	Codes
Coding_Sheets	Consolidation_Xref	Contacts
Contacts_Ext	Custom_Ext	Dashboard_Parts
Delete_Log	EG_Audit_Trails	EG_Limit_Periods
EG_Limits	EG_Programs	EG_Rate_Periods
EG_Rates	EntityProperty	FormDefinition
FormPrompt	FormSection	FormUser
FormUserGroup	GCS_Sessions	GFW_Currencies

GFW_Currencies_History	GFW_Locks	GFW_Preferences
GFW_View_Columns	GFW_View_Sorts	GFW_Views
GFW_Workspace	GridField	GridSort
Groups	Header_Details	IGAM_Forms
Jobs	Keys	Label
Letter_Events	Letter_Lib	Log
Match_Batches	Matches	Message_Board
Organizations	Organizations_Ext	Payments
Payments_Ext	Permissions	Postal_Codes
Report_Fields	Report_Formats	Report_Lines
Report_Sections	Report_Sorts	Reports
Reports_Library	Requests	Requests_Ext
Requirements_Ext	Review_Rules	Review_Stages
Reviews	Reviews_Ext	Reviews_InProgress
Rule_Reviewers	Searches	Select_Clauses
Tables	Tables_Master	Task_History
Tasks	Temp_Data	Text_File
UDF	Users	Wire_Transfers
Workflow	WorkflowExecution	WorkflowExecutionStep
WorkflowStep	WorkflowUpdate	XML_Store

2 New GIFTS Alta Standalone or File Server Installation

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

In This Chapter

Before You Begin **24**
New Standalone Installation **26**
File Server Installation **30**

Before You Begin

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

- 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 Alta, please see "Compatibility with Crystal Reports" on page 184.
- GIFTS Alta 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 Alta. It installs the entire GIFTS Alta system on the local hard drive of a single workstation, and only this workstation will have access to GIFTS Alta. To perform this type of installation, please follow the instructions in "New Standalone Installation" on page 26.

About the File Server Installation Process

This installation installs GIFTS Alta 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 Alta database, on the server—and a *Workstation Installation*, which installs files to each workstation and connects each workstation to the GIFTS Alta system on the server.

To perform this type of installation, please follow the instructions in "File Server Installation" on page 30.

System Files

For a complete list of the system files installed by the GIFTS Alta setup process, please refer to the "GIFTS Alta Impact Analysis" on page 176.

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 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 Alta. It installs the entire GIFTS Alta system on the local hard drive of a single workstation; only this workstation will have access to GIFTS Alta.

Step 1: Copying Your GIFTS Alta Configuration File

This procedure describes how to copy the configuration file for your GIFTS Alta system from your extracted GIFTS Alta installation Files. 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 Alta.
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 Alta

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

1. Extract the MicroEdge GIFTS Alta Installation Files to your workstation.
2. Access the Master\Install folder of the GIFTS Alta installation files and run the Steup.exe file. The GIFTS Alta 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.

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

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

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

5 Click **Next.** The Configuration window prompts you to specify the location of your GIFTS Alta 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 Alta.

7 Select *Microsoft Word*, and click **Next**. You are prompted to choose where you want the GIFTS Alta 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 "Local GIFTS Alta Installation" is to take place in the folder you specified.

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

10 If your computer is not running a compatible version of the Microsoft Data Access Components (MDAC) software needed to run GIFTS Alta, 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.

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

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

Step 3: Configuring Windows for Use with GIFTS Alta

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

1. Go to Windows Start ➤ Computer to open the Windows Explorer.
2. From the Explorer menu, go to Organize ➤ Folder and search options, View ➤ Folder Options, or View ➤ Options (the name of the menu item is different depending on your version of Windows).
3. Click the **View** tab.
4. Ensure that the "Hide 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 Alta.

Tip: After installing GIFTS Alta on any workstations running Windows Vista, 7, or 8, and before logging into GIFTS Alta, 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 will instead be 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 applies to all workstations running Windows Vista, Windows 7, or Windows 8.**

If you make modifications to the GIFTS.ini in the *C:\Users\[username]\AppData\Local\VirtualStore\Windows* folder, please be sure to copy the same file to the *C:\Windows* folder so they match.

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

Logging in to GIFTS Alta for the First Time

To ensure that your installation has been successful, you can log in to a GIFTS Alta 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 Alta system; be sure to set up Login IDs and passwords when you set up GIFTS Alta for your organization, as described in the *GIFTS Alta Administrator's Guide*.

File Server Installation

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

In a network environment, GIFTS Alta 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 Alta Installation files, 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 Alta workstation.

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

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 Alta will be installed.

- All users of GIFTS Alta must have full access rights to the network directory where the GIFTS Alta 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 Alta database.

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

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

Copying Your GIFTS Alta Configuration File

This procedure describes how to copy the configuration file for your GIFTS Alta system from your extracted GIFTS Alta Installation Files. 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 Alta.
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 Alta on Your File Server

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

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

1. Extract the MicroEdge GIFTS Alta Installation files to a workstation with network access.

2 Access the Master\Install folder and run the Setup.exe file. The GIFTS Alta Welcome screen is displayed.

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

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

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

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

Example: You want to install GIFTS Alta on the P: drive of your network file server. Enter P:\GIFTS after clicking **Browse**. The GIFTS Alta 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.

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

7 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 Alta.

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

9 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 Alta Server Installation" is to take place in the folder you specified.

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

11 The install process may involve up to four steps depending what is currently installed on the workstation or server.

- Install Alta program files
- Install Crystal Reports v11 files (if not currently installed)
- Install .Net 4 Framework (if not currently installed)
- Install MS Data Access Components (MDAC) (if not currently installed)

Note: If your computer is not running a compatible version of above software needed to run GIFTS Alta, you are prompted to install it. Click OK and follow the on-screen instructions to complete the installation from your downloaded files. After the 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 12.

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

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

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

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 Alta directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

The GIFTS Alta 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 Alta 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 Alta 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 Alta, 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 Alta is now installed on the workstation. If you are going to use GIFTS Alta to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS Alta 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 Alta.

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

Your installation of GIFTS Alta should now be complete: enjoy!

Logging in to GIFTS Alta for the First Time

To ensure that your installation has been successful, you can log in to a GIFTS Alta 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 Alta system; be sure to set up Login IDs and passwords when you set up GIFTS Alta for your organization, as described in the *GIFTS Administrator's Guide*.

3 New Microsoft SQL Server Installation

This chapter describes how to install GIFTS Alta in the Microsoft SQL Server (2005 or later) environment.

In This Chapter

Before You Begin **38**

Overview of the GIFTS ALTA Installation Process **39**

Step 1: Important Prerequisites **40**

Step 2: Setting Up the GIFTS ALTA Database **43**

Step 3: Installing GIFTS ALTA on Your File Server **48**

Step 4: Populating the GIFTS ALTA Database **53**

Step 5: Installing the GIFTS Alta Workstations **54**

Step 6: Logging in to GIFTS Alta for the First Time **57**

Before You Begin

Please address the following important points before you install GIFTS Alta:

- 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 Alta 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 184.
- 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 Alta setup process, consult the "Installation Impact Analysis" on page 175.

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 Alta Installation Process

The procedures outlined below will take you through the entire process of installing the GIFTS Alta 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 Alta system. It also outlines prerequisites for your network environment.

Step 2: Setting Up the GIFTS ALTA Database This portion of the installation is used to create the GIFTS Alta 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 ALTA on Your File Server In this step, you will install the GIFTS Alta program onto a network drive that is accessible to all workstations that will use GIFTS Alta. This procedure also configures the workstation you're using as a GIFTS Alta workstation.

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

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

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

Step 1: Important Prerequisites

The following prerequisites must be met before you begin your GIFTS Alta 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 Alta 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 2008 Management Studio.

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

- ✔ GIFTS Alta requires an ODBC driver on each workstation to connect to the SQL Server. These drivers are installed by the GIFTS Alta Setup program.

  Note: Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

- ✔ 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 Alta, MyGIFTS, and ReviewerCONNECT users. To adjust this setting:
  - ❖ In the 2008 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 2008 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 Alta file server will be installed.

Other Installation Considerations

Please consider the following while installing GIFTS Alta:

✔ We recommend that you create your GIFTS Alta 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 Alta data from one server to another, you should make sure that the new GIFTS Alta database on the destination SQL server has the same collation settings as the GIFTS Alta 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 Alta database is programmed to use, your GIFTS Alta 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 Alta has been tested and certified with SQL Server 2008, and SQL Server 2012. We will support GIFTS Alta when used with other Collation Names. However, be aware that if your choice creates issues in the GIFTS Alta system, the only solution our support staff may be able to offer is to change to the recommended setting.

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

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

Step 2: Setting Up the GIFTS Alta Database

This step creates a new SQL Server database and database login for GIFTS Alta, 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 Alta 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.

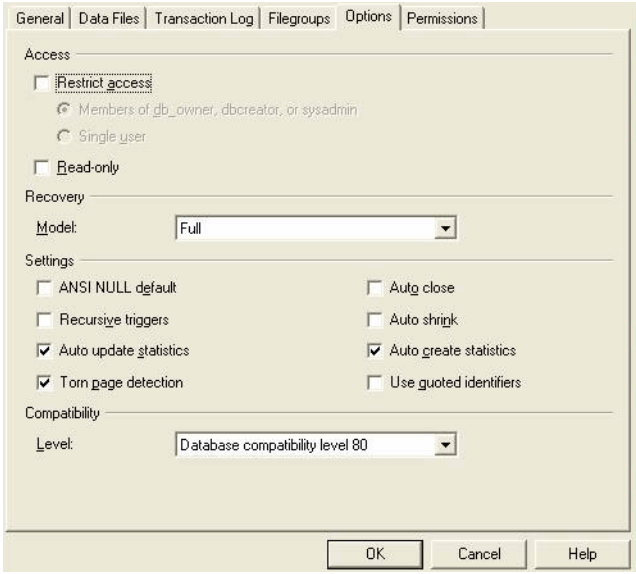
MicroEdge recommends choosing 'Simple' or 'Full' as your database recovery preference ('Full' is the SQL default).

- 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 Alta 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.'



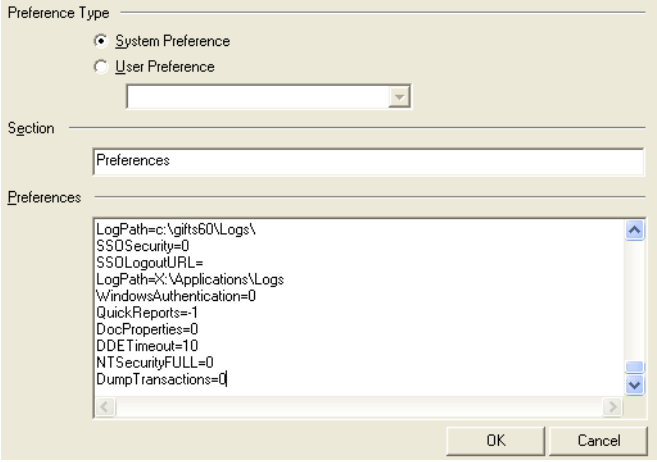
4. Click **OK**.

If you are using SQL 2008 or later, you must indicate to GIFTS Alta 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 Alta Database and Login for SQL Server 2008 or Later

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

Step 2a: Creating the GIFTS Alta Login This step creates the Login ID used by the GIFTS Alta system to connect to the GIFTS Alta database. (Please contact Tech Support for the Login ID and password to use.)

Note: If you want to change the password, you may do so after you install GIFTS Alta. 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 Alta, please refer to the *GIFTS Alta 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 Alta 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. Enter the login ID in the **Login** name field of the General page.
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: Passwords are case-sensitive for SQL Server 2008 or later.
9. Click **OK** to save the login.

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

Step 2b: Create the GIFTS Alta Database and Transaction Log This step creates the database named GIFTS Alta 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 Alta 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 Alta.
5. In the Owner field, enter the ownername (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 Alta 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 Alta on your network file server.

Step 3: Installing GIFTS Alta on Your File Server

In a network environment, program files and report template files for GIFTS Alta 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 Alta workstation during the installation process. Perform this procedure from a workstation that you intend to use with GIFTS Alta.

After installing the GIFTS Alta 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 Alta Configuration File

This procedure describes how to copy the configuration file for your GIFTS Alta system from your extracted GIFTS Alta Installation Files. 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 Alta.
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 Alta server software.

Step 3b: Installing GIFTS Alta on the File Server

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

1. Extract the MicroEdge GIFTS Alta Installation files to a workstation with network access.
2. Access the Master\Install folder and run the Setup.exe file. The GIFTS Alta 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.
3. Click **Next**. The Select Setup Type window opens.
4. Select the "Network Installation" option and click **Next**. The Choose Destination Location window opens.
5. Click **Browse** and specify the location of the GIFTS Alta directory. You should choose a network location that will be accessible to all the workstations that will run GIFTS Alta.

   Example: You want to install GIFTS Alta on the P: drive of your network file server. Enter P:\GIFTS after clicking Browse. The GIFTS Alta 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.
6. After specifying the location of the GIFTS Alta directory, click **Next**. The Configuration Disk window prompts you to specify the location of your GIFTS Alta configuration file.
7. 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 Alta.
8. Select Microsoft Word, and click **Next**. You are prompted to choose where you want the GIFTS Alta program icons to be displayed in the Windows Start menu.

9 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 Alta Server Installation" is to take place in the folder you specified.

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

The install process may involve up to four steps depending what is currently installed on the workstation or server.

- Install Alta program files
- Install Crystal Reports v11 files (if not currently installed)
- Install .Net 4 Framework (if not currently installed)
- Install MS Data Access Components (MDAC) (if not currently installed)

If your computer is not running a compatible version of above software needed to run GIFTS Alta, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the installation from your downloaded files.

Note: After the 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.

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 Alta 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 Alta uses to connect to your Microsoft SQL Server. In this procedure, you will create an ODBC Data Source named GIFTS,

which GIFTS Alta uses to connect to the GIFTS Alta 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, choose SQL Server authentication to verify using a login ID and password entered by the user.
7. Enter the server's login ID and password 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 Alta to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS Alta and Word can share data properly:

1. Go to Windows Start ➤ Computer to open the Windows Explorer.

2 From the Explorer menu, go to Organize ➤ Folder and search options, View ➤ Folder Options, or View ➤ Options (the name of the menu item is different depending on your version of Windows).

3 Click the **View** tab.

4 Ensure that the "Hide 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 Alta.

Tip: After installing GIFTS Alta on any workstations running Windows Vista, and before logging into GIFTS Alta, 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.

If you make modifications to the GIFTS.ini in the *C:\Users\[username]\AppData\Local\VirtualStore\Windows* folder, please be sure to copy the same file to the *C:\Windows* folder so they match.

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

Step 4: Populating the GIFTS Alta Database

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

To populate the database:

1. Access the GIFTS folder and run the SQLInst.exe file. The Create SQL Database window opens.
2. 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 Alta database on your SQL Server.
3. 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 Alta 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 remaining workstations to use GIFTS Alta.

Step 5: Installing the GIFTS Alta Workstations

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

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

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

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

Step 5a: Installing GIFTS Alta

This process uses the GIFTS Alta Setup program to install the files needed to run GIFTS Alta 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 the Master folder on the original 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 Alta directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Alta 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 Alta 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 Alta 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 Alta, 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 Alta uses to connect to your Microsoft SQL Server. In this procedure, you will create an ODBC Data Source named GIFTS Alta. This data source is used by GIFTS Alta to connect to the GIFTS Alta 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. 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 Alta to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS Alta 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 Alta.

Step 5d: Microsoft Word 2010 Trusts

Microsoft introduced the Trust Center functionality in Office 2010. This requires special configuration on each workstation installed with Office 2010 in order to properly use GIFTS Alta correspondence templates.

Please follow the steps below:

1. Open Microsoft Word 2010 and go to **File > Options > Trust Center**
2. Click the **Trust Center Settings...** button
3. Click **Trusted Locations** on the left panel
4. Check **Allow Trusted Locations on my network** option
5. Click **Add new location...**
6. Add the GIFTS folder as a new location (usually C:\GIFTS)
7. Check the box for **Subfolders of this location are also trusted**.

If the above does not resolve the issue, in the Trust Center window, click **File Block Settings** in the left panel. Some settings that dictate what files the Trust Center will block may need to be unchecked as well.

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

Step 6: Logging in to GIFTS Alta for the First Time

To ensure that your installation has been successful, you can log in to a GIFTS Alta 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 Alta system; be sure to set up Login IDs and passwords when you set up GIFTS Alta for your organization, as described in the *GIFTS Alta Administrator's Guide*.

4 New Oracle Server Installation

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

In This Chapter

Before You Begin 60
Overview of the Installation Process 62
Step 1: Important Prerequisites 63
Step 2: Setting Up the GIFTS Database 65
Step 3: Installing GIFTS ALTA on Your File Server 68
Step 4: Populating the GIFTS ALTA Database 74
Step 5: Installing the GIFTS Alta Workstations 75
Step 6: Logging in to GIFTS ALTA for the First Time 80
Retrieving the Database Creation Scripts 81

Before You Begin

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

- 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 Alta, please see "Compatibility with Crystal Reports" on page 184.
- The installation process creates several network directories. Make sure that you have the necessary permissions to create these directories.
- GIFTS Alta 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 Alta setup process, consult the "Installation Impact Analysis" on page 175.

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

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

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

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

Step 1: Important Prerequisites

The following prerequisites must be met before you begin your GIFTS Alta 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 Alta 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 Alta requires ODBC drivers on each workstation to connect to the Oracle server. These drivers are installed by the GIFTS Alta Setup program.

Note: Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

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 Alta file server will be installed.
- ✔ Ensure that all computers you plan to use with GIFTS Alta have adequate storage space and hardware, as described in "GIFTS Alta 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 Alta. 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 Alta 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 Alta 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 Alta database is programmed to use, your GIFTS Alta 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 Alta has been tested and certified. We will support GIFTS Alta when used with other character sets and sort orders. However, be aware that if your choices create issues in your GIFTS Alta 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 Alta 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 Alta Login

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

Note: If you want to change the password, you may do so after you install GIFTS Alta. 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 Alta, 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 Alta 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 Alta on Your File Server

In a network environment, the GIFTS Alta 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 Alta workstation during the installation process. Perform this procedure from a workstation that you intend to use with GIFTS Alta.

After you install the GIFTS Alta software on your file server, three more steps must be performed to complete network installation and the configuration of this GIFTS Alta 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 Alta Configuration File

This procedure describes how to copy the configuration file for your GIFTS Alta system from your extracted GIFTS Alta Installation Files. 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 Alta.
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 Alta server software.

Step 3b: Installing GIFTS Alta on the File Server

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

1. Extract the MicroEdge GIFTS Alta Installation files to a workstation with network access.
2. Access the Master\Install folder and run the Setup.exe file. The GIFTS Alta Welcome screen is displayed.

   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.
3. Click **Next**. The Select Setup Type window opens.
4. Select the "Network Installation" option and click **Next**. The Choose Destination Location window opens.
5. Click **Browse** and specify the location of the GIFTS Alta directory. You should choose a network location that will be accessible to all the workstations that will run GIFTS Alta.

   Example: You want to install GIFTS Alta on the P: drive of your network file server. Enter P:\GIFTS after clicking Browse. The GIFTS Alta 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.
6. After specifying the location of the GIFTS Alta directory, click **Next**. The Configuration Disk window prompts you to specify the location of your GIFTS Alta configuration file.
7. 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 Alta.
8. Select Microsoft Word, and click **Next**. You are prompted to choose where you want the GIFTS Alta program icons to be displayed in the Windows Start menu.

9 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 Alta Server Installation" is to take place in the folder you specified.

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

The install process may involve up to four steps depending what is currently installed on the workstation or server.

- Install Alta program files
- Install Crystal Reports v11 files (if not currently installed)
- Install .Net 4 Framework (if not currently installed)
- Install MS Data Access Components (MDAC) (if not currently installed)

If your computer is not running a compatible version of above software needed to run GIFTS Alta, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the installation from your downloaded files.

Note: After the 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 Alta 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 default user name and 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 Alta to connect to the GIFTS Alta database on your Oracle server. GIFTS Alta 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 Facts Sheet for your version of GIFTS Alta must reside on the workstation. In most cases (as described in the fact sheet), these drivers were installed by the GIFTS Alta 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 Alta.
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 Alta to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS Alta and Word can share data properly:

1. Go to Windows Start ➤ Computer to open the Windows Explorer.
2. From the Explorer menu, go to Organize ➤ Folder and search options, View ➤ Folder Options, or View ➤ Options (the name of the menu item is different depending on your version of Windows).
3. Click the **View** tab.
4. Ensure that the "Hide 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 Alta.

Tip: After installing GIFTS Alta on any workstations running Windows Vista, and before logging into GIFTS Alta, 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 Alta, 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.

If you make modifications to the GIFTS.ini in the *C:\Users\[username]\AppData\Local\VirtualStore\Windows* folder, please be sure to copy the same file to the *C:\Windows* folder so they match.

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

Step 4: Populating the GIFTS Alta Database

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

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 81.

1. Access the GIFTS folder and run the SQLInst.exe file.
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 Alta 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 Alta 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 Alta.

Step 5: Installing the GIFTS Alta Workstations

This step consists of running the GIFTS Alta 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 Alta directory on your file server.

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

Step 5a: Perform the Workstation Installation

This process uses the GIFTS Alta Setup program to install the files needed to run GIFTS Alta 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 Master folder on your original 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 Alta directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Alta 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 Alta 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 Alta 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 Alta, 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 Alta 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 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 Alta to connect to the GIFTS Alta database on your Oracle server. GIFTS Alta 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 Facts Sheet for your version of GIFTS Alta must reside on the workstation. In most cases (as described in the fact sheet), these drivers were installed when you installed GIFTS Alta.

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 Alta.
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 Alta to create merged correspondence in Microsoft Word, please use the following procedure to set up Microsoft Windows so that GIFTS Alta 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 Alta.

Step 5e: Microsoft Word 2010 Trusts

Microsoft introduced the Trust Center functionality in Office 2010. This requires special configuration on each workstation installed with Office 2010 in order to properly use GIFTS Alta correspondence templates.

Please follow the steps below:

1. Open Microsoft Word 2010 and go to **File > Options > Trust Center**
2. Click the **Trust Center Settings...** button
3. Click **Trusted Locations** on the left panel
4. Check **Allow Trusted Locations on my network** option
5. Click **Add new location...**
6. Add the GIFTS Alta folder as a new location (usually C:\GIFTS)
7. Check the box for **Subfolders of this location are also trusted**.

If the above does not resolve the issue, in the Trust Center window, click **File Block Settings** in the left panel. Some settings that dictate what files the Trust Center will block may need to be unchecked as well.

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

Step 6: Logging in to GIFTS Alta for the First Time

To ensure that your installation has been successful, you can log in to a GIFTS Alta 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 Alta system; be sure to set up Login IDs and passwords when you set up GIFTS Alta for your organization, as described in the *GIFTS Alta 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 ALTA Database" on page 74).

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

1. Access the GIFTS folder and run the SQLInst.exe file.
2. Check the **Create SQL Scripts** option and choose where you wish the scripts to be saved.
3. Ensure that the "Create Source Database on Target Server" and "Copy Source Data to Target Server" options *are not* selected.
4. 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 use the default user, 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 Alta reports—will fail.

5 New Installation of GIFTS Alta with Citrix Presentation Server

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

In This Chapter

Before You Begin **84**

Citrix Installation Options for Your Server **85**

Option 1: Installing a GIFTS Alta Workstation **86**

Option 2: Installing a Standalone System **90**

Before You Begin

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

- 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 Alta. To obtain the latest compatibility information for GIFTS Alta, 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 for Your Server

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

- **Installing GIFTS Alta Workstation Software on Your Citrix Server** – this procedure describes how to install the GIFTS Alta 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 Alta, including clients who have already installed their GIFTS Alta system on other computers. See "Option 1: Installing a GIFTS Alta Workstation" on page 86.

- **Installing a Standalone GIFTS Alta System on Your Citrix Server** – this option is for clients who wish to install their entire GIFTS Alta system on a single computer running Terminal Services with Citrix, and to make GIFTS Alta available to other users through Citrix Presentation Server. See "Option 2: Installing a Standalone System" on page 90.

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

Option 1: Installing a GIFTS Alta Workstation

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

Step 1: Install Your GIFTS Alta System

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

- Clients with a file server system should refer to the instructions in "New GIFTS Alta Standalone or File Server Installation" on page 23.
- Clients installing GIFTS Alta in a SQL Server environment should follow the instructions in "New Microsoft SQL Server Installation" on page 37.
- Clients installing GIFTS Alta in an Oracle server environment should follow the instructions in"New Oracle Server Installation" on page 59.

Note: If you wish to install GIFTS Alta on a single computer only, please refer to "Option 2: Installing a Standalone System" on page 90.

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 Alta. 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 Alta 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 Alta workstation software on your Presentation Server.

Step 3: Installing GIFTS Alta on Your Presentation Server

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

- You must launch the GIFTS Alta Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you do not run GIFTS Alta Setup from within the Control Panel, GIFTS Alta 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

Alta installation process and close the Add/Remove Programs utility before restarting the computer.

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

To install GIFTS Alta on your server:

1. From the Windows Start menu, choose Control Panel ➤ Install Application from Remote Desktop.
2. **Browse** to and run the Setup.exe program located in the GIFTS\Setup directory of your GIFTS Alta file server.

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

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

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

   - **File server installations** – please refer to "About the File Server Installation Process" on page 25.
   - **SQL Server installations** – please refer to "New Microsoft SQL Server Installation" on page 37.
   - **Oracle Server installations** – please refer to "Overview of the Installation Process" on page 62.

When you have finished installing the GIFTS Alta 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 Alta Help Files

This procedure describes how make the GIFTS Alta help files available to users who access GIFTS Alta 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 Alta help files:

empadmin.chm	gfwbudget.chm
empgifts.chm	gfwgam.chm
gfwadmin.chm	gifts.chm
gfwap.chm	mesupp.chm
altagifts.chm	gfw60.chm

3. Paste the GIFTS Alta help files to the virtual WINDOWS directory of *each user* who uses GIFTS Alta 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 Alta 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 Alta 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 Alta with Citrix is complete!

Option 2: Installing a Standalone System

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

Step 1: Disabling Remote Logons

Before installing GIFTS Alta, 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 86 and proceed to the next step.

Step 2: Copying Your GIFTS Alta Configuration File

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

1. Access the location where you extracted the GIFTS Alta Installation Files.
2. 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 Alta.
3. Right-click on your new copy of the gifts.cfg file and select Properties.
4. 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.)
5. Click **OK** to save the gifts.cfg properties.

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

Step 3: Installing GIFTS Alta

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

- You must launch the GIFTS Alta Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you do not run GIFTS Alta Setup from within the Control Panel, GIFTS Alta 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 Alta installation process and close the Add/Remove Programs utility before restarting the computer.
- At the conclusion of the GIFTS Alta Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS Alta installation is complete before closing the utility.

To install a standalone GIFTS Alta system on your Terminal Server:

1. From the Windows Start menu, choose **Control Panel ➤ Install Application from Remote Desktop**.
2. Browse to the location of the Master/Install folder and run the Setup.exe file. The GIFTS Alta installation process begins.

   Important Reminder: You *must* run the GIFTS Alta Setup program from within the Control Panel.
3. You may now continue with your GIFTS Alta installation. To do so, please follow the steps in "About the Standalone Installation Process" on page 24.

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

Step 4: Copying the GIFTS Alta Help Files

To make the GIFTS Alta online help available to each user, please follow the instructions in "Step 4: Copying the GIFTS Alta Help Files" on page 89. Then, proceed to the next step of this procedure to complete your installation.

Step 5: Completing Your Installation

To complete your installation, publish GIFTS Alta 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 Alta with Citrix is complete!

6 New Installation of GIFTS Alta with Terminal Server

This chapter describes how to install GIFTS Alta on a server running Windows® Terminal Services.

In This Chapter

Before You Begin **94**

Installing GIFTS Alta on Your Terminal Server **95**

Step 1: Terminal Server Installation **95**

Step 2: Publish the Application to Terminal Services **96**

Step 3: Test and Configure Remote Web Access **96**

Before You Begin

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

- 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 environment. MicroEdge Technical Support personnel cannot provide advice or assistance related to the setup of Terminal Server.
- Ensure that your server operating system is compatible with GIFTS Alta. To obtain the latest compatibility information for GIFTS Alta, please go to http://www.microedge.com and log in to GIFTS PowerME.
- **IMPORTANT:** GIFTS Alta must already be installed on a File Server to begin installation on a Terminal Server. For more information on file server installation, refer to the File Server Installation section on page 30 of the GIFTS Alta Installation Guide.

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

Installing GIFTS Alta on Your Terminal Server

This procedure describes how to install GIFTS Alta system on a computer running Terminal Services to provide access to GIFTS Alta. Using this procedure, all components of GIFTS Alta will be installed on the computer-including the GIFTS Alta database.

Step 1: Terminal Server Installation

1. From a workstation with network access, go to **Start** > **All Programs** > **Accessories** > **Remote Desktop Connection**.
2. Enter your Terminal Server address and click **Connect**.
3. Login to your Terminal Server.
4. Go to **Start** > **Control Panel**.
5. On the Control Panel, click on **Install Application on Remote Desktop Server**.
6. If a User Account Control warning prompt is displayed, click **Yes**.
7. When the Install Program From Floppy Disk or CD-ROM prompt appears, click **Next**.
8. On the Run Installation Program prompt, click **Browse**.
9. Navigate to your file server and locate the *Setup.exe* file. (usually in the GIFTS\Setup folder)
10. Select the *Setup.exe* file and click **Open**.
11. Click **Next** to continue.
12. When the Open File - Security Warning prompt appears, click **Run**.
13. Follow the GIFTS Alta installation wizard.
14. When the GIFTS Alta installation is complete, click **Finish**.

15 Close the Control Panel window.

16 Go to **Start** > **All Programs** and you should see a MicroEdge GIFTS folder.

Step 2: Publish the Application to Terminal Services

1 Go to **Start** > **Administrative Tools** > **Remote Desktop Services** and select **RemoteApp Manager**.

2 On the right side panel under Actions, click on **Add RemoteApp Programs**.

3 When the RemoteApp Wizard opens, click **Next**.

4 On the programs list, check the boxes next to GIFTS Alta and any other related modules.

5 Click **Next** to continue.

6 Review your selections on the Review Settings window then click **Finish**.

7 The programs you selected should now be listed on the RemoteApp Programs list on the bottom of the RemoteApp Manager window.

Step 3: Test and Configure Remote Web Access

1 Go to **Start** > **Administrative Tools** > **Remote Desktop Services** and click on **Remote Desktop WebAccess Configuration**.

2 Login to the Remote Desktop Services Default Connection.

3 You should see all the RemoteApp program icons displayed.

4 Click on the **GIFTS Alta icon**.

5 A RemoteApp warning prompt will appear. Click **Connect** to continue.

6 Login using your network credentials.

7 When the Open File - Security Warning appears, click **Run**.

8 GIFTS Alta will now open as normal and request your login.

Note: For more information about setting up RemoteApps for users, see **http://technet.microsoft.com/en-us/library/cc730673(v=ws.10).aspx**

7 Upgrading a GIFTS Alta Standalone Workstation or File Server

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

In This Chapter

Before You Begin **100**
Standalone Upgrade **103**
File Server Upgrade **107**

Before You Begin

This process upgrades your GIFTS 6.4 or later, or previous version of Alta system to the most recent GIFTS Alta. To determine which version you have in GIFTS 6.x, go to Help: About. To determine which version you have in GIFTS Alta, go to the User Menu: About Alta.

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 Alta for the duration of your upgrade.
- Upgrading GIFTS Alta can take a significant amount of time depending how large your current installation is.
- If you use MyGIFTS or ReviewerCONNECT, it must be version 3.6 or higher. Otherwise, you will have to upgrade to GIFTS Connections 3.6 at the conclusion of your GIFTS Alta 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 Alta. 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 184.

- 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 Alta installed on a single workstation. To perform this type of upgrade, please refer to "Standalone Upgrade" on page 103.

About the File Server Upgrade

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

This upgrade includes a *Server Upgrade* process—which upgrades the shared files and GIFTS Alta database on the server—and a *Workstation Upgrade* which upgrades the files on each GIFTS Alta workstation. To perform this type of upgrade, please refer to "File Server Upgrade" on page 107.

Note: If you have a Microsoft SQL Server or Oracle server backend, please refer to "Upgrading GIFTS Alta Client/Server Installations" on page 113 for upgrade instructions.

System Files

For a complete list of the system files installed by the GIFTS Alta upgrade, consult the "GIFTS Alta Impact Analysis" on page 176.

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 Alta and who have installed the entire GIFTS Alta system on the hard drive of a single workstation.

Step 1: Upgrading Your GIFTS Alta 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 Alta 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 Alta 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 Alta and double-click the *Setup.exe* file. Click **Run** at the Security Warning prompt.

4. At the MicroEdge GIFTS Alta 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 Alta 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 Alta 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.

   The install process may involve up to four steps depending what is currently installed on the workstation or server.

   - Install Alta program files
   - Install Crystal Reports v11 files (if not currently installed)

- Install .Net 4 Framework (if not currently installed)
- Install MS Data Access Components (MDAC) (if not currently installed)

If your computer is not running a compatible version of above software needed to run GIFTS Alta, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the installation from your downloaded files.

Note: After the 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 8.

8 When the upgrade is complete, the Setup Complete window opens.

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

9 In the Setup Complete window you are given the option to upgrade your GIFTS Alta 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 106 and run the database upgrade manually.

If you want to run the database upgrade now, select the **Run GIFTS Alta 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.

- 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 106 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 106 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 Alta.

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 104.

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

To upgrade your GIFTS Alta database for use with GIFTS Alta:

1. From the Windows Start menu, select **Run**.
2. **Browse** to locate the GIFTS Alta Master/Install folder and double-click on the Setup.exe file. This will essentially run through the GIFTS Alta install again.
3. When you reach the Setup Complete window, make sure the **Run GIFTS Alta 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 Alta upgrade is complete, and you may resume your use of GIFTS Alta.

File Server Upgrade

This type of upgrade is for GIFTS Alta systems installed on a network file server and one or more GIFTS Alta 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 Alta workstation using the MicroEdge GIFTS Alta Upgrade Installation Files.

The Server Upgrade includes the following steps:

- "Step 1: Updating Your GIFTS ALTA Configuration File" on page 107
- "Step 2: Upgrading the GIFTS ALTA File Server" on page 108
- "Step 3: Manually Upgrading the GIFTS Alta Database" on page 110
- "Step 4: Upgrading Other GIFTS ALTA Workstations" on page 111

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 Alta 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 ALTA File Server".

To update your GIFTS Alta configuration file:

1. Copy the gifts.cfg file to the \GIFTS directory on your GIFTS Alta 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 Alta File Server

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

Important: This process must be performed from a workstation already configured to run GIFTS Alta. 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 Alta 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 Alta and double-click the *Setup.exe* file. Click **Run** at the Security Warning prompt.
4. At the MicroEdge GIFTS Alta 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 Alta 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 Alta 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.

The install process may involve up to four steps depending what is currently installed on the workstation or server.

- Install Alta program files
- Install Crystal Reports v11 files (if not currently installed)
- Install .Net 4 Framework (if not currently installed)
- Install MS Data Access Components (MDAC) (if not currently installed)

If your computer is not running a compatible version of above software needed to run GIFTS Alta, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the installation from your downloaded files.

Note: After the 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 8.

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

Important: The following database upgrade makes irreversible changes to your database. Before proceeding, make sure that you have a current backup of your 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 GIFTS Alta Database" on page 110 and run the database upgrade manually.

- 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 Alta Database" on page 110 to run the upgrade yourself *after* backing up the database.
- If you want to run the database upgrade now, select the "Run GIFTS Alta 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 ALTA Workstations" on page 111.

Step 3: Manually Upgrading the GIFTS Alta 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 ALTA Workstations" on page 111.

This step updates the structure of your GIFTS Alta database and performs data updates to make your database compatible with GIFTS Alta. Users will not be able to log in to GIFTS Alta 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 Alta. Either run it from the same workstation you used for "Step 2: Upgrading the GIFTS ALTA File Server", or upgrade a workstation according to the instructions in "Step 4: Upgrading Other GIFTS ALTA Workstations" on page 111, 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 Alta Master/Install folder and double-click on the Setup.exe file. This will essentially run through the GIFTS Alta install again.
3. When you reach the Setup Complete window, make sure the **Run GIFTS Alta 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 Alta Workstations

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

The GIFTS Alta Workstation Upgrade must be *run on every workstation* that has access to GIFTS Alta—except the GIFTS Alta workstation used for "Step 2: Upgrading the GIFTS ALTA File Server" on page 108. 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 Alta directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Alta 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 Alta 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 Alta 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 Alta, 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 Alta workstations, your GIFTS Alta upgrade is complete. You may resume your use of GIFTS Alta.

Important: If you have a version of MyGIFTS or ReviewerCONNECT earlier than 3.5, you now need to upgrade GIFTS Connections to verison 3.6. Please refer to the *GIFTS Connections: MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide* for more information.

8 Upgrading GIFTS Alta Client/ Server Installations

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

In This Chapter

Before You Begin **114**

Step 1: Important Prerequisites **117**

Step 2: Upgrading the File Server **119**

Step 3: Manually Upgrading the GIFTS Alta Database **122**

Step 4: Upgrading Your GIFTS ALTA Workstations **124**

Before You Begin

This process upgrades your GIFTS 6.4 or later, or previous version of Alta system to the most recent GIFTS Alta.

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 Alta for the duration of the upgrade.
- Upgrading GIFTS Alta can take a significant amount of time depending how large your current installation is.
- If you use MyGIFTS or ReviewerCONNECT, it must be version 3.6 or higher. Otherwise, you will have to upgrade to GIFTS Connections 3.6 at the conclusion of your GIFTS Alta 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 Alta. 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 184.

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 Alta setup process, consult the "Installation Impact Analysis" on page 175.

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 Alta 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 Alta workstation.

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

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

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 Alta 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 Alta configuration are ready.

Preparing Your Environment

Upgrading to GIFTS Alta 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 Alta directory and the GIFTS Alta 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 Alta database. For more information about this process, please consult your SQL Server documentation.
- Ensure that your database server is compatible with GIFTS Alta.

  Note: Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.
- GIFTS Alta connects to the database server using ODBC drivers, which are installed during the upgrade process.
  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 184.
- GIFTS Alta requires a comparable amount of hard disk space to previous versions of GIFTS. Please refer to "GIFTS Alta 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 Alta 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 119.

To update your GIFTS Alta configuration file:

1. Copy the gifts.cfg file to the \GIFTS directory on your GIFTS Alta 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 Alta workstation. The setup process uses the information contained in the workstation's gifts.ini file to determine the location of your current GIFTS Alta system, and upgrades it accordingly.

Please note that the workstation from which you run the file server upgrade is also upgraded to a GIFTS Alta 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 Alta 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 Alta and double-click the *Setup.exe* file. Click **Run** at the Security Warning prompt.

4. At the MicroEdge GIFTS Alta 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 Alta 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 Alta 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.

IThe install process may involve up to four steps depending what is currently installed on the workstation or server.

- Install Alta program files
- Install Crystal Reports v11 files (if not currently installed)
- Install .Net 4 Framework (if not currently installed)
- Install MS Data Access Components (MDAC) (if not currently installed)

If your computer is not running a compatible version of above software needed to run GIFTS Alta, you are prompted to install it. Click **OK** and follow the on-screen instructions to complete the installation from your downloaded files.

Note: After the 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 8.

8 When the upgrade is complete, the Setup Complete window opens. In this window you are given the option to upgrade your GIFTS Alta 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 GIFTS Alta Database" on page 122 and run the database upgrade manually.

If you want to run the database upgrade now, select the **Run GIFTS Alta 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 GIFTS Alta Database" on page 122 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 ALTA Workstations" on page 124.

Step 3: Manually Upgrading the GIFTS Alta 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 ALTA Workstations" on page 124.

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

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 Alta. 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 ALTA Workstations" on page 124 and use it to run the database upgrade following the directions below.

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

To upgrade your GIFTS Alta database:

1. At the workstation you upgraded in Step 3, open the Windows Start menu and select **Run**.
2. **Browse** to locate the GIFTS Alta Master/Install folder and double-click on the Setup.exe file. This will essentially run through the GIFTS Alta install again.
3. When you reach the Setup Complete window, make sure the **Run GIFTS Alta 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 Alta 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 Alta. Clients with Oracle server may also need to update the ODBC data source on each workstation.

Running the Workstation Upgrades

The GIFTS Alta Workstation Upgrade must be run on *every* workstation that has access to GIFTS Alta *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 Alta 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 Alta directory, the Setup.exe file is located at P:\GIFTS\Setup\Setup.exe.

   The GIFTS Alta 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 Alta 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 Alta 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 Alta, 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 Alta workstation. Once you have upgrade all of your GIFTS Alta workstations, your GIFTS Alta upgrade is complete! You may now resume your use of GIFTS Alta.

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 later, or a previous version of Alta—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 Facts Sheet' for your version of GIFTS Alta. This driver is required by the Crystal Reports viewer used in the GIFTS Alta Report Library. GIFTS Alta uses a different ODBC driver (as specified in the fact sheet), but uses the information in this data source to locate the GIFTS Alta database.

To update the data source for a GIFTS Alta 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 Alta 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 Alta.
8. Click **OK** and close the ODBC Administrator. You now have an ODBC Data Source named GIFTS.

9 Upgrading GIFTS Alta with Citrix Presentation Server

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

In This Chapter

Before You Begin.....128
Upgrading a GIFTS Alta Workstation Running Citrix 131
Upgrading a Standalone System Running Citrix.....134

Before You Begin

This process upgrades your GIFTS 6.4 or later, or previous version of Alta system to the most recent GIFTS Alta.

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 184.
- 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 Alta 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 Alta workstation software on a computer running Citrix, as described in "Option 1: Installing a GIFTS Alta Workstation" on page 86.

In this process, you will upgrade your GIFTS Alta system—and then upgrade the workstation that is running Citrix Presentation Server. To perform this type of upgrade, please refer to "Upgrading a GIFTS Alta Workstation Running Citrix" on page 131.

Options 2: Citrix Standalone Upgrade

This upgrade is for systems where the entire GIFTS Alta system has been installed on a single computer running Citrix, as described in "Option 2: Installing a Standalone System" on page 90.

In this process, you will simply upgrade the GIFTS Alta system on that computer, as described in "Upgrading a Standalone System Running Citrix" on page 134.

Other Upgrade Options

If neither of the two preceding options applies to your GIFTS Alta 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 175.

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 Alta Workstation Running Citrix

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

Step 1: Upgrade Your GIFTS Alta System

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

- Clients with a file server system should refer to the instructions in "Upgrading a GIFTS Alta Standalone Workstation or File Server" on page 99.
- Clients with a Microsoft SQL Server or Oracle server environment should follow the instructions in"Upgrading GIFTS Alta Client/Server Installations" on page 113.

Note: If you wish to upgrade a standalone GIFTS Alta system, please refer to "Upgrading a Standalone System Running Citrix" on page 134.

Step 2: Disabling Remote Logons

Before upgrading GIFTS Alta, 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 86. Then, proceed to the next step.

Step 3: Upgrading GIFTS Alta on Your Citrix Server

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

- You must launch the GIFTS Alta Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you

do not run GIFTS Alta Setup from within the Control Panel, GIFTS Alta 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 Alta upgrade process and close the Add/Remove Programs utility before restarting the computer.
- At the conclusion of the GIFTS Alta Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS Alta upgrade is complete before closing the utility.

To upgrade GIFTS Alta on your Citrix Presentation Server:

1. From the Windows **Start** menu of the computer running Citrix, choose **Control Panel ➤ Install Application from Remote Desktop**.
2. **Browse** to and run the Setup.exe program located in the GIFTS\Setup directory of your GIFTS Alta file server.

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

   The GIFTS Alta Setup process begins.
3. You may now upgrade GIFTS Alta, as described in the section that applies to your configuration of GIFTS Alta:

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

   - **File server installations** – please refer to "Step 4: Upgrading Other GIFTS ALTA Workstations" on page 111.
   - **SQL Server and Oracle installations** – please refer to "Step 4: Upgrading Your GIFTS ALTA Workstations" on page 124.

When you have finished upgrading the GIFTS Alta workstation software, you may proceed to the next step.

Step 4: Copying the GIFTS Alta Help Files

To make the GIFTS Alta online help available to each user, this procedure describes how make the GIFTS Alta help files available to users who access GIFTS Alta 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 Alta help files:

empadmin.chm	gfwbudget.chm
empgifts.chm	gfwgam.chm
gfwadmin.chm	gifts.chm
gfwap.chm	mesupp.chm
altagifts.chm	gfw60.chm

3. Paste the GIFTS Alta help files to the virtual WINDOWS or WINNT directory of *each user* who uses GIFTS Alta 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 Alta 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 Alta with Citrix is complete!

Upgrading a Standalone System Running Citrix

This procedure describes how to upgrade a standalone GIFTS Alta system on a computer running Citrix Presentation Server. Using this procedure, all components of GIFTS Alta will be upgraded—including the GIFTS Alta database. This option does not apply to client/server systems.

Step 1: Disabling Remote Logons

Before upgrading GIFTS Alta, 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 86. Then, proceed to the next step.

Step 2: Update Your GIFTS Alta 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 Alta".

To update your GIFTS Alta 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 Alta

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

- You must launch the GIFTS Alta Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you do not run GIFTS Alta Setup from within the Control Panel, GIFTS Alta 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 Alta upgrade process and close the Add/Remove Programs utility before restarting the computer.
- At the conclusion of the GIFTS Alta Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS Alta upgrade is complete before closing the utility.

To upgrade a standalone GIFTS Alta system on your Terminal Server:

1. From the Windows **Start** menu, choose Control Panel ➤ Install Application from Remote Desktop.
2. **Browse** to the location of the GIFTS Alta Upgrade files and run the *Setup.exe* file in the Master/Install.
3. The GIFTS Alta Setup process begins.

   Important Reminder: You *must* run the GIFTS Alta Setup program from within the Control Panel.
4. You may now continue with your GIFTS Alta upgrade. To do so, please follow the steps in "Step 2: Upgrading Program Files" on page 104.
5. 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 106 to do so.

When you have finished upgrading GIFTS Alta, you may proceed to the next step.

Step 4: Copying the GIFTS Alta Help Files

To make the GIFTS Alta online help available to each user, this procedure describes how make the GIFTS Alta help files available to users who access GIFTS Alta 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
gfwadmin.chm	gifts.chm
gfwap.chm	mesupp.chm

3. Copy the GIFTS Alta help files to the virtual WINDOWS or WINNT directory of *each user* who uses GIFTS Alta 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 Alta 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 Alta with Citrix is complete!

10 Upgrading GIFTS Alta on Terminal Server

This chapter describes how to upgrade GIFTS Alta on computers running Windows® Terminal Services.

In This Chapter

Before You Begin.....138
Upgrading GIFTS Alta on a Terminal Server 139
How to Obtain Technical Support.....139

Before You Begin

This process upgrades your GIFTS 6.4 or later, or previous version of Alta system to the most recent GIFTS Alta.

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 Alta:

- Your program, database, reports, and template files are altered by this process. Please make a complete backup of your current GIFTS Alta directory before proceeding.
- All users must be logged out of GIFTS Alta for the duration of the upgrade.
- If you are using any virus-protection software, please disable it before you upgrade GIFTS Alta. Virus-protection programs may cause errors during the upgrade process.
- Read the following sections, 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.
- Always upgrade your File server before upgrading your Terminal server.

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 Alta installations that can be upgraded using the procedures in this chapter.

Upgrading GIFTS Alta on a Terminal Server

To upgrade your GIFTS Alta on a Terminal Server, follow the same procedure as a new installation.

Refer to "Step 1: Terminal Server Installation" on page 95.

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

Upgrading a GIFTS Alta Workstation Running Citrix

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

Step 1: Upgrade Your GIFTS Alta System

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

- Clients with a file server system should refer to the instructions in "Upgrading a GIFTS Alta Standalone Workstation or File Server" on page 99.
- Clients with a Microsoft SQL Server or Oracle server environment should follow the instructions in"Upgrading GIFTS Alta Client/Server Installations" on page 113.

Note: If you wish to upgrade a standalone GIFTS Alta system, please refer to "Upgrading a Standalone System Running Citrix" on page 143.

Step 2: Disabling Remote Logons

Before upgrading GIFTS Alta, 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 86. Then, proceed to the next step.

Step 3: Upgrading GIFTS Alta on Your Citrix Server

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

- You must launch the GIFTS Alta Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you

do not run GIFTS Alta Setup from within the Control Panel, GIFTS Alta 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 Alta upgrade process and close the Add/Remove Programs utility before restarting the computer.
- At the conclusion of the GIFTS Alta Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS Alta upgrade is complete before closing the utility.

To upgrade GIFTS Alta on your Citrix Presentation Server:

1. From the Windows **Start** menu of the computer running Citrix, choose **Control Panel ➤ Install Application from Remote Desktop**.
2. **Browse** to and run the Setup.exe program located in the GIFTS\Setup Alta directory of your GIFTS Alta file server.

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

   The GIFTS Alta Setup process begins.
3. You may now upgrade GIFTS Alta, as described in the section that applies to your configuration of GIFTS Alta:

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

   - **File server installations** – please refer to "Step 4: Upgrading Other GIFTS ALTA Workstations" on page 111.
   - **SQL Server and Oracle installations** – please refer to "Step 4: Upgrading Your GIFTS ALTA Workstations" on page 124.

When you have finished upgrading the GIFTS Alta workstation software, you may proceed to the next step.

Step 4: Copying the GIFTS Alta Help Files

To make the GIFTS Alta online help available to each user, this procedure describes how make the GIFTS Alta help files available to users who access GIFTS Alta 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 Alta help files:

empadmin.chm	gfwbudget.chm
empgifts.chm	gfwgam.chm
gfwadmin.chm	gifts.chm
gfwap.chm	mesupp.chm
altagifts.chm	gfw60.chm

3. Paste the GIFTS Alta help files to the virtual WINDOWS or WINNT directory of *each user* who uses GIFTS Alta 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 Alta 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 Alta with Citrix is complete!

Upgrading a Standalone System Running Citrix

This procedure describes how to upgrade a standalone GIFTS Alta system on a computer running Citrix Presentation Server. Using this procedure, all components of GIFTS Alta will be upgraded—including the GIFTS Alta database. This option does not apply to client/server systems.

Step 1: Disabling Remote Logons

Before upgrading GIFTS Alta, 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 86. Then, proceed to the next step.

Step 2: Update Your GIFTS Alta 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 Alta".

To update your GIFTS Alta 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 Alta

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

- You must launch the GIFTS Alta Setup program from within the Add/Remove Programs Control Panel, as described in this procedure. If you do not run GIFTS Alta Setup from within the Control Panel, GIFTS Alta 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 Alta upgrade process and close the Add/Remove Programs utility before restarting the computer.
- At the conclusion of the GIFTS Alta Setup process, you should close the Add/Remove Programs utility before proceeding; make sure that the GIFTS Alta upgrade is complete before closing the utility.

To upgrade a standalone GIFTS Alta system on your Terminal Server:

1. From the Windows **Start** menu, choose Control Panel ➤ Install Application from Remote Desktop.
2. **Browse** to the location of the GIFTS Alta Upgrade files and run the *Setup* file. The GIFTS Alta Setup process begins.

   Important Reminder: You *must* run the GIFTS Alta Setup program from within the Control Panel.
3. You may now continue with your GIFTS Alta upgrade. To do so, please follow the steps in "Step 2: Upgrading Program Files" on page 104.
4. 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 106 to do so.

When you have finished upgrading GIFTS Alta, you may proceed to the next step.

Step 4: Copying the GIFTS Alta Help Files

To make the GIFTS Alta online help available to each user, this procedure describes how make the GIFTS Alta help files available to users who access GIFTS Alta 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
gfwadmin.chm	gifts.chm
gfwap.chm	mesupp.chm

3. Copy the GIFTS Alta help files to the virtual WINDOWS or WINNT directory of *each user* who uses GIFTS Alta 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 Alta 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 Alta with Citrix is complete!

11 GIFTS Alta Extensions: Link and Reminders Engine

This chapter describes how to install the optional GIFTS Alta Extensions for Link and Reminders.

In This Chapter

Installing GIFTS Alta Extensions **148**

GIFTS Alta Link for Use with Outlook **148**

GIFTS Alta Reminders Engine **148**

Step 1: The Extended Alta Settings Tool **149**

Step 2: Installing Link for Use with Outlook **149**

Step 3: Installing the GIFTS Alta Reminders Engine **152**

Installing GIFTS Alta Extensions

GIFTS Alta includes two optional extensions which were once part of the GIFTS Plus Pack.

- GIFTS Alta Link for Use with Outlook
- GIFTS Alta Reminders Engine

GIFTS Alta Link for Use with Outlook

Link allows you to do the following with GIFTS Alta:

- Send Outlook email to GIFTS Alta as a Mail Activity and optionally link the Mail Activity with a record in GIFTS Alta.
- Store the email and/or email attachments as documents. (Document Manager required)
- The body of the email will be saved in the Long Notes section of the Mail Activity or the email will be saved as a message (.msg) file in Document Manager.
- If configured for it, email attachments may also be exported into GIFTS Alta as External Document Activities.

GIFTS Alta Reminders Engine

The Reminders Engine allows you to do the following with GIFTS Alta:

- Generate automated reminders
- Send reminders to multiple recipients

Overview of the Setup and Installation Process

For installation, you will need to do the following:

1. In the Administrator Module, use the **Extended Alta Settings** tool to set up the security permissions for Reminders and Link Plus.
2. Close both Outlook and GIFTS Alta.
3. Install the Link extension, if desired.
4. Install the Reminders Engine extension, if desired.

Important: Both Outlook and GIFTS Alta must be closed when you install Link.

Step 1: The Extended Alta Settings Tool

Reminders and Link have the ability to affect large amounts of data in a single operation. Since these changes cannot be undone, it is important to restrict the use of these utilities to qualified members of your staff.

You can use the Alta Extended Settings tool to determine which GIFTS Alta users have access to the functions provided by Reminders Plus and Link.

The GIFTS Extended Alta Settings tool can be accessed through the GIFTS Administrator Module under **Tools > Extended Alta Settings**.

For more information, please refer to the section on *GIFTS Alta Extended Configuration Settings* in the GIFTS Alta Administrator's Module User Guide.

Step 2: Installing Link for Use with Outlook

Note: Link is not compatible with 64-bit Outlook.

Link allows you to import Outlook email and email attachments into GIFTS Alta as Mail Activities and External Document Activities, respectively.

Before You Begin:

- Both Outlook and GIFTS Alta must be closed when you install Link.
- If you are re-installing or updating Link for use with Outlook, you must first make sure the previous version of Link has been completely uninstalled. **Please refer to Solution article 1946 in the GIFTS PowerME site for details.**
- If you are installing Link for the first time, you can simply proceed.
- **Document Manager:** In order to import Outlook email attachments, you must have the Document Manager installed.
- **Install for Everyone Option:** This option during the install process allows Link Plus to be available to anyone who logs in to the same workstation. It is only available to Office 2007 or 2010 users and you must be logged in as an Administrator during the installation process.
- **Office 2003 Users:** The install for **Everyone** option is not available.
- **Office 2007 Users:** If you wish to use the install for Everyone option, a Microsoft Hotfix must first be downloaded and installed. Please refer to **http://support.microsoft.com/kb/976811**.
- **All Citrix users:** Link will not work with Citrix unless Outlook is also accessed via Citrix.
- **Citrix users with Office 2003:** Each Link user must have the Link installation run separately under their user login on the Citrix server that he or she will be accessing.

To Install Link Plus for Outlook:

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

   Note: For Citrix users, browse from the Citrix server to the Alta Extensions subfolder.

2 Open the AltaLink subfolder for your version of Outlook and double-click **Setup.exe**.

A message may appear advising you that one or more components must be installed. Click **Accept** or **Install**, as needed, to continue.

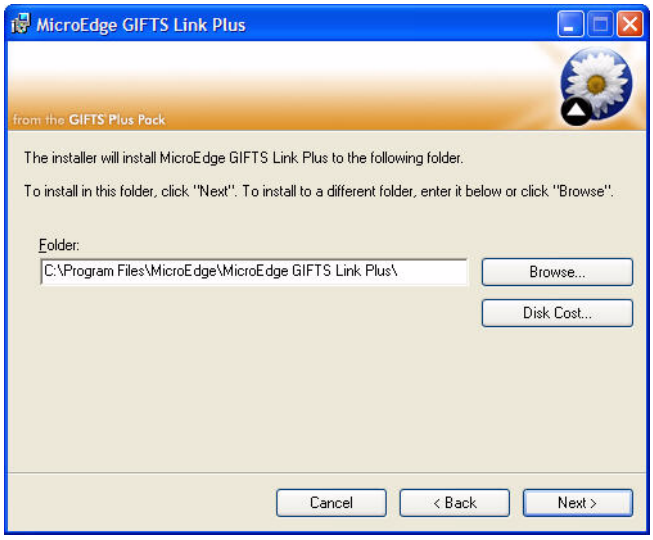
Components may include:

- Windows Installer 4.5
- Microsoft Visual Studio 20xx Tools for Office Runtime
- Microsoft Office 20xx Primary Interop Assemblies

3 Click **Install**.

4 When the Link Setup Wizard appears, click **Next.**

5 The installer will inform you of the default folder location for the installation.



6 If you want to change the default GIFTS Alta Link folder location, click **Browse** and select an alternate folder location.

You can also click the **Disk Cost** button to view a list of available drives along with their current available space and the required space for the initial installation.

7 Click **Next** to continue.

8 When the Confirmation Installation screen appears, click **Next**.

9 When Link installation is complete, click **Close**.

Step 3: Installing the GIFTS Alta Reminders Engine

Before You Begin:

- If you are upgrading to the GIFTS Alta Reminders Engine, you must first uninstall your older version of the GIFTS Reminders Plus Engine through your **Start > Control Panel > Add/Remove Programs** feature.
- Delete the old shortcut to the Reminders Plus Engine you may have on your desktop to manually generate and send reminders.

Note: The normal GIFTS Alta Reminders feature is installed with GIFTS Alta.

Although you can create reminders from any GIFTS Alta workstation by going to **User menu > Reminders**, you can only manually generate and send reminders from a workstation on which you have installed the GIFTS Alta Reminders Engine.

To install the Reminders Engine:

1 Go to the **Alta Extensions** folder, typically installed in the GIFTS Alta directory (e.g., C:\GIFTS\Alta Extensions), and open the **AltaReminder Setup** subfolder.

2 Double-click **Setup.exe**. The Alta Reminders Engine Setup Wizard is displayed.

3 Click **Next**, and then **Next** again. The Alta Reminders Engine files are installed on the workstation.

4 Click **Finish**. The Alta Reminders Engine installation is complete.

Creating a Shortcut to Generate Reminders Manually

The Reminders Engine can be run manually at any time from a workstation on which the Reminders Engine Setup has been run.

The Reminders Engine is run via the AltaReminders.exe located in your Alta Extensions subfolder. However, because this executable also runs the normal GIFTS Alta Reminders feature, if you double-click the AltaReminders.exe, it will open the normal Reminders setup feature, exactly as if you had selected it from your GIFTS Alta User's menu.

In order to tell the AltaReminders.exe to run the Reminders Engine to generate and send reminders, you need to add a specific parameter to the run command.

This is done by creating and modifying a shortcut to the AltaReminders.exe.

To create a shortcut to run the Reminders Engine:

1. Locate AltaReminders.exe in your Alta Extensions directory.
2. Right-click on AltaReminders.exe and select **Create Shortcut**. A shortcut is created in the same folder. You can move this shortcut, for example to your desktop, after creating it.
3. Right-click on the shortcut and select **Rename**. Rename your shortcut "Reminders Engine", or something else you will remember easily. You do not need to include .exe in the name.
4. Right-click on the shortcut and select **Properties**. The Properties window appears.
5. In the **Target** field, at the end of the path to AltaReminders.exe, type a blank space and then type "-generate" (do not type a blank space after "-generate"). This parameter indicates that the Reminders Engine should run, generating and sending reminders.
6. Click **Apply**.

Your shortcut is now set up to run the Reminders Plus Engine. You can double-click this shortcut to generate and send reminders manually at any time.

12 Maintenance, Security, and Data Integrity

This chapter describes the diagnostic and maintenance utilities provided for GIFTS Alta, and the GIFTS Alta security features. It also describes the products used to develop the GIFTS Alta software.

In This Chapter

GIFTS Alta Diagnostics Utility **156**

Isolating System File Conflicts **157**

Maintaining Your Database **158**

Budget Diagnostics Utility **160**

Security and Data Integrity **161**

System Architecture **163**

GIFTS Alta Diagnostics Utility

The GIFTS Alta Diagnostics utility is designed to assist MicroEdge's Technical Support staff in identifying and resolving problems in your GIFTS Alta 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 Alta, and provides a summary of system information like memory, available resources, and the current Windows Regional Settings.
- **GIFTS Alta Information:** a summary of all of the GIFTS Alta-related files, used to identify problematic versions or duplicate files. This can be used to list the system files installed with GIFTS Alta, 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 Alta 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 Alta application.
2. From the Main menu, select User menu ➤ About Alta.
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 Alta 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 standalone installations of GIFTS Alta and the file server version of GIFTS Alta.

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 Alta quits unexpectedly (for example, if there is a power outage or a hardware malfunction). Most often, GIFTS Alta 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 Alta database in a Zip format that you can then provide to MicroEdge Technical Support for research purposes.

GIFTS Alta 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 Alta 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 Alta 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 Alta, 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 Alta 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 Alta 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 Alta 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 Alta environment. GIFTS Connections administrators face additional data security considerations, especially if they have MyGIFTS and/or ReviewerCONNECT users accessing GIFTS Alta 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 Alta 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 Alta Administrator.

Password Security

GIFTS Alta provides for the creation and maintenance of unique User IDs and passwords. GIFTS Alta also supports Windows NT integrated security, which permits grantmakers who use Windows servers to skip the GIFTS Alta login process: each user's Windows login ID is automatically read and used by GIFTS Alta. Similar login integration is provided for Microsoft SQL Server and Oracle databases. For more information, please refer to the *GIFTS Alta Administrator's Guide*.

Rollback Recovery

GIFTS Alta 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 Alta fund transfer between two budget categories, *there is no data corruption* since GIFTS Alta only *commits* the changes once the *entire* transaction is completed successfully.

Audit Trail

GIFTS Alta 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 Alta requires that all users have full access rights to the network directory and subdirectories where GIFTS Alta is installed.

Client/Server Access Security

GIFTS Alta 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 Alta does not interact with them. The GIFTS Alta 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 Alta system, please search for "backups" in the MicroEdge Solutions Knowledgebase.

System Architecture

GIFTS Alta has been designed following the principles specified in the *Microsoft Windows Interface Application Design Guide* and the *Microsoft Windows Software Development Kit*.

GIFTS Alta uses a Microsoft Access 2003 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 2003 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 Alta 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 Alta databases are compatible with the versions of Business Objects Crystal Reports listed in the GIFTS Alta Compatibility Facts Sheet. (The Professional edition of Crystal Reports is required for client/server systems.)

> **Note:** Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

Note that all editions of GIFTS Alta provide the same user interface and functionality regardless of the database used. GIFTS Alta 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.

12 Maintenance, Security, and Data Integrity

13 Expanding Your GIFTS Alta System

This chapter describes how you can expand the functionality of GIFTS Alta with optional modules, customizations, trade-ups, migration, or by linking GIFTS Alta to an external system.

In This Chapter

Optional Modules and Components **166**

GIFTS Connections **169**

System Trade-up and Migration **170**

Links to External Systems **172**

Optional Modules and Components

The following optional modules and add-ons can be used with any GIFTS Alta installation.

Internet Grant Application Manager

The Internet Grant Application Manager (IGAM) enables GIFTS Alta to receive grant applications and requirements through the Internet. Incoming applications are stored separately from the main GIFTS Alta database, and applications can be rejected or transferred to GIFTS Alta for further review. After retrieval, requirements directly update GIFTS Alta records. IGAM also includes a Forms Manager and Internet Hosting Service that you can use to create, post, and manage application and requirement forms.

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 Alta Check Writer to print checks directly from GIFTS. The Check Writer prints GIFTS Alta 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 Alta.

Specific links are available for many popular accounting packages, including Blackbaud Accounts Payable, Quicken®, and QuickBooks®.

Reviewers Module

The GIFTS Alta 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 169 for more information.

GIFTS Alta Customizer

The GIFTS Alta Customizer enables you to design additional data entry tabs for GIFTS Alta 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.

GIFTS Alta Blueprint Module

GIFTS Alta Blueprint is a comprehensive set of tools which have been built using the new GIFTS Alta interface to help create custom fields, forms, workflows, and keep track of upcoming tasks.

Note: Once Blueprint is installed, the GIFTS Alta Customizer options will no longer be available in the Administrator's module.

The Blueprint tools include:

- The Custom Fields Manager
- The Fields Library
- The Forms Library
- The Workflow Library
- The Taskboard
- The GCS Layouts Manager

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 Alta 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 Alta product includes a Matching Gifts Summary import, and Employee GIFTS Alta 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 Alta. 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 Alta database through a web browser. The GIFTS Connections Server (GCS) retrieves data from your GIFTS Alta 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 Alta. This allows users the flexibility to connect to your GIFTS Alta 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 Alta database from remote locations. Whether connecting through an intranet or over the Internet, your users have a way to interact with GIFTS Alta 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 Alta.

ReviewerCONNECT

If you have the GIFTS Alta 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 Standalone to File Server

To upgrade a standalone GIFTS Alta system to a network file server version, you can obtain a new configuration file from MicroEdge and then re-install GIFTS Alta 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 Alta (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:** SAP 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 refer to the documentation for your version of Crystal Reports.

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 Alta, 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 Alta creates configuration files that store the location of the GIFTS Alta programs, data, and document templates. When you migrate your GIFTS Alta 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 Alta. For more information about migrating GIFTS Alta 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 Alta Document Manager and change the directory name or mapped drive letter that externally attached documents are stored in, their links to GIFTS Alta must be updated to reflect the new drive mapping.

Links to External Systems

Note: Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

Commercial Accounting Systems

The GIFTS Alta 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 Alta 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 Alta. 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 Alta 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 GIFTS Alta to Microsoft Excel or an HTML file. In addition, the report viewers used by GIFTS Alta for ad hoc reports, standard reports, and custom reports enable you to export data to the data formats listed in the GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME website.

Note: Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

As with any type of export, some formatting may be lost during the export process.

Linking to Other Products

All versions of GIFTS Alta 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 Alta.

Caution: When linking to other systems, ensure that GIFTS Alta data *is not* modified by any application other than GIFTS Alta. The GIFTS Alta database can be corrupted if another application modifies it. As described in the *Client Resource Guide*, MicroEdge will not support your GIFTS Alta software if data is entered or modified through any means except the application software provided by MicroEdge.

14 Installation Impact Analysis

The following impact analyses detail the system files that are installed with GIFTS Alta. Files are listed according to the directory where they will be installed.

Note: The GIFTS Alta Setup process overwrites existing system files only when the file to be installed is dated later than the existing file.

In This Chapter

GIFTS Alta Impact Analysis **176**

GIFTS Alta Impact Analysis

The following tables detail the system files that are installed with GIFTS Alta. 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 Alta 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 or Syswow64 Directories – GIFTS Alta Workstations

On 32-bit Windows workstations, the following files are installed to the \Windows\System32 directory.

On 64-bit Windows workstations, the following files are installed to the \Windows\Syswow64 directory.

Self-Registering Files

Filename	Version	File Date	Size (in Kb)
AniGIFV6.ocx	2.0.0.19	4/3/2002	36
arpro2.dll	2.3.1.1264	1/21/2005	1,793
ARVIEW2.OCX	2.3.1.1264	1/21/2005	599
Atl.dll	6.05.2284	7/17/2009	69
c1sizer.ocx	8.0.20071.39	10/2/2006	344
Cfx4032.ocx	4.0	2/1/2001	557
COMCAT.DLL	6.1.7600.16385	7/13/2009	7
Comctl32.ocx	6.00.8105	5/22/2000	595
Comdlg32.ocx	6.00.8418	5/7/1999	137
DSSOCK32.OCX	1.65.000	2/17/1996	48

Filename	Version	File Date	Size (in Kb)
dzocx32.ocx	1.0.0.5	11/18/1996	72
exclexpt.dll	2.3.1.1264	1/21/2005	350
htmlexpt.dll	2.3.1.1264	1/21/2005	542
https62.ocx	6.2.0.3071	5/29/2008	214
IGToolBars50.ocx	5.0.0000	3/6/2002	482
ipdaems62.ocx	6.2.0.3071	5/29/2008	166
ipports62.ocx	6.2.0.3071	5/29/2008	162
MEDate.ocx	1.0.0.0	9/30/2004	120
meEmail.dll	1.05.0001	5/29/2013	120
MEGiftsBusiness.dll	1.05.0010	6/6/2013	14937
mem32x30.ocx	3.0.39	6/9/2009	326
METCPCommunications.dll	1.0.0.0	10/18/2002	184
METimer.dll	1.0.0.0	10/18/2002	28
MFC40.DLL	4.1.000	9/18/2010	932
MFC42.DLL	6.06.400	3/11/2011	1111
Mmail32.ocx	5.10.007	2/2/2000	99
MSADODC.OCX	6.0.8804	5/21/2000	117
MSBIND.DLL	6.00.8862	7/14/2000	76
mscomctl.ocx	6.01.9834	6/6/2012	1,046
mshtml.dll	9.00.8112.16450	8/24/2012	12031
msoutl32.ocx	1.0.2922	10/6/1999	77
msscript.ocx	1.0.7600.16385	7/13/2009	93
MSVBVM50.DLL	5.02.8244 (SP2)	12/6/1999	1,324
MSVBVM60.DLL	6.0.9815	7/14/2009	1,354
MSWINSCK.OCX	6.0.8988	12/6/2000	107
NPO_IGAM_Component.ocx	1.00	2/5/2010	832
OC30.DLL	3.20	5/22/1995	626
oleaut32.dll	6.1.7601.17676	8/27/2011	559
OLEPRO32.DLL	6.1.7601.17514	11/20/2010	88
OUTSIDEX.OCX	7.7.0	5/22/2003	200
pdfexpt.dll	2.3.1.1264	1/21/2005	366
Richtx32.ocx	6.00.8804	5/22/2000	200
rtfexpt.dll	2.3.1.1264	1/21/2005	206
scrrun.dll	5.8.7600.16385	7/13/2009	160
SfxBar.dll	1.0	1/19/2001	127

Filename	Version	File Date	Size (in Kb)
shdocvw.dll	6.1.7601.17514	11/20/2010	176
smtps62.ocx	6.2.0.3071	5/29/2008	189
soaps62.ocx	6.2.0.3071	5/29/2008	242
Spell8.ocx	8.0.20071.65	10/2/2006	291
ssdw3bo.ocx	3.0.000	3/19/2001	865
SSLstBar.ocx	1.0.0000	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	3.1.00	5/30/2000	430
textexpt.dll	2.3.1.1264	1/21/2005	126
THREED20.OCX	2.0.0000	7/1/1997	324
tidate8.ocx	8.0.20071.24	12/20/2006	369
tiffexpt.dll	2.3.1.1264	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
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	6.1.7601.17514	11/20/2010	66
comctl32.dll	6.1.7601.17514	11/20/2010	518
compobj.dll	2.1	6/10/2009	28
CTL3D32.DLL	2.31.0.0	7/13/2009	27
dzip32.dll	3.0.0.15	4/14/1997	122
Edt32x30.ocx	3.0.0.38	9/4/2007	1334
GAPI32.DLL	5.5	12/1/1999	96
gdiplus.dll	6.1.7601.17825	5/4/2004	1607
IMM32.DLL	6.1.7601.17514	11/20/2010	116

Filename	Version	File Date	Size (in Kb)
MFCANS32.DLL	2.2.000	10/6/1999	131
mshtml.tlb		8/24/2012	2327
Msldbusr.dll	1.100.1113	11/9/1998	19
msvcirt.dll	6.1.7600.16385	7/13/2009	59
msvcp60.dll	7.0.7600.16385	7/13/2009	397
msvcrt.dll	7.0.7601.17744	12/16/2011	675
msvcrt20.dll	2.12.0.0	8/23.2001	248
msvcrt40.dll	6.1.7600.16385	7/13/2009	60
ole2.dll	2.10	6/10/2009	42
ole2disp.dll	2.10	6/10/2009	166
ole2nls.dll	2.10	6/10/2009	150
OLEDLG.DLL	6.1.7600.16385	7/13/2009	101
RICHED20.DLL	3.1	11/20/2010	463
RICHED32.DLL	6.1.7601.17514	11/20/2010	9
shlwapi.dll	6.1.7601.17514	11./20/2010	342
ssdw3b32.ocx	3.0.00	3/19/2001	865
STDOLE2.TLB		7/13/2009	17
storage.dll	2.10	8/23/2001	5
tibase8.dll	8.0.20071.24	12/20/2006	536
typelib.dll	2.10	6/10/2009	174
usp10.dll	1.0626.7601.715 14	11/20/2010	612
VBAMAP32.DLL	2.1.0.0	8/11/1995	15
winsock.dll	3.10	7/13/2009	3

Outside-In Viewer Files

This feature is no longer used in GIFTS Alta.

Instead, the standard Windows behavior of opening the file in the application associated with it by Windows is used, including the standard Windows prompt to associate the file type with an application if none can be found.

Crystal Reports Files – GIFTS Alta Workstations

The self-registering Crystal files listed below are installed to the following directories on each workstation:

C:\Program Files\Common Files\Business Objects\3.0\bin.

Filename	Version	File Date	Size (in Kb)
craxdrt.dll	11.0.0.2381	2/8/2007	8021

C:\Program Files\Common Files\Business Objects\3.0\crystalreportviewers11\ActiveXControls

Filename	Version	File Date	Size (in Kb)
crviewer.dll	11.0.0.2385	2/12/2007	13007

Other Crystal files are installed here: C:\Windows\Crystal.

Filename	Version	File Date	Size (in Kb)
U2fdif.dll	8.0.1.0	12/07/1999	36
U2fhtml.dll	8.0.1.0	01/06/2000	32
U2frtf.dll	8.0.1.0	01/26/2000	120
U2fwks.dll	8.0.1.0	12/07/1999	40
U2fwordw.dll	8.0.1.0	12/07/1999	104
U2fxls.dll	8.0.1.0	01/26/2000	204
u2lsamp1.dll	8.0.1.0	12/07/1999	24
U2LSTR.DLL		09/06/1995	33
U2LSTRNG.DLL		11/06/1995	27
u2ltec1.dll		09/06/1995	28
u25total.dll		03/31/1998	59

15 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 Alta. If you do not intend to use Crystal Reports or another report writer, you may ignore this chapter.

In This Chapter

Creating Custom Reports.....182

How GIFTS ALTA Upgrades Affect Custom Reports 183

Compatibility with Crystal Reports 184

Upgrades to Crystal Reports 186

Creating Custom Reports

To meet your reporting needs, the GIFTS Alta Report Library includes more than 300 standard reports. For a complete list of these reports, please refer to *Using GIFTS Alta Reports.*

You can also generate ad hoc reports from the GIFTS Alta Workspace, as described in the *GIFTS Alta User's Guide*. The ad hoc reporting feature includes 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 Alta reports. MicroEdge can support your use of these products by providing detailed documentation of the GIFTS Alta 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 Alta Report Library, you must use Crystal Reports. Please refer to "Compatibility with Crystal Reports" on page 184 for compatibility information.

How GIFTS Alta Upgrades Affect Custom Reports

When you upgrade any GIFTS Alta 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 Alta may necessitate changes to your custom reports. To determine whether database changes to GIFTS Alta will impact your custom reports, review the *Database Schema* document for the version of GIFTS Alta 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 Alta installation. GIFTS Alta is compatible with the versions of Crystal Reports listed in the GIFTS Alta Compatibility Facts Sheet. Be sure to choose the appropriate version of Crystal Reports when you upgrade GIFTS Alta.

Note: Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

New versions of GIFTS Alta 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 Alta on the same workstation
- Plan to use Crystal Reports to create or modify reports

All other clients can skip this section.

The GIFTS Alta installation process installs Crystal Reports viewer to run many of the standard reports in the GIFTS Alta Report Library. Due to the presence of this viewer, GIFTS Alta is not compatible with versions of Crystal Reports that are not listed on the GIFTS Alta Compatibility Facts Sheet by going to the GIFTS PowerME website.

Note: Please refer to the most recent GIFTS Alta Compatibility Facts Sheet on the GIFTS PowerME site for comprehensive compatibility information. Search for 'Compatibility Facts Sheet' and select the latest document for your version of GIFTS Alta.

Caution: The presence of an incompatible version of Crystal Reports on a GIFTS Alta workstation will interfere with the proper performance of both GIFTS Alta and Crystal Reports.

MicroEdge recommends the Standard Edition of Crystal Reports for use with standalone and file server versions of GIFTS Alta. The Professional Edition is required for clients using the client/server version of GIFTS Alta.

When a new version of Crystal Reports becomes available, MicroEdge schedules a thorough quality assurance testing cycle to ensure that GIFTS Alta and the GIFTS Alta 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 Alta.

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 GIFTS Alta Compatibility Facts Sheet for your version of GIFTS Alta, 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 Alta.

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 172
    standard 167, 172
audit trail 162

B

backups 20, 162
Blackbaud Accounts Payable 167
branch security 168
Budget Diagnostics report 160
Budget Module 168

C

character set, for Oracle servers 65
check writing 166
Citrix Presentation Server
    installing GIFTS on 83, 93
    sample configuration 3
    upgrading GIFTS on 127, 137
client/server systems
    considerations and benefits 5
    installing GIFTS on 37, 59
    sample configuration 4
    upgrading 113
collation name, for SQL Server 42
compatibility level, of SQL databases 42
configuration guidelines
    database servers 14
    file servers 13
    workstations 12
configuration options
    GIFTS 2-5
    GIFTS Connections 6-7
consolidating duplicate records 159
Crystal Reports
    compatibility with GIFTS 184
    upgrading 186
custom reports
    and GIFTS upgrades 183
    report writers 182
customization module 167

D

database
    corruption 158
    creation scripts 81
    disk space requirements 8
    list of tables 21
database maintenance
    client/server 159
    file server 158
diagnostic utility, for GIFTS 148, 156
disk space requirements
    GIFTS 7
    GIFTS database 8
    IGAM 9
    workstations 9
DLL conflicts 20, 157
documentation
    conventions xiv-xv
    on CD xviii
    Solutions Knowledgebase xix
    using the documentation set xvi-xvii
duplicate records, in database 159

E

employee gifts 166
exporting data 173

F

file server systems, GIFTS
- installation 23
- sample configuration 3
- upgrading 99

G

GIFTS Connections
- product description 169
- sample configuration 6–7

H

hardware recommendations 12

I

IGAM
- disk space requirements 9
- hardware requirements 14
- ports used by 15
- test utility 156

Import Module 168
installation
- configuration examples 2–5
- file server systems 23
- on Microsoft SQL Server 37
- on Oracle server 59
- overview of procedures xi
- standalone systems 23
- with Citrix Presentation Server 83, 93

Internet access to GIFTS 169

L

links
- accounting 172
- to third-party products 173

M

maintenance
- of client/server databases 159
- of file server databases 158
- utilities for GIFTS 148, 156

maintenance and support program xix
matching gifts 166
memory requirements 12
MicroEdge Solutions Knowledgebase xix
Microsoft SQL Server
- collation name 42
- concurrent connections required 40, 41
- database compatibility level 42
- installation 37
- prerequisites to installation 40
- transaction log 43
- upgrading GIFTS on 113

Microsoft Word 18
migrating GIFTS to another server 171
MSINFO utility 157
MyGIFTS
- product description 169

O

ODBC data source
- Oracle workstations 71
- SQL workstations 55

Oracle server

character set 65
database table names 21
database tables 21
installation 59
installation prerequisites 63
installing GIFTS on 59
upgrading GIFTS on 113
owner, of Oracle tables 21

P

passwords 161
peer-to-peer network 3
performance, of system 17
permissions, required to run GIFTS 18
ports
for IGAM traffic 15

Q

Quickbooks 167
Quicken 167

R

recalculating summary data 159
repair, of Access databases 158
reporting, custom 182
ReviewerCONNECT
product description 169
rollback recovery 161

S

scripts, for database creation 81
security
GIFTS program access 161
passwords 161
software, compatibility with GIFTS 18
Solutions Knowledgebase xix
sort order, for Oracle servers 65
speed, of system 17
SQL Server
See Microsoft SQL Server
standalone systems, GIFTS
example 3
installation 23
upgrading 99
storage requirements
GIFTS 7
IGAM 9
workstations 9
system files
comprehensive list of 175
conflicts 20
isolating conflicts 157

T

tables, list of 21
trade-up
file server to client/server 170
standalone to file server 170
transaction commit recovery 161
transaction log, SQL 43
troubleshooting
database problems 158
GIFTS utilities for 148, 156

U

upgrades, *See also* trade-up 170
upgrading
and custom reports 183
client/server systems 113
Crystal Reports 186
file server systems 99
on Citrix Presentation Server 127, 137

overview of procedures xii
standalone systems 99

V

volunteer gifts 166

W

wide area network 5
Windows Terminal Server
See Citrix Presentation Server
word processor version control 18