GIFTS® Alta 1.7 Upgrade Overview

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This document provides a "big picture" overview of the various steps needed to complete all included upgrades in your download of GIFTS Alta 1.7.

We recommend you review this document first, determining which steps will be required according to your specific GIFTS configuration. Then you can follow the instructions in the installation guide knowing you're performing the upgrade in proper order.

Detailed steps for each distinct upgrade process are found in the GIFTS Alta 1.7 *Installation and Technical Reference Guide* (included in the Doc folder after unzipping the download).

Before You Begin	• You must perform this step at a GIFTS workstation with network and internet access. • You must be using GIFTS 6.4 or GIFTS Alta 1.1 or later. This upgrade is not compatible with earlier versions of GIFTS. • If IGAM is installed, it must be version 5 or later. This upgrade is not compatible with earlier versions of IGAM. • To determine your version, log in to GIFTS and select **Help** > **About** from the main menu. The GIFTS version number and other product details are displayed. • If you are not on version 6.4 or later, please contact MicroEdge Technical Support for assistance with the upgrade installation. • IGAM 3 or 4 users, please review the release notes for IGAM 5 and IGAM 5.5 prior to installing GIFTS Alta with IGAM 6.0 so you can prepare for the many changes involved in the new design interface.

Are there additional steps I need to take?

After upgrading to GIFTS Alta 1.7, if you have any of the following products installed, they will need to be reinstalled by running the setup.exe in the specified GIFTS subfolders. This will update various files necessary to resolve known issues from previous versions.

- Alta Links and Reminders – Requires full uninstall and reinstall. Please refer to step 6(Upgrading Link and Reminders).

MicroEdge Technical Support

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

Overview

	Step	Who needs to do this?
1	Download and Unzip the Setup Files	All clients who want to upgrade to any of the following: • GIFTS Alta 1.7 • IGAM 6.0 • MyGIFTS and ReviewerCONNECT 3.6 • GIFTS Alta Link (optional) • GIFTS Alta Reminders Engine (optional)
2	Back up your Database	As the upgrade process involves making changes to your database in order to be compatible with GIFTS Alta 1.7, it is recommended that you make a full backup copy of your existing database and store it in an alternate location.
3	Determine Your Upgrade Route	As GIFTS can be installed in several very different configurations, it is imperative that you determine how your current system is set up. The details of the upgrade process will differ based on your GIFTS system.
4	Upgrade GIFTS Alta and IGAM	Clients who want to upgrade to GIFTS Alta 1.7 and IGAM 6.0. (A single upgrade process updates both GIFTS and IGAM.) Your GIFTS configuration file will determine if IGAM 6.0 is installed with GIFTS Alta 1.7.
5	Upgrade MyGIFTS and/or ReviewerCONNECT to v3.6	**Clients already on version 3.6 can skip this step.** Clients who have an earlier version of MyGIFTS and/or ReviewerCONNECT are **required** to perform this upgrade. The included setup files upgrade both MyGIFTS and ReviewerCONNECT to version 3.6.
6	Upgrading to GIFTS Alta 1.7 Link and/or Reminders Engine	GIFTS Alta Link and Reminders Engine are optional add-on extensions which can be installed from the Alta Extensions subfolder. **NOTE:** Clients who currently have a previous version installed must first completely uninstall and then install the 1.7 version. Please review in the included steps before proceeding.

Step 1 – Download and Unzip Upgrade File

Before You Begin

The following steps must be performed at a GIFTS workstation with Internet access.

If this is a server installation, you must also have access to the server where GIFTS is currently installed.

Download Process

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

Now that you have the Upgrade file downloaded to your workstation or server, you can extract the compressed files. Windows has built-in functionality to do this.

Unzip Process

1. Right click the zip file(s) you downloaded and select **Extract All** from the menu. The Extraction Wizard welcome screen opens.
2. Click **Next**. The Select a Destination window opens.
3. Click **Browse**, select a folder on the workstation (e.g., you might create a folder called "GIFTS Alta 1.1 Upgrade"), and click **OK**.
4. Click **Next** to finish.
5. This will create a folder

Confirmation

The setup files will unzip and be extracted to the selected folder. Its contents should look similar to the following:

Name	Size	Type
Doc		File Folder
Help		File Folder
Install		File Folder
MDAC		File Folder
Util		File Folder
Alta.ico	4 KB	Icon
Autorun.inf	1 KB	Setup Information
Readme.txt	2 KB	Text Document

You should also open the Doc folder (shown in the folder above) to access the different installation guides you need to complete the upgrade, as well as all the user documentation for the different GIFTS products.

Step 2 – Backup Your GIFTS Folder and Database

As the upgrade process involves making changes to the files in your GIFTS folder and your database in order to be compatible with GIFTS Alta 1.7, it is recommended that you make a full backup copy of your existing GIFTS folder and database and store it in an alternate location.

Step 3 – Determine Your Upgrade Process

As GIFTS can be installed in several very different configurations, it is imperative that you determine how your current system is set up.

The details of the upgrade process will differ based on your GIFTS system.

To determine which back-end you are using:

1. Log in to GIFTS.
2. From the main menu, select **Help** > **About**. The product details open.
3. Click the **System Info** button to open the GIFTS Diagnostics window.

   The **Back-end** row will show which database your GIFTS system uses.

Database Type	System	Follow Installation Steps in..
Microsoft Access	Standalone Workstation	Ch.7
Microsoft Access	Network File Server with multiple workstations	Ch.7
SQL Server	Client/Server	Ch.8
Oracle	Client/Server	Ch.8
Citrix	Workstation or Standalone System	Ch.9

Step 4 – Upgrade to GIFTS Alta 1.7

To perform the upgrade, follow the detailed instructions found in the *GIFTS Alta 1.7 Installation and Technical Reference Guide* in the above referenced chapters.

Remember where you extracted the upgrade setup files.

You will need to access the **setup.exe** file during the upgrade process in the **Install** subfolder.

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

1. Install Alta program files
2. Install Crystal Reports v11 files (if not currently installed)
3. Install .Net 4 Framework (if not currently installed)
4. Install MS Data Access Components (if not currently installed)
5. Database upgrade

Confirmation

To confirm a successful upgrade, look for the new GIFTS Alta icon in your Windows Start menu and log in.

To check if IGAM was upgraded as well, from Alta go to the **Modules > IGAM** to open IGAM, then go to **Help > About** to see the version number.

GIFTS Plus Pack Users

Many of GIFTS Plus Pack's features have been integrated into GIFTS Alta. However, GIFTS Plus Pack users who have **Link Plus** and **Reminders Plus Engine** installed will need to uninstall those features and then manually install the new GIFTS Alta versions.

Please refer to Step 6 for more details.

Step 5 – Upgrade MyGIFTS and/or ReviewerCONNECT

NOTE: If you are not a MyGIFTS or ReviewerCONNECT client or are already on version 3.6, skip this step.

If you are a current user of MyGIFTS and/or ReviewerCONNECT (also known as GCS), you must have version 3.6 installed on your system to be compatible with GIFTS Alta 1.7.

The setup files for GCS 3.6 are included with your download of GIFTS Alta 1.7.

Once the upgrade of GIFTS Alta 1.7 and/or IGAM is completed, you can upgrade to GIFTS Connections 3.6.

Before You Begin

Prerequisites for upgrading or installing MyGIFTS and ReviewerCONNECT are found in the *MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*. (GCS36-Installguide.pdf)

Process

To perform the upgrade, follow the detailed instructions found in the *MyGIFTS and ReviewerCONNECT Installation and Technical Reference Guide*.

This installation guide (GCS36-Installguide.pdf) is included in the Docs folder of the unzipped setup files.

Confirmation

Once the upgrades to MyGIFTS and ReviewerCONNECT are complete, confirm the upgrade as follows:

Open your web browser and go to the MyGIFTS login page, or to either the external or internal reviewer login page for ReviewerCONNECT.

The version number is shown on the login page; confirm that it is 3.6.

Step 6: Upgrading Link and Reminders

If you are upgrading to GIFTS Alta 1.7 Link for use with Outlook, you must first make sure the previous version of GIFTS Alta Link or GIFTS Link Plus has been completely uninstalled.

6.1 Completely Uninstalling Current Link Plus

Before You Begin:

- Both Outlook and GIFTS Alta must be closed when you uninstall GIFTS Alta Link or Link Plus.
- Office 2003 and Office XP are no longer supported for GIFTS Alta 1.7.

Uninstall Previous Link Plus and All Related Components:

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

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

6.2 Installing GIFTS Alta 1.7 Link for Use with Outlook

Before You Begin:

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

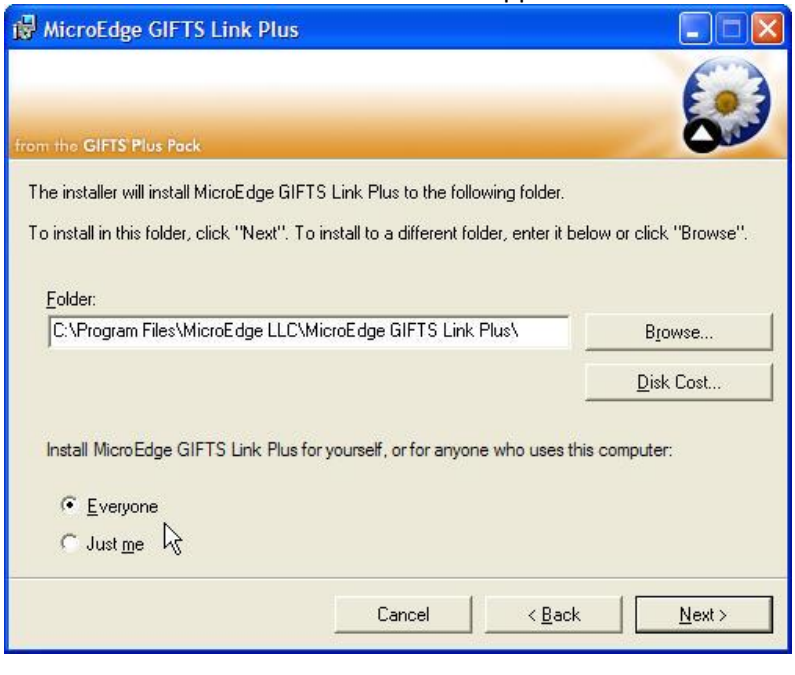
To Install Link for Outlook:

1. From your GIFTS workstation browse to the **Alta Extensions** sub folder, typically installed in the GIFTS 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 LinkPlus for use with Outlook 2007, 2010, or 2013 folder (depending on which version of Outlook you are using) and double-click **Setup.exe**. A message may appear informing you that Microsoft Office 2007/2010/2013 Primary Interop Assemblies will be installed on your machine.

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

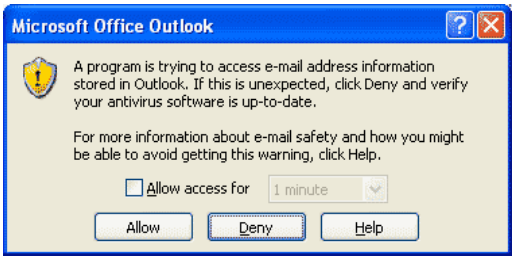


Note: If you do not have VSTO runtime installed, you will be prompted to install this first.

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

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

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



Manually Installing the Other Outlook Add-Ins:

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

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

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

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

6.3 Upgrading the GIFTS Alta Reminders Engine

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

To upgrade the Reminders Engine:

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

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