Contents

This article describes how to install and configure GIFTS Plus Pack.

NOTE: GIFTS Plus Pack version 5.3 must be installed with GIFTS 6.7. Previous versions of GIFTS are not compatible.

In This Article:

Overview of the Setup Process

To install GIFTS Plus Pack 5.3, you will need to do the following:

1. From a GIFTS workstation, install your new **GIFTS configuration file** and run the **Plus Pack Setup** program.

2. Use the **Plus Pack Configuration utility** to set up the security permissions for the Plus Pack.

The remaining steps must be performed on each GIFTS workstation:

3. Microsoft .NET Framework 2.0 or later must be installed, if necessary. Clients using Windows 7 or later can skip this step as Microsoft .NET framework is already installed with the operating system. Also, if you regularly update the Windows software on your workstations, the .NET Framework may be installed already.

4. Install the **Reminders Plus Engine**, if necessary.

5. Install **Link Plus for use with Outlook**, if necessary.

   Note: Both Outlook and GIFTS must be closed when you install Link Plus.

6. Configure **.NET security** to allow access to the Plus Pack utilities.

Before You Begin

The Microsoft .NET Framework restricts the use of .NET applications to help ensure that malicious programs (such as a virus or Trojan horse) cannot be run. During the installation process, you will set up .NET to "trust" the Plus Pack utilities so that they can be run from your file server.

Before beginning your installation, contact your IT department to inquire whether your network security policies allow workstations to run .NET applications over a network share. If access to .NET applications over your network is not permitted, this document includes an alternate installation procedure that you can use to install the Plus Pack locally on each GIFTS workstation. However, MicroEdge recommends that that you use the standard installation procedure unless the use of .NET applications over your network is prohibited by your IT department.

Step 1: Installing the Plus Pack on Your GIFTS File Server

In this step, you will install a new GIFTS configuration file and install the Plus Pack software. The installation process can also install the Microsoft .NET Framework on your workstation; the Framework must be installed before you can use the Plus Pack.

Note: If you have a standalone version of GIFTS (where the GIFTS programs and database are installed on a single computer), the Plus Pack files are installed on your standalone GIFTS computer.

IMPORTANT: This process must be done from a GIFTS workstation connected to your local network.

Installing Your New GIFTS Configuration File

If you are installing the Plus Pack for the first time, copy your new GIFTS configuration file (**gifts.cfg**) from the email received from MicroEdge to your GIFTS directory. This new configuration file activates the custom menus that are used by the Plus Pack.

To install your new configuration file:

1. In Windows Explorer, navigate to your GIFTS directory and back up your current **gifts.cfg** file by re-naming it **gifts.cfg.bak**.

    Note: If you do not know the location of your GIFTS directory, please refer to Article #7664 in the MicroEdge Solutions Knowledgebase; the article describes how to find the GIFTS directory on your system.

2. Copy the new **gifts.cfg** from the email received from MicroEdge and paste it into your GIFTS directory.

3. If you copied the **gifts.cfg** file from a CD-ROM, right-click on your new copy of the **gifts.cfg** file and select Properties, then 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.) Click **OK** to save the **gifts.cfg** properties.

    Note: If your GIFTS system includes the Internet Grant Application Module, log in to the IGAM after installing your new configuration file to ensure that the IGAM server accepts your new configuration information. If you receive an "invalid Validation Key was specified in the Payload" error when launching the IGAM, contact MicroEdge Technical Support at (877) 704-3343 and ask to have your IGAM gate re-opened.

Installing the Plus Pack Files on Your Server

To install the GIFTS Plus Pack files to your file server:

1. Copy the GIFTS Plus Pack folder on to your computer and double-click **Setup.exe** to begin installation. A GIFTS Plus Pack Setup welcome message displays.

2. Click **Next**. The installer displays the location of your GIFTS directory. Verify that the location displayed is correct.

3. Click **Next**. The Plus Pack application files and support files are installed in the GIFTS\GIFTSPLUS directory.   If you do not already have the Microsoft .NET Framework installed, a message displays notifying you that the Microsoft .NET Framework is required to run the Plus Pack Configuration utility.

4. Click **OK**. The Microsoft .NET Framework installation opens, and asks whether you would like to proceed.

5. Click **Yes** to proceed.

6. The Plus Pack Setup program indicates that the installation is complete. Note that you may be prompted to restart the workstation at the conclusion of the .NET Framework installation.

7. Click **Finish**. The Plus Pack Configuration utility is opened.

Note: If an error message is displayed at the end of the installation process, the installer was not able to run the Plus Pack Configuration utility. Proceed to the next section for information about running the utility.

At this point, you can use the Plus Pack Configuration utility to set up security for Batch Plus, Requirements Plus, Payments Plus, Reminders Plus, Tax Status Plus, Watchlists Plus, and Link Plus. Please proceed to the following section for information about Plus Pack security.

Step 2: Setting Up Plus Pack Security

Batch Plus, Requirements Plus, Payments Plus, Reminders Plus, Tax Status Plus, Watchlists Plus, and Link Plus 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 Plus Pack Configuration utility to determine which GIFTS users have access to the functions provided by Batch Plus, Requirements Plus, Payments Plus, Reminders Plus, Tax Status Plus, Watchlists Plus, and Link Plus. Note that all GIFTS users have access to Charts Plus and E-mail Plus; there are no security restrictions for these features.

Accessing the Plus Pack Configuration Utility

The Plus Pack Configuration utility runs automatically at the conclusion of the Plus Pack installation process. If you would like to run the utility at any other time, double-click **PlusConfigurationTool.exe** from the Install/Config folder of the setup files you downloaded in *"Step 1: Installing the Plus Pack on Your GIFTS File Server"* on page 2. The utility must be run from a GIFTS workstation that has Microsoft .NET Framework 2.0 or later installed.

Note: If your network security policies do not allow you to run .NET applications over your network, you need to copy the Install/Config folder locally (on the workstation from which **PlusConfigurationTool.exe** will be run).

Caution: The Plus Pack Configuration utility does not require an administrative login. If you copy the utility to your network, be sure to copy it to a location where only the GIFTS Administrator can open it. You can use Windows security to deny the "execute" permission to unauthorized users. For information about Windows security, please refer to your Windows documentation.

Setting Up Batch Plus Security

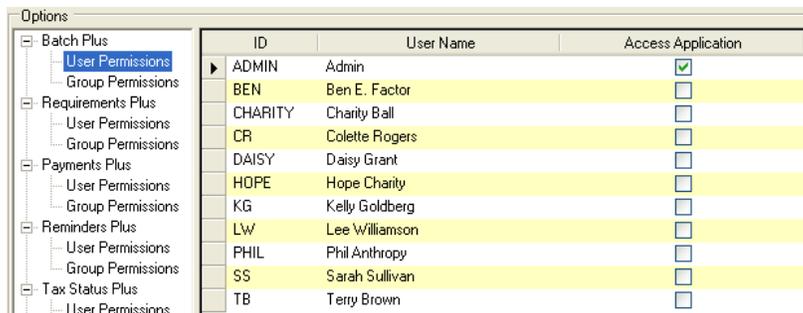To set up the menus and security for Batch Plus:

1. Open the Plus Pack Configuration utility, as described in the preceding section. The Plus Pack configuration options are displayed.

2. In the Options list to the left, highlight **Batch Plus**. A list of Batch Plus functions is displayed.

3. Choose which of the functions should be displayed to Batch Plus users. If a function is not selected, no users will have access to it.

4. Click the **Group Permissions** option for Batch Plus. A list of your GIFTS user groups is displayed.

5. Click the Access Application checkbox for user groups that should have access to Batch Plus. All users within the groups you select are granted permission to use Batch Plus.

6. If there are any additional users who should have access to Batch Plus, click the **User Permissions** option. A list of GIFTS users is displayed.

7. Click the Access Application checkbox for users who should have access to Batch Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

At this point, you can click **OK** to save your security settings or—if you want to set up security for Requirements Plus—go to step 2 in "Setting Up Requirements Plus Security" to continue using the configuration utility.

Setting Up Requirements Plus Security

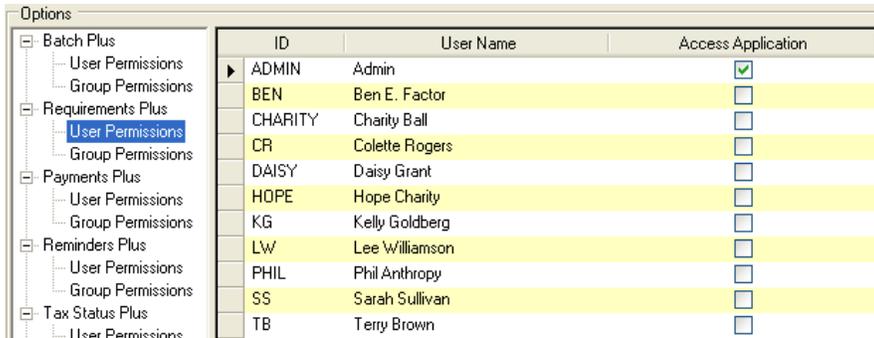To set up the menus and security for Requirements Plus:

1. Open the Plus Pack Configuration utility, as described in "Accessing the Plus Pack Configuration Utility" on page 4. The Plus Pack configuration options are displayed.

2. In the **Options** list to the left, highlight **Requirements Plus**. A list of Requirements Plus functions is displayed.
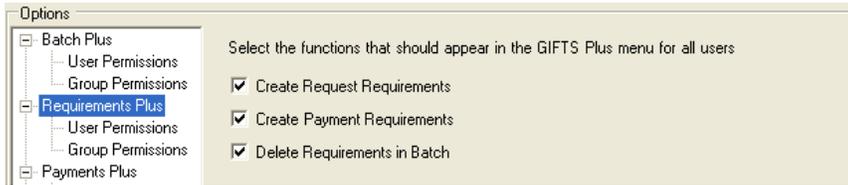
3. Choose which of the functions should be displayed to Requirements Plus users. If a function is not selected, no users will have access to it.

4. Click the **Group Permissions** option for Requirements Plus. A list of your GIFTS user groups is displayed.
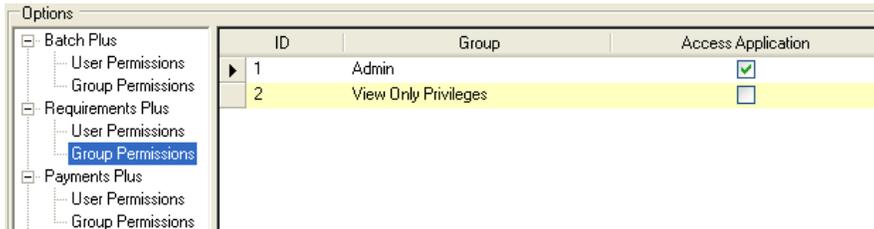
5. Click the Access Application checkbox for the user groups that should have access to Requirements Plus. All users within the groups you select are granted permission to use Requirements Plus.

6. If there are any additional users who should have access to Requirements Plus, click the **User Permissions** option. A list of GIFTS users is displayed.

7. Click the Access Application checkbox for users who should have access to Requirements Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

At this point, you can click **OK** to save your security settings or—if you want to set up security for Payments Plus—go to step 2 in "Setting Up Payments Plus Security" to continue using the configuration utility.

Setting Up Payments Plus Security

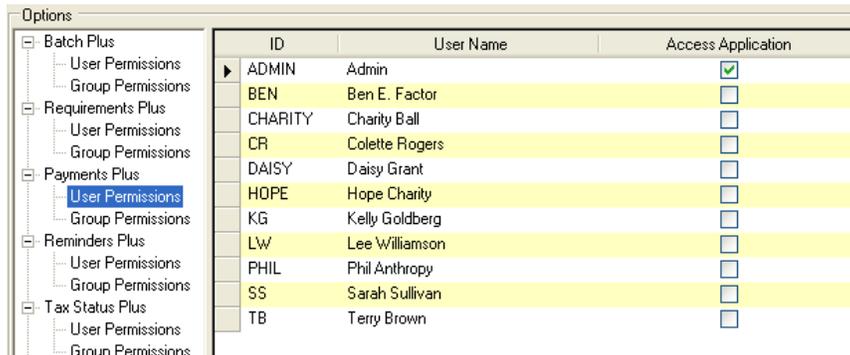To set up the menus and security for Payments Plus:

1. Open the Plus Pack Configuration utility, as described in "Accessing the Plus Pack Configuration Utility" on page 4. The Plus Pack configuration options are displayed.

2. In the **Options** list to the left, open the **Payments Plus** options.

3. Click the **Group Permissions** option for Payments Plus. A list of your GIFTS user groups is displayed.
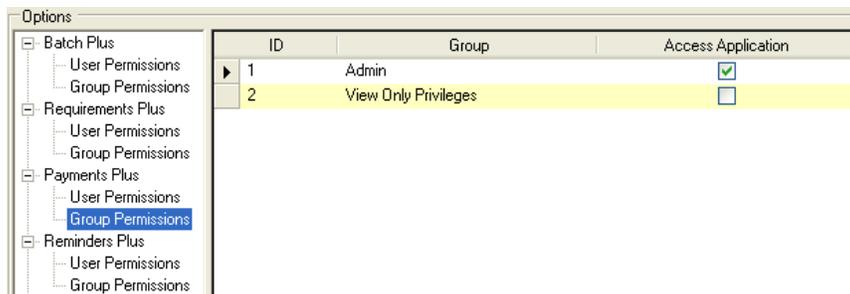
4. Click the Access Application checkbox for the user groups that should have access to Payments Plus. All users within the groups you select are granted permission to use Payments Plus.

5. If there are any additional users who should have access to Payments Plus, click the **User Permissions** option. A list of GIFTS users is displayed.

6. Click the Access Application checkbox for users who should have access to Payments Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

At this point, you can click **OK** to save your security settings or—if you want to set up security for Reminders Plus—go to step 2 in "Setting Up Reminders Plus Security" to continue using the configuration utility.

Setting Up Reminders Plus Security

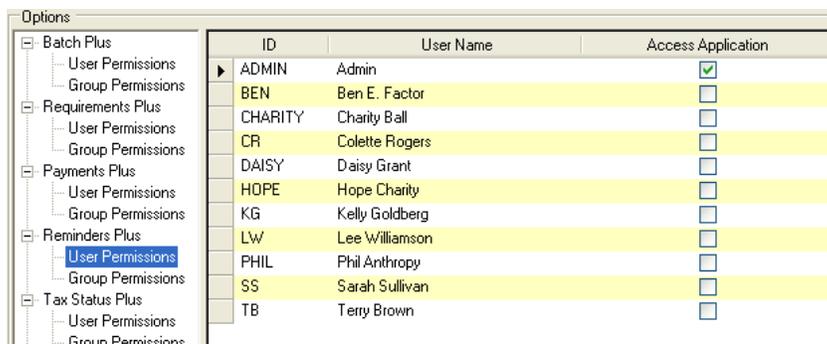To set up the menus and security for Reminders Plus:

1. Open the Plus Pack Configuration utility, as described in "Accessing the Plus Pack Configuration Utility" on page 4. The Plus Pack configuration options are displayed.

2. In the **Options** list to the left, open the **Reminders Plus** options.

3. Click the **Group Permissions** option for Reminders Plus. A list of your GIFTS user groups is displayed.
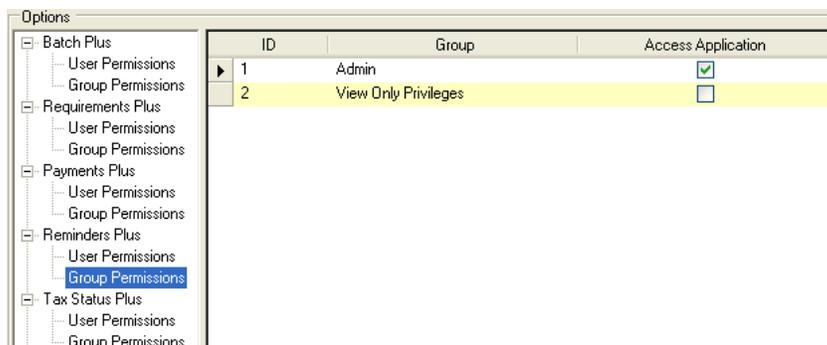
4. Click the Access Application checkbox for the user groups that should have access to Reminders Plus. All users within the groups you select are granted permission to use Reminders Plus.

5. If there are any additional users who should have access to Reminders Plus, click the **User Permissions** option. A list of GIFTS users is displayed.

6. Click the Access Application checkbox for users who should have access to Reminders Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

At this point, you can click **OK** to save your security settings or—if you want to set up security for Tax Status Plus—go to step 2 in "Setting Up Tax Status Plus Security" to continue using the configuration utility.

Setting Up Tax Status Plus Security

To set up the default selected tax status fields and security for Tax Status Plus:

1. Open the Plus Pack Configuration utility, as described in the preceding section. The Plus Pack configuration options are displayed.

2. In the Options list to the left, highlight **Tax Status Plus**. A list of default selected Tax Status Plus fields are displayed.

3. Click the checkbox next to the tax status fields that will be selected by default to overwrite current organization information when a user updates an organization.

   Note: The Web Service URL is a link to the MicroEdge web service that retrieves information from MicroEdge's Tax Exempt Organization Database. Leave this field blank if you want to use MicroEdge's default Web Service URL.

4. Click the Group Permissions option for Tax Status Plus. A list of your GIFTS user groups is displayed.

5. Click the Access Application checkbox for the user groups that should have access to Tax Status Plus. All users within the groups you select are granted permission to use Tax Status Plus.

6. If there are any additional users who should have access to Tax Status Plus, click the User Permissions option. A list of GIFTS users is displayed.

7. Click the Access Application checkbox for users who should have access to Tax Status Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

At this point, you can click **OK** to save your security settings or—if you want to set up security for Watchlists Plus—go to step 2 in "Setting Up Watchlists Plus Security" to continue using the configuration utility.

Entering Proxy Server Information for Tax Status Plus

Since Tax Status Plus uses a web service to access information from MicroEdge's Tax Exempt Organization Database, you can enter proxy server information in the Proxy Settings section of the Plus Pack Configuration utility. This is only needed if your organization uses a proxy server. This allows Tax Status Plus to retrieve this information using the web service.

Tip: If your organization does not use a proxy server, you do not need to complete this task.

Note: This is the same information that is located in the Preferences tool's GIFTSConnections section in the GIFTS Administrator module. Whatever you enter here overwrites the information entered there.

To enter proxy server information:

1. In the Options list to the left, highlight **Proxy Settings**. Your proxy settings display.

2. Enter the following information, if necessary:

Proxy Server (Name or IP): [URL or IP address of proxy server]
Port: [port on which proxy server is running]
User Name: [Windows username that allows access to proxy server]
Password: [Windows password that allows access to proxy server]
Domain: [user domain]

Important: The Windows password you enter in the Password field will be encrypted in the Preferences tool, unless it is the same as the current password. If you want to use the same password as the one in the Preferences tool, you must first delete it from the Preferences tool and enter it here. If you do not, the web service will not be able to successfully connect to the proxy server. For questions regarding your proxy settings, please consult with your network administrator.

3. Click **OK**. The proxy server information is saved.

Setting Up Watchlists Plus Security

To set up the default Watchlists, threshold, and security for Watchlists Plus:

1. Open the Plus Pack Configuration utility, as described in the preceding section. The Plus Pack configuration options are displayed.

2. In the Options list to the left, highlight **Watchlists Plus**. A list of default selected Watchlists is displayed.

    Note: As of September 14, 2007, the following Watchlists are included in this list:

    *   OFAC – Office of Foreign Assets Control
    *   BXA – Bureau of Industry and Securities
    *   FBI – FBI Most Wanted
    *   PEP_F0 – Politically Exposed Persons
    *   England – Bank of England Sanctions

- OSFI – Canadian List
- Europe – European Union List
- UNSL – United Nations Sanctions List
- WBNK – World Bank Ineligible Firms
- Interpol – International Criminal Police
- TEL – Terrorist Exclusion List

3. If you do not want to include certain Watchlists when Watchlists Plus performs a search, highlight one or more Watchlists from the right watchlist field, and click **Remove**.

   Note: To add a removed watchlist, highlight it from the left watchlist field and click **Include**.

4. Edit the Threshold, if necessary.

   Important: This field defines how close the record information from GIFTS must match the information on a watchlist in order for a "hit", or acknowledgement of a matching record, to be registered in Watchlists Plus. You can have a threshold between .75 and 1. If you use a high threshold, such as .95 and above, information must be closely matched for a hit to occur. If you use a lower threshold, information does not have to be so closely matched for a hit to occur. Generally, a low threshold returns more hits, and a high threshold returns fewer hits. The default threshold is .95.

   Note: The Web Service URL is a link to the web service that provides the Watchlists Plus functionality. Leave this field blank to use the default hard-coded Web Service URL. The Web Service Password is the password to this web service. Leave this field blank if you want to use the default hard-coded password.

5. Click the **Group Permissions** option for Watchlists Plus. A list of your GIFTS user groups is displayed.
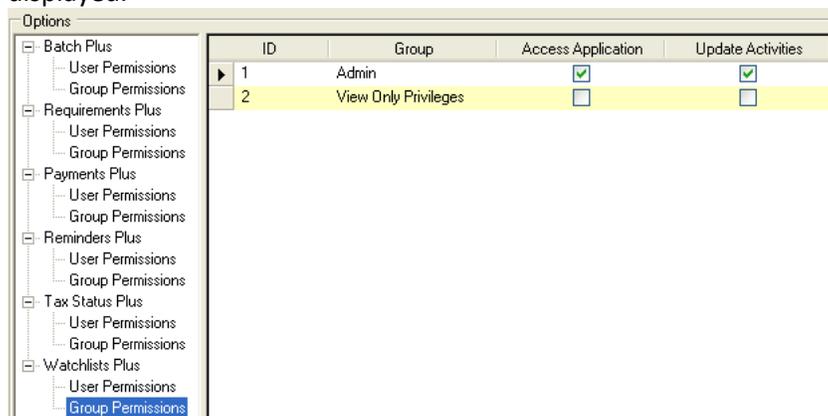
6. Click the Access Application checkbox for the user groups that should have access to Watchlists Plus. All users within the groups you select are granted permission to use Watchlists Plus.

   Note: In order to keep compliance records accurate, it is important to restrict the use of the utility to qualified members of your staff.

7. Click the Update Activities checkbox for the user groups that will be able to mark Watchlists Plus Activities as false positives, or Done.

Note: Users must have the Update/Delete System Activities permission in order to mark Watchlists Plus Activities as false positives. For more information, please refer to the "Managing Permission Sets" section in Chapter 4 of the *GIFTS Administrator's Guide*.

8. If there are any additional users who should have access to Watchlists Plus, click the **User Permissions** option. A list of GIFTS users is displayed.

9. Click the **Access Application** checkbox for the users who should have access to Watchlists Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

10. Click the **Update Activities** checkbox for the user groups that will be able to mark Watchlists Plus Activities as false positives, or Done.

   Note: Users must have the Update/Delete System Activities permission in order to mark Watchlists Plus Activities as false positives. For more information, please refer to the "Managing Permission Sets" section in Chapter 4 of the *GIFTS Administrator's Guide*.

At this point, you can click **OK** to save your security settings or—if you want to set up security for Link Plus—go to step 2 in "Setting Up Link Plus Security" to continue using the configuration utility.

Entering Proxy Server Information for Watchlists Plus

Since Watchlists Plus uses a web service to access information, you can enter proxy server information in the Proxy Settings section of the Plus Pack Configuration utility. This is only needed if your organization uses a proxy server. This allows Watchlists Plus to retrieve Watchlists information using this web service. You do not need to repeat this task if you have already performed it for Tax Status Plus.

Tip: If your organization does not use a proxy server, you do not need to complete this task.

Note: This is the same information that is located in the Preferences tool's GIFTSConnections section in the GIFTS Administrator module. Whatever you enter here overwrites the information entered there.

To enter proxy server information:

1. In the Options list to the left, highlight **Proxy Settings**. Your proxy settings display.

2. Enter the following information, if necessary:

    Proxy Server (Name or IP): [URL or IP address of proxy server]
    Port: [port on which proxy server is running]
    User Name: [Windows username that allows access to proxy server]
    Password: [Windows password that allows access to proxy server]

    Domain: [user domain]

    Important: The Windows password you enter in the Password field will be encrypted in the Preferences tool, unless it is the same as the current password. If you want to use the same password as the one in the Preferences tool, you must first delete it from the Preferences tool and enter it here. If you do not, the web service will not be able to successfully connect to the proxy server. For questions regarding your proxy settings, please consult with your network administrator.

3. Click **OK**. The proxy server information is saved.

Setting Up Link Plus Security

To set up how imported email messages are stored, how to treat existing Email Activities in GIFTS, where email messages are to be stored, whether or not to include email attachments in GIFTS, and security for Link Plus:

1. Open the Plus Pack Configuration utility, as described in the preceding section. The Plus Pack configuration options are displayed.

2. In the Options list to the left, highlight **Link Plus**.
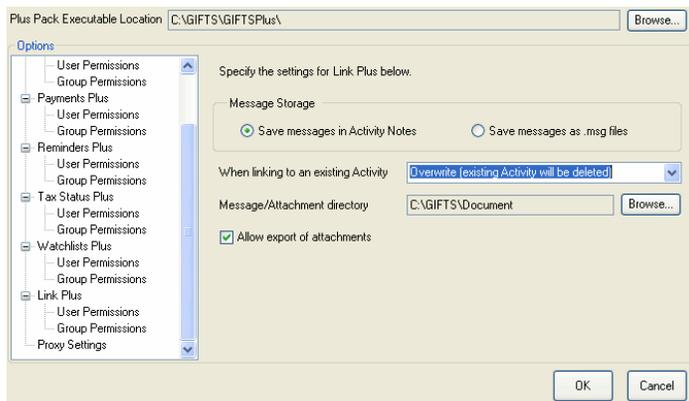
3. In the Message Storage section, select one of the following options:

    •   **Save messages in Activity Notes:** This radio button saves the body of the Outlook email in the Long Notes section of the associated Mail Activity.

    •   **Save messages as .msg files:** If you have Document Manager, this radio button saves the Outlook message file (.msg) as a document which is linked to the Mail Activity.

    Note: You can set .msg files to open with Outlook by setting up Outlook as the alternate document viewer for .msg files. You must be sure to include the '/f' parameter at the end of the path. For example, for Outlook 2003, your alternate document viewer path could be:

    "C:\Program Files\Microsoft Office\Office 11\outlook.exe" /f

    For Outlook 2007, your alternate document viewer path could be:

    "C:\Program Files\Microsoft Office\Office 12\outlook.exe" /f

    For more information, refer to "Configuring Alternate Viewers" in the *GIFTS Administrator's Module.*

4. In the When linking to an Existing Activity section, select one of the following options. These options determine how previously created Mail Activities in GIFTS will be handled when new Outlook emails are linked to them during the linking process.

    •   **Overwrite (existing Activity will be deleted):** The existing Mail Activity (and associated .msg file), as well as any External Document attachments will be overwritten with the new Outlook email.

    •   **Create new (existing Activity will remain):** The existing Mail Activity (and associated .msg file), as well as any External Document attachments will not be overwritten with the new Outlook email.

    •   **Ask user (user chooses to delete existing or not):** A checkbox will allow the user to choose whether or not to delete the existing Mail Activity (and associated .msg file), as well as any External Document attachments.

5. In the Message/Attachment directory section, click the **Browse** button to change the location where email attachments and Outlook message files (.msg) are stored. This field only displays if you have the Document Manager.

6. Select the **Allow export of attachments** checkbox if you want users to have the option of creating separate External Document Activities for any email attachments when linking an Outlook email. If you deselect this checkbox, users will not have this option, and no email attachments will be imported into GIFTS when linking an Outlook email. This field only displays if you have the Document Manager.

7. Click the **Group Permissions** option for Link Plus. A list of your GIFTS user groups is displayed.
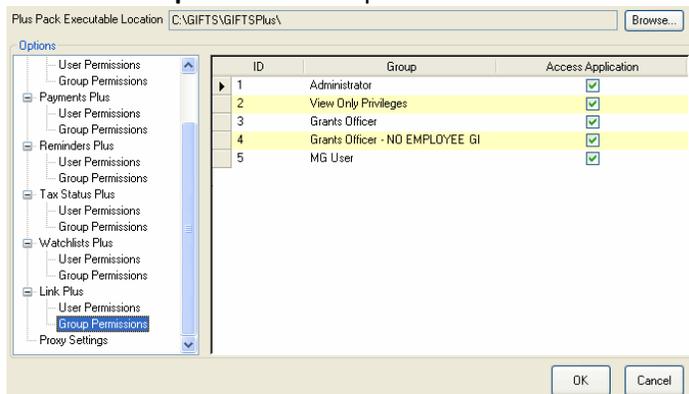
8. Select the **Access Application** checkbox for the user groups that should have access to Link Plus. All users within the groups you select are granted permission to use Link Plus.

9. If there are any additional users who should have access to Link Plus, click the User Permissions option. A list of GIFTS users is displayed.
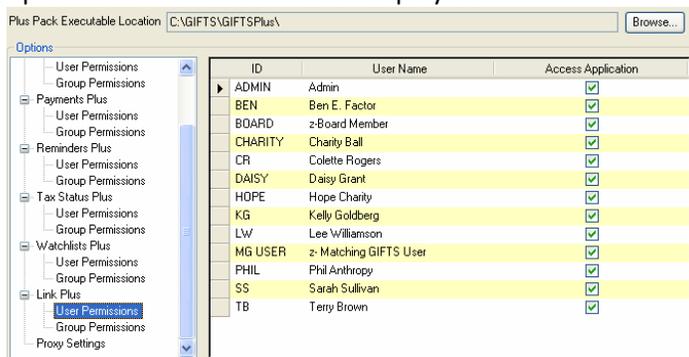
10. Click the Access Application checkbox for users who should have access to Link Plus. (If you have already granted access to a user's group, you do not have to select his or her name to provide access.)

Step 3: Installing the .NET Framework

Tip: For some clients, it may be more efficient to perform Step 3 and parts of Step 4 on each GIFTS workstation before proceeding to the next workstation (instead of performing Step 3 on each

workstation, and then returning to each workstation for Step 4). Please read Steps 3 and 4 before you continue, to ensure that you understand what steps need to be taken on your system and to determine the most efficient way to proceed.

To run the GIFTS Plus Pack, each GIFTS workstation must have version 2.0 of the Microsoft .NET Framework. If you regularly update your Windows software, the Framework may already be installed on your workstations.

Note: Clients using Windows Vista can skip this step as version 2.0 of the Microsoft .NET framework is already installed with the Windows Vista operating system.

To see if the .NET Framework is installed on a workstation:

1. Select **Control Panel** from the Start menu, or select **Settings > Control Panel** from the Start menu.

2. Select the **Add or Remove Programs** option. Windows displays a list of software currently installed on the computer.

3. Scroll through the list of software. If "Microsoft .NET Framework 2.0" is not listed, you need to install it before you can use the GIFTS Plus Pack.

You can obtain and install the .NET Framework from Microsoft's Windows Update website. To go to this site, select Windows Update from the Windows Start menu. The website guides you through the process of updating Windows to include the .NET Framework software. Once this is complete, open the Framework .NET folder and double-click **dotnetfx.exe**.

For more information about using Windows Update to install the .NET Framework, please contact Microsoft. After you have installed the .NET Framework on each workstation, proceed to the next step to configure .NET security.

Step 4: Installing the Reminders Plus Engine

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

To install the Reminders Plus Engine:

1. Go to the GIFTSPlus folder, typically installed in the GIFTS directory (e.g., C:\GIFTS\GIFTSPlus), and open the RemindersPlus Engine Setup folder.

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

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

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

Step 5: Installing Link Plus for use with Outlook

Before You Begin:

- Both Outlook and GIFTS must be closed when you install Link Plus.

- If you are **re-installing** or **updating** Link Plus for use with Outlook, you must first make sure the previous version of Link Plus has been completely uninstalled. *Please refer to Solution article 1946 in the GIFTS PowerME site for details.*

- If you are installing Link Plus 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 2010 or later users and you must be logged in as an Administrator during the installation process.

- **All Citrix users:** Link Plus will not work with Citrix unless Outlook is also accessed via Citrix.

- **Citrix users:** Each Link Plus user must have the Link Plus 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 workstation browse to the GIFTSPlus sub folder, typically installed in the GIFTS directory (e.g., C:\GIFTS\GIFTSPlus), and open the LinkPlus Setup folder.

   NOTE: For Citrix users, browse from the Citrix server to the GIFTSPlus subfolder.

2. Open the LinkPlus for use with Outlook folder (depending on which version of Outlook you are using) and double-click **Setup.exe**.

   A message may appear informing you that Microsoft Office 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.
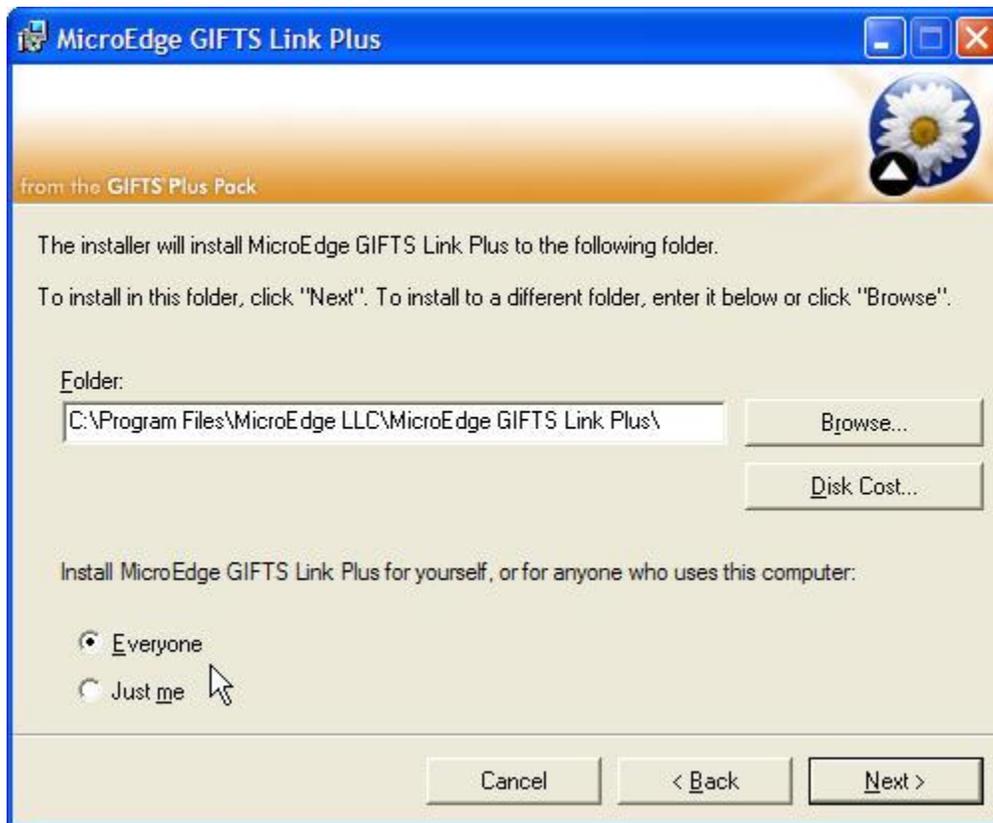
Note: If you do not have VSTO runtime installed, you will be prompted to install this first.

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

6. At this stage, you also have the option in the lower left to make Link Plus available to **Everyone** or **Just me**. Selecting **Everyone** will allow anyone who logs into the workstation to have access to Link Plus in their Outlook.

7. Click **Next**. The Confirmation Installation screen appears.

8. Click **Next** to install Link Plus. Link Plus is installed.

9. Click **Close**.

Step 6: Configuring .NET Security

The Microsoft .NET Framework includes security settings that prevent malicious software from damaging your computers. By default, Windows does not allow workstations to run .NET applications like the GIFTS Plus Pack over your network.

Since the Plus Pack utilities are installed on your network file server, you must configure .NET security on each GIFTS workstation to allow the Plus Pack utilities to run.

Note: If your organization's network security policies do not allow trusting of .NET applications over a network share (as described in "Before You Begin" on page 2), proceed to the "Alternate Installation Procedure" on page 21. All other clients should use the procedure in this section, which is the recommended method for setting up the Plus Pack.

Granting .NET Permissions to the Plus Pack Programs using the GIFTS Trust Utility

In order to set up a workstation's .NET Framework to permit use of the Plus Pack utilities you need to trust four files: the **GIFTSBatchPlus.exe**, the **ChartFX.dll**, the **Infragistics2.shared.6.3.dll**, and the **SecurityManager.2005.dll**.

To trust these files:

1. From the GIFTS directory, double-click **GIFTSTrust.exe**. The GIFTS Trust window is displayed.

    Note: If you are using a Wondows 7/Vista workstation, right-click on **GIFTSTrust.exe** and select the **Run as Administrator** option. You must do this in order for the Plus Pack modules to run successfully from a Windows 7/Vista workstation.
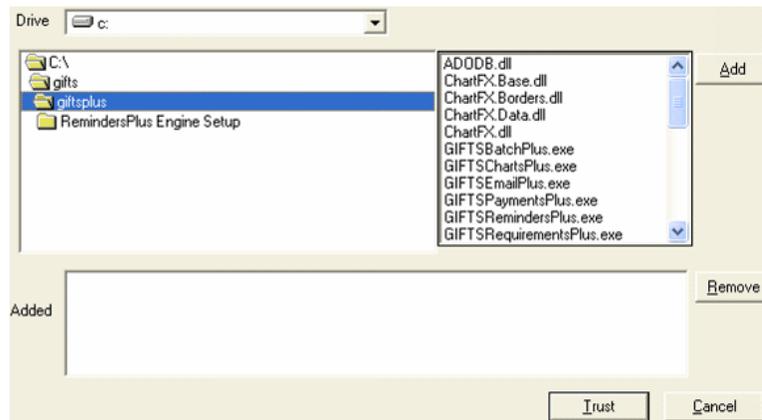
2. From the field on the right side of the GIFTS Trust window, select **GIFTSBatchPlus.exe** and click Add. The file appears in the Added section.

3. Repeat Step 2 for the **ChartFX.dll**, the **Infragistics2.shared.6.3.dll**, and the **SecurityManager.2005.dll**.

4. Click **Trust**. A message appears indicating that the files have been processed. Your setup of .NET security on the workstation is complete.

Granting .NET Permissions to the Plus Pack Programs Manually

As an alternative to using the GIFTS Trusting utility, you can manually enter .NET permissions using the command line.

To grant .NET permissions to the Plus Pack programs manually:

From the Windows Start menu, go to Run.

Note: If you are using a Windows 7/Vista workstation, from the Windows Start menu, go to **Accessories > Command Prompt**. Right-click on Command Prompt and select **Run as Administrator**.

11. In the **Open** field, type *CMD*.

12. Click **OK**. The Windows command prompt is displayed.

13. Enter the following command in the command line:

   - C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CasPol.exe -m -ag All_Code -strong -file "\\<ServerName>\<GIFTSPlus folder location>\GIFTSBatchPlus.exe" -noname -noversion FullTrust -n "GIFTSPlus"

   Where <Servername> is the name of the server, and <GIFTSPlus folder location> is the location of the GIFTS Plus folder.

   Important: The command line is case-sensitive, and must use straight (not smart) quotes, and must not include any line breaks. If you have problems copying and pasting the above commands in the command line, try manually typing it.

14. Press **Enter**. You are prompted to confirm that the operation you are performing will alter security policy.

15. Click **Yes**.

16. Press **Enter**. The strong key is trusted and a Success message appears.

17. Repeat Steps 1-7 for each of the following commands:

   - C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CasPol.exe -m -ag All_Code -strong -file "\\<ServerName>\<GIFTSPlus folder location>\ChartFX.dll" -noname -noversion FullTrust -n "ChartFX"

   - C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CasPol.exe -m -ag All_Code -strong -file "\\<ServerName>\<GIFTSPlus folder location>\Infragistics2.shared.6.3.dll" -noname -noversion FullTrust -n "Infragistics"

   - C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CasPol.exe -m -ag All_Code -strong -file "\\<ServerName>\<GIFTSPlus folder location>\SecurityManager.2005.dll" -noname -noversion FullTrust -n " SecurityManager.2005"

Setting up .NET Security on Your Remaining Workstations

Repeat the previous task on each GIFTS workstation (either manually or using the GIFTS Trust utility) to allow use of the Plus Pack utilities. When each workstation has been set up, your GIFTS users may begin use of the Plus Pack, as described in the *GIFTS Plus Pack 5.2.3 User's Guide*.

Alternate Installation Procedure

Important: This procedure is only for clients whose network security policies do not allow trusting of .NET applications over their network. These steps should be performed after you have completed Steps 1-3 of the Plus Pack installation.

When GIFTS users access a Plus Pack utility, the utility is run from the location specified in the Plus Pack Configuration utility. By default, this location is the GIFTSPLUS folder on your file server.

In this procedure, you will copy the Plus Pack program files to a local directory on each GIFTS workstation and configure the Plus Pack to "point" to these local directories when users start a Plus Pack utility.

Part 1: Copy the Plus Pack Files to the Workstation

To copy the Plus Pack files to a GIFTS workstation:

1. Using Windows Explorer, copy the entire GIFTSPLUS folder from the GIFTS directory on your file server to the local hard drive of a GIFTS workstation. Since the Plus Pack utility will use the same drive mapping for all workstations, be sure to copy the folder to a location that exists on all of your workstations.

    Example:

    C:\Program Files\GIFTSPLUS

2. Ensure that all GIFTS users on the workstation have "read" and "execute" permissions for the GIFTSPLUS directory. (For information about Windows security, please contact your IT department or Microsoft documentation.)

## Part 2: Configure .NET to Trust the Local Files

Note: This procedure is only required if .NET has been set up to not trust .NET assemblies installed on the workstation. By default, .NET is set up to allow locally-installed assemblies to run. To find out if this step is necessary, consult with your IT department. MicroEdge Technical Support cannot provide assistance with the setup of .NET Framework security.

In order to set up a workstation's .NET Framework to permit use of the Plus Pack utilities you need to trust three files: the **GIFTSBatchPlus.exe**, the **ChartFX.dll**, the **Infragistics2.shared.6.3.dll**, and the **SecurityManager.2005.dll**.

To trust these files using the GIFTS Trust utility:

1. From the GIFTS directory, double-click **GIFTSTrust.exe**. The GIFTS Trust window is displayed.

    Note: If you are using a Windows 7/Vista workstation, right-click on **GIFTSTrust.exe** and select the **Run as Administrator** option. You must do this in order for the Plus Pack modules to run successfully from a Windows 7/Vista workstation.
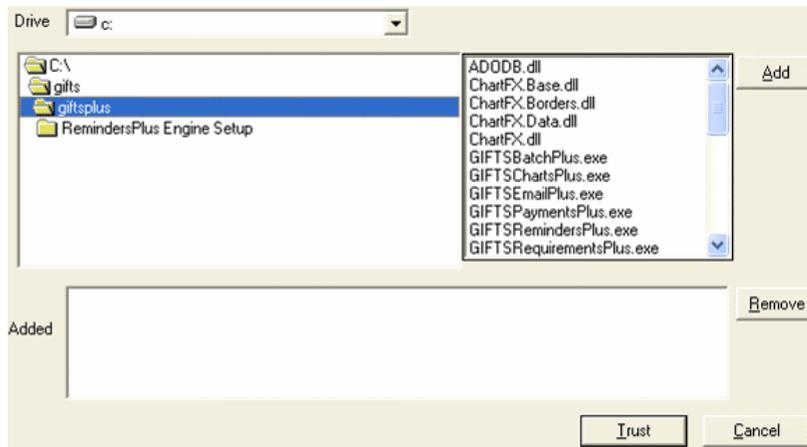
2. From the field on the right side of the GIFTS Trust window, select **GIFTSBatchPlus.exe** and click Add. The file appears in the Added section.

3. Repeat Step 2 for the **ChartFX.dll**, the **Infragistics2.shared.6.3.dll**, and the **SecurityManager.2005.dll**.

4. Click **Trust**. A message appears indicating that the files have been processed. Your setup of .NET security on the workstation is complete.

As an alternative to using the GIFTS Trusting utility, you can manually enter .NET permissions using the command line.

To grant .NET permissions to the Plus Pack programs manually:

1. From the Windows Start menu, go to Run.

   Note: If you are using a Windows 7/Vista workstation, from the Windows Start menu, go to **Accessories > Command Prompt**. Right-click on Command Prompt and select Run as Administrator.

2. In the Open field, type CMD.

3. Click **OK**. The Windows command prompt is displayed.

4. Enter the following command in the command line:

   C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CasPol.exe -m -ag All_Code -strong -file "\\<C:\location of GIFTS Plus files>\GIFTSBatchPlus.exe" -noname -noversion FullTrust -n "GIFTSPlus"

   Where <C:\location of GIFTS Plus files> is the location of the GIFTS Plus files.

Important: The command line is case-sensitive, and must use straight (not smart) quotes, and must not include any line breaks. If you have problems copying and pasting the above commands in the command line, try manually typing it.

5. Press **Enter**. You are prompted to confirm that the operation you are performing will alter security policy.

6. Click **Yes**.

7. Press **Enter**. The strong key is trusted and a Success message appears.

8. Repeat Steps 1-7 for each of the following commands:

   - C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CasPol.exe -m -ag All_Code -strong -file "\\<ServerName>\<GIFTSPlus folder location>\ChartFX.dll" -noname -noversion FullTrust -n "ChartFX"

   - C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CasPol.exe -m -ag All_Code -strong -file "\\<ServerName>\<GIFTSPlus folder location>\Infragistics2.shared.6.3.dll" -noname -noversion FullTrust -n "Infragistics"

   - C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CasPol.exe -m -ag All_Code -strong -file "\\<ServerName>\<GIFTSPlus folder location>\SecurityManager.2005.dll" -noname -noversion FullTrust -n "Infragistics"

Part 3: Repeat Parts 1 and 2 on Each GIFTS Workstation

Repeat Part 1 and Part 2 (if necessary) to install and trust the Plus Pack files on each GIFTS workstation. Be sure to copy the Plus Pack files to the same location on each workstation. If the mapping to the GIFTSPLUS folder is not the same on every workstation, not all users will be able to access the utilities.

Part 4: Configure the Plus Pack to Run the Locally-Installed Files

After you have installed and trusted the Plus Pack files on each workstation, you can configure the Plus Pack to run the program files locally. This part of the procedure only needs to be performed once:

1. Open the Plus Pack Configuration utility. (For information about opening the utility, see "Accessing the Plus Pack Configuration Utility" on page 4.) The **Plus Pack Executable** Location field displays the location of the Plus Pack program files on your file server.

2. Click **Browse**. You are prompted to enter the location of the Plus Pack program files.

3. Browse to the copy of the GIFTSPLUS folder that you copied to the workstation's local hard drive, and click **OK**.

   For example:

   C:\Program Files\GIFTSPLUS

4. Click **OK** to save the Plus Pack preferences. The path you specified will be used by each GIFTS workstation to locate the Plus Pack program files.

Your local installation of the Plus Pack utilities is complete. Your users may now begin use of the Plus Pack, as described in the *GIFTS Plus Pack 5.2.3 User's Guide*.

Troubleshooting

1	If an error similar to the following is displayed when you attempt to run a Plus Pack utility, it cannot be run because its use is prohibited by your .NET security settings.
	Application has generated an exception that could not be handled.
	Process id=0x2dc (732), Thread id=0x9b8 (2488).
	Click **OK** *to terminate the application* *Click* **CANCEL** *to debug the application.*
	Note that the **Process ID** and **Thread ID** specified by the message may vary.
	To resolve the issue, please review the sections of the installation procedure that pertain to .NET security and ensure that you have properly set up trusting for the Plus Pack, Infragistics, and ChartFX files.
2	If an error similar to the following is displayed when you attempt to run a Plus Pack utility, a change must be made to your **GIFTS.ini** file.
	The Plus Pack Configuration Tool may not launch at this time because the following error has occurred: Error occurred while loading menu options. *Error occurred while reading GIFTS configuration file.* *Error occurred while reading GIFTS configuration options.* *(Configuration Object Read) Error occurred while reading GIFTS configuration options: StartIndex cannot be less than zero.* *Parameter name: startIndex*
	Look for **C:\Windows\GIFTS.ini** and open the file with a text utility such as Notepad.
	Under the section for DatabaseName, replace the mapped drive letter path with UNC paths.
	Example: G:\GIFTS\gifts.mdb becomes \\servername\gifts\gifts.mdb