



## GiftWrap 4.0 Data Preparation and Transfer Instructions

These instructions describe how to prepare a GiftWrap 3.6 database and transfer it to PG Calc for conversion to GiftWrap 4.0. These instructions also explain how to send custom reports, checks and advices for conversion.

Because GiftWrap databases contain sensitive personal information, such as social security numbers, dates of birth, and bank account numbers linked with names and addresses, PG Calc has created a secure Data Transfer site for database file upload with encrypted transmission using secure socket layers (SSL) and encrypted storage of your database.

Please follow these instructions to ensure secure transmission of your database. Do not send your database to PG Calc by email attachment or other unencrypted means.

### **Step 1: Get ready for your scheduled conversion date**

Conversions must be scheduled in advance. PG Calc will be converting clients all year, and some periods may fill up quickly. If you have not already done so, please request your reservation date early to get your preferred date at <http://www.pgcalc.com/giftadmin/giftwrapmigrations.htm>.

- 1) Plan to upload your database on or before your scheduled conversion date. Please schedule internal IT resources accordingly.
- 2) If you are still using a version before GiftWrap 3.6, please contact PG Calc at [giftwrap@pgcalc.com](mailto:giftwrap@pgcalc.com) before transferring your data as additional conversion steps will need to be arranged.
- 3) If you have more than one database to convert, let us know how many you have by emailing [giftwrap@pgcalc.com](mailto:giftwrap@pgcalc.com). Perform the steps below for each database.
- 4) If you wish to train staff on GiftWrap 4.0 using sample data instead of production data, sign up for an evaluation account at <http://www.pgcalc.com/giftadmin/gwtry.htm>.

*Before starting Steps 2 and 3, ask all users to exit GiftWrap 3.6 and stay logged out until these steps are completed.*

### **Step 2: prepare your database to send**

Run *Clean Up Database* and *Verify Database* before backing up your database. *Clean Up Database* and *Verify Database* act on the data behind the scenes, so it is important to run these routines even if you choose not to fix any of the issues identified.

- 1) Launch GiftWrap 3.6 and log into the GiftWrap database.
- 2) Close the Search window.
- 3) Go to the File menu and choose the Clean Up Database command.
- 4) Go to the File menu and choose the Verify Database command.

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Verify Database gives you a list of warnings about errors, suspected errors, and inconsistencies. You may want to resolve some of these issues before backing up your database, but it is not required. Any unresolved issues will carry over to GiftWrap 4.0.

#### **Step 3: Back up the database**

**IMPORTANT:** Any changes made in GiftWrap 3.6 after the backup files are run will not be reflected in the converted database. You will need to enter those changes again in GiftWrap 4.0 after conversion.

If you completed step 2 before your last regularly scheduled backup, you can send copies of your latest daily backup .bak file and skip to step 4. Otherwise, you should create a .bak backup file to send.

The instructions below describe how to backup using the GiftWrap 3.6 Database Manager. If you have a SQL Server license, you can use SQL Enterprise Manager or SQL Management Studio if you prefer, and skip to step 4.

- 1) Go to Start – All Programs – PG Calc and login to the GiftWrap 3.6 Database Manager using SQL authorization, not your usual GiftWrap login. Default passwords are provided by PG Calc. If these have been changed, consult your system administrator.  
SQL login:  
User name: sa  
Password: P2@pen.svr
- 2) Highlight the database in the Databases list that you wish to send.
- 3) Right click on the database name and choose Backup Database (this can also be selected from the Databases menu).
- 4) Choose either “Immediate Full Backup” or “Express Full Backup”.
- 5) Make note of the data directory you chose to save the backup .bak file (by default C:\Program Files\Microsoft SQL Server\MSSQL\Data on the database server).

#### **Step 4 – Zip the backup .bak file**

If your .bak file is bigger than 25 MB, zip the .bak file before sending using WinZip or 7-Zip or other compression programs that create standard .zip files. Below are the steps to zip your .bak file using WinZip.

- 1) Run WinZip.
- 2) Click New to create a new archive.
- 3) Browse to the folder where you wish to store the zip file, enter a file name for the zip file, then click OK. You can put the zip file anywhere and name it anything you want. Remember the name and location for step 5.
- 4) Click Add, then browse to the drive on the server where the .bak file from step 3 was stored (for example, C:\Program Files\Microsoft SQL Server\MSSQL\Data). You may need to specify a network location, if that is where the files were stored, such as \\Servername\Drivename\Program Files\Microsoft SQL Server\MSSQL\Data.
- 5) Select the file to be zipped (for example, GiftWrap.bak).

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If you are converting more than one database, they can be uploaded in a single .zip file so long as the file size is 25 MB or less. Otherwise, they can be zipped and uploaded separately.

You only need to zip the .bak file. The .trn file with the transaction log backup is not needed for the conversion.

You do not need to encrypt or password protect the database file as it will be uploaded securely using SSL and encrypted on arrival. If you nonetheless password protect or encrypt the file (not recommended), the password should be emailed to [giftwrap@pgcalc.com](mailto:giftwrap@pgcalc.com) or called in to 888-474-2252. Do not email the .zip file or .bak file. Failing to send your password will delay your conversion.

#### **Step 5 – Upload your database to PG Calc**

About a week prior to your reservation date, the person designated to handle the data transfer for your organization will receive login credentials to PG Calc's secure Data Transfer site from [gwsetup@pgcalc.com](mailto:gwsetup@pgcalc.com). To upload your database to PG Calc's secure data transfer site:

- 1) Go to <https://giftwrap.pgcalc.com/DBUpload/>
- 2) Log in using the transfer code and email address sent in the email titled "GiftWrap Data Transfer Code".
- 3) Browse to the location of the .zip file you created in step 4 (or the .bak file you created in step 3 if it is smaller than 25 MB) and click Submit.
- 4) Wait while your file loads. Do not close the upload window until the *Upload Complete* message appears.
- 5) If you receive any errors or do not see a message that your upload is complete, please contact PG Calc by emailing [giftwrap@pgcalc.com](mailto:giftwrap@pgcalc.com) or calling 888-474-2252.

When you are finished uploading your database, you may want to clean up copies of any files you created to guard against leaving extra files around on your system.

#### **Step 6 – Check for custom report, check, or advice files and, if any, send for conversion**

GiftWrap 3.6 custom formats will not work in GiftWrap 4.0. PG Calc will convert any existing custom reports, checks, and advices from GiftWrap 3.6 to GiftWrap 4.0 format at no charge at the time of migration. Please send only those custom reports, checks, and advices that are currently being used.

**Custom Reports:** If you do not see a Menu named "Custom" on the menu bar in GiftWrap 3.6, you do not have any custom reports. If you do see a Menu named "Custom", click this menu and review the list of custom reports. Send to us only those custom reports that are currently in use. You will find the .rpt files in the Reports subfolder of the GiftWrap 3.6 install folder. The default location of this folder is C:\Program Files\GiftWrap\Reports.

**Custom Checks and Advices:** Choose Payments > Payment Settings in GiftWrap 3.6. Review the Check Style and Advice Style menus to see if custom checks or advices are in use. If so, you will find the corresponding .rpt files in folders named \CustomChecks and \CustomAdvices in the GiftWrap 3.6 install

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folder. The default locations of these folders are C:\Program Files\GiftWrap\Reports\CustomChecks and C:\Program Files\GiftWrap\Reports\CustomAdvices, respectively.

Copy and email .rpt files to ellen@pgcalc.com (since .rpt files contain no data, it is OK to email) or upload them to the Data Transfer site.

### **Data Not Migrated**

There are two categories of GiftWrap data that are not migrated when your data is converted to GiftWrap 4.0. These are user account information and audit data. User account information is not migrated because GiftWrap 4.0 is a multi-tenant, multi-user platform, and the user access control model in GiftWrap 4.0 is different from that in GiftWrap 3.6. Similarly, GiftWrap 3.6 audit data is architecturally incompatible with 4.0. The database structure, fields and relations are all different from GiftWrap 3.6, and so GiftWrap 3.6 audit data cannot be migrated to GiftWrap 4.0.

Once migrated, you should do the following:

- 1) Log into the GiftWrap 4.0 application.
- 2) Select “Administrator – User Setup” under the Setup menu.
- 3) Create user accounts for all users in your organization that will need access to the GiftWrap 4.0 application.

**Transaction auditing:** All audit data resulting from transactions on the GiftWrap 4.0 platform will be captured and stored in the GiftWrap 4.0 audit table. Audit trail information is accessible from the Utilities menu in GiftWrap 4.0.

Note that functions on the Administrative Settings screen under the GiftWrap 3.6 Setup menu, like social security masking or password change, must be explicitly set in GiftWrap 4.0 post migration.

### **Additional information on GiftWrap 4.0**

Comprehensive information on GiftWrap 4.0 and the migration process is available at <http://www.pgcalc.com/giftadmin/gw3xusers.htm>.

### **Questions?**

PG Calc’s Client Services team welcomes your comments and questions.

Phone: 888-474-2252

Email: support@pgcalc.com