



GiftWorks 2011 Upgrade Guide

If you are upgrading from **GiftWorks 2006** [start on page 2](#)

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Upgrading From GiftWorks 2006

Introduction

Congratulations on your purchase of GiftWorks 2011. The tools that you need for donor and donation management are all right where you need them with GiftWorks.

GiftWorks 2011 is the next generation of GiftWorks. In GiftWorks 2011 Standard and Premium, we've made many changes and improvements that will make your GiftWorks experience even better.

To take advantage of the new features, it will be necessary to upgrade your existing database to the new format.

We are very aware of how important your donor and donation information is to your organization, and we have taken extreme care to make this upgrade process as painless as possible. Be sure to read through this entire guide before proceeding with the upgrade.

It is important that you know that your original data is automatically backed up as part of the upgrade process. If your review of the data after the upgrade reveals any issues, you can simply restore the backup and go through the upgrade process again with different options.

The GiftWorks 2011 database upgrade process will work with the database most recently used with any version of GiftWorks from 2.0.80.00 through 2.0.141.00. If you still have your old version of GiftWorks installed, you can determine your version by clicking the **Help** pulldown menu at the very top left of GiftWorks and then select **About GiftWorks**.

It is very unlikely that you are running a version of GiftWorks older than 2.0.80.00. If you are, please contact GiftWorks support at 2011upgrade@giftworksconnect.com for instructions.

PREMIUM

Instructions on using your GiftWorks 2011 Premium license key follow the upgrade information below. If you have already upgraded to GiftWorks 2011 Standard, you can go straight to the Entering Your Premium License Key information below. Otherwise, follow the upgrade steps first.

What's Changed Since GiftWorks 2006?

The biggest change in GiftWorks 2011 is in the structure of donors, how donations are attributed, and the relationships among donors, households, and organizations. See the [What's New in GiftWorks 2011 Guide](#) for more detailed information about all of the changes and the additional features in GiftWorks 2011 Premium.

CHANGES AFFECTED BY THE UPGRADE

The following organization fields are no longer available in GiftWorks:

- Number of employees
- Region
- Industry
- Annual Revenue
- EIN
- Acronym
- Relationship

Any data you have stored in these fields will not be available after you complete the upgrade process, except for relationship, which you can optionally choose to have put in a custom field.

The ability to specify a parent-branch relationship between organizations has been removed. Any such relationships will be removed by the upgrade process.

Some of the SmartList criteria have been eliminated in the new version. Any SmartLists you created that include criteria eliminated in GiftWorks 2011 will have those criteria removed from the SmartList. The SmartList criteria that were eliminated are:

- Individuals: Personal Details – “Household name is...”
- Individuals: Organization Details – “Organization street (address) matches...”
- Individuals: Organization Details – “Organization city is...”
- Individuals: Organization Details – “Organization state is...”
- Individuals: Organization Details – “Organization Zip code is...”
- Individuals: Organization Details – “Organization Zip code matches...”

- Organizations: Company Details – “Parent (organization) name is...”
- Organizations: Company Details – “Parent (organization) name matches...”
- Organizations: Organization Information – “Revenue is...”
- Organizations: Organization Information – “Industry is...”
- Organizations: Organization Information – “Employees is...”
- Organizations: Organization Information – “Region is...”

- Donations: Donation Details – “On behalf of household name is...”
- Donations: Donation Details – “On behalf of organization name is...”
- Donations: Donation Details – “Household name is...”

- Pledges: Pledge Details – “On behalf of household name is...”
- Pledges: Pledge Details – “On behalf of organization name is...”
- Pledges: Pledge Details – “Household name is...”

See Appendix A: GiftWorks 2011 Upgrade Checklist for information on reviewing your SmartLists after the upgrade. In the unlikely event that you have a SmartList based only on criteria that have been eliminated in GiftWorks 2011, that SmartList will be deleted.

Customizations made to SmartLists and reports will be reset during the upgrade. These customizations include additional columns added to a report or SmartList, grouping, totals or sorting, date ranges, and other customizations. Other than as described above, the update does not change the criteria specified for SmartLists.

Letters that you created in earlier versions of GiftWorks should be reviewed, as there have been some changes to the available fields for letters. The following fields were eliminated in GiftWorks 2011:

- Organization: Primary Contact Job Title
- Organization: Primary Contact Formal Salutation
- Organization: Primary Contact Informal Salutation
- Organization: Primary Contact Formal Addressee
- Organization: Primary Contact Informal Addressee
- Organization: Billing Contact Job Title
- Organization: Billing Contact Formal Salutation
- Organization: Billing Contact Informal Salutation
- Organization: Billing Contact Formal Addressee
- Organization: Billing Contact Informal Addressee

See Appendix A: GiftWorks 2011 Upgrade Checklist for more information on reviewing your letters.

Saved import configurations (.GIC files) that were created in earlier versions of GiftWorks will not work with the importer in GiftWorks 2011. You will need to re-map and save any import configurations that you want to use with GiftWorks 2011.

Upgrade Overview

The process of upgrading to GiftWorks 2011 happens in 3 basic steps:

1. Backup your current GiftWorks 2006 database.

To ensure the safety of your GiftWorks information, we strongly encourage you to backup your current GiftWorks database to a safe and secure location.

2. Upgrade to GiftWorks 2011.

You will need to download and install the latest version of GiftWorks. If GiftWorks 2006 is currently installed on your machine, the GiftWorks 2011 installation process will remove the previous version of GiftWorks and then install GiftWorks 2011.

3. Upgrade your GiftWorks 2006 database.

After installing GiftWorks 2011, you will upgrade your GiftWorks database to the latest format. Upgrading your database will occur the first time you sign in to your GiftWorks database using GiftWorks 2011.

The following information will help guide you through the upgrade steps.

Step 1 – Backup Your Current Database

Before you start the GiftWorks 2011 upgrade, it is imperative that you **BACK UP YOUR CURRENT GIFTWORKS DATABASE**. The upgrade process will create its own backup as well, but we recommend that you create your own backup.

To back up your GiftWorks database:

1. Sign in to the GiftWorks database that you want to back up.
2. Click the **Settings** button at the top of GiftWorks.
3. Click the **Manage Your Database** heading.
4. Click **Manage Your GiftWorks Database**.
5. Click **Backup the Database**.
6. Click the **Browse** button to choose a location and filename. Browse to the folder in which you want to save your backup file, and type the file name you want to use for the backup, then click **Open**.

IMPORTANT TIP

Back up your database in a file location that is separate from the computer you are working on.

7. Click **OK** to begin the backup. The backup may take some time to complete. The time will vary depending on the size of your database.
8. When the backup is complete, a window will pop up that reads **Backup is complete**. Click **OK** to finish the backup process.

If you have any trouble with completing your backup, please contact GiftWorks support at 2011upgrade@giftworksconnect.com.

Once you have backed up your GiftWorks database, proceed to the next page.

Step 2 - Upgrade to GiftWorks 2011 Standard or 2011 Premium

The information below will help you get your current installation of GiftWorks upgraded to the correct version. If you are upgrading to Standard, follow the instructions below.

If you are upgrading to Premium, you must first upgrade to Standard by following the instructions below. Then, continue on to the Upgrade of a Database Created with a Previous Version of GiftWorks 2011, and then Entering Your GiftWorks 2011 Premium License Key section to complete your upgrade.

OPTION 1: IF YOU PURCHASED UPGRADE LICENSES

If you have purchased a license to upgrade from a previous version of GiftWorks to GiftWorks 2011 Standard or Premium, you will receive instructions on how to download GiftWorks 2011.

If you have multiple computers on which to upgrade GiftWorks, you only need to perform the database upgrade once since, generally speaking, all of your computers share the same database file.

You will need to install the upgraded version of GiftWorks on each computer. Once the database has been upgraded, only computers running GiftWorks 2011 will be able to access it. Continue to Starting the Upgrade, below.

OPTION 2: IF YOU HAVE NOT PURCHASED UPGRADE LICENSES

If you have not yet purchased an upgrade license, but want to try GiftWorks 2011, **please read this entire section before you start.**

You can download and install the trial version from the GiftWorks website at www.giftworksconnect.com/GiftWorks. You can complete the upgrade process and use GiftWorks 2011 for the 30-day trial period.

Important

At the end of the trial period, you will need to purchase a license to continue using GiftWorks 2011, or you will need to uninstall GiftWorks 2011 and reinstall the earlier version of GiftWorks.

If you do not purchase an upgrade license for GiftWorks 2011, you will need to revert to the backup copy of your database you created before installing the upgrade. If you do so, you will lose any changes you made to the data while using GiftWorks 2011.

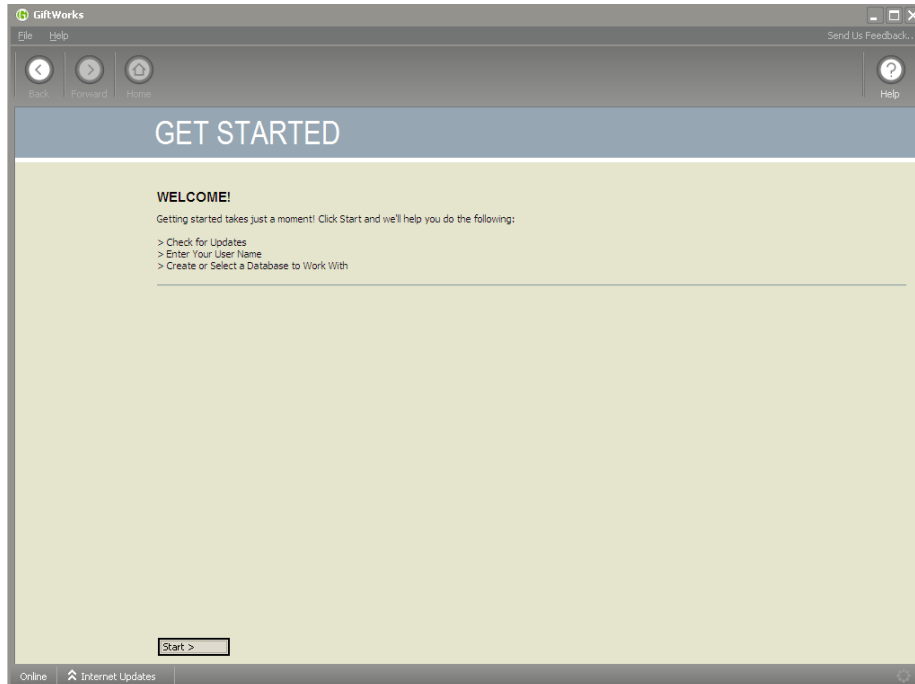
STEP 3 – Upgrade Your GiftWorks Database

STARTING THE UPGRADE OF A DATABASE CREATED WITH GIFTWORKS 2006

The first thing you need to do before beginning the upgrade process is back up your database. Once you've backed up your database, you can install the new version.

To start the installation, double-click the file you downloaded and follow the on-screen instructions. Once the installation is complete, you can either start GiftWorks by leaving the box checked on the last step of the installation, or you can go to the **Start** menu, then to **All Programs**, then to **Mission Research**, then click **GiftWorks**.

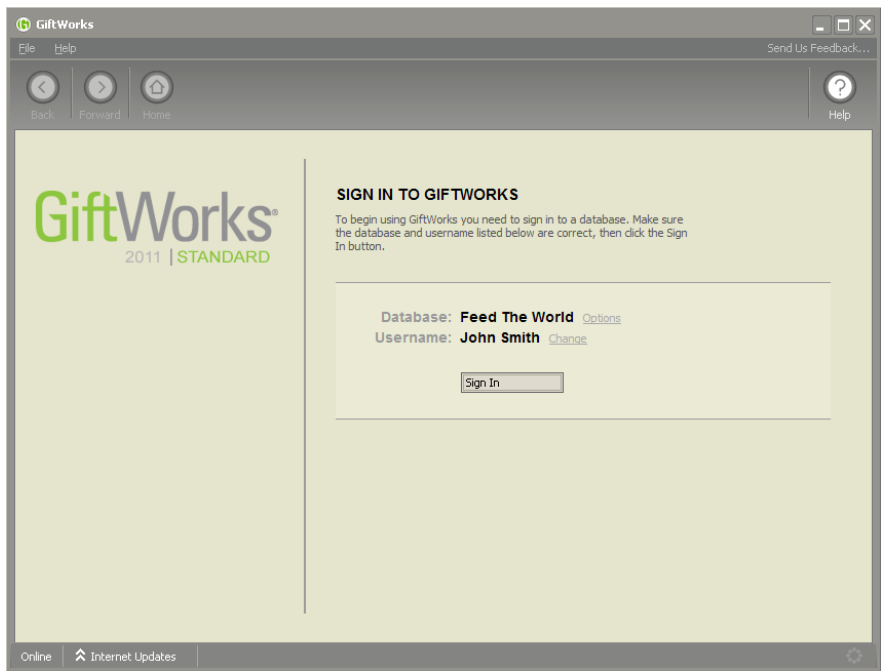
You will need to enter your software key or choose to use the trial version of GiftWorks, and then register your installation. Once you have finished the registration, you'll be taken to the Getting Started process.



Be sure to go through the process to the **Select a Database** screen, then choose **Select an existing database** and click **Next**. See the GiftWorks 2011 Getting Started Guide for more information on the Getting Started process.

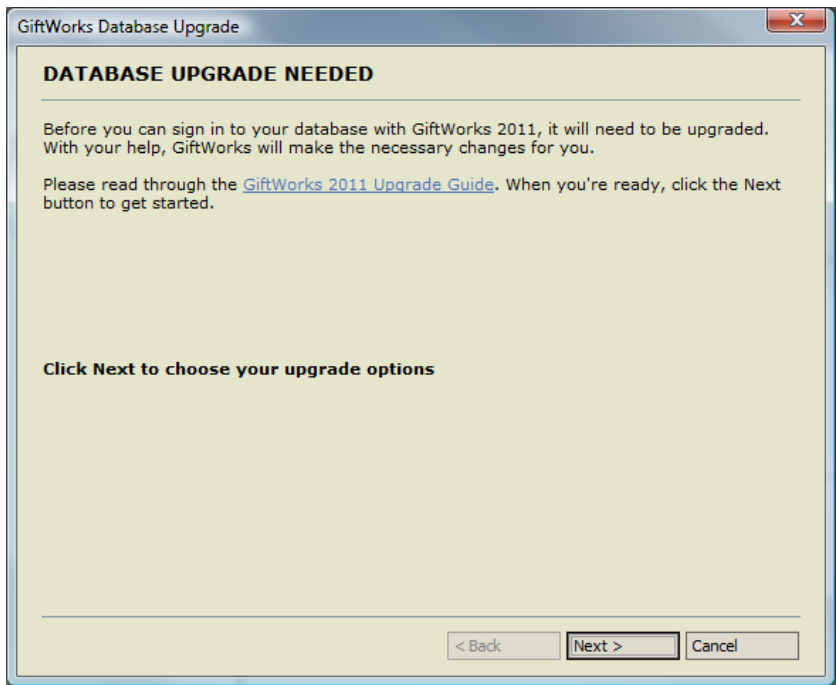
On the next screen, click the **Browse** button and browse to the location of your existing GiftWorks database (.gds) file. Click the database file to select it and then click **Open**, then click **Next**.

This will take you to the **Sign In** screen. You are now ready to begin the database upgrade process.



BEGINNING THE DATABASE UPGRADE

Click **Sign In** to begin. GiftWorks will recognize that this is a database from a previous version and will begin the upgrade process automatically.



Click **Next** to get started. The next screen is where you will choose the options for upgrading your database. The sections below outline each of the options, the impact that each will have on your existing data, and how it will look in GiftWorks 2011.

DISPLAY NAME FORMAT

The first option is to choose a **Display Name Format**. This will affect all individual donors in your existing database.

The screenshot shows a dialog box titled "GiftWorks Database Upgrade" with a close button (X) in the top right corner. The main heading is "CHOOSE UPGRADE OPTIONS". Below this, there is a paragraph of instructions: "Use these options to tell GiftWorks how you would like your database to be upgraded. Hover your mouse over an option label to see a brief explanation. If you need additional explanations of the options, please see the [GiftWorks 2011 Upgrade Guide](#)." The dialog contains several dropdown menus:

- Display Name Format: Smith, John (Last, First)
- Household Members: Smith, John (Last, First)
- Organization Contacts: John Smith (First Last)
- Organization Mailing Info: Primary and billing contacts will be donors
- Relationship Field: Leave organization mailing information unchanged
- Household Donations: The organization relationship field will be discarded
- Organization Donations: Move on-behalf-of donations to the household

At the bottom, there is a section titled "Option: Display Name Format" with the text: "This upgrade option designates whether the display names of individuals in your database will be updated to 'Last, First' format or 'First Last' format." At the very bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

Display Name is a new field in GiftWorks 2011, and is used throughout GiftWorks wherever a donor is displayed. You will see the display name at the top of the screen when viewing a donor, and when donors are displayed in SmartLists, reports, and in other places. Because you will be sorting by the display name, the recommended format is Last, First (as in Smith, John). The option you choose here will not alter any of your existing data, because display name is a new field.

The option you choose here will be set as the default display name format for your new database. You can view or change this setting by clicking the **Settings** button at the top of GiftWorks, and clicking **Change Field Defaults** under the **Customize** header. The display name format setting is the eighth field in the list.

Important Note

For organization donors in your existing database, the organization name will be used as the display name. If you have organizations whose names begin with "The," you may want to edit their display names after the database upgrade so that they read like "Acme Corporation, The." This makes for better sorting.

To save time when doing this, create a SmartList of donors whose name contains "The." See the SmartLists section of the GiftWorks manual for more information on creating SmartLists.

HOUSEHOLD MEMBERS

The second option affects how members of households in your existing database will be brought into GiftWorks 2011. In older versions of GiftWorks, each household was made up of one or more individual donors linked to a household.

The household was really a separate record that contained some aggregate information for the household, but could not have donations directly attributed to it, only “on behalf of” the household. The “on behalf of” donations were actually primarily attributed to one of the individual donors.

The screenshot shows a dialog box titled "GiftWorks Database Upgrade" with a close button (X) in the top right corner. The main heading is "CHOOSE UPGRADE OPTIONS". Below the heading is a paragraph of instructions: "Use these options to tell GiftWorks how you would like your database to be upgraded. Hover your mouse over an option label to see a brief explanation. If you need additional explanations of the options, please see the [GiftWorks 2011 Upgrade Guide](#)." Below this are several dropdown menus for configuration options:

- Display Name Format: Smith, John (Last, First)
- Household Members: Household members will be donors
- Organization Contacts: Household members will be donors (highlighted)
- Organization Mailing Info: Leave organization mailing information unchanged
- Relationship Field: The organization relationship field will be discarded
- Household Donations: Move on-behalf-of donations to the household
- Organization Donations: Move on-behalf-of donations to the organization

At the bottom, there is an "Option: Household Members" section with the text: "Should household members be designated as Affiliate Donors (if there are no donations for the members)?" Below this are three buttons: "< Back", "Next >", and "Cancel".

In GiftWorks 2011, a household is a donor with a household profile. You can store all household member information in that one household record. Or if you need to track individual information about the members, you can add them as donors who are members of the household. The members can also optionally be affiliate donors, if you do not expect to receive donations from them and do not want them to be included in donor counts.

Households that you upgrade will be brought into GiftWorks 2011 as donors with household profiles. With the household members option, you can choose if household members should be brought through as donors or affiliate donors. Note that any donor in a previous version of GiftWorks who has given any donations will be brought through as a donor, regardless of the option you choose here. Affiliate donors cannot have donations in GiftWorks 2011. See the **Donor Management Guide** for more information on affiliate donors.

ORGANIZATION CONTACTS

The third option lets you choose how contacts for your organization donors will be upgraded for GiftWorks 2011. In previous versions of GiftWorks, an organization was one record, and any contacts for that organization had to be added as individual donors and then linked to that organization.

One disadvantage to this approach was that the organization contacts could be indistinguishable from other individuals in GiftWorks. If you didn't want to solicit or send other mailings to the organization contacts, you would need to explicitly prevent them from appearing in your lists.

GiftWorks Database Upgrade

CHOOSE UPGRADE OPTIONS

Use these options to tell GiftWorks how you would like your database to be upgraded. Hover your mouse over an option label to see a brief explanation. If you need additional explanations of the options, please see the [GiftWorks 2011 Upgrade Guide](#).

Display Name Format: Smith, John (Last, First) ▾

Household Members: Household members will be donors ▾

Organization Contacts: Primary and billing contacts will be donors ▾

Organization Mailing Info: Primary and billing contacts will be affiliate donors ▾

Relationship Field: The organization relationship field will be discarded ▾

Household Donations: Move on-behalf-of donations to the household ▾

Organization Donations: Move on-behalf-of donations to the organization ▾

Option: Organization Contacts
Should primary and billing contacts for organizations be designated as Affiliate Donors (if there are no donations for the contacts)?

< Back Next > Cancel

The existing organization will be created in GiftWorks 2011 as a donor with an organization profile. The two options here let you choose whether to bring organization contacts into GiftWorks 2011 as donors or affiliate donors. Any organization contacts that have donations will be brought through as donors, regardless of which option you choose here.

ORGANIZATION MAILING INFO

The fourth option affects how the mailing information (salutation and addressee) from your existing organization donors is brought through to GiftWorks 2011.

GiftWorks Database Upgrade

CHOOSE UPGRADE OPTIONS

Use these options to tell GiftWorks how you would like your database to be upgraded. Hover your mouse over an option label to see a brief explanation. If you need additional explanations of the options, please see the [GiftWorks 2011 Upgrade Guide](#).

Display Name Format: Smith, John (Last, First) ▾

Household Members: Household members will be donors ▾

Organization Contacts: Primary and billing contacts will be donors ▾

Organization Mailing Info: Leave organization mailing information unchanged ▾

Relationship Field: Leave organization mailing information unchanged ▾

Household Donations: Allow GiftWorks to determine the optimal organization mailing information ▾

Organization Donations: Move on-behalf-of donations to the organization ▾

Option: Organization Mailing Info
If an organization has a primary contact, GiftWorks can use the primary contact information to update the organization mailing info (salutation and addressee). GiftWorks can overwrite the organization's mailing information from the primary contact or can use the primary contact's mailing information to create recommended mailing information. Alternately, the organization's mailing information will remain unchanged.

< Back Next > Cancel

The first choice will bring the organization salutation and addressee information through without any changes. The second choice will overwrite the new organization's salutation and addressee information with the information from the primary contact (if any) designated for that organization.

If there is no primary contact, the salutation and addressee fields will come through unchanged. If you choose the third choice, GiftWorks will import the organization and its primary contacts (based on your organization contacts selection), and then calculate the salutation and addressee information based on the combination of organization and primary contact information.

ORGANIZATION RELATIONSHIP FIELD

The fifth option lets you choose what to do with the Organization Relationship field that existed in previous versions of GiftWorks but has been eliminated in GiftWorks 2011. Example values that were included for this field by default include partner, peer, agency, and franchise.

GiftWorks Database Upgrade

CHOOSE UPGRADE OPTIONS

Use these options to tell GiftWorks how you would like your database to be upgraded. Hover your mouse over an option label to see a brief explanation. If you need additional explanations of the options, please see the [GiftWorks 2011 Upgrade Guide](#).

Display Name Format: Smith, John (Last, First) ▾

Household Members: Household members will be donors ▾

Organization Contacts: Primary and billing contacts will be donors ▾

Organization Mailing Info: Leave organization mailing information unchanged ▾

Relationship Field: The organization relationship field will be discarded ▾

Household Donations: The organization relationship field will be copied to a custom field

Organization Donations: Move on-behalf-of donations to the organization ▾

Option: Organization Relationship Field
The organization relationship field is no longer available in GiftWorks 2011. This option allows you to copy the organization relationship field to a custom field. If you did not use this field in the previous version of GiftWorks, then GiftWorks will discard this field.

< Back Next > Cancel

The two choices here let you either discard the values in this field completely or copy them into a custom field. The new custom field will be called Organization Relationship and will contain the values from your existing version of GiftWorks. Any SmartList criteria based on the old organization relationship field will be changed to use the newly created custom field.

If there are no additional custom fields available in your database, this option will be disabled on the Upgrade Options screen.

HOUSEHOLD DONATIONS

The sixth option lets you choose how to upgrade donations that were recorded in the previous version of GiftWorks as “on behalf of” a household. In the previous version, it was necessary to record the donation as being from an individual donor (for example, a household member) on behalf of the household.

CHOOSE UPGRADE OPTIONS

Use these options to tell GiftWorks how you would like your database to be upgraded. Hover your mouse over an option label to see a brief explanation. If you need additional explanations of the options, please see the [GiftWorks 2011 Upgrade Guide](#).

Display Name Format: Smith, John (Last, First) ▾

Household Members: Household members will be donors ▾

Organization Contacts: Primary and billing contacts will be donors ▾

Organization Mailing Info: Leave organization mailing information unchanged ▾

Relationship Field: The organization relationship field will be discarded ▾

Household Donations: Move on-behalf-of donations to the household ▾

Organization Donations: Move on-behalf-of donations to the household ▾
Move ALL household member donations to the household
Keep on-behalf-of donations with the household member

Option: Household Donations
Household member donations can be handled in 3 ways. They can stay with the household member, all donations can be moved to the household, or only donations given on-behalf-of can be moved to the household.

< Back Next > Cancel

Choosing to move the donations to the household will attribute the donations to the donor with a household profile created by the database upgrade process. Choosing to move ALL household member donations to the household will move all donations from any household member to the household whether those donations were entered as on behalf of the household or not. Choosing to keep the donations with the household member will cause the household member to be created as a donor (rather than as an affiliate donor) without regard to what option you choose for the Household Members option shown above.

ORGANIZATION DONATIONS

The seventh option lets you choose how to upgrade donations that were recorded in the previous version of GiftWorks as "on behalf of" an organization. In the previous version, you had the option of recording a donation as being directly from the organization, or as being from an individual donor (for example, the primary contact) on behalf of the organization.

GiftWorks Database Upgrade

CHOOSE UPGRADE OPTIONS

Use these options to tell GiftWorks how you would like your database to be upgraded. Hover your mouse over an option label to see a brief explanation. If you need additional explanations of the options, please see the [GiftWorks 2011 Upgrade Guide](#).

Display Name Format: Smith, John (Last, First) ▾

Household Members: Household members will be donors ▾

Organization Contacts: Primary and billing contacts will be donors ▾

Organization Mailing Info: Leave organization mailing information unchanged ▾

Relationship Field: The organization relationship field will be discarded ▾

Household Donations: Move on-behalf-of donations to the household ▾

Organization Donations: Move on-behalf-of donations to the organization ▾

Move on-behalf-of donations to the organization ▴

Keep on-behalf-of donations with the organization contact ▾

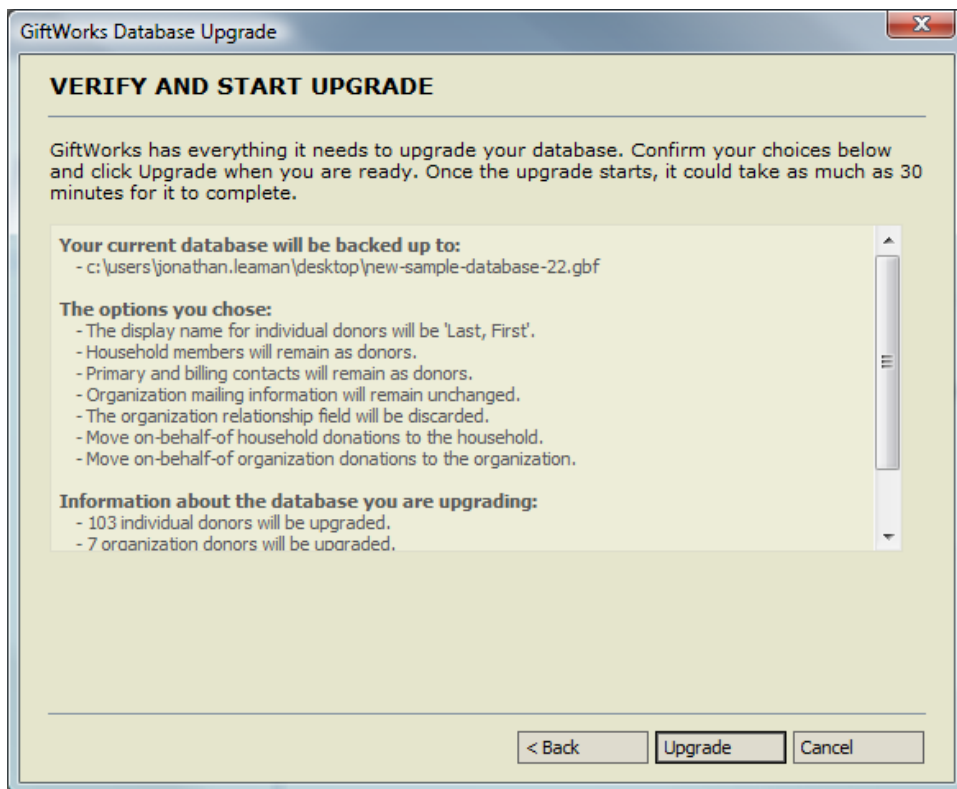
Option: Organization Donations:
Should on-behalf donations for an organization stay with the organization contact or be moved to the organization?

< Back Next > Cancel

Choosing to move the donations to the organization will attribute the donations to the donor with an organization profile created by the database upgrade process. Choosing to keep the donations with the organization contact will cause the organization contact to be created as a donor (rather than as an affiliate donor) without regard to what option you choose for the Organization Contacts option shown above.

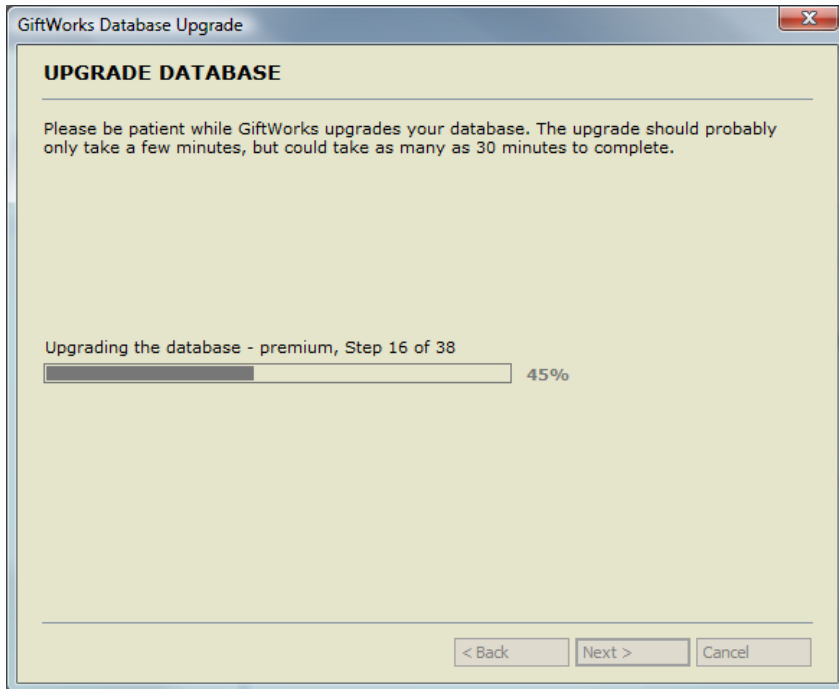
Once you have made a selection for each of the options, click **Next** to continue with the database upgrade.

The next screen shows you information about your database, and a summary of the options you chose for the database upgrade. It also indicates the location where your database will be automatically backed up by the upgrade process. To change any of upgrade options, click **Back**. Otherwise, click **Upgrade** to start the database upgrade process.



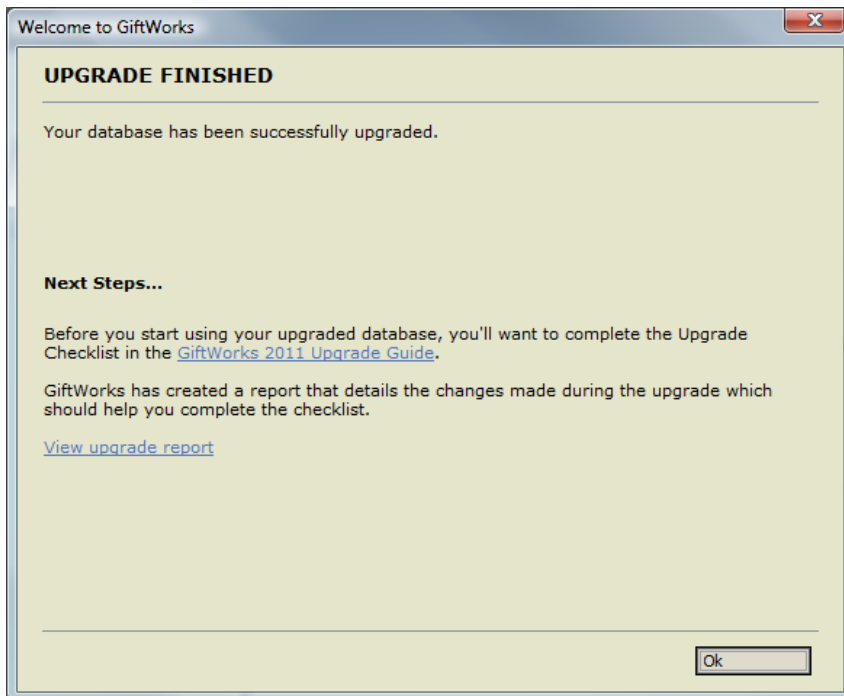
The next screen shows you your progress through the database upgrade. There are multiple steps that GiftWorks goes through to upgrade your database. Depending on the size of your database, the whole upgrade may take several minutes, and individual steps of the process may take a few minutes each.

If GiftWorks appears to have stopped responding during any of the steps, please be patient. The upgrader indicates progress through the steps, but if any one step takes a long time, it may appear to have paused. If it seems to have been stuck for an inordinate amount of time, please contact GiftWorks support at 2011upgrade@giftworksconnect.com.

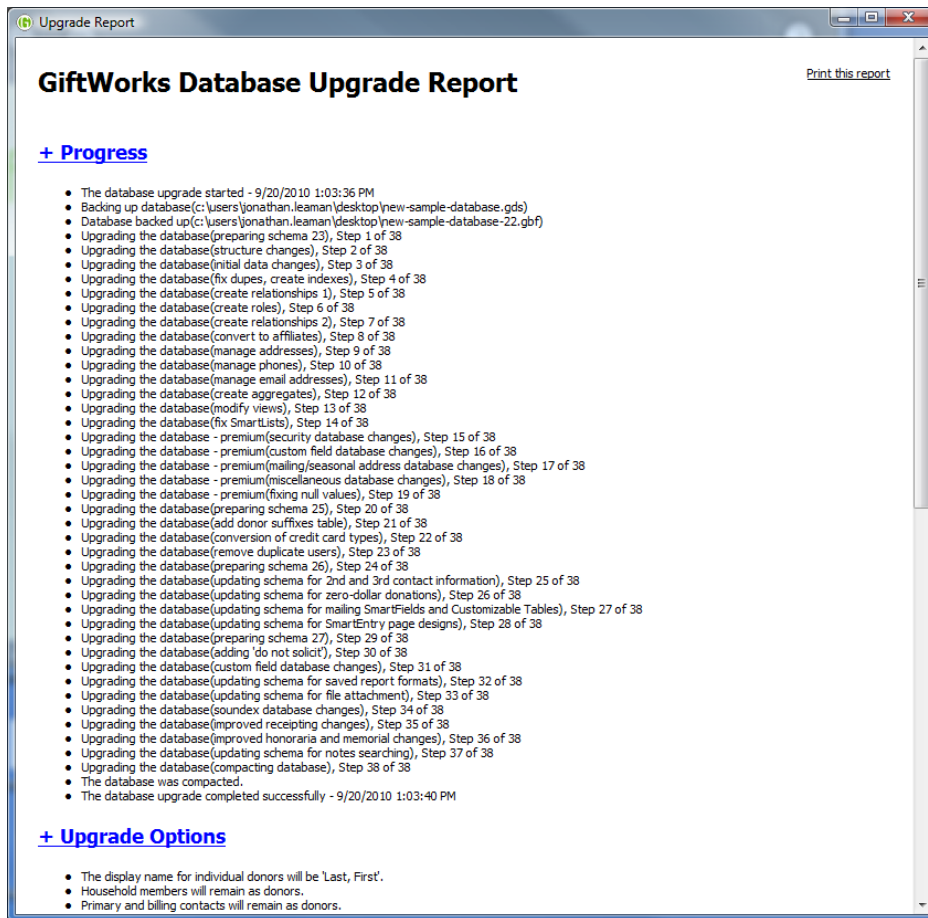


If you receive any errors during your upgrade process, please contact us right away at 2011upgrade@giftworksconnect.com. Rest assured, your data has been backed up, and you will be able to recover everything.

When the upgrade is complete, you will be taken to the following screen.



Click the **View a detailed report** link to see a report like the following. This report will summarize everything done during the upgrade of your database.



Clicking the **GiftWorks 2011 Upgrade Guide** link will bring you to this GiftWorks 2011 Upgrade Guide. You can then go to Appendix A for the upgrade checklist.

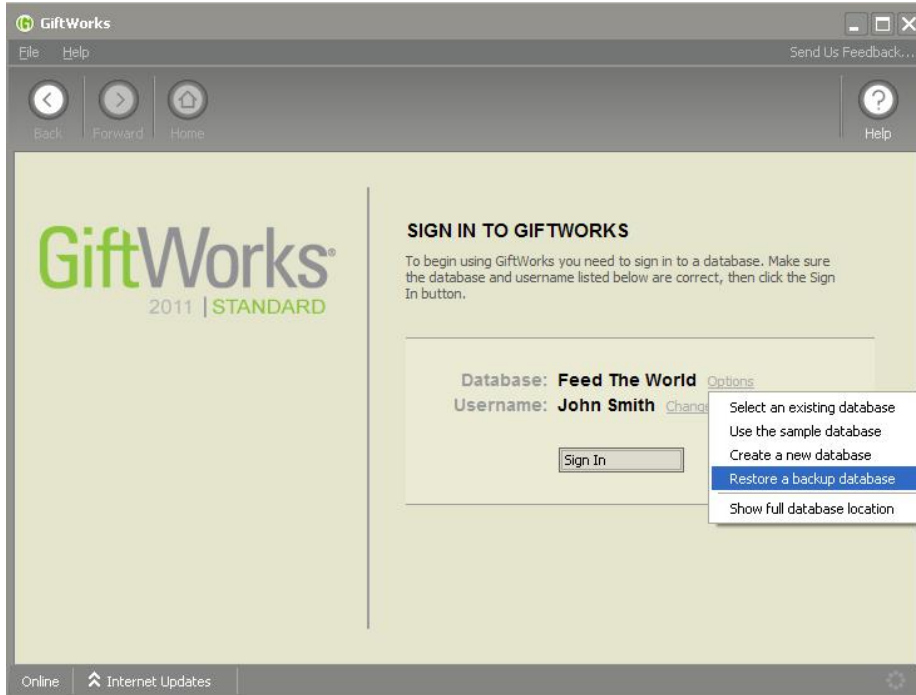
Clicking **OK** will sign you into your newly upgraded database. One of the first things you should do is go through the upgrade checklist in Appendix A to verify that your information was upgraded the way you want. If you want to redo the upgrade, you will need to revert to your old database, so any changes you make before redoing the upgrade will be lost. You should therefore verify the contents of the upgrade before you start entering new data.

Once you have verified the upgraded information, please create a backup of your newly -upgraded database. That way, if you enter some data and decide that you want to revert to the fresh upgrade, you can do so. As always, it is a good idea to back up your database any time you make any significant changes to it. To back up your database, follow the instructions on page 6 of this guide.

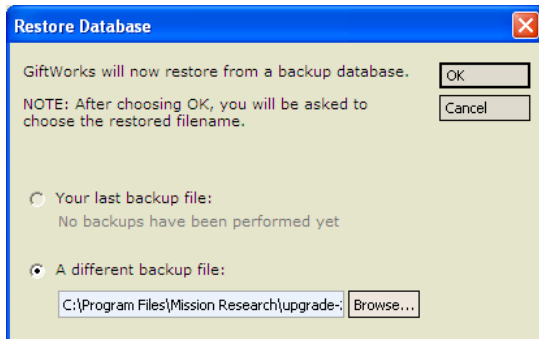
If you have any questions about or issues with the upgrade process, please contact us at 2011upgrade@giftworksconnect.com.

If You Need to Redo the GiftWorks 2011 Upgrade

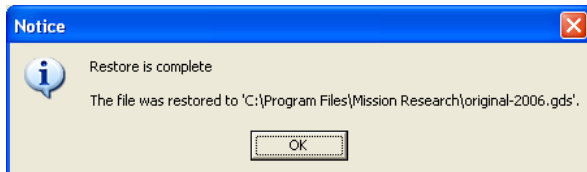
If you need to redo the upgrade (for example, if you want to change the upgrade options you chose previously), return to the sign-in screen. You can get there by clicking **File** in the top left corner of GiftWorks, and then clicking **Sign Out**. You can also shut down and restart GiftWorks. Click **Options** next to the database name, then select **Restore a backup database**.



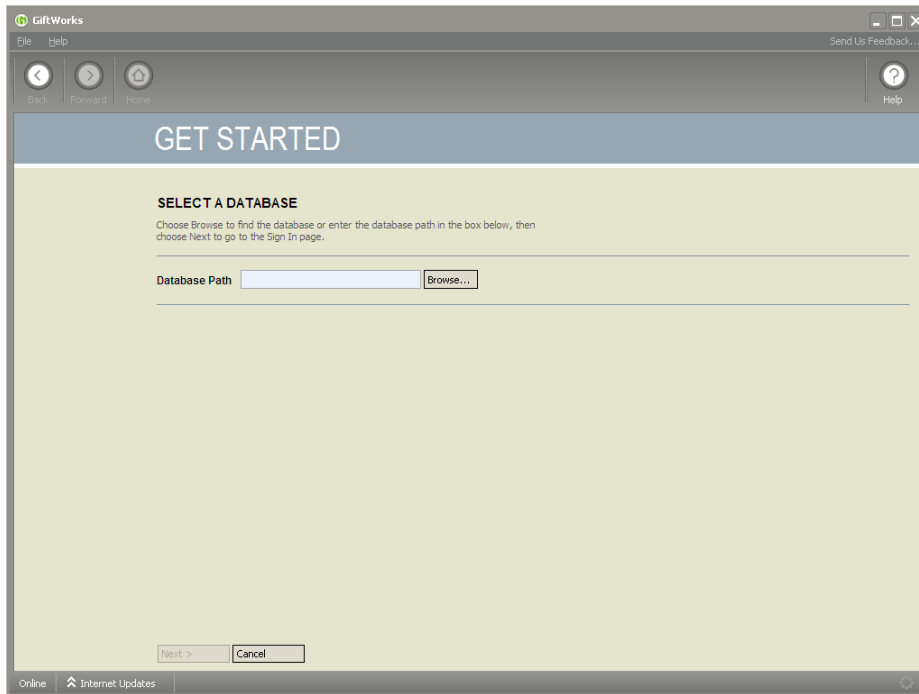
On the next screen, click the **Browse** link and browse to the location of the database backup (.gbf) file that you created prior to starting the upgrade. Click the name of that file, then click **Open**.



Next, click **OK** to start the restore. On the next window, type in a name for the restored database (.gds) file, and click **Open**. GiftWorks will restore your database and will show the following message.



Click **OK**, then click **Options** next to the database name again. Choose **Select an existing database**. Now that you've restored the database, you need to point GiftWorks to the newly restored file.



Click **Browse** and browse to the location of the restored database (.gds) file you just created. Click the name of that file, then click **Open**, then click **Next**.

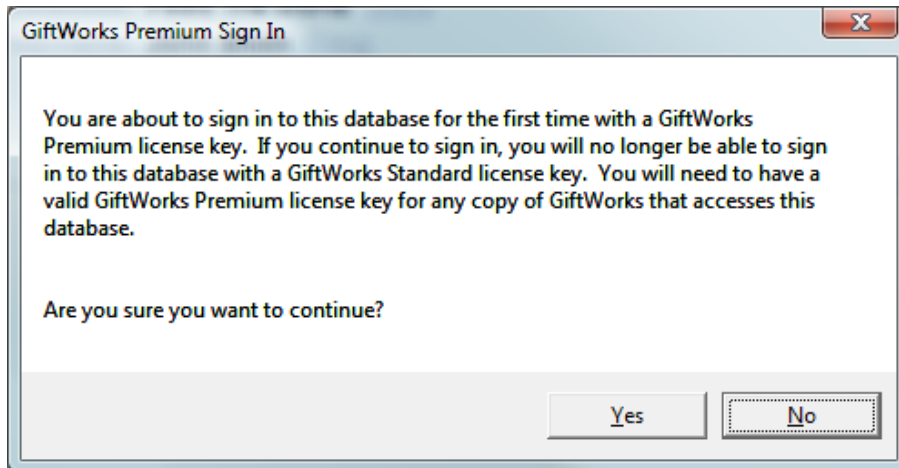
This will return you to the sign-in screen. You are now ready to restart the database upgrade. See Beginning the Database Upgrade above for instructions on continuing with the upgrade.

Entering Your GiftWorks 2011 Premium License Key

When you purchase GiftWorks 2011 Premium, you receive a Software Key. The key looks like MGW5-XXXX-XXXX-XXXX. Your GiftWorks 2011 Premium license key unlocks the newest features in GiftWorks. To enter your software key, click on Help at the top left of your screen and choose Update License Key. Enter the key in the box and click Go. If you have not yet received your software key, please contact your sales representative or Mission Research Support.

IMPORTANT NOTE

Every computer you use to access GiftWorks must have the same version of GiftWorks installed. You will need to purchase a Premium license key for each of your GiftWorks computers if haven't already done so.



Once you sign in to a database for the first time with a GiftWorks 2011 Premium, any other computer that needs to access the GiftWorks database will not be able to do so if they haven't already entered a Premium license key.

Appendix A: GiftWorks 2006 to 2011 Upgrade Checklist

After your database upgrade is complete, the following checklist will help you review the results and ensure that the upgraded data looks how you want. If you are not satisfied with the results, you can redo the upgrade.

- Review your donors
 - Examine donors that were part of a household
 - Examine donors that were related to organizations
 - Examine donations given “on behalf of” households or organizations
 - Examine donors with different profiles—donors that were individuals, organizations, or households in your original database—to verify their donor information
- Review all SmartLists that you created or customized
 - Ensure that the results returned are what you expect
 - You will need to re-customize any SmartLists whose view you customized
 - The following criteria were eliminated in GiftWorks 2011:
 - Individuals: Personal Details – “Household name is...”
 - Individuals: Organization Details – “Organization street (address) matches...”
 - Individuals: Organization Details – “Organization city is...”
 - Individuals: Organization Details – “Organization state is...”
 - Individuals: Organization Details – “Organization Zip code is...”
 - Individuals: Organization Details – “Organization Zip code matches...”

 - Organizations: Company Details – “Parent (organization) name is...”
 - Organizations: Company Details – “Parent (organization) name matches...”
 - Organizations: Organization Information – “Revenue is...”
 - Organizations: Organization Information – “Industry is...”
 - Organizations: Organization Information – “Employees is...”
 - Organizations: Organization Information – “Region is...”

 - Donations: Donation Details – “On behalf of household name is...”
 - Donations: Donation Details – “On behalf of organization name is...”
 - Donations: Donation Details – “Household name is...”

 - Pledges: Pledge Details – “On behalf of household name is...”
 - Pledges: Pledge Details – “On behalf of organization name is...”
 - Pledges: Pledge Details – “Household name is...”
- Review letters that you created or modified, including running through a sample mailing to verify that the donor and donation information merges into the letters correctly
 - Preview all mailings before you print or save them to be sure that donor information is merging into the letters correctly
 - The following letter fields were eliminated in GiftWorks 2011:
 - Organization: Primary Contact Job Title
 - Organization: Primary Contact Formal Salutation
 - Organization: Primary Contact Informal Salutation
 - Organization: Primary Contact Formal Addressee
 - Organization: Primary Contact Informal Addressee
 - Organization: Billing Contact Job Title
 - Organization: Billing Contact Formal Salutation
 - Organization: Billing Contact Informal Salutation
 - Organization: Billing Contact Formal Addressee
 - Organization: Billing Contact Informal Addressee
- Review your customizations in the Settings area

- Click the Settings button at the top of the GiftWorks window, then click the Customize header or on Additional Settings
- Verify Your Organization information (under Additional Settings)
- Check your Default values (under Customize)
- Check your Default Display name format (under Customize)
- Check your Phone number format settings (under Customize)
- Check your ZIP/Postal Code default (under Customize)
- Review your label and envelope design
 - Click the Mailings button at the top of GiftWorks
 - Click the Print Labels (or Envelopes) link, choose For A List
 - Choose a list that has donors and click Next
 - On the label (or envelope) page, click the Format Labels (or Format Envelopes) button
 - Design your labels or envelopes
- Review donor categories
 - Click the Settings button at the top of the GiftWorks window
 - Click the Customize header
 - Click the Change GiftWorks Fields link
 - On the list of fields, click Donor Categories
 - Click the Change Field button
 - Review, add, edit, or delete donor categories
- Review your relationship roles
 - Click the Settings button at the top of the GiftWorks window
 - Click the Customize header
 - Click the Change GiftWorks Fields link
 - On the list of fields, click Relationship Roles
 - Click the Change Field button
 - Review, add, edit, or delete relationship roles
- Set up SmartList categories
 - Click the Settings button at the top of the GiftWorks window
 - Click the Additional Settings header
 - Click Manage SmartList Categories
 - Add appropriate SmartList categories by clicking the Add button

- Review payment types
 - Click the Settings button at the top of the GiftWorks window
 - Click the Customize header
 - Click the Change GiftWorks Fields link
 - On the list of field, click Payment Types
 - Click the Change Field button
 - Review, add, edit, or delete payment types
- Run a GiftWorks Checkup
 - Click the Settings icon on the top menu
 - Click the Database and Maintenance link
 - Click the GiftWorks Checkup link
 - Click the Run Checkup button

If you encounter any problems with your database upgrade, you can either redo the database upgrade (see Redoing the Database Upgrade above), or contact GiftWorks Support at 2011upgrade@giftworksconnect.com.

Appendix B: Detailed List of Upgrade Actions when upgrading from 2006 to 2011

To help you understand the database upgrade process, below is a detailed list of actions that the database upgrade performs.

1. All individual donors will be upgraded to donors without a profile.
2. All organization donors will be upgraded to donors with an organization profile.
3. All households will be upgraded to donors with a household profile.
4. All deleted Organization fields will be discarded.
 - a. Number of employees
 - b. Region
 - c. Industry
 - d. Annual Revenue
 - e. EIN
 - f. Acronym
5. The Organization relationship field will be handled according to the Upgrade option selected:
 - a. Discarded
 - b. Copied to a custom field
6. All donor relationships will remain intact. All relationship types that were originally included with GiftWorks will be categorized as relationship, work relationship, or family relationship. All unknown relationships will be set to "relationship."
7. If an individual donor is linked to an organization, then a relationship will be created between the individual and the organization using the employee/employer roles. Additionally, the organization name will be copied to the "organization name" field for the upgraded donor.
8. If an organization donor has a primary contact, a relationship will be created between the primary contact and the organization using the employer/employee relationship. Additionally, the primary contact's prefix, first, middle, last name, suffix, job title, department, profession, manager's name, and assistant's name will be copied to the corresponding fields in the organization.
9. If an organization has a primary contact, then the organization's mailing information (salutation and addressee) will be set according to the Upgrade option selected:
 - a. The original organization mailing information will be used, or
 - b. The primary contact's mailing information will be used, or
 - c. GiftWorks will use the organization name and primary contact name to determine the best salutation and address for the organization.

10. If an organization has a billing contact, a relationship will be created between the billing contact and the organization using the employer/employee relationship.
11. Primary and billing contacts will be designated as affiliate donors depending on the Upgrade option selected.
12. If an organization has other donors listed as contacts, a relationship will be created between the contacts and the organization using the employer/employee relationship.
13. Members of a household will be related to the household using the existing roles.
14. Members of a household will be designated as affiliate donors depending on the Upgrade option selected.
15. If a donor was using an address, email, and/or phone number from another donor, the address information will be copied to the donor who was using shared information.
16. Donations given on behalf of an organization will be (optionally) moved to the organization.
17. Donations given on behalf of a household will be (optionally) moved to the household.
18. SmartLists that contain obsolete criteria will be modified and the obsolete criteria will be removed. If there are no remaining criteria (if all criteria are obsolete), the SmartList will be deleted.

If any GiftWorks fields (status, source, etc.) contain duplicate values, the upgrade process consolidates all the values to one of them and marks the remaining duplicates as "Deleted."

Upgrading From GiftWorks 2008

Introduction

Congratulations on your purchase of GiftWorks 2011. The tools that you need for donor and donation management are all right where you need them with GiftWorks.

GiftWorks 2011 is the next generation of GiftWorks. In GiftWorks 2011 Standard and Premium, we've made many changes and improvements that will make your GiftWorks experience even better.

To take advantage of the new features, it will be necessary to upgrade your existing database to the new format.

We are very aware of how important your donor and donation information is to your organization, and we have taken extreme care to make this upgrade process as painless as possible. Be sure to read through this entire guide before proceeding with the upgrade.

It is important that you know that your original data is automatically backed up as part of the upgrade process. If your review of the data after the upgrade reveals any issues, you can simply restore the backup and go through the upgrade process again with different options.

The GiftWorks 2011 upgrade process will work with the database most recently used with any version of GiftWorks from 3.0.61.00 through 3.0.158.00. If you still have your old version of GiftWorks installed, you can determine your version by clicking the **Help** pulldown menu at the very top left of GiftWorks and then select **About GiftWorks**.

PREMIUM

Instructions on using your GiftWorks 2011 Premium license key follow the upgrade information below. If you have already upgraded to GiftWorks 2011 Standard, you can go straight to the Entering Your Premium License Key information below. Otherwise, follow the upgrade steps first.

Upgrade Overview

The process of upgrading to GiftWorks 2011 happens in 3 basic steps:

- 1. Backup your current GiftWorks 2008 database.**
To ensure the safety of your GiftWorks information, we strongly encourage you to backup your current GiftWorks database to a safe and secure location.
- 2. Upgrade to GiftWorks 2011.**
You will need to download and install the latest version of GiftWorks. If GiftWorks 2008 is currently installed on your machine, the GiftWorks 2011 installation process will remove the previous version of GiftWorks and then install GiftWorks 2011.
- 3. Upgrade your GiftWorks 2008 database.**
After installing GiftWorks 2011, you will upgrade your GiftWorks database to the latest format. Upgrading your database will occur the first time you sign in to your GiftWorks database using GiftWorks 2011.

The following information will help guide you through the upgrade steps.

Step 1 – Backup Your Current Database

Before you start the GiftWorks 2011 upgrade, it is imperative that you **BACK UP YOUR CURRENT GIFTWORKS DATABASE**. The upgrade process will create its own backup as well, but we recommend that you create your own backup.

To back up your GiftWorks database:

1. Sign in to the GiftWorks database that you want to back up.
2. Click the **Settings** button at the top of GiftWorks.
3. Click the **Database and Maintenance** heading.
4. Click **Manage Your GiftWorks Database**.
5. Click **Back up the Database**.
6. Click the **Browse** button to choose a location and filename. Browse to the folder in which you want to save your backup file, and type the file name you want to use for the backup, then click **Open**.

IMPORTANT TIP

Back up your database in a file location that is separate from the computer you are working on.

7. Click **OK** to begin the backup. The backup may take some time to complete. The time will vary depending on the size of your database.
8. When the backup is complete, a window will pop up that reads **Backup is complete**. Click **OK** to finish the backup process.

If you have any trouble with completing your backup, please contact GiftWorks support at 2011upgrade@giftworksconnect.com.

Once you have backed up your GiftWorks database, proceed to the next page.

Step 2 - Upgrade to GiftWorks 2011 Standard or 2011 Premium

The information below will help you get your current installation of GiftWorks upgraded to the correct version. If you are upgrading to Standard, follow the instructions below.

If you are upgrading to Premium, you must first upgrade to Standard by following the instructions below. Then, continue on to **STEP 3**, and then Entering Your GiftWorks 2011 Premium License Key section to complete your upgrade.

OPTION 1: IF YOU PURCHASED UPGRADE LICENSES

If you have purchased a license to upgrade from a previous version of GiftWorks to GiftWorks 2011 Standard or Premium, you will receive instructions on how to download GiftWorks 2011.

If you have multiple computers on which to upgrade GiftWorks, you only need to perform the database upgrade once since, generally speaking, all of your computers share the same database file.

You will need to install the upgraded version of GiftWorks on each computer. Once the database has been upgraded, only computers running GiftWorks 2011 will be able to access it. Continue to **STEP 3**, below.

OPTION 2: IF YOU HAVE NOT PURCHASED UPGRADE LICENSES

If you have not yet purchased an upgrade license, but want to try GiftWorks 2011, **please read this entire section before you start.**

You can download and install the trial version from the GiftWorks website at www.giftworksconnect.com/GiftWorks. You can complete the upgrade process and use GiftWorks 2011 for the 30-day trial period.

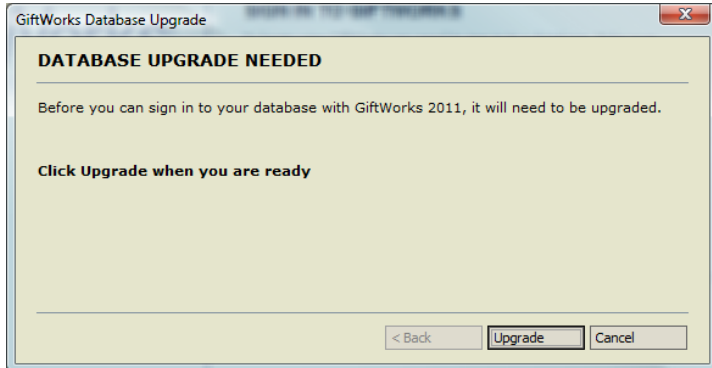
Important

At the end of the trial period, you will need to purchase a license to continue using GiftWorks 2011, or you will need to uninstall GiftWorks 2011 and reinstall the earlier version of GiftWorks.

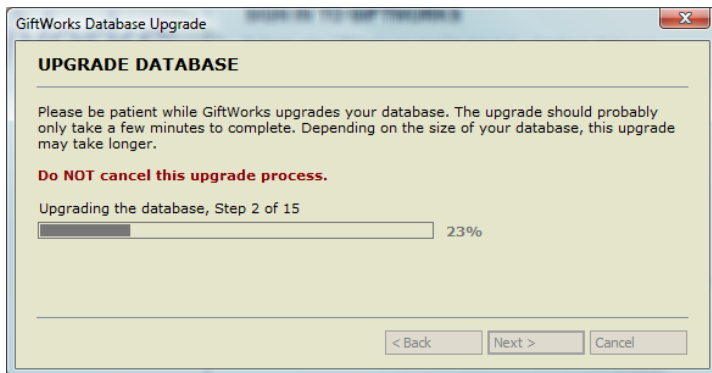
If you do not purchase an upgrade license for GiftWorks 2011, you will need to revert to the backup copy of your database you created before installing the upgrade. If you do so, you will lose any changes you made to the data while using GiftWorks 2011.

STEP 3 – Upgrade Your GiftWorks Database

When you sign in to an existing GiftWorks 2008 database, GiftWorks will prompt you to upgrade the database. Click Next to continue.



GiftWorks will upgrade your previous database and will then sign into GiftWorks.



Your upgraded database is ready to use. The process of upgrading your database will only be done one time. Subsequent users of the same database will not have to go through the database upgrade process.

Upgrading From GiftWorks 2010

Introduction

Congratulations on your purchase of GiftWorks 2011. The tools that you need for donor and donation management are all right where you need them with GiftWorks.

GiftWorks 2011 is the next generation of GiftWorks. In GiftWorks 2011 Standard and Premium, we've made many changes and improvements that will make your GiftWorks experience even better.

To take advantage of the new features, it will be necessary to upgrade your existing database to the new format.

We are very aware of how important your donor and donation information is to your organization, and we have taken extreme care to make this upgrade process as painless as possible. Be sure to read through this entire guide before proceeding with the upgrade.

It is important that you know that your original data is automatically backed up as part of the upgrade process. If your review of the data after the upgrade reveals any issues, you can simply restore the backup and go through the upgrade process again with different options.

The GiftWorks 2011 upgrade process will work with the database most recently used with the following version of GiftWorks - 4.0.22.00. If you still have your old version of GiftWorks installed, you can determine your version by clicking the **Help** pulldown menu at the very top left of GiftWorks and then select **About GiftWorks**.

PREMIUM

Instructions on using your GiftWorks 2011 Premium license key follow the upgrade information below. If you have already upgraded to GiftWorks 2011 Standard, you can go straight to the Entering Your Premium License Key information below. Otherwise, follow the upgrade steps first.

Upgrade Overview

The process of upgrading to GiftWorks 2011 happens in 3 basic steps:

- 1. Backup your current GiftWorks 2010 database.**
To ensure the safety of your GiftWorks information, we strongly encourage you to backup your current GiftWorks database to a safe and secure location.
- 2. Upgrade to GiftWorks 2011.**
You will need to download and install the latest version of GiftWorks. If GiftWorks 2010 is currently installed on your machine, the GiftWorks 2011 installation process will remove the previous version of GiftWorks and then install GiftWorks 2011.
- 3. Upgrade your GiftWorks 2010 database.**
After installing GiftWorks 2011, you will upgrade your GiftWorks database to the latest format. Upgrading your database will occur the first time you sign in to your GiftWorks database using GiftWorks 2011.

The following information will help guide you through the upgrade steps.

Step 1 – Backup Your Current Database

Before you start the GiftWorks 2011 upgrade, it is imperative that you **BACK UP YOUR CURRENT GIFTWORKS DATABASE**. The upgrade process will create its own backup as well, but we recommend that you create your own backup.

To back up your GiftWorks database:

Sign in to the GiftWorks database that you want to back up.

1. Click the **Settings** button at the top of GiftWorks.
2. Click the **Database and Maintenance** heading.
3. Click **Manage Your GiftWorks Database**.
4. Click **Back up the Database**.
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Back up your database in a file location that is separate from the computer you are working on.

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If you have any trouble with completing your backup, please contact GiftWorks support at 2011upgrade@giftworksconnect.com.

Once you have backed up your GiftWorks database, proceed to the next page.

Step 2 - Upgrade to GiftWorks 2011 Standard or 2011 Premium

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If you are upgrading to Premium, you must first upgrade to Standard by following the instructions below. Then, continue on to **STEP 3**, and then Entering Your GiftWorks 2011 Premium License Key section to complete your upgrade.

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If you have multiple computers on which to upgrade GiftWorks, you only need to perform the database upgrade once since, generally speaking, all of your computers share the same database file.

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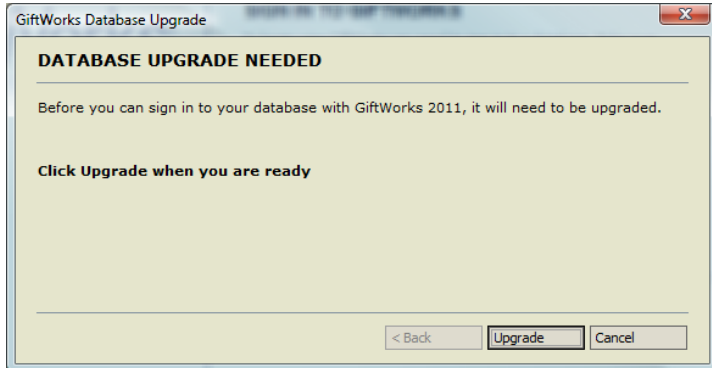
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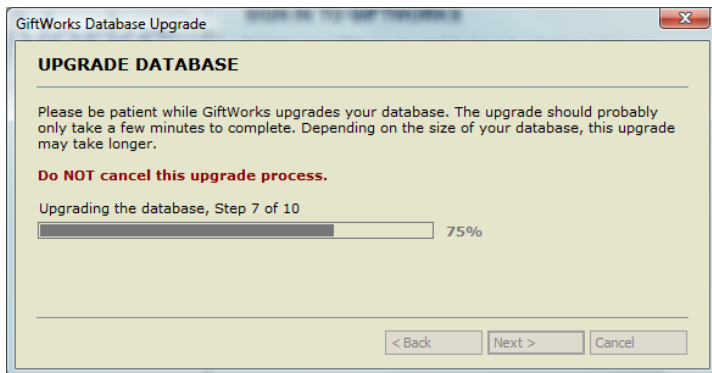
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