

# ***GOLDMINE***<sup>®</sup> **4.0**

***Turn Your Contacts Into Gold!***<sup>®</sup>

*Enterprise Administrator's Guide*  
*for MS SQL 7.0*  
July 1999

Copyright © 1999 **GoldMine Software Corporation**. All Rights Reserved.

United States of America  
17383 Sunset Boulevard, Suite 301  
Pacific Palisades, California 90272

Trade Secrets and Proprietary Notice: This software contains valuable trade secrets and proprietary information of GoldMine Software Corporation, formerly ELAN Software Corporation. No part of this software may be reproduced or transmitted in any form or by any means, electronic, mechanical or otherwise without written permission from GoldMine Software Corporation.

This software and manual are protected by all applicable copyright laws. The details of permitted use of this product are set forth in the **License Agreement**.

To contact GoldMine Software Corporation:

Voice: 310-454-6800  
Fax: 310-454-4848

Support: 310-459-1222  
Fax: 310-459-8222  
BBS: 310-459-3443

Internet: <http://www.goldminesw.com>

#### **Trademark Acknowledgments**

*GoldMine* is a registered trademark of GoldMine Software Corporation. *GoldSync*, Automated Processes, InfoCenter, and Turn Your Contacts Into Gold! are trademarks of GoldMine Software Corporation. Other brands and products are trademarks of their respective holders. Printed in the U.S.A.

# License Agreement

## **Important**

By using this software you accept the following terms of this License Agreement. If you do not agree with these terms, you should not use the software and promptly return it for a refund.

## **Ownership**

GoldMine Software Corporation, formerly ELAN Software Corporation, retains the ownership of this copy of the enclosed software package. It is licensed to you for use under the following conditions:

## **Grant of License**

You may only concurrently use the enclosed software on the number of computers for which this license grants (for example, single-user version licenses one concurrent usage; five-user network version licenses five concurrent usages). If the number of users of the software exceeds the licenses, you must have a reasonable process in place to assure that the number of persons concurrently using the software does not exceed the number of licenses.

Network versions of the software may be combined to build larger networks (for example, two five-user versions may be combined to form a ten-user network). You may add a single-user version to an existing network configuration to increase the number of network licenses (for example, you may add a single-user version to a five-user network version to build a six-user network). You may transfer this software to another party if the other party agrees to the terms and conditions of the agreement and completes and returns a registration card to GoldMine Software Corporation. The registration card is available by writing to GoldMine Software Corporation. If you transfer the software, you must simultaneously transfer all documentation and related disks.

## **Restrictions**

You may not copy the documentation or software except as described in the installation section of this manual. You may not distribute, rent, sub-license or lease the software or documentation, including translating, decompiling, disassembling, or creating derivative works. You may not reverse-engineer any part of this software, or produce any derivative work. You may not make telecommunication transmittal of this software.

## **Termination**

This license and your right to use this software automatically terminates if you fail to comply with any provision of this license agreement.

## **Rights**

GoldMine Software Corporation retains all rights not expressly granted. Nothing in this license agreement constitutes a waiver of GoldMine Software Corporation's rights under the U.S. copyright laws or any other Federal or State law.

## **Limited Warranty**

If you discover physical defects in the media, GoldMine Software Corporation will replace the media or documentation at no charge to you, provided you return the item to be replaced with proof of payment to GoldMine Software Corporation during the 90-day period after having taken delivery of the software.

GoldMine Software Corporation excludes any and all implied warranties, including warranties of merchantability and fitness for a particular purpose and limits your remedy to return the software and documentation to GoldMine Software Corporation for replacement.

Although GoldMine Software Corporation has tested the software and reviewed the documentation, GOLDMINE SOFTWARE CORPORATION MAKES NO WARRANTY OF REPRESENTATION, EITHER EXPRESSED OR IMPLIED, WITH RESPECT TO THIS SOFTWARE OR DOCUMENTATION, ITS QUALITY, PERFORMANCE, MERCHANTABILITY, OR FITNESS FOR A PARTICULAR PURPOSE. AS A RESULT, THIS SOFTWARE AND DOCUMENTATION ARE LICENSED "AS IS" AND YOU, THE LICENSEE, ARE ASSUMING THE ENTIRE RISK AS TO ITS QUALITY AND PERFORMANCE.

IN NO EVENT WILL GOLDMINE SOFTWARE CORPORATION BE LIABLE FOR DIRECT, INDIRECT, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OR INABILITY TO USE THE SOFTWARE OR DOCUMENTATION, even if advised of the possibility of such damages. In particular, GoldMine Software Corporation shall have no liability for any data stored or processed with this software, including the costs of recovering such data.

THE WARRANTY AND REMEDIES SET FORTH ABOVE ARE EXCLUSIVE AND IN LIEU OF ALL OTHERS, ORAL OR WRITTEN, EXPRESSED OR IMPLIED. No GoldMine Software Corporation dealer, agent, or employee is authorized to make any modifications or additions to this warranty.

Information in this document is subject to change without notice and does not represent a commitment on the part of GoldMine Software Corporation. The software described in this document is furnished under this license agreement. The software may be used or copied only in accordance with the terms of the agreement. It is against the law to copy the software on any medium except as specifically allowed in the license agreement. No part of this manual may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose without the written permission of GoldMine Software Corporation.

Some states do not allow the exclusion of implied warranties or liability for incidental or consequential damages, so the above limitation or exclusion may not apply to you. This warranty gives you specific legal rights, and you may also have other rights which vary from state to state.

***For details about the licensing system for the GoldMine product family, see "GoldMine's Flexible Licensing System" in the GoldMine Reference Manual.***

# Table of Contents

<b>1. Introduction to SQL .....</b>	<b>1</b>
<b>What is SQL? .....</b>	<b>1</b>
Organizing Data in a Relational Database .....	2
Working with a Database Management System .....	3
Accessing Data with SQL.....	3
<b>Types of Server Architecture for Database Management .....</b>	<b>3</b>
File Server Architecture.....	3
Client/Server Architecture .....	4
<b>2. Setting up GoldMine for use with SQL Servers .....</b>	<b>7</b>
<b>Planning your Implementation.....</b>	<b>7</b>
<b>How does GoldMine Enterprise Differ from GoldMine Standard? .....</b>	<b>8</b>
Querying Contacts .....	8
Querying Profiles.....	10
Minimizing your Ranges .....	10
Other Differences in Functionality .....	11
Creating a Data Maintenance Schedule .....	11
<b>3. Setting up Databases on a Microsoft SQL Server .....</b>	<b>13</b>
<b>Overview of the Installation Process .....</b>	<b>13</b>
<b>Creating an MS SQL 7.0 Database .....</b>	<b>14</b>
<b>Modifying your MS SQL Server Configuration to Run GoldMine .....</b>	<b>16</b>
User Connections.....	17
Allocating Memory.....	17
<b>Configuring the BDE Administrator for an MS SQL Server .....</b>	<b>19</b>
<b>Creating a Database File .....</b>	<b>22</b>
Setting Database Options.....	24
Selecting Individual Tables to Rehost .....	26
Setting Access Options .....	27
Starting to Create Database Files .....	28
Creating Logins .....	29
<b>Assigning Permissions and Granting Access .....</b>	<b>32</b>
Granting Table Access to All Users.....	32
Assigning Server Roles.....	34
Assigning Database Permissions to Individual Users .....	36
<b>Configuring GoldMine User Names for MS SQL Servers .....</b>	<b>37</b>
<b>Installing MS SQL Client Utilities .....</b>	<b>38</b>
<b>Configuring Workstations .....</b>	<b>40</b>
<b>Creating the Shortcut and Starting GoldMine .....</b>	<b>41</b>

**Appendixes**

*I. Tables Created for GoldMine Databases.....43*

*II. Troubleshooting Guide.....45*

**Resources**

*Bibliography .....49*

*GoldMine Software Corporation Support Services.....51*

**Indexes**

*Illustrations .....57*

*General .....59*

# About this Guide

The *GoldMine Enterprise Administrator's Guide* contains an introduction to **Structured Query Language (SQL)**, client/server network configurations, and related concepts.

For procedures and technical information related to *GoldMine*, see the *GoldMine Reference Manual*. For extended information about SQL concepts and specific products, see either the publications listed in the bibliography on page 49, and/or vendor-provided documentation.

The guide contains references to some Windows-related functionality, such as defining terms related to basic mouse functions. However, detailed discussion of using Windows is beyond the scope of this guide. For more information about Windows, refer to your Microsoft Windows documentation, or other related references.



---

All SQL server product instructions refer to servers running on Microsoft Windows NT 4.0.

---

## Style Conventions used in this Guide

The *Enterprise Administrator's Guide* uses the following types of special symbols and conventions:

- Print conventions
- General conventions
- Mouse conventions




The following sections describe each of these conventions.

### Print Conventions

Print conventions used throughout this guide provide a consistent way of representing screen displays, command entries, and keyboard characters viewed while working with *GoldMine*.

**Screen Items** Menu items, dialog boxes, field names, and button labels are printed in a **bold typeface** similar to the typeface in *GoldMine's* onscreen displays. For example, the command to create a contact record appears in print as **New Record**. In general, any text that appears on the screen is printed to look like the screen display.

**Command Entries** Commands or other keystroke strings that the user should enter *exactly as shown* are printed in a monospaced typeface that accurately represents the exact spacing between characters.

**Keyboard Keys** References to keys on your keyboard are printed as graphic characters that match the actual keys on your keyboard. For example, the **Enter** key appears as . Commands that require combination keystrokes, that is, holding down one key while pressing another, are connected by a hyphen (-) For example, to access the **File** menu from your keyboard, press -.

**New Terms** New terms are printed in *bold italics*.



Specific keyboard operations are identified by the keyboard symbol.



Specific mouse operations are identified by the mouse symbol.



---

Notes appear throughout the manual to provide additional information on a topic, such as indicating a procedure that must be completed *before* performing the current procedure, or text that provides greater technical detail. These notes are identified by the light bulb symbol and delineated by borders.

---



Tips indicate alternate or additional methods to accomplish a task.



---

Online or print references are listed to provide additional information for topics.

---



---

Cautions appear before procedures or other directions that can cause equipment or data damage if not followed exactly as written.

---

## General Conventions

General conventions used throughout this guide provide a consistent way of referencing individual or multi-step actions.

*Select* refers to executing commands that are available either as menu options, or as command buttons in a dialog box. For example, “select **OK**” indicates that you must click the **OK** button with the mouse. *Select* also refers to making a choice among available commands from a browse window, drop-down list, radio buttons, etc.

Steps that involve two or more selections from a menu may be presented as a combination selection; that is, the menu commands are presented in sequence, divided by |. For example, when you read:

“To create a database, select **Tools|Create Databases**”

Select **T**ools on the Main Menu to display a drop-down list, from which you can select **C**reate **D**atabases.

*Performing an action described in a procedure*



Select the **C**reate **D**atabases command from the **T**ools drop-down menu

## Mouse Conventions



If you use a multiple-button mouse with *GoldMine*, the left mouse button is configured as the primary mouse button. The right mouse button serves as the secondary button.

The following terms describe mouse actions referenced throughout this guide.

**Point** Position the mouse pointer until the tip of the pointer rests on the desired area of input on the screen, such as an option on a pull-down menu.

**Click** Press and immediately release the left mouse button without moving the mouse.

**Right-click** Press then immediately release the right mouse button without moving the mouse.

**Double-click** Click the left mouse button twice in rapid succession.

**Drag** Click and hold the left mouse button while moving the mouse pointer.



# Introduction to SQL

Computer systems excel at storing and organizing information. Applications, such as *GoldMine*, store information in one or more databases in which logically related records are organized. Storing information in a database provides many advantages, such as a common point of access for multiple users and/or applications, and data security.

The demand for fast and efficient computing has led to numerous technical innovations. Improved hardware has increased processing power exponentially, and, in addition, innovations in the linking of computers to share information have also increased processing capabilities. A network links computers together into a *Local Area Network (LAN)* in which a dedicated computer, or server, manages resources and information for a group of PC workstations.

The rise of network computing has changed the way in which information is stored, accessed, and processed. Network applications that manage information now typically organize shared data in a *relational database* structure, which is supervised by a *database management system (DBMS)*. The DBMS controls access to the database, and the acceptability of requests for information from a particular PC.

For a user to retrieve information from a server, both the server and the PC must share a common communication method. That is, the PC must be able to request information in a manner that the server can understand. Conversely, the server must be able to process the request, and respond to the query in a manner that the PC can understand. Today, the most widely accepted language used to facilitate communications between PCs, the network server, and the data that users want to access is *Structured Query Language (SQL)*.

## What is SQL?

SQL is a language that is used to communicate with a specific type of database. SQL is one component of an information management system that involves the following:

- Organizing data in relational databases
- Using a Database Management System (DBMS) to administer the database
- Interacting with the DBMS via SQL

## Organizing Data in a Relational Database

As computers have grown in processing capabilities, there has been a corresponding growth in the development of an information system that facilitates quick and reliable data management and retrieval. Today, the most popular method of data organization is the *relational database*.

At the most basic level, a relational database consists of tables that organize data in columns and rows. The following figure shows an example of a table in a relational database.

<i>Relational Database Table</i>	<b>Cust. ID</b>	<b>Company</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>ZIP Code</b>
	10010	Acme Products	1234 Main St.	Phoenix	AZ	85000
	10011	Garcia Pharmacy	705 Pacific Avenue	Long Beach	CA	90813
	10012	Fulton Widgets	315 Hillcrest Dr. #103	Thousand Oaks	CA	91321
	10013	Newton Beauty Supply	217 Angeleno Ave.	Burbank	CA	91502
	10014	Lady Day Distributors	1616 Johnson Dr.	Houston	TX	76098

The cell at any column/row can contain only one value. Columns and rows work together to define the type of information that a cell can contain.

### Columns

Each column contains values that provide information of one specific type, such as City, Quantity, or Price. One column—or a combination of columns—is identified as the *primary key*, which is the unique value by which each record can be identified. For example, in the preceding figure, the primary key might be the **Cust. ID** value for each record.

### Rows

Each row contains one record that consists of a set of column values. A table can contain as few as zero rows, or unlimited rows. SQL can retrieve data from tables by working with relationships represented by *common data values* between tables. A common data value is a value that is the same between multiple tables. For example, both a CUSTOMER table and an INVOICE table might contain **Cust. ID** values.

If the **Cust. ID** column is the primary key value for the CUSTOMER table, the **Cust. ID** column in the INVOICE table is known as the *foreign key*. A foreign key consists of one or more columns whose values match primary key value(s) in another table. The interaction of the primary key(s) and foreign key(s) are the basis of the “relationships” in a relational database. That is, a parent-child relationship exists between the primary key(s) and the foreign key(s).

## ***Working with a Database Management System***

Network applications typically use a database management system (DBMS) to supervise the maintenance of and access to the database. A DBMS works within a database configuration (or architecture) that stores, controls access to, and processes requests for shared data. A DBMS has a database engine that defines the structure for the database, stores the data, and responds to requests by retrieving data from the stored locations. The DBMS can organize data in one large database that stores all system data, or in multiple unique databases in the same system.

## ***Accessing Data with SQL***

While a DBMS administers the databases on a system, SQL is the language that controls and communicates with the DBMS. SQL has become the commonly accepted language for accessing and working with data in relational databases.

SQL consists of a set of statements that work with relational databases to:

- Define a database structure
- Control access to data
- Request, retrieve, and display data
- Communicate with other systems, whether they are computers using the same DBMS over a connected network, or systems using different types of DBMS.

## ***Types of Server Architecture for Database Management***

SQL is designed to work with a database system in a client/server configuration, or architecture, in which users can store and retrieve shared data. Computer networks generally use one of two types of relational database system architectures:

- File server
- Client/server

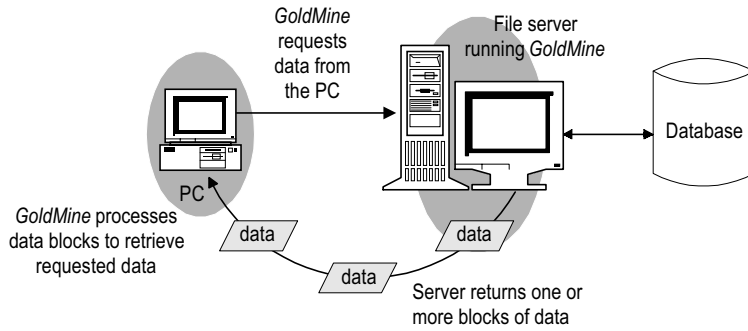
Both types of architecture are described over the following pages to illustrate the advantages of using SQL in a client/server architecture.

### ***File Server Architecture***

The acceptance of LANs created a need for a configuration that could manage shared data that was stored in a central location. Users needed a way of accessing information from the central file(s), and the organization needed a way of both protecting data integrity and controlling traffic to maintain the availability of shared resources.

File server architecture was developed to respond to these needs. The following figure shows a PC running *GoldMine* that requests data from a file server.

**Requesting data in a file server architecture**



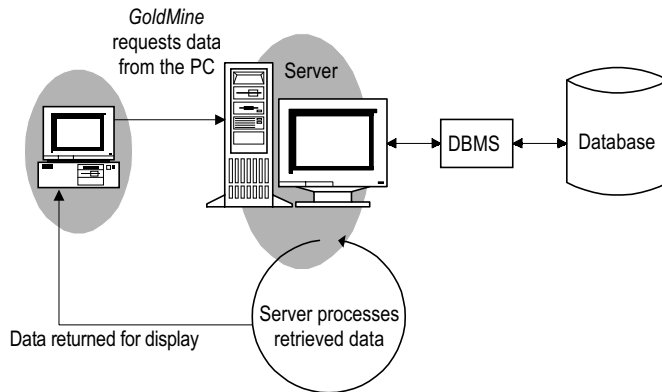
In a file server architecture, the shared database files reside on a *file server*, which is typically a dedicated PC that stores shared files for network access. Each connected PC runs the application, such as *GoldMine*, that will request data from the file server. Upon receiving a request from a PC, the file server will return a block of data across the network. The requesting PC retrieves and stores the entire block of data locally. The PC performs the final processing required to extract the data from the block.

In conditions of light usage or small databases, the file server architecture performs well. However, problems can arise when the number of PCs connected to the network grows, and/or usage becomes heavier. Because the server returns *blocks* of data to the requesting PC, the network traffic resulting from requests for data can be high, thereby slowing performance.

**Client/Server Architecture**

Client/server architectures use LAN resources more efficiently to reduce network traffic and respond to requests for data while maintaining data security. The following figure shows a PC running *GoldMine* that requests data from the client/server.

**Requesting data in a client/server architecture**



The client/server architecture effectively divides the functions of the DBMS between the PCs, and the server. Installed programs on each PC, such as *GoldMine*, work as the database “front-end” tools that request data from the server. The server acts as the “back-end” database engine that maintains and administers access to the data. When the server receives a request from a PC, the server scans the database for data. Processing occurs at the server, so that the server sends back the data in “final form” as the response to the query. The tool that enables the application “front-end” to communicate with the server “back-end” database engine is SQL. SQL is designed for use with the client/server architecture.



# Setting up GoldMine for use with SQL Servers

*GoldMine* maintains the most vital data for your business—customers, leads, and associates—so you will want to plan your implementation carefully to ensure a successful implementation. By planning prior to implementation, you can develop a strategy for maintaining your data, and training members of the organization to make best use of *GoldMine's* workgroup capabilities. While this guide is designed to assist you in the process, consulting with an Authorized *GoldMine* Solutions Partner can help to ensure a seamless implementation.

## ***Planning your Implementation***

To ensure that *GoldMine* meets the needs of your organization, consider the following factors:

- Server on which the *GoldMine* program files and/or data files will reside.\*
- Amount of storage space to be allocated for *GoldMine* databases.
- Number of users accessing *GoldMine*. In your estimate, be sure to include your remote users who will synchronize with the host data.
- Data security issues: you can define the level of security in both your SQL server software and in *GoldMine*.
- Network performance capabilities.
- Word processing application to be used to generate merge forms; that is, Word 95 or Word 97.

---

\* Any *data* for your SQL databases will reside on the media specified for your database platform. For example, if your database platform runs under UNIX, you will store your data on that UNIX server. However, the *program files* for *GoldMine* must reside on a system that supports DOS 3.1 file and record locking, such as Novell NT or Windows 95/98.

## How does GoldMine Enterprise Differ from GoldMine Standard?

*GoldMine* Enterprise Edition performs some operations differently than *GoldMine* Standard Edition using dBase. Differences occur because of the client/server architecture—see “Types of Server Architecture for Database Management” on page 3. Differences affect querying in two primary areas:

- How data is queried
- *GoldMine*'s response time based on the amount of data

There are several elements in your network environment that will affect the performance of *GoldMine* Enterprise Edition. Each of the following key components *interactively* affect performance:

- Processing power of your server
- Amount of RAM on your server
- Performance tuning of your database server
- Number of contacts, including their activities and history
- Number of users accessing the server

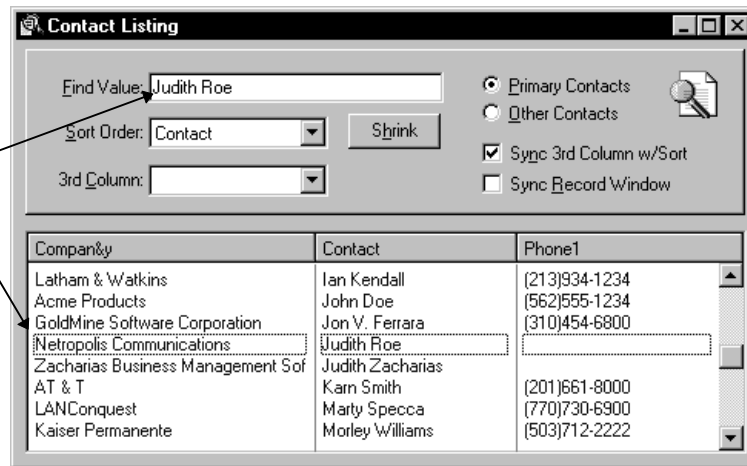
Each component affects other components. For example, an organization with a large number of users and a large amount of data requires a powerful server with a larger amount of RAM to experience good performance. However, an organization with only 50 users and several thousand records can successfully run *GoldMine* with a smaller server.

### Querying Contacts

Using *GoldMine* Enterprise Edition, you *must* provide a subject entry on which to run the query. This entry must be distinct from the active contact entry that appears automatically in the **Contact Listing**. This differs from querying with *GoldMine* Standard Edition (dBASE), in which you can query using the active contact. *GoldMine* Standard Edition returns a list that includes the active contact entry, and all contacts “surrounding” the active contact, as shown in the figure on the facing page.

**dBase  
query style**

Browse window lists the contact among “surrounding” contacts

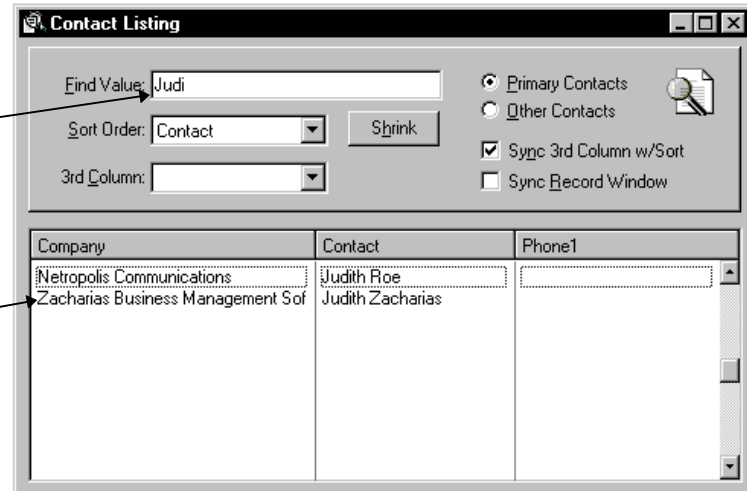


In the Enterprise Edition, the browse window of the **Contact Listing** contains the active contact record, but no “surrounding” records. In addition, *GoldMine* Enterprise returns *only* the contacts that exactly match the typed entry, as shown in the following figure.

**SQL  
query style**

You must type at least a partial value to query

Browse window lists only contacts that exactly match the **Find Value**



For example, if you type the *complete name* Art Bardton in **Find Value**, *GoldMine* would “see” only Art Bardton in the listing of contacts. Since none of the other contacts match that contact name, no other contacts appear in the browse window.

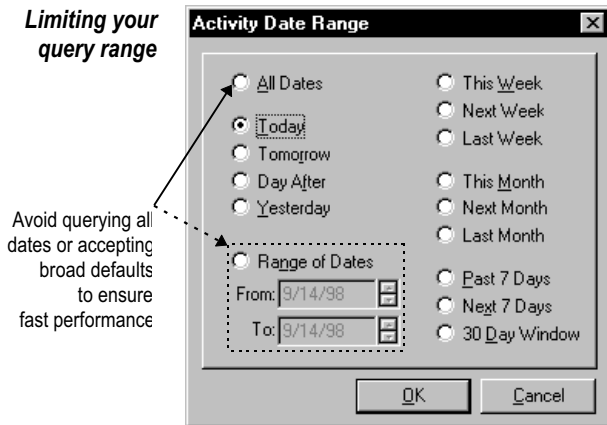
## Querying Profiles

Similar to working with the **Contact Listing**, querying profiles also returns only the contacts that you explicitly specify. For profiles, you must type least three characters of your search value in **Find** for *GoldMine* to retrieve the contacts. A three-character entry establishes a limit that speeds the query. For example, if you have thousands of credit card entries stored as profiles, and you query on credit card numbers that started with 5, then *GoldMine* would have to return all credit card numbers that start with 5. Retrieving all matching records could take a long time.

This method of querying applies throughout *GoldMine* Enterprise. This includes searching for a particular member in a group, and searching for a **Personal Rolodex** entry. If your query fails to return any data, then enter less of the value to generalize your search. For example, if you type Sara Smith in **Find Value**, and no contacts appear, try with only Sara.

## Minimizing your Ranges

In some *GoldMine* windows, such as the **Activity List** and the **Calendar**, you can specify the range of dates for which you want to display calendar or history data. For example, you can select **Date Range** from the Activity List local menu to display the **Activity Date Range** dialog box.



If your organization schedules many activities, and has a large number of users accessing *GoldMine*, query performance with *GoldMine* Enterprise is far faster if users avoid “global” queries, such as selecting **All Dates** from the **Activity Date Range** dialog box that is available for the **Activity List**.

Specifying a more precise range will result in superior performance. For example, if you need to see your activities for the current week, select a date range of **This Week** instead of **All Dates**. If you select **Range of Dates**, enter **From** and **To** dates that specify the actual period that you want to see, instead of accepting the default entries. Use the same technique with the **Real-Time** tab in the **Activity List**. By limiting your range to a smaller period of time, such as the current day or week, you will experience exceptional performance, given that the other configuration elements are in place, as discussed on page 8.

### **Other Differences in Functionality**

In addition to differences in query functionality between the Standard (dBASE) Edition and Enterprise Edition of *GoldMine*, two other differences in *GoldMine* Enterprise should also be noted:

- Record number of **Summary** tab is no longer present.
- Databases require *no* rebuilding *unless* you are creating user-defined fields. *When you do rebuild, you will need to reset the privileges on the tables that were rebuilt.* For details on granting privileges to those tables, see “Setting Access Options” on page 28.



Users who are experienced with their database server can manually add user-defined field columns to the Contact2 table *instead* of rebuilding. Use the following procedure to add user-defined fields more quickly and without the requirement to reset the table's permission:

1. Add the users-defined field in *GoldMine*, as described in “Working with Custom User Fields” in the *Reference Manual*.
2. Using your database server's management utility, open the Contact2 table.
3. Add a column with the same name, length, and properties as your user-defined field.

This method produces the same results as rebuilding a database, but is faster and does not require the resetting of the table's permissions.

---

### **Creating a Data Maintenance Schedule**

Proper maintenance of *GoldMine* data will keep your *GoldMine* system free of problems that may result from system or network errors, corrupted indexes, or corrupted data. The type of contact sets in use determines the maintenance requirements as follows:

- **SQL databases:** perform reindexing either in **GoldMine's Maintenance Wizard**, or by using **MS SQL 7.0 DBCC** statements.
- **dBASE IV contact sets:** reindex and pack periodically in **GoldMine's Maintenance Wizard**.



---

For details on using **GoldMine's Maintenance Wizard**, see “Indexing and Rebuilding Files” in the *GoldMine Reference Manual*.

For details on working with **MS SQL 7.0 DBCC** statements, see “DBCC (T-SQL)” in the *SQL Server Books Online*.

---

For most *GoldMine* systems, indexing once a week is sufficient. More frequent indexing may be necessary if there is a high volume of data modifications. For dBASE IV contact sets, you should pack/rebuild the database approximately once a month.

# Setting up Databases on a Microsoft SQL 7.0 Server

## Overview of the Installation Process

To set up *GoldMine* properly, you must follow a sequence of steps to install *GoldMine*'s program files, and the other programs required by *GoldMine* Enterprise Edition. The following list of steps shows the procedure that you must perform for SQL Server 7.0. This guide provides most of the necessary information, and references will direct you to any needed outside documentation.

1. Install *GoldMine* on your network drive—see “Installing *GoldMine* on a Network” in the *GoldMine Reference Manual*. Your system must run *GoldMine* version 4.00.9626.



### **Before you start:**

1. For best results from your server when running *GoldMine*, use the recommended versions of the following Microsoft products:

- MS SQL 7.0 Service Pack 1 or later
- NT Server 4.0 Service Pack 5 or later

2. Check that your system is running *GoldMine* version 4.00.9626 or greater. To display information about the version from within *GoldMine*, from the Main Menu, select **Help|About**.

If your *GoldMine* version is less than 4.00.9626, *you must update before continuing*. To update the version on a system with Internet access: from *GoldMine*'s Main Menu, select **Help|Net Update**.

---

2. Install your SQL server software—see your SQL Server documentation. You do not have to install both *GoldMine* and the SQL software on the same server.
3. Create a database on the SQL server.

4. Modify your SQL 7.0 configuration for use with *GoldMine*.\*
5. Set up a BDE alias.
6. Create SQL contact set(s) with *GoldMine*.
7. Create user login(s) for the SQL Server for *either* each *GoldMine* user, *or* for all *GoldMine* users.
8. Modify user properties in *GoldMine* to link *GoldMine* users with SQL Server 7.0 users. If you have not yet created *GoldMine* users, you must do so before continuing—see “Setting up Security and Access Rights” in the *GoldMine Reference Manual*.
9. Install SQL Server client utilities on workstations.

The following documentation provides details for steps 3–9. For the remaining steps, see the resources listed in the step.

## Creating an MS SQL 7.0 Database

For each *GoldMine* contact set that you wish to rehost to SQL Server, you must create a database in the **SQL Enterprise Manager**. Global *GoldMine* databases, such as the **Calendar** and **Mailbox**, should only be rehosted once to one MS SQL database. If you implement only one contact set, all *GoldMine* files can be rehosted to the same SQL database. For details on rehosting, see “Rehosting *GoldMine* Data to SQL Server 7.0” on page ###.

To create a database in SQL Server 7.0 for use with *GoldMine*:


1. To start the **Enterprise Manager**, from the Windows’ task bar, select **Start|Programs|Microsoft SQL Server 7.0|Enterprise Manager**
2. In the left pane, search the list of SQL servers to locate the server that will receive the rehosted database(s).

If you find the server you want, highlight the server. Go to step 4.

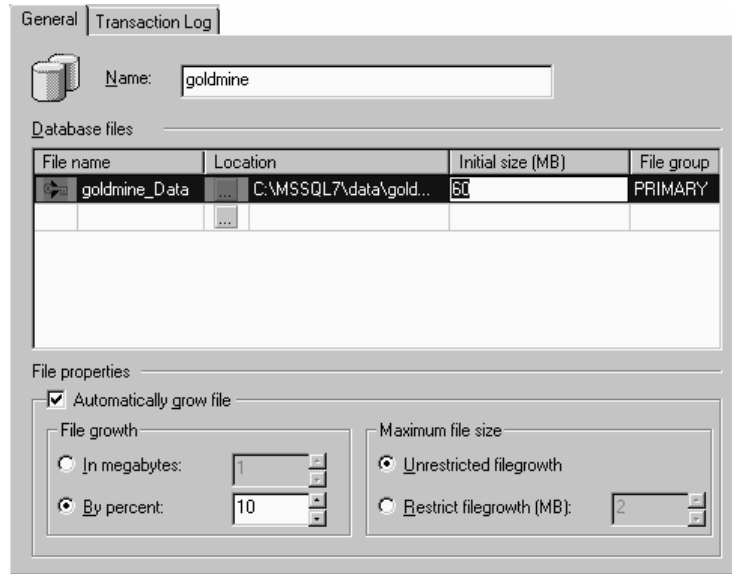
If not, continue with step 3.

---

\* The *GoldMine Enterprise Administrator’s Guide* provides the procedures and recommendations for the most essential settings, but comprehensive tuning of your database server is beyond the scope of this guide. Further customization of your MS SQL 7.0 configuration should be performed by either a database administrator or certified MS SQL technician.

3. Right-click on **SQL Server Group** to display the local menu. Select **New SQL Server Registration**. The **Server Registration Wizard** appears. You can select a server from a list of candidate MS SQL servers. For details on registering a server, see your MS SQL Server 7.0 documentation. *You must register your server before proceeding to the next step.*
4. To establish a connection with the selected server, click  next to the server entry.
5. Right-click on the databases folder to display the local menu, then select **New Database**. The **Database Properties** dialog box appears. By default, the **Enterprise Manager** displays the **General** tab.

**General tab**



6. Type a **Name** for the database. Since you must refer to this name at a later time in the configuration process, be sure to keep a record of the name.
7. Check that the **Location** field contains the drive and directory in which you want to create the database file on the server. *Unless you plan to create the database on a different physical drive than where MS SQL resides, do not change this setting from the default.*
8. Set the **Initial size (MB)** for your SQL database. If you plan to rehost a preexisting dBase database, enter a value that is approximately 15% larger than the size of your total dBase data.



---

By default, SQL Server 7.0 automatically expands database size, which directs SQL Server to monitor the free space in a database and expand the size as needed. Unless special needs or circumstances require otherwise, leave the default setting to allow SQL Server to manage the size of your databases and thereby reduce the amount of database maintenance required.

---



---

Unless you are experienced with database management and fully understand the implications, do not modify any other default settings when creating a database.

---

9. Select the **Transaction Log** tab. MS SQL Server generates a transaction log for each hosted database to record each change made to that database. Check that the **Location** field contains the drive and directory in which you want to create the transaction log file on the server machine.

Creating a database may be a somewhat lengthy process.

10. When the database is created, select the database entry, then right-click to display the local menu. Select **Properties**. The **Database Properties** dialog box appears.
11. Select the **Options** tab.
12. Select **Truncate log on checkpoint** and **Select into/bulk Copy**.
13. Select **OK**.

Your database has been created. Repeat steps 4–13 for each database you must create. Keep a record of the name given to each database, as you need this information to create an alias in the Borland Database Engine (BDE). If you plan to rehost only one *GoldMine* contact database, you must create only one SQL database.

## **Modifying your MS SQL Server Configuration to Run GoldMine**

Please read this section carefully before performing the procedure. *Only technically experienced individuals should attempt making changes to an MS SQL server. Any mistakes made in following these instructions can render your MS SQL server unusable.* If you are not technically qualified, ask your database administrator or an MS SQL-certified Authorized GoldMine Solutions Partner perform these steps.

To run *GoldMine* on an MS SQL server, there must be:

- Sufficient number of user connections to accommodate the total number of *GoldMine* users
- and
- Minimum amount of memory must be available to support each user connection

## User Connections

*GoldMine* opens a *user connection* to access a table on the MS SQL server. The maximum number of user connections allowed by the server is specified in the MS SQL server configuration settings. The server must allow two user connections per *GoldMine* user accessing the data. For example, if you have 20 *GoldMine* users, your *user connections* must be at least 40.

## Allocating Memory

In addition to setting the number of user connections, you must allocate sufficient memory to support each user connection. The memory available for SQL Server is limited both by the settings specified and by the amount of RAM on the server. For each user connection, you must allocate 37 KB. You can configure MS SQL 7.0 *either* to either dynamically allocate memory up to a specified maximum, *or* you can allocate a fixed amount of memory for MS SQL 7.0 to use.



---

The 37-KB memory requirement is the *minimum requirement* to maintain the connections desired. However, this is *not* enough memory to run *GoldMine* optimally.

---

*GoldMine* Software recommends a *minimum* of 128 MB of RAM on the server. The exact amount of memory you need for your server will depend on the number of users accessing the data and the number of contact records in *GoldMine*, as well as activities run by the server in addition to *GoldMine*. Allocating additional memory through the server configuration enhances overall MS SQL performance. For assistance in determining an adequate amount of memory for your server, contact an Authorized *GoldMine* Solutions Partner certified in MS SQL.




---

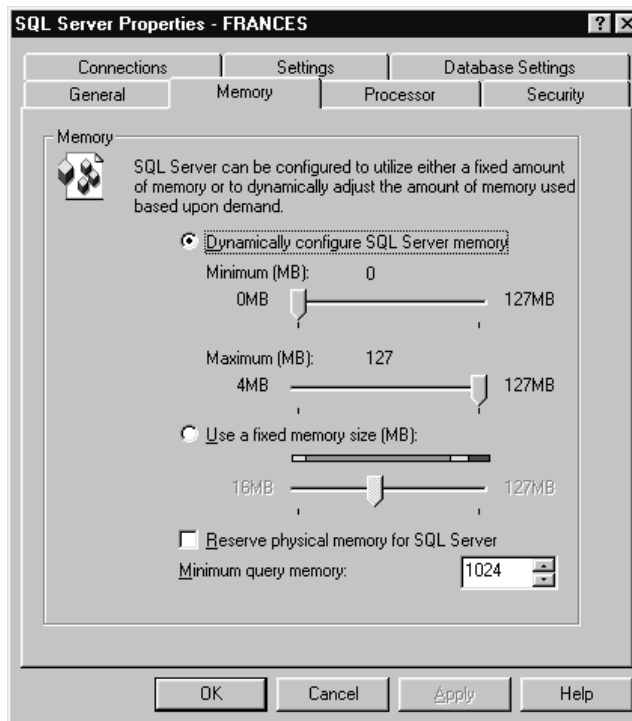
The following modifications are *not necessary* unless the settings have already been modified from their default. It is recommended that you leave these settings as they were when SQL Server was installed.

---

To change the user connections and memory allocation from **SQL Enterprise Manager**:

1. Click  next to your server name to establish a connection to the server.
2. Right-click on the server name to display the local menu. Select **Properties**. The **SQL Server Properties** dialog box appears. By default, the **SQL Enterprise Manager** displays the **General** tab.
3. Select the **Memory** tab.

**SQL Server  
Properties box**



The memory tab contains the following options:

- **Dynamically configure SQL Server memory**(recommended): specifies a minimum and maximum amount of memory in megabytes that MS SQL 7.0 can allocate for its memory needs. To change the minimum and maximum settings, drag the sliding memory indicator to the desired level of memory allocation. Selecting this option will reduce or eliminate memory allocation errors because MS SQL Server can determine and allocate memory demanded by an operation.
- **Use a fixed memory size**: specifies a fixed amount of memory for MS SQL 7.0 to use for memory. If you select this option, be sure to allocate sufficient memory for the user connections (37 KB per user connection). To change the allocation, drag the sliding memory indicator to the desired level of memory allocation. Selecting this option runs the risk of encountering memory allocation errors.\*

**4. Select the Connections tab.**

---

\* If the available memory does not meet the 37-KB/user-connection requirement, an error message appears to indicate that the server cannot run with the current memory allocation. Increase the size of the memory allocation until the message does not appear.

5. For **Maximum Concurrent User Connections**, specify 0 to allow MS SQL Server to automatically decide how many user connections are needed ( no maximum). If you must limit the number of concurrent *GoldMine* users, specify the maximum number of user connections in this field. The server must allow two user connections per *GoldMine* user accessing the data, so if you have 20 *GoldMine* users, your *user connections* must be at least 40.
6. Select **OK**.
7. Right-click on your server to display the local menu, then select **Stop**.
8. Right-click on your server to display the local menu. Select **Start**.

## Configuring the BDE Administrator for use with SQL Server 7.0

The next step in setting up *GoldMine* for a Microsoft SQL server is to create the database alias in the BDE. *GoldMine* works with the BDE to communicate with the servers. Creating an alias provides *GoldMine* with a means to identify the SQL database.



---

Each workstation that will access the *GoldMine* SQL data must use the same, shared copy of the Borland Database Engine. For details on administering your BDE, see FactsBack #500, which you can download from the GoldMine Software Web site at <http://www.goldminesw.com>.

---

To establish a BDE connection between *GoldMine* and MS SQL Server 7.0:

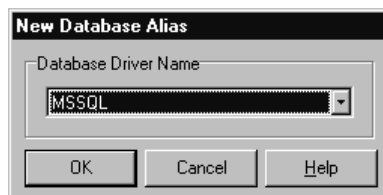
1. To start the **BDE Administrator**, run BDEADMIN.EXE from *either*:


- GoldMine/Setup/BDEShare/ folder
- or*
- Windows' Control Panel (**Start|Settings|Control Panel**)

If you cannot locate the **BDE Administrator**, your BDE may be incorrectly configured. For details, see FactsBack document #500 as described above.

2. From the Main Menu, select **Object|New**.

**New Database  
Alias  
dialog box**



- From the **Database Driver Name** drop-down list, select **MSSQL**. Select **OK**.
- In the left pane of the **BDE Administrator**, type a name for the alias, then press **ENTER**.  
To indicate that changes have been made,  appears next to the alias name. *Do not save changes at this time*, but continue with “Required Edits to the Default Entry for MS SQL.”

**Required Edits to the Default Entry for MS SQL**

- In the **Definition** folder, type the **DATABASE NAME** created in **Microsoft SQL Enterprise Manager**.

**Defining the BDE setup for MS SQL**

Definition	
<b>Type</b>	MSSQL
APPLICATION NAME	
BATCH COUNT	200
BLOB EDIT LOGGING	
BLOB SIZE	64
BLOBS TO CACHE	256
DATABASE NAME	GMDATABASE
DATE MODE	0
ENABLE BCD	FALSE
ENABLE SCHEMA CACHE	FALSE
HOST NAME	
LANGDRIVER	
MAX DBPROCESSES	31
MAX QUERY TIME	900
MAX ROWS	-1
NATIONAL LANG NAME	
OPEN MODE	READ/WRITE
SCHEMA CACHE DIR	
SCHEMA CACHE SIZE	8
SCHEMA CACHE TIME	.1
SERVER NAME	gmserver
SQLPASSTHRU MODE	SHARED AUTOCOMMIT
SQLQRYMODE	
TDS PACKET SIZE	4096
USER NAME	sa

Edit the fields as shown by following steps 1-6

- Change **SERVER NAME** to the computer name of your MS SQL server.
- Change **USER NAME** to the user name that will log in to MS SQL, as shown in the figure. This login will be used *only* if no login is entered in the **Logon name** field in the **Access** tab of *GoldMine's [username] Properties* window.
- In the **BLOB SIZE** field, type 64.

5. You can increase the **MAX QUERY TIME** if the size of your contact set is very large. This value limits the number of seconds that a client (workstation) will wait after requesting data from the server before timing out. Setting the entry to 300 (seconds) is usually sufficient, even for a database of several hundred thousand contacts.
6. Type a **BLOBS TO CACHE** value representing the approximate number of activities your users will view in *GoldMine's* **Activity List**. Acceptable values include 256, 512, and 1024.




---

If the **BLOBS TO CACHE** value is set too low, *GoldMine* may display the following error:


#### **Invalid Blob Handle in Record Buffer**

To correct this error, increase the setting. *Only increase this setting if the error occurs.* Raising the setting requires more memory on the workstation running *GoldMine*.

---

7. To apply the changes, *either* click  in the upper left-hand corner, *or*, from the Main Menu, select **Object|Apply**. A prompt asks:

**Save all edits to [database alias]?**

8. To set up the BDE connection to the new database alias, select **OK**.
9. Select the **Configuration** tab.
10. To expand the tree, select **Configuration|Drivers|Native|MSSQL**.
11. In the right pane, increase the **TIMEOUT** value to 7200.
12. To apply the changes, *either* click  *or*, from the Main Menu, select **Object|Apply**. A prompt asks:  
**Save all edits to [database alias]?**
13. Select **OK**.

You have finished creating the alias. Be sure to test the connection because you must be able to connect successfully to continue the rehosting process.

To test the connection, return to the **Databases** tab, then click  next to the new alias.

If you connect successfully, a green box will appear around the alias icon.

If not, see the “Troubleshooting Guide” on page 45.

## Rehosting GoldMine Data

Once the BDE is configured to access an SQL database you can rehost *GoldMine* data. Close the **BDE Administrator**, then start *GoldMine*.

Using **GoldMine's Database Wizard**, you can *either*:

- Create a database for new data
- or*
- **Rehost** (copy and convert) an existing database existing onto a different server

### Creating a Database

You can create a blank database structure to store the *GoldMine* table structure. Once created, you can later manually enter or import data into the database.

### Rehosting a Database

You can rehost an existing *GoldMine* contact database or other *GoldMine* files onto the MS SQL Server. This process does *not* affect the original database, but instead, copies and converts a file from one format type, such as dBASE, to another, such as SQL.

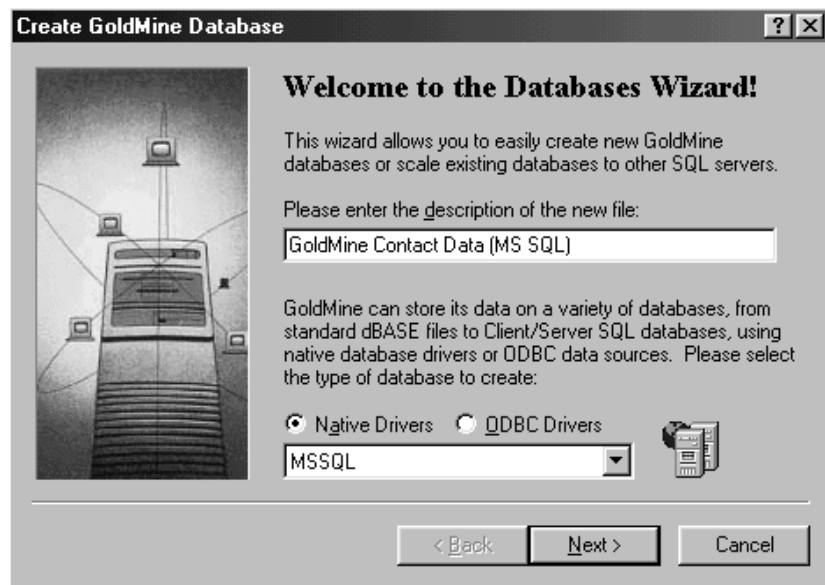
The **Create GoldMine Database Wizard** can rehost either one or two databases:

- **Contact set database:** contains all of the contact tables that store contact information, such as names, addresses, phone numbers, and other contact-related information. When you rehost a contact set, *GoldMine* adds a contact set record to the **Contact Files** dialog box.
- **Other GoldMine files:** includes the **Calendar**, forms, **InfoCenter™**, etc. When you rehost these files, *GoldMine* does *not* add records to the **Contact Files** dialog box. Instead, the **GoldDir** line of *GoldMine's* GM.INI file is modified to set *GoldMine* to use the new SQL database when accessing these files.

To create a database in *GoldMine*:

1. From the Main Menu, select **File****O**pen File, then select **N**ew from the **Contact Files** dialog box.

**Create GoldMine  
Database Wizard**

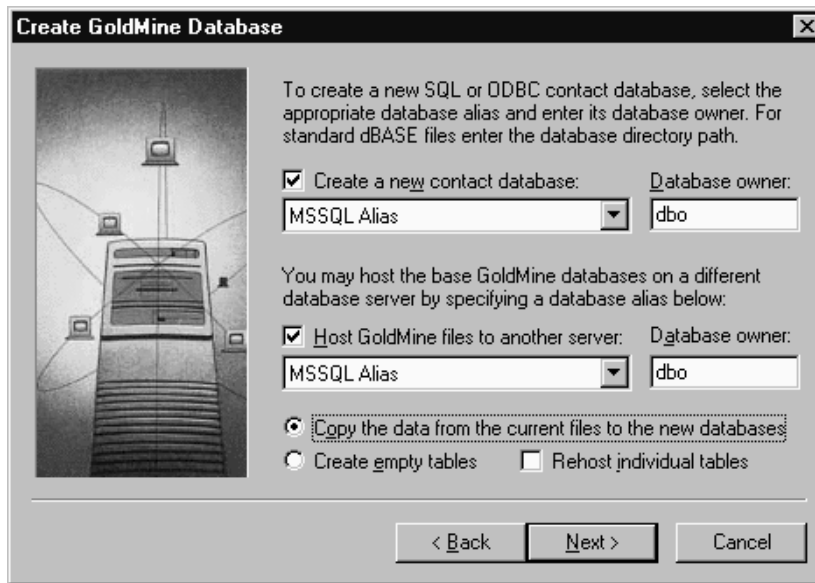


2. Below **Please enter the description of the new file**, type a descriptive title for the contact set. When creating a database or rehosting a contact set, *GoldMine* will use this title when listing the file in the **Contact Files** dialog box. However, when you *only* rehost other *GoldMine* files such as the **Calendar**, **InfoCenter™**, etc., this field can be left blank. *GoldMine* does *not* list these files in the **Contact Files** dialog box.
3. Designate a driver and database type as follows:
  - a. Select **N**ative Drivers.
  - b. Select **MSSQL** from the drop-down list.
4. When done, select **N**ext>. The second dialog box of the **Create GoldMine Database Wizard** appears. Continue with “Setting Database Options.”

## Setting Database Options

Once you select **Next>** from the first dialog box of the **Create GoldMine Database Wizard**, the second dialog box appears. The following figure shows the second dialog box of the wizard that appears when you select an SQL database type, such as **MSSQL**.

### Create GoldMine Database Wizard



To create or rehost a database on SQL server 7.0:

1. To **Create a new contact database**, select the BDE alias you created earlier in this document from the drop-down list.
2. To rehost your *GoldMine* files, including the **Calendar**, **InfoCenter™**, forms, and other tables, in addition to your contact data, specify a location by selecting any listed database alias from the **Host GoldMine files to another server** drop-down list.

If you are only rehosting a contact set, uncheck the **Host GoldMine files to another server**.

4. Specify the **Database owner**. This should be the user in SQL that you will use to rehost your database(s). Do *not* edit this field unless you have a specific reason, and have created an administrative user in SQL Server for this purpose. If you have not modified your SQL server's security, leave the **Database owner** at **dbo**.



---

The first time that you rehost databases from dBASE to an SQL server, you will want to select *both* the contact set database *and* the global *GoldMine* data files so that all data is located on the SQL server. Both *GoldMine* files and contact set files can exist in the same SQL database.

However, you should only rehost the *GoldMine* files once. If you rehost more than one contact database, do *not* check **Host GoldMine files to another server** during each additional rehost. You do *not* have to rehost both at the same time.

---

4. Specify whether you want to *either* copy data from the currently open contact set to the newly created database, *or* create an empty database structure to receive data at a later time.

a. Select one of the following options:

- **Copy the data from the current files to the new databases:** Copies data from the currently open contact set. If necessary, *GoldMine* will convert the data to the format appropriate for the database type specified on the first dialog box of the **Create GoldMine Database Wizard**.

*or*

- **Create empty tables:** Creates a database structure that can receive data at a later time. *Never* select this option if you select **Host GoldMine files to another server**.

b. To specify one or more tables for *GoldMine* to copy, select **Rehost individual tables**. *GoldMine* displays the **Rehost Selected Tables** dialog box, from which you can select one or more tables to copy. Check this option only if you want to specify the tables to be copied. For example, you might want to copy the table(s) needed to complete rehosting if the process was interrupted.

The individual tables will *either* be empty, *or* contain data from the currently open contact file or root *GoldMine* data, depending on the option selected in step 4a.

5. When done, select **Next>**. To gain access to the database server, *GoldMine* may prompt you for the SQL login.

- To enable access to the database server, type `sa` for the **Username**. Bypass **Password**, and select **OK**.<sup>\*</sup> This login request will *not* accept your *GoldMine* username and password. Although *GoldMine* is prompting the user for an entry, this password is required by the SQL database, not by *GoldMine*.

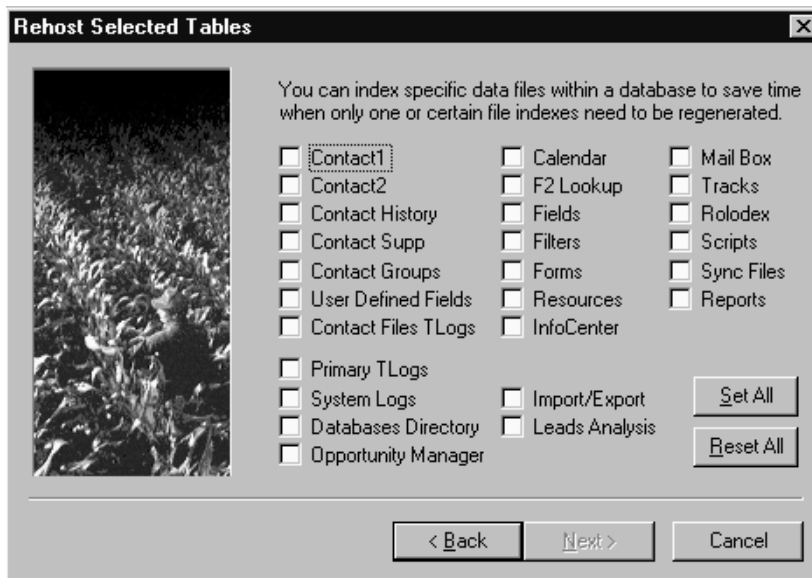
If you selected *either* **Copy the data from the current files to the new databases** or **Create empty tables** and did not select **Rehost individual tables**, the **Database Access** dialog box appears. Go to “Setting Access Options” on page 27.

If you selected **Rehost individual tables**, the **Rehost Selected Tables** dialog box appears. Continue with “Selecting Individual Tables to Rehost.”

### Selecting Individual Tables to Rehost

If you select **Rehost individual tables** from the second dialog box of the **Create GoldMine Database Wizard**, then select **Next>**, the **Rehost Selected Tables** dialog box appears.

**Rehost Selected Tables dialog box**



<sup>\*</sup> If you cannot log in using the username `sa` and without a password, the SQL Server’s security has been modified. Check with your database administrator for the username and password for an SQL Server user that has the security rights to create tables.

1. Check each box corresponding to the data file(s) that you want to select.

Selecting individual tables for rehosting is useful when you want to:

- Restore a table from a dBASE backup
- Transfer a table to another *GoldMine* system
- Restart *from the point of failure* after a failed attempt to rehost

2. When done, select **Next>**. Go to “Starting to Create Database Files” on page 29.

### Setting Access Options

If you select *either* **Copy the data from the current files to the new databases** or **Create empty tables** from the second dialog box of the **Create GoldMine Database Wizard**, then select **Next>**, the **Database Access** dialog box appears.

**Database  
Access  
dialog box**



To grant access to the database:

1. To grant access to specified users, select a user or user group from the **Allow access to:** drop-down list. By default, *GoldMine* will grant access to **(public)**. If unsure, leave the default setting.
2. To specify a *database* that *GoldMine* can use when associating transfer set data, type a unique **Contact set code** value for the *database*. This code is necessary only if you plan to synchronize multiple contact sets.



---

For details about contact set codes, see “Setting Database Options” in the *GoldMine Reference Manual*.

---

3. To allow *only* the currently running *GoldMine* (as determined by serial number) to open the database, select **Allow database access only from this GoldMine installation**. A *GoldMine* system with a different serial number cannot open the database.
4. Select **Next>**. Continue with “Starting to Create Database Files.”

### **Starting to Create Database Files**

Once you have finished defining options for the database, the **Creating Database Files** dialog box appears.

When ready to start creating the database, select **Finish**. If you are copying a large number of records as part of the process, creating a database can be a relatively time-consuming process.

To stop the process at any time, select **Cancel**.

*GoldMine* displays the **Creating GoldMine Database Files** status window to provide status information during the creation of the database.

If you have rehosted the global *GoldMine* databases, a window will prompt you to make them default. Select **Yes** to instruct *GoldMine* to open the newly rehosted SQL databases whenever the program is run.

When done creating the database, *GoldMine* closes the **Creating Databases Files** status window.

## **Creating MS SQL Server 7.0 Users**

To access the MS SQL Server, each user must have a login to the database. You can use one of the following methods to create logins for use with *GoldMine*:

- **Create a single MS SQL Server login for all GoldMine users:** simpler method that minimizes administration within MS SQL Server, but may reduce the amount of manageability and accountability. Using only one login will not allow an administrator to separately track changes to the database by different users.
- **Create an MS SQL login for each user:** requires more initial administration, but allows greater flexibility in security and accountability. Using this method, users can be assigned unique permissions, and their changes can be tracked on a per user basis.

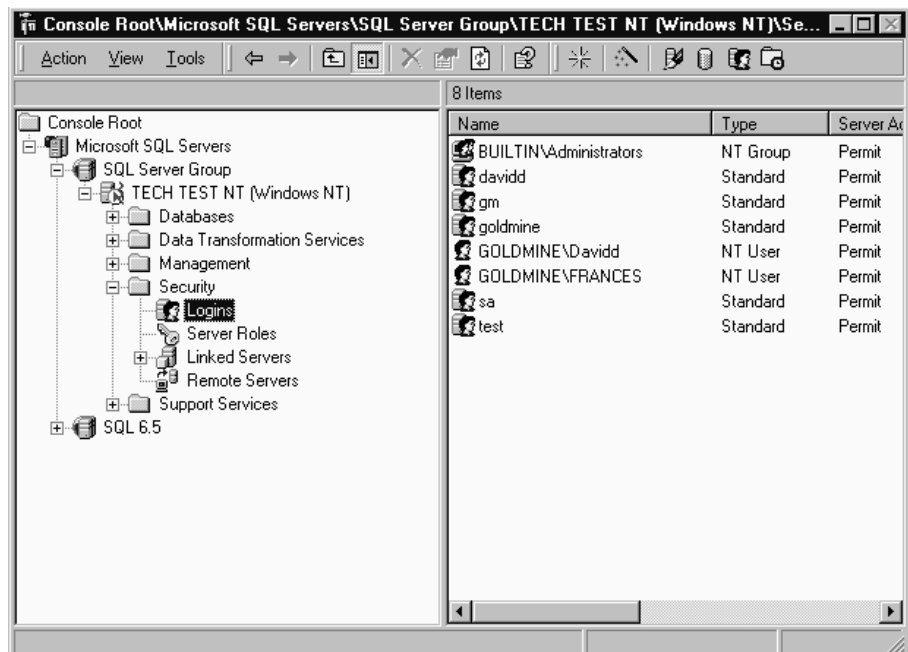
Either approach will work with *GoldMine*. Depending on the demands and requirements of your environment, such as the number of *GoldMine* users, the required security for those users, and the amount of time allocated for the rehosting process, one approach will be more advantageous than the other. Your database administrator can determine which method will work best for your environment.

## Creating Logins

To create logins:

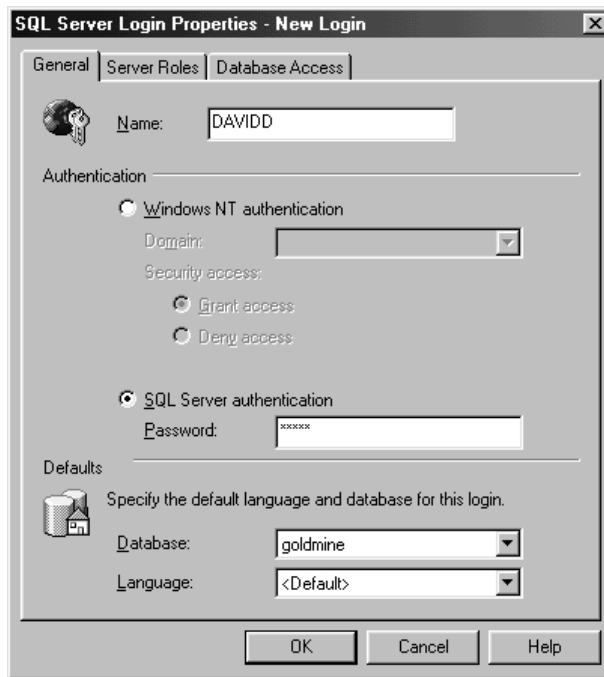
1. To start the **SQL Enterprise Manager**, from the Windows' task bar, select **Start|Programs|Microsoft SQL Server 7.0|Enterprise Manager**
2. In the left pane, search the list of MS SQL servers to locate the server on which you have rehosted your *GoldMine* data.
3. Click **+** next to the server with the rehosted data.
4. Click **+** next to the **Security** folder.
5. Select **Logins** , as shown in the following figure, then right-click to display the local menu.

**MS SQL Server  
7.0 Enterprise  
Manager**



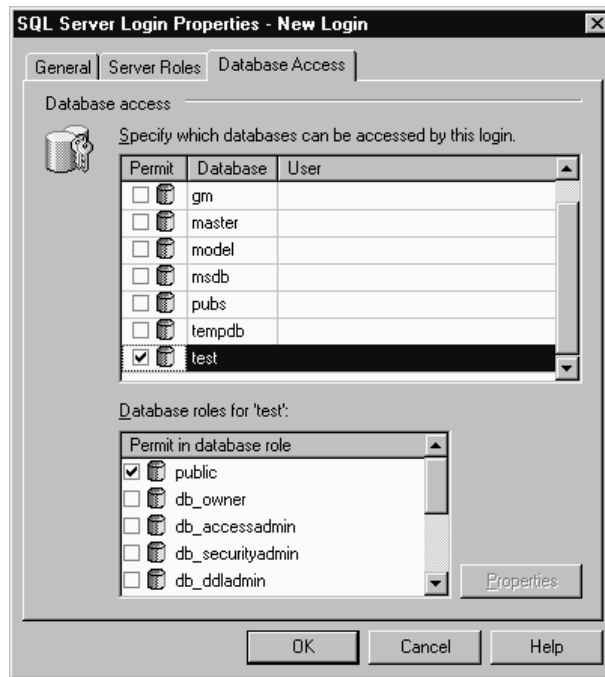
6. Select **New Login**.

**SQL Server  
Login  
Properties  
window  
(General tab)**



7. Select *one* of the following methods of **Authentication** for this user:
  - **Windows NT Authentication:** allows you to specify a user on your NT network to be imported into MS SQL Server. The user can log into MS SQL Server with the same username and password he uses to log in to the Windows NT network. Continue with step 8.
  - **SQL Server Authentication:** prompts you to *create* a username and password for a user, and will *not* import users from Windows NT. Go to step 9.
8. Select the **Domain** where the user exists on your Windows NT network from the drop-down list. For **Security Access**, select **Grant Access**. Go to step 10.
9. Type a **Password** for your **SQL Server authentication**. The entry appears as asterisks.
10. Type a user **Name**. If you selected **Windows NT Authentication** in step 7, this entry is typically the user name of an existing Windows NT account. If you selected **SQL Server Authentication**, this entry is a new username for MS SQL Server.
11. To select a default **Database** or **Language** (other than English) for the user, you can select available options listed in the corresponding drop-down lists.
12. Select the **Database Access** tab.

SQL Server  
Login  
Properties -  
New Login  
window  
(Database  
Access tab)



13. Identify the *GoldMine* database(s) to which you want to grant access for the new user, then click the appropriate checkbox(es).

14. Select **OK**.

You have finished creating a user, and granting access privileges to *GoldMine* database(s). To create additional users, repeat steps 4–14. After creating all users, continue with “Assigning Permissions and Granting Access.”

## Assigning Permissions and Granting Access

To ensure the security appropriate to maintain the integrity of your data, you can work with the following settings:

- **Granting Table Access** is required to assign the appropriate security rights to each user who will access the *GoldMine* tables. You *must* grant table access to allow users to access the *GoldMine* data.
- **Assigning Server Roles** is one of two methods by which specific users can be granted permissions to create or remove objects, run system processes, and perform general administration on the SQL Server. If any users in your MS SQL Server implementation will perform these operations, they must be assigned appropriate rights. Assigning roles will give the user a predefined group of permissions for simultaneous use.
- **Setting Database Permissions** is the other method by which specific users can be granted administration permissions. Setting the database permissions allows you to pick individual rights for each user, instead of assigning a group of permissions with an administrative role.



---

CREATE TABLE rights in MS SQL are required for a user to perform the following operations in *GoldMine*:



- Rehosting data
- Rebuilding a database
- Creating transfer sets for synchronization


The CREATE TABLE privilege can be assigned with *either* a server role, *or* by setting database permissions for the SQL user who will perform these *GoldMine* operations. However, users who only perform routine *GoldMine* operations only need the options set in the following section, “Granting Table Access to All Users.”

---

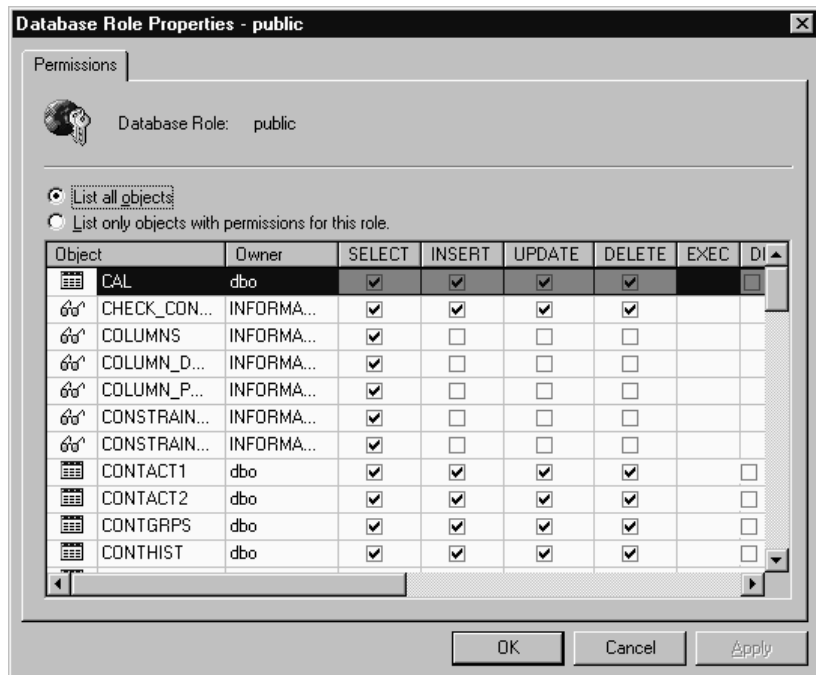
### Granting Table Access to All Users



To grant access to the *GoldMine* tables to all users:


1. To start the **SQL Enterprise Manager**, from the Windows’ task bar, select **Start|Programs|Microsoft SQL Server 7.0|Enterprise Manager**
2. In the left pane, search the list of MS SQL servers to locate the server on which you have rehosted your *GoldMine* data.
3. Click  next to the server with the rehosted data.
4. Click  next to the **Databases** folder.

5. Click  next to the database to which you want to grant access.
6. Click **Roles**. The available roles appear in the detail pane.
7. Right-click the **Public** role to display the local menu, then select **Properties**. The **Database Role Properties** window appears.
8. Check that all users are displayed in the **User** pane.  
  
If not, you will need to *either Add them, or follow the procedure described in “Creating Logins” on page 29.*  
  
If all users are displayed, continue with step 9.
9. Click **Permissions**.

**Permissions tab**



The **Object** column of the **Permissions** tab lists  (tables) and  (views) available in the selected database, and the level of access your users have to these tables and views.

10. For each *GoldMine* table, check the boxes for **Select**, **Insert**, **Update**, and **Delete** to assign access right. Each *GoldMine* table appears in upper-case letters next to . For a list of the *GoldMine* tables in your database, see “Tables Created for *GoldMine* Databases” on page 43.
11. Click **OK** to enter settings from the **Permissions** tab. The **General** tab appears.
12. Click **OK** to enter settings from the **General** tab.

Your users have been granted access to the tables in this *GoldMine* database. To implement more than one *GoldMine* database, repeat steps 4–9 for each additional database.



When done, you can either:

- Go to “Configuring *GoldMine* Usernames for SQL Servers” on page 37  
*or*
- Continue with “Granting Additional Permissions” to assign administrative rights

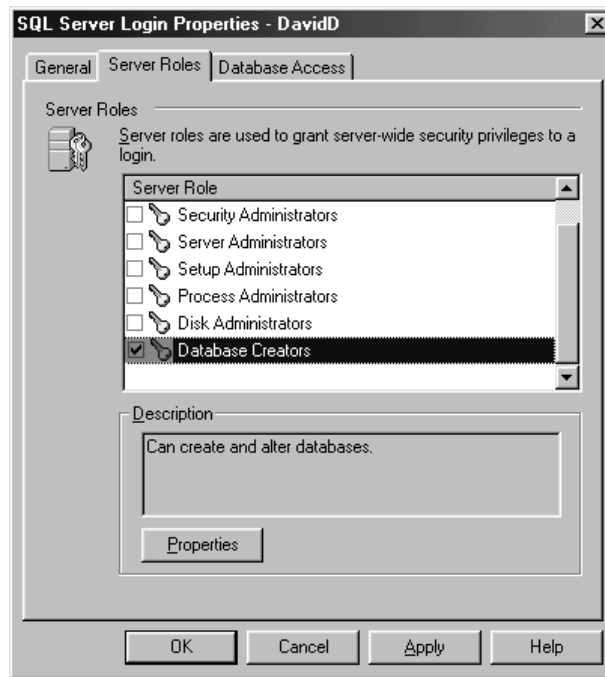
### **Assigning Server Roles**

You may need to assign administrative rights to specific users. You can do this by assigning a group of permissions at once with a *role*.

To assign a role:

1. To start the **Enterprise Manager**, from the Windows’ task bar, select **Start|Programs|Microsoft SQL Server 7.0|Enterprise Manager**
2. In the left pane, search the list of SQL servers to locate the server on which you have rehosted your *GoldMine* data.
3. Click  next to the server with the rehosted data.
4. Click  next to the **Security** folder.
5. Click **Logins**. The SQL Server users appear in the right pane.
6. Right-click on the user that you want to edit to display the local menu. Select **Properties**. The **SQL Server Login Properties** window appears. By default, the **General** tab appears.
7. Select the **Server Roles** tab. SQL Server displays the **Server Role** pane.

**Server Roles tab**



8. Check the appropriate boxes to assign specific administrative roles to the user. The following table shows the operations granted to each administrative role.

Statement	Database Creators	Process Administrators	Security Administrators	Server Administrators
Alter Database	yes	no	no	no
Create Database	yes	no	no	no
DBCC	no	no	no	yes
Deny	no	no	yes	no
Grant	no	no	yes	no
Kill	no	yes	no	no
Reconfigure	no	no	no	yes
Restore	yes	no	no	no
Revoke	no	no	yes	no
Shutdown	no	no	no	yes

The **Disk Administrators** and **Setup Administrators** roles grant privileges to perform only specified system-stored procedures. They do not have permissions to execute any Transact-SQL statements. However, the **System Administrators** fixed server role grants permissions to execute all Transact-SQL statements.



For details on specific roles or statements, see the [SQL Server Books Online](#), which is available from the Windows' task bar by selecting **Start|Programs|Microsoft SQL Server 7.0|Books Online**.

9. Click **OK**.
10. To grant server roles to additional users, repeat steps 5–9.

### Assigning Database Permissions to Individual Users

A more flexible way to grant permissions can be accessed through the **Database Properties**. Assigning permissions in this manner allows specific statements to be allowed to that user while others are denied.

To grant permissions individually:

1. To start the **Enterprise Manager**, from the Windows' task bar, select **Start|Programs|Microsoft SQL Server 7.0|Enterprise Manager**
2. In the left pane, search the list of SQL servers to locate the server on which you have rehosted your *GoldMine* data.
3. Click **+** next to the server with the rehosted data.
4. Click **+** next to the **Databases** folder.
5. Right-click the database to which you want to grant permissions to display the local menu. Select **Properties**.
6. Select the **Permissions** tab.

#### Permissions tab

User/Role	Create Table	Create View	Create SP	Create Default	Create Rule
public	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
davidd	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FRANCES	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
gm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
goldmine	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Check the boxes corresponding to the statements and the users or roles to which you want to grant statements. For details about the statements listed in this tab, see your SQL Server 7.0 documentation.



---

The *only* statement relevant to *GoldMine* is the CREATE TABLE statement. *GoldMine* uses the CREATE TABLE statement when rehosting data, rebuilding databases, and creating transfer sets for synchronization. A *GoldMine* user performing these operations must have rights to execute the CREATE TABLE statement. Other options in the **Permissions** tab are never used by *GoldMine*, but may be useful for the purposes of database administration.

---

8. Click **Ok**.

9. To assign individual permissions to another database, repeat steps 4–9.

## Configuring *GoldMine* User Names for MS SQL Servers

As an administrator, you have the responsibility of ensuring the security of your organization's data while permitting appropriate access to each user. To grant user access to *GoldMine* data, you must assign a unique user name in *GoldMine*.



---

For details on assigning unique user names, see "Setting up *GoldMine* Users" in the *GoldMine Reference Manual*.

---

However you assign SQL logins, the login to the SQL database server can be transparent to the users when the database server login and password is specified in the properties of the *GoldMine* user name.

To specify the SQL login for each user:

1. Within *GoldMine*, from the Main Menu, select **File|Configure *GoldMine*|User's File**. The **Users' Master File** dialog box appears.
2. In the **Username** column of the browse window, select the user for whom you wish to assign an SQL database login. Select **Properties**. The **[username] Properties** window appears. By default, *GoldMine* displays the **Profile** tab.
3. Select the **Access** tab.

**Entering an SQL login and password**

SQL Server Logon

Logon name:

Password:

4. In the **SQL Server Logon** section, specify the **Logon Name** of up to 15 alphanumeric characters. This entry is the login to the SQL Server created for this user.
5. Type the **Password** you created for this SQL Server login.

*GoldMine* uses the **Logon name** entry to attempt a connection to the SQL database server. If no **Logon name** is specified, *GoldMine* attempts to log in to the database server using the *GoldMine* user name and password.

6. Click **OK**. The *GoldMine* username has been configured. Repeat steps 2–6 for each *GoldMine* user who will access the SQL database.



---

If you have contact sets residing on multiple SQL database servers, you can enter an additional SQL login for the contact set in *GoldMine*'s **Contact File Profile** dialog box. To access the **Contact File Profile** dialog box, from *GoldMine*'s Main Menu, select **File|Open File**. In the browse window, select the contact set, then select **Properties**. The **Contact File Profile** dialog box has an **SQL Server Logon** section identical to the figure shown above. To enter an additional login, follow steps 4–6 in this section.

---

Your *GoldMine* user configuration is complete. To complete the implementation of SQL Server 7.0, continue with “Installing MS SQL Client Utilities.”

## Installing MS SQL Client Utilities

For a workstation to access an SQL database, the MS SQL client utilities must be installed. The installation requires approximately 35 MB available on each workstation. The following steps were designed for use with the SQL Server 7.0 Standard Edition on a Windows 95/98 workstation. Before proceeding, you should uninstall any earlier versions of the MS SQL client on the workstation.

To install the client utilities:

1. Close all open applications.
2. Place the SQL Server 7.0 CD-ROM in the workstation's CD drive. If the workstation does not have a CD drive and you are installing through a network, use Windows Explorer to open the network CD drive, then double-click **autorun.exe**.

If Internet Explorer 4.01 SP1 or later is not installed, you must **Install SQL Server 7.0 Prerequisites**, and return to this menu when done.

If Internet Explorer 4.01 SP1 or later is installed on the workstation, continue with step 3.

3. Click **Install SQL Server 7.0 Components**.

4. Click **Database Server - Standard Edition**. A message may appear stating that the server component cannot be installed to this workstation. If so, click **OK**. The **Welcome** screen of the **Microsoft Server 7.0** installation wizard appears.
5. Click **Next>**. The **License Agreement** appears.
6. Read the **License Agreement**, then select **Yes** to continue.
7. Type your **Name** and **Company** name, then click **Next>**.
8. Type the **CD Key** for your copy of SQL Server 7.0, then click **OK**.
9. Read the details on the product ID, then click **OK**.
10. In the **Setup Type** dialog box, you can specify a folder to install to with the **Browse** button. By default, MS SQL installs the client utilities in C:\MSSQL7. Click **Next>**. The **Select Components** dialog box appears.




---

The following installation options are the *minimum* required for *GoldMine*'s purposes. You *must* install the listed components, but can install additional components if desired.

---

**Select Components dialog box**

	Required:	Available:
Space on program files drive :	4580 K	148406 K
Space on system drive:	30683 K	148406 K
Space on data files drive:	0 K	148406 K

11. Check **Client Connectivity**. You can uncheck any other options, as they are unnecessary for *GoldMine*.




---

For details about the optional components, see your SQL Server documentation.

---

12. Click **Next>** to display the final screen of the wizard.

13. Click **Next>** to begin copying files.

14. Click **Finish** when prompted.

You have finished installing the MS SQL client utilities on this workstation. Continue with “Configuring Workstations.”

## **Configuring Workstations**

After installing the client utilities on a workstation, you must configure the Client Network Utility to access your database server, and create a shortcut to *GoldMine* for the workstation.

To configure the Client Network Utility:

1. To start the **Enterprise Manager**, from the Windows’ task bar, select **Start|Programs|Microsoft SQL Server 7.0|Client Network Utility**. The **SQL Server Client Network Utility** dialog box appears.
2. Click **Add**. The **Add Network Library Configuration** screen appears.
3. Specify the name and address of the database server in the **Server alias** field.
4. Select an appropriate network library from the list, and specify connection parameters for the selected library. Your network and database server determine these settings. For details on these entries, see your network administrator and MS SQL documentation.
5. Click **OK** to return to the **SQL Server Client Network Utility** window.
6. Click **OK**.

You are done configuring the Client Network Utility for this workstation.

## Creating the Shortcut and Starting GoldMine

The shortcut to start *GoldMine* is the same as the other shortcuts already on your desktop. Set the shortcut to point to GMW4.EXE installed on the network. If you are prompted for the location of the idapi32.dll, navigate to the location of that DLL on the network.



---

For details on installing *GoldMine* on a single-user system, and starting *GoldMine* on any system, see “Installing and Starting *GoldMine*” in the *GoldMine User’s Guide*.

For details on installing *GoldMine* on your network, see “Installing *GoldMine* on a Network” in the *GoldMine Reference Manual*.

---

If BDE errors appear when you start *GoldMine*, the most likely cause is that one of the steps in this guide was overlooked.

To correct the errors, you can:

- Review the procedures contained in this document.
- See the “Troubleshooting Guide,” on page 45.



# Appendix I: Tables Created for GoldMine Databases

The following list contains the SQL server tables that *GoldMine* creates when rehosting *either* contact sets, *or* root *GoldMine* data. Full access must be granted to each of these tables.

<b>Tables Created when Creating a Contact Set</b>	<b>Tables Created when Rehosting Root GoldMine Data</b>
CONTACT1	CAL
CONTACT2	FIELDS
CONTHIST	FORMS
CONTSUPP	FORMSFLD
CONTGRPS	GMTLOG
CONTTLOG	IMPEXP
CONTUDEF	INFOMINE
	LEADDBFS
	LOOKUP
	MAILBOX
	OPMGR
	OPMGRFLD
	PERPHONE
	REPORT32
	REPORTS (if upgraded from <i>GoldMine</i> for Windows 2.5a)
	RESITEMS
	SCRIPTSW
	SPFILES
	SYNCPROC
	SYNCSITE
	SYSLOG
	TRACKS
	USERLOG



# Appendix II: Troubleshooting Guide

While setting up *GoldMine* Enterprise, you may encounter a problem that generates an onscreen error message. This troubleshooting guide lists the error message, the probable cause(s) of the problem, and action(s) you can take to resolve each problem. For problems with multiple causes, read the action statement with the same number as the probable cause number.

If you cannot solve the problem by using the information in this appendix, GoldMine Software offers many avenues of technical assistance to meet your needs. For details, see “GoldMine Software Corporation Support Services” on page 51.

Error Message/Symptom	Probable Cause	Action
<p><b>Vendor Initialization Failed</b></p> <p>The BDE cannot locate the Vendor Init DLL.</p>	<ol style="list-style-type: none"> <li>1. Required client utilities are not installed for your DBMS.</li> <li>2. Required Vendor Init DLL is not in the path, or the path is incorrect.</li> <li>3. The Vendor Init DLL is incorrect for your version of MS SQL</li> </ol>	<ol style="list-style-type: none"> <li>1. Install required client utilities on the workstation—see the chapter corresponding to your database server in this guide.</li> <li>2. Locate the Vendor Init DLL specified in the Configuration tab of the BDE for your database server driver. Make sure the path to Vendor Init DLL is located in your system path.</li> <li>3. Change the Vendor Init DLL specified in the Configuration tab of the BDE to correspond with your version of MS SQL.</li> </ol>

Error Message/Symptom	Probable Cause	Action
<p><b>No aliases appear in GoldMine's Create Database Wizard</b></p> <p>No aliases have been created in the BDE.</p>	<ol style="list-style-type: none"> <li data-bbox="537 205 719 231">1. No alias exists.</li> <li data-bbox="537 365 857 483">2. You are using a BDE configuration different from the configuration in which you created the alias.</li> </ol>	<ol style="list-style-type: none"> <li data-bbox="898 205 1219 323">1. Create the BDE alias— see “Configuring the BDE Administrator for use with SQL Server 7.0” on page 19.</li> <li data-bbox="898 365 1230 663">2. Check the location of IDAPI32.CFG on the system on which you created the alias. Make sure the BDE on the workstation points to the same location. If not, you can open the other file from the <b>BDE Administrator</b> by selecting <b>Object Open configuration</b>.</li> </ol>
<p><b>Unknown Database. Context: open Database</b></p> <p>The BDE cannot log in to the database using the specified alias.</p>	<ol style="list-style-type: none"> <li data-bbox="537 695 857 846">1. Although the login is correctly entered, the alias is not entered in the IDAPI32.CFG used by your BDE.</li> <li data-bbox="537 1056 857 1173">2. The maximum user connections is set to low for the number of <i>GoldMine</i> users.</li> </ol>	<ol style="list-style-type: none"> <li data-bbox="898 695 1230 993">1. Check the location of IDAPI32.CFG on the system on which you created the alias. Make sure the BDE on the workstation points to the same location. If not, you can open the other file from the <b>BDE Administrator</b> by selecting <b>Object Open configuration</b>.</li> <li data-bbox="898 1014 1230 1220">2. Refer to the section labeled “Modifying your MS SQL Server Configuration to Run <i>GoldMine</i>”. Set the user connections in the <b>Enterprise Manager</b> to 0 (for unlimited connections).</li> </ol>

Error Message/Symptom	Probable Cause	Action
<p><b>Contact Files NOT Found in MSSQL: AliasName: dbo:!</b></p> <p><i>GoldMine</i> cannot access any tables in the database in the specified alias.</p>	<ol style="list-style-type: none"> <li>1. Tables have been dropped, or deleted, and no longer exist.</li> <li>2. The user attempting to access the tables does not have required permissions to the <i>GoldMine</i> tables.</li> </ol>	<ol style="list-style-type: none"> <li>1. Check for the tables in a backup of <i>GoldMine</i>.</li> <li>2. Grant permissions to the <i>GoldMine</i> data—see “Assigning Permissions and Granting Access” on page 32.</li> </ol>
<p><b>General SQL error. Insufficient SQL rights for operation. Native SQL error: 229</b></p> <p>The user cannot login or access a specific table without getting error 229.</p>	<p>The user has not been granted the proper permissions to view or modify the <i>GoldMine</i> data.</p>	<p>Grant permissions to the <i>GoldMine</i> data—see “Assigning Permissions and Granting Access” on page 32.</p>
<p><b>General SQL error. Invalid table create request Native SQL error: 3704</b></p> <p>The user cannot perform certain actions within <i>GoldMine</i>, such as rebuilding or rehosting files.</p>	<p>The user does not have permissions to execute the Create Table statement.</p>	<p>Grant rights to the Create Table statement for this user—see “Assigning Database Permissions to Individual Users” on page 36.</p>



# Bibliography

The following books provide extensive information about the history, setup, use, and programming applications of SQL.

***LAN Times Guide to SQL***

James R. Groff and Paul N. Weinberg

©1994

Osborne McGraw-Hill

Berkeley, CA

***Microsoft SQL Server 6.5 DBA Survival Guide (2<sup>nd</sup> Edition)***

Mark Spenik and Orryn Sledge

© 1996

SAMS Publishing

Indianapolis, IN

***Microsoft SQL Server 7.0 Books Online***

(online Help files available with MS SQL Server 7.0)

To access: from the Windows' task bar, select **Start|Programs|Microsoft SQL Server 7.0|Books Online**.



# GoldMine Software Corporation Support Services

From sources of online services to expert telephone support, GoldMine Software offers many avenues of technical assistance to meet your needs. There are various options for free 24-hour, seven-day a week support, and options for premium phone support during the following Pacific Time hours:

Monday–Thursday: 7:00 a.m.–5:00 p.m.

Friday: 7:00 a.m.–4:00 p.m.

The following sections summarize each support option available for *GoldMine* 4.0 and *GoldSync* 4.0.\*

## **24-hour/7-day FREE Support Options**

GoldMine Software provides three sources of free support for *GoldMine* users:

- Internet Web Site
- Electronic Bulletin Board System (BBS)
- FactsBack Document Service

The following sections describe each type of support.

### ***World Wide Web Home Page***

Our World Wide Web page is located at <http://www.goldminesw.com>. This resource offers GoldMine Software product information, in-depth technical documents covering procedural instructions and troubleshooting, utility programs and enhancements for *GoldMine* and *GoldSync*, and a Newsgroup forum where users can post technical issues for response by other users and GoldMine Technical Support staff.

---

\* GoldMine Technical Support will provide help configuring the version of the Borland Database Engine (BDE) supplied by GoldMine Software to use all of the settings recommended by *GoldMine* only. If you need help with a custom BDE configuration, or want to use a different BDE configuration, Technical Support is unable to offer assistance. In these instances, we recommend that you work with an Authorized GoldMine Solutions Partner or Borland.

### **Electronic Bulletin Board System (BBS)**

Using a modem, a user can log into the GoldMine Bulletin Board System (BBS) to access information provided by GoldMine Software Technical Support staff, other *GoldMine* and *GoldSync* users, and developers of third-party add-on products. To gain security access to download product updates, please call Technical Support at 310-459-1222.

New users of the BBS have access to the technical documentation and any files available on the web site without special security on the BBS. The telephone number for the BBS is 310-459-3443. For details about calling our BBS, Windows 95 users should see FactsBack #382, and Windows 3.1 users should see FactsBack #383, as described in “FactsBack Document Service” below.

### **FactsBack Document Service**

The FactsBack Document Service is a library of technical documents that cover a wide range of topics, including troubleshooting error messages and walk-throughs of commonly used *GoldMine* and *GoldSync* functions. You can access the FactsBack service through our World Wide Web page, the BBS, or by calling 310-459-1222, Ext. 3, using a fax machine with a handset. FactsBack #998 is the index of all FactsBack documents.

## **Premium Support Options**

In addition to the unlimited support described previously, GoldMine Software offers additional types of support on a limited or premium basis. The following sections describe each support type.

*Telephone/FAX Support is tracked by issue number.* To ensure that your technical issues are thoroughly and completely resolved, all support is handled on a per-issue basis through our automated Issue Tracking System. The Issue Tracking System will prompt you for information, then give you an issue ID number and transfer you to the first available technician.



---

Please make note of your issue ID number as you must provide the number if you need to call back on the same issue.

---

### **GoldMine 4.0 Free Telephone Support Incidents**

Your purchase of *GoldMine* includes a number of complementary incidents to get you up and running smoothly. Single-user systems offer three free technical incidents, five-user systems offer five technical incidents, and 10-user and greater systems offer seven free technical incidents. Sites with 25 or more users should contact GoldMine Software for information about our Maintenance Plans. GoldMine Software offers telephone technical support Monday through Thursday from 8:00 a.m. to 5 p.m., and on Friday from 8:00 a.m. to 4:15 p.m. (Pacific Time). You can reach Technical Support by calling 310-459-1222.

### **GoldSync 4.0 Free Telephone Support Incidents**

*GoldSync* 4.0 is licensed and supported as a stand-alone package, even though it shares components with *GoldMine*. *GoldSync* three-site systems include two technical incidents, five sites include three technical incidents, 10-site and greater systems include five free technical incidents. *GoldSync* technical support is intended to troubleshoot specific anomalies, and cannot be used as a substitute for proper installation and setup by a *GoldSync* Certified Technician. You can reach Technical Support by calling 310-459-1222. For best results, your *GoldSync* Certified Technician should be at your site when calling Technical Support.

Sometimes you may have a few general questions. Rather than handling each question as a separate technical incident (causing you to use up several incidents in one quick call), we will answer a few, general “quick” questions and treat them as a single issue for up to 10 minutes of technician time.

### **GoldMine 4.0 Support by Fax**

Support by fax is provided for most faxes as one technical incident per fax. Be sure to include your *GoldMine* serial number and company information with your faxed question. We will fax the answer back to you within two business days. Where extensive research is required, or where technician time may exceed 10 minutes, more than one technical incident may be required. If so, we will notify you in advance. You can fax Technical Support at 310-459-8222.

Should you require additional assistance beyond your complementary issues, or wish to have your call expedited for a significantly reduced wait time, GoldMine Software offers two premium support plans:

- Pay-per-incident
- Pay-per-minute

### **GoldMine 4.0 Premium Support: Pay-per-Incident**

You may pay by VISA, MasterCard, or American Express. Pay-per-Incident is the recommended plan for all but the simplest issues. You pay a fixed price, even if an extended period of time and/or several calls is required to resolve the issue. General issues (merge forms, customizing fields and views, scheduling, etc) are \$35.

Some aspects of *GoldMine* (Automated Processes™, reports, and remote synchronization) require more complex analysis and troubleshooting. Telephone consultation is not recommended for these issues. Instead, these issues are best handled by one of our Solutions Partners. Should you elect to consult GoldMine Technical Support about these functions, the technical incident is viewed as requiring more complex and time-consuming troubleshooting. For this reason, incidents regarding automated processes are charged at \$55, and synchronization and reports issues are charged at \$95.

Sometimes, issues in one of these areas may be simple and may take 10 minutes or less to resolve or you may have “quick questions” that can be answered in 10 minutes. In these cases, the issue will be charged \$35, the same fee as a general issue.

To minimize your wait, all premium support calls are expedited ahead of other Technical Support calls. You can reach the premium support service by calling toll-free at 888-995-8324. International callers can reach the same service by calling 310-459-1222 (long-distance charges may apply).

**Pay by Check.** If you prefer to pay by check rather than using a credit card, you can prepay for a block of technical incidents. Such technical incident blocks must be prepaid before you can access premium support. For details, please call GoldMine Software Technical Support at 310-459-1222, then press 0.

#### **GoldMine Premium Support: Pay-per-Minute**

You may pay by VISA, MasterCard, or American Express. You are charged \$2 per minute for time spent on the phone with a technician, and for any time that the technician spends researching the issue. You will not be charged for any time spent on hold, unless the technician is actively working on your issue while you are holding.

For most issues, we recommend using Pay-per-Incident support over Pay-per-Minute. While we will make every reasonable effort to resolve the issue, some issues may not be resolved, or may take an extended amount of time to resolve. With Pay-per-Incident, you pay a fixed price, even if it takes an extended period of time and/or several calls to resolve the issue. With Pay-per-Minute, you are paying for the time spent for our best reasonable attempt to resolve an issue.

All premium support calls are expedited ahead of other technical support calls so that your wait time is minimal. You can reach this service by calling toll-free to 888-995-8324. International callers can access the same service by calling 310-459-1222 (long-distance charges may apply.)

### **Other Sources of Support**

In addition to using support resources offered by GoldMine Software, GoldMine Solutions Partners and GoldMine Authorized Trainers can assist your organization with installing, maintaining, and running *GoldMine* and *GoldSync*. While Technical Support does not provide training or “walkthroughs” of *GoldMine* features, GoldMine Solutions Partners are available to provide these services

#### **Local GoldMine Solutions Partner**

*GoldMine* Solutions Partners are *GoldMine*-certified computer consultants. They offer technical support, systems analysis, training, and consulting in *GoldMine*. They can come to the site and offer support beyond that which can be accomplished over the phone. In addition, they can help to analyze a company’s *GoldMine* needs and customize *GoldMine* to best meet the needs of the company. For details, visit the GoldMine Web site as described on page 51, check the *Enhancement Guide* included in the *GoldMine* software package, or call the Sales Department at GoldMine Software at 800-654-3526.

### **GoldMine Authorized Trainers**

GoldMine Authorized Trainers can provide on-site training to meet a variety of organizational needs. For details, visit the GoldMine Web site as described on page 51, check the *Enhancement Guide* included in the *GoldMine* software package, or call the Sales Department at GoldMine Software at 800-654-3526.

### **GoldMine Enterprise Support**

Moving *GoldMine* to the client/server platform provides better performance, security, and scalability. However, this conversion adds complexity to your installation and configuration, which is inherent to the client/server platform, and typically *not* due to *GoldMine* requirements. The key to success lies in properly configuring your environment, and your chosen database server. Correct setup of your network, client workstations, and your SQL server configuration is crucial to running *GoldMine*.

Most of this work is performed outside of *GoldMine*, and requirements vary among networks and database servers. While phone support is not adequate to address these tasks, our Authorized GoldMine Solutions Partners can offer expert assistance. Solutions Partners have exclusive access to opportunities to enhance their knowledge about *GoldMine*, and many are also certified by a database server vendor. They have worked with prerelease copies of *GoldMine* Enterprise long before the release to gain the necessary expertise to provide assistance to clients.

Those Authorized GoldMine Solutions Partners who are also certified by a database vendor are the best source of technical support. Please confirm with your Authorized GoldMine Solutions Partner about certification and/or experience with the database server that you use. *GoldMine* Enterprise must be installed by a GoldMine Solutions Partner.

After installation, you have the option to work with GoldMine Software Technical Support. GoldMine Technical Support provides support for *GoldMine* Enterprise that is similar to the types of support available for *GoldMine* dBase—see page 51. Where Technical Support determines that a problem is caused by a factor external to *GoldMine*, or if we cannot duplicate the problem on our database server, you should consult an Authorized GoldMine Solutions Partner or other organization that you believe to be competent to resolve the problem. In such cases, GoldMine Technical Support provides support *only* to determine that a problem is caused by something external to *GoldMine*, and/or attempt to duplicate the problem on our database server.

### **Support for Embedded Microsoft SQL Server**

All Authorized GoldMine Solutions Partners have had the opportunity to undergo training and certification by Microsoft for MS SQL. More Solutions Partners are trained and certified with MS SQL than with any other database server.

These Solutions Partners are the best choice for technical support, and are strongly recommended as the preferred alternative to telephone technical support. If you prefer, you may purchase support for the *GoldMine* Enterprise MS SQL embedded solution from GoldMine Software Technical Support. As client/server issues require more in-depth

troubleshooting, are usually more time consuming, and require special training, there is a \$200 charge per incident for this support.

If GoldMine Technical Support cannot resolve the MS SQL issue, we will close the incident without charge. In these cases, you may contact Microsoft to purchase a support incident for a \$195 charge, or consult a GoldMine Solutions Partner.

# Index of Illustrations

## C

- Create GoldMine Database Wizard
  - Database Access dialog box, 27
  - first dialog box, 23
  - Rehost Selected Tables dialog box, 26
  - second dialog box, 24

## D

- dBASE query style, 9
- Defining the BDE setup for MS SQL, 20

## E

- Entering an SQL login and password, 37

## L

- Limiting your query range, 10

## M

- Manage Logins dialog box, 29, 30, 31, 35

## N

- New Database Alias Server Configuration Options dialog box, 19

## P

- Permissions tab, 33, 36

## R

- Relational Database Table, 2
- Requesting data in a client/server architecture, 4
- Requesting data in a file server architecture, 4

## S

- Select Components dialog box, 39



# General Index

## B

BDE, 19  
errors, 41  
technical support for, 51  
bibliography, 49

## C

clicking with a mouse, ix  
client server architecture, 4–5  
client/server, 3  
common data values, 2  
configuring *GoldMine* user names for SQL servers, 37–38  
contact file database, 22

## D

database  
engine, 3  
relational, 2  
tables created for *GoldMine*, 43  
types of server architecture for managing, 3–5  
working with a DBMS, 3  
database management system (DBMS), 1,3  
double-clicking the mouse, ix  
dragging the mouse, ix

## E

Electronic Bulletin Board System (BBS), 52  
*Enterprise Administrator's Guide*  
general conventions, viii–ix  
mouse conventions, ix  
print conventions, vii–viii

## F

FactsBack document service, 52  
fax technical support, 53  
file server, 3–4  
foreign key, 2

## G

general conventions, viii–ix  
*GoldMine*  
Authorized Trainers, 55  
BBS, 52  
configuring user names for SQL servers, 37–38  
creating a database file, Error! Not a valid  
bookmark in entry on page 28  
planning your implementation, 7  
Solutions Partner, 54  
technical support, 51–56  
World Wide Web Home Page, 51

## I

idapi32.dll, 41

## L

LAN, 1  
license agreement, iii–iv  
Local Area Network, 1

## M

minimizing display ranges, 10–11  
mouse  
clicking, ix  
*conventions used in the Enterprise Administrator's Guide*, ix  
double-clicking, ix  
dragging, ix  
pointing, ix  
right-clicking, ix

## P

pointing with a mouse, ix  
primary key, 2  
print conventions, vii–viii  
profile queries, 10

## Q

querying profiles, 10

## R

rehost, 22

relational database, 1, 2

primary key, 2

tables in a, 2

right-clicking the mouse, ix

role, 34

## S

server architecture, 3–5

client/server, 4–5

file server, 3–4

Structured Query Language (SQL), vii, 1–3

configuring *GoldMine* user names for SQL servers,

37–38

## T

table, 2

tables created for *GoldMine* databases, 43

technical support, 51–56

BBS, 52

client/server, Error! Not a valid bookmark in entry

on page 56

FactsBack document service, 52

fax, 53

GoldMine Authorized Trainers, 55

GoldMine Solutions Partners, 54

GoldMine's Web site, 51

pay-per-incident, 53–54

pay-per-minute, 54

premium support options, 52–54

telephone support incidents, 52–53

telephone support incidents, 52–53

troubleshooting guide, 45–47

## U

user connection, 17