

# ***GOLDMINE<sup>®</sup> 4.0***

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

*Enterprise Administrator's Guide*  
*for Oracle 8*

4/99

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

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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>

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# About this Guide

The GoldMine Enterprise Administrator's Guide *for Oracle 8* 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 43, 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.



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

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## 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.



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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.

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Tips indicate alternate or additional methods to accomplish a task.



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

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

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## 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 **T**ools|**C**reate Databases”

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

Performing an action described in a procedure



Select the **C**reate Databases 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 for 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.

<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

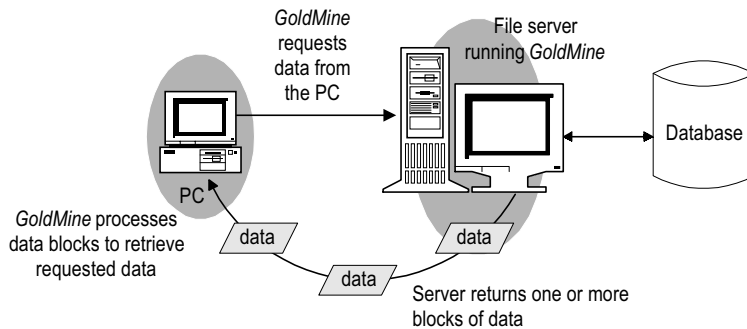
Both types of architecture are described over the following pages to illustrate the advantages of using SQL in a client/server architecture.

### 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

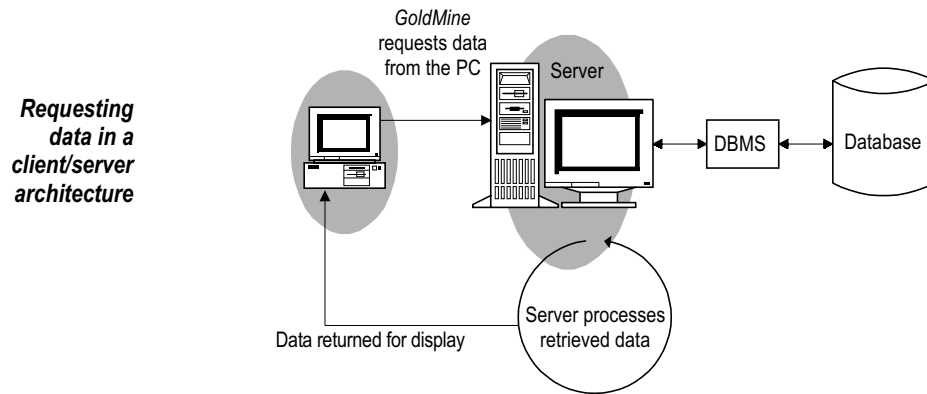


In a file server architecture, the shared database files reside on a **file server**, which is typically a dedicated PC that stores shared files for network access. Each connected PC runs the application, such as *GoldMine*, that will request data from the file server. Upon receiving a request from a 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.



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* contains the most vital data for your business—your customers, leads, and associates—so you will want to plan your implementation carefully to ensure a successful and effective 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:

- Database platform—MS-SQL, Informix, Sybase, InterBase, Oracle, or DB2.
- 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 software to be used to generate merge forms; that is, Word 95 or Word 97.

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\* 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 4. 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.

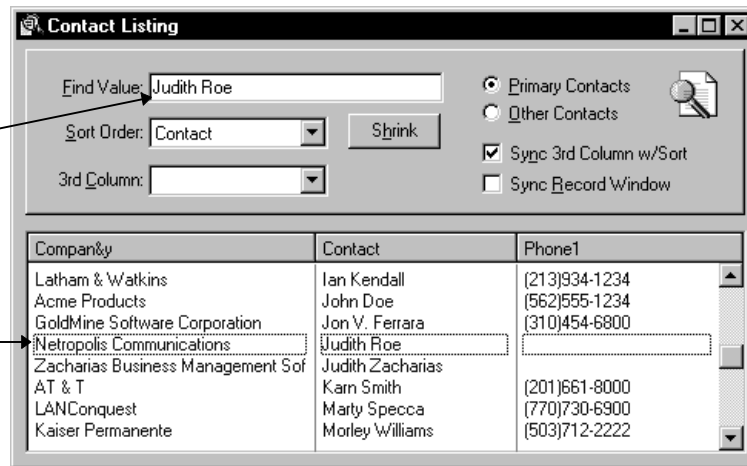
### Querying Contacts

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**

GoldMine automatically inserts a value from the active contact record

Browse window lists the contact among "surrounding" contacts

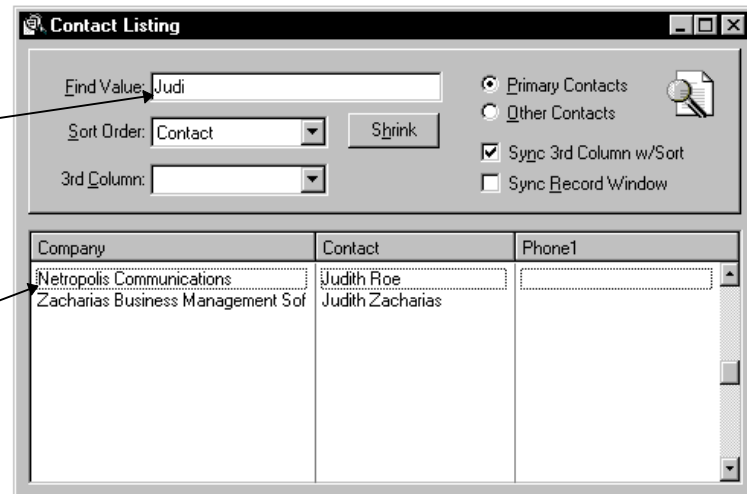


In the Enterprise Edition, the browse window of the **Contact Listing** contains the active contact record, but no "surrounding" records. In addition, *GoldMine Enterprise* returns *only* the contacts that exactly match the typed entry, as shown in the following figure.

**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.

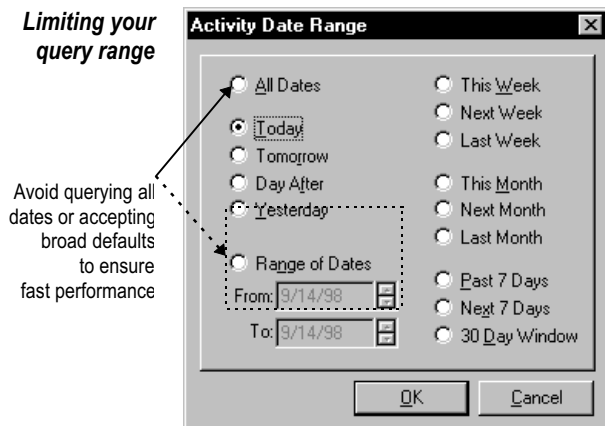
## Querying Profiles

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*, note the following other differences in *GoldMine* Enterprise:

- 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.
- Scrolling up may not be active.\*

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

Proper maintenance of *GoldMine* data will keep your *GoldMine* system free of problems that may occur due to 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 in your SQL server platform.
- **dBASE IV contact sets:** reindex and pack periodically in **GoldMine’s Maintenance Wizard**.



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

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For most *GoldMine* systems, weekly indexing 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. If you make any structural changes to user-defined fields in *either* dBASE *or* SQL contact sets, you *must* pack/rebuild your database.

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\* To enable paging up, you can add the following setting to the [GoldMine] section of the *username.INI* file:

```
AllowSQLPgDn=1
```

This setting can be useful on small databases, but because scrolling slows performance, scrolling is best left disabled when working with large numbers of records.



# Setting up Databases on an Oracle 8.0 SQL 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 steps show the procedure that you must perform for Oracle 8. Most of the information is provided in this guide. Any procedures found in the *GoldMine Reference Manual* are referenced below.

1. Install *GoldMine* on your network drive—see “Installing *GoldMine* on a Network” in the *GoldMine Reference Manual*.
2. Install your SQL server software—see the documentation provided with your SQL server software.
3. Create the database on the SQL server.
4. Create the database alias in SQL Net8 Easy Configuration.
5. Set up a BDE alias.
6. Create a user to rehost the database.
7. Create SQL contact set(s) in *GoldMine*.
8. Create a user login on the SQL server for *either* each *GoldMine* user, *or* for all *GoldMine* users.
9. Grant access to *GoldMine*'s tables on the SQL server to *GoldMine* users.

10. Create users in GoldMine. After you install the program files on the network, be sure to create the user logins in *GoldMine* for each of your users who will access *GoldMine*—see “Setting up Security and Access Rights” in the *GoldMine Reference Manual*.
11. Install SQL client utilities on workstations.

This chapter will outline each of the steps required, except where noted to reference another source (steps 1, 2, and 10).

## Creating Databases in Oracle 8

To create a contact database in Oracle 8, complete steps 1–2 from “Overview of the Installation Process” on the previous page, then continue with this section.

While Oracle is available for a variety of platforms, this procedure shows how to create a database in Oracle from a Windows NT 4.0 server. *You do not have to run Oracle from an NT server.* The following steps provide the simpler method of creating a database that does not include advanced customization of your database. You can create your database using the custom options—for details, see your Oracle documentation.

1. Start the **Oracle Enterprise Manager**.
2. From the server running Oracle, start the **Oracle Database Assistant**.



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For the JAVA commands to run, Oracle requires that your NT system be set to a color mode of at least 256 colors. A color setting of 16 colors or 256 colors may display a Dr. Watson error message while the **Oracle Database Assistant** splash screen is trying to load. (In some configurations, the **Oracle Database Assistant** always displays an error message when loading.) To ensure that the **Oracle Net8 Easy Config** does start correctly, do not set Windows NT display settings to **True Color**.

---

3. Select **Create a Database**, then select **Next>**.
4. To select the database type that you want to create, select **Typical**. Select **Next>**.
5. To **Select the data cartridges you want to include in your database** select the cartridge(s) that correspond to your Oracle license. *GoldMine* requires no specific cartridge. Select **Next**.

If you selected one or more cartridges, go to step 7.

If not, continue with step 6.

6. Select *either* **Copy existing database files from your CD** *or* **Create New database files**

7. From the prompt, select **Create database now**.

8. Select **Finish**.

A prompt displays the message:

**This wizard will try to create a database for you. This may take some time. Do you wish to proceed?**

9. Select **Yes**. Oracle displays the SID to your database.

10. Write down the database SID name. The information is required at a later point in the setup. Select **OK**.

A prompt displays the message:

**Do you want to add the SID for this database to your LISTENER.ORA file?**

11. Select **Yes**.

Oracle continues to create your database. When done, a message appears:

**Database creation completed. Please check for any errors in c:\orant\database\SPOOLMAIN.LOG.**

### ***Running the Oracle Net8 Easy Config***

The next step in configuring your Oracle database to run the **Oracle Net8 Easy Config**. The **Oracle Net8 Easy Config** automatically edits the tnsnames.ora file.

1. From the Windows task bar, select **Start|Programs|Oracle for Windows NT|Net8 Easy Config**.

Oracle may display a prompt:

**Comment information has been detected in your Network Configuration files which may be lost or repositioned when you save your Network Configuration. Do you wish to continue?**

If this prompt does not appear, go to step 3.

If this prompt does appear, continue with step 2.

2. Select **Yes**. The **Oracle Service Name** wizard appears.

3. Select **Add New Service**.

4. Type a **New Service Name**. Oracle allows this name to be different for any of the workstations accessing the data. However, since all clients will access a network installation of the BDE, maintaining a single name for all clients will enable one BDE alias to refer to your database.

Be sure to write down the service name. You will need this name when creating the alias in the Borland Database Administrator.

5. Select **Next>**.
6. Select the type of network protocol to use. *GoldMine* does not require a specific network protocol. Select **Next>**.
7. Depending on the selected network protocol, prompts will request network-specific information. For example, if you selected **Named Pipes**, you would be prompted for the computer name of the server. When done configuring network protocol-specific settings, select **Next>**.
8. Specify the **Database SID**, which was designated in the **Database Assistant** when the service was created. Select **Next>**.
9. To test the connection to the service—which is highly recommended—select **Test Service**.

**Connection  
Test dialog box**

**Connection Test**

To attempt a connection enter a valid database username and password and press Test. Expect a connection to take a few to several seconds. When you are finished testing press Done.

Database Logon Information

Username:

Password:

Test

Done

10. In the **Username** field, type `internal`.
11. In the **Password** field, type `oracle`.

12. Select **Test**. The lower pane of the **Connection Test** dialog box displays the status of the test. If successful, a message appears:

**The connection test was successful.**

13. Select **Done**.
14. Select **Next**, then **Finish**.

## Creating Users

The next step in setting up Oracle is to create a user login to be used for the rehosting process. You will also need additional users for all of your *GoldMine* users to connect to the database server through *GoldMine*.

You can *either* create them all at this point in the setup, *or* wait to create the other *GoldMine* users after the database has been rehosted. If you create all of the users now, you must return to the security manager after the data has been rehosted.

The following procedure identifies the *minimum* roles and privileges a user needs to connect to a database and use *GoldMine*. The system administrator can grant additional roles or privileges.


1. Start the **Oracle Security Manager**, then log in by entering the following:
  - a. In the **User** field, type INTERNAL.
  - b. In the **Password** field, type ORACLE.
  - c. Type the **Service** name that you configured in **Net8 Easy Config** (as described on page 15), followed by **.WORLD**.

For example:

**PROJECT.WORLD**

- d. From the **Connect As** drop-down list, select **NORMAL**.

★ Alternatively, you can log in as another user assigned full rights.

- e. When done, press .

2. From the Main Menu, select **User|Create**.
3. Type a user **Name** for the individual.



4. Accept the **Profile** setting as **Default**.
5. For the **Authentication**, select **Password**.
6. In **Enter Password**, type the password for the user, then type the password again to **Confirm Password**.
7. To specify the default tablespaces\* for this login, complete the **Tablespaces** section as follows: For the default,
  - For the **Default** tablespace: select **Usr**
  - For the **Temporary** tablespace: select **Temporary**
8. For the **Status** setting, select **Unlocked**.
9. Select **Create**.
10. Click  to expand the **Users** tree.
11. Select the user name just created, then select the **Roles/Privileges** tab in the right pane of the window.
12. For the **Privilege Type**, select **Roles**.
13. Verify that the **Connect** role is granted to the user. A role that allows table creation, such as the dba role, needs to be granted to the user who will be performing the rehost process.
14. Select the **Quotas** tab.
15. Select the **Usr** tablespace, then select **Unlimited**.
16. Select the **Temporary** tablespace, then select **Unlimited**.
17. Select **Apply**.

If you are creating the user to rehost the *GoldMine* data, stop at this point, and go to “Refreshing the Services in the Oracle Enterprise Manager” on page 19.

If you are creating logins for general *GoldMine* users and you have already rehosted your data, continue with step 18.

---

\* The tablespaces specified here are the default tablespaces created by Oracle. If you have created your own tablespaces, you can substitute them as needed.

18. Select the **Object Privileges** tab. Under **Schemas**, double-click on the user who created the contact set in *GoldMine*. Then double-click on the **Tables** folder.
19. Select the first contact set table, such as **Contact1**. You must select all listed privileges. In the right pane, select the **Alter** privilege. Press and hold down  while also selecting the **Update** privilege.
20. To grant the privileges to the selected user, click .
21. Repeat step 20 for each of the contact set tables.
 

Full access must be granted to each of the tables created by *GoldMine* that make up a contact set, or the elements contained in your root *GoldMine* data. For a list of tables, see Appendix I on page 35.
22. Repeat this procedure for each database to which you want to grant access to the user.
23. Repeat these steps for each user you need to create. Be sure to modify the *GoldMine* user's properties to reflect the SQL database login created for that *GoldMine* user. For details, see "Configuring *GoldMine* User Names for SQL Servers" on page 29.

## Refreshing the Services in the Oracle Enterprise Manager

The last step to configure your Oracle database is to refresh the **Oracle Enterprise Manager** so that Oracle can "see" your new database. You must refresh the services to ensure that you can maintain your database from the **Oracle Enterprise Manager**.




---

To refresh properly, the server *must* have the Oracle **Agent80** service started.

---


1. From the Windows 95 task bar, select **Start|Programs|Oracle Enterprise Manager|Enterprise Manager**.
2. Type the new **Username** and **Password**. When you type the **Service** entry, be sure to add **.WORLD**, as described on page 17.
3. For **Connect As**, select **NORMAL**.
4. Select **OK**.
5. To start the **Refresh and Retry Service Discover Wizard** from the **Enterprise Manager**, select **Navigator|Service Discovery|Refresh Services**. Select **Next>**.

6. For **Nodes to Refresh**, select the name of the Oracle server on which the service is running. Select **Next>**.
7. Select to retrieve the service information **Immediately after Wizard completion**.
8. To modify your **tnsnames.ora file** automatically, select **Yes**. Select **Next>**.
9. When ready to start the refresh process, select **Finish**.
10. When the discovery of services is done, select **Close**.
11. To verify your service was discovered, in the upper left-hand pane, double-click on **Networks**, then double-click on **Databases**. Your new service appears in the list. You are now ready to use your Oracle database.

## ***Increasing the Oracle Data File Size***

If you require additional storage space for your *GoldMine* data, you must increase the size of the data files for your Oracle database.

To increase the data file size:

1. Start the **Oracle Storage Manager**.
2. Type your username, password, and the service name created in the **Net8 Easy Config**, then select **OK**.
3. To expand the **Datafiles** tree, click .
4. Select the datafile to edit on the left pane. The **General** and **Auto Extend** tabs appear in the right pane.
5. Select the **Auto Extend** tab.
6. Select **Enable Auto Extend**.
7. Set the **Increment** by which to increase the database size automatically. Depending on the amount of data anticipated, a value between 5MB–25MB is typically sufficient.

8. For the **Maximum Extent**, select *either*:

- **Maximum**: the database will *not* **Auto Extend** past the specified **Increment** value  
*or*
- **Unlimited**: the data file will **Auto Extend** as your database grows with no final database limit other than capacity of the hard drive

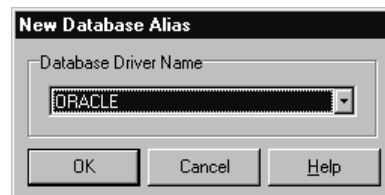
## Configuring the BDE Administrator for an Oracle 8 SQL Server



The next step in setting up *GoldMine* for Oracle 8 SQL server is to create the database alias in the BDE. *GoldMine* works with the BDE to communicate with the Oracle 8 SQL server. Creating an alias provides *GoldMine* the means to identify the SQL database.

To establish a BDE connection between *GoldMine* and an Oracle SQL server:

1. Start the **BDE Administrator**.
2. From the Main Menu, select **Object|New**.

*New Database  
Alias  
dialog box*




3. From the **New Database Alias** drop-down list, select **ORACLE**. Select **OK**.
4. In the left pane of the **BDE Administrator**, type a name for the alias, then press . 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 Oracle.”

**Defining the BDE setup for Oracle**


Definition	
Type	
BATCH COUNT	ORACLE
BLOB SIZE	200
BLOBS TO CACHE	32
ENABLE BCD	64
ENABLE INTEGERS	FALSE
ENABLE SCHEMA CACHE	FALSE
LANGDRIVER	
LIST SYNONYMS	NONE
MAX ROWS	-1
NET PROTOCOL	TNS
OPEN MODE	READ/WRITE
ROWSET SIZE	20
SCHEMA CACHE DIR	
SCHEMA CACHE SIZE	8
SCHEMA CACHE TIME	-1
SERVER NAME	DRA_SERVER
SQLPASSTHRU MODE	SHARED AUTOCOMMIT
SQLQRYMODE	
USER NAME	MYNAME

Change to the **USER NAME** that will log in to Oracle

**Required Edits to the Default Entry for Oracle**

1. In the **Definition** folder, change **SERVER NAME** to the database alias created in the **Oracle Net8 Easy Config**, as shown in the figure—see “Running the Oracle Net8 Easy Config” on page 30.
2. Change **USER NAME** to the user name that will log in to Oracle, as shown in the above figure. This login will be used *only* if no **Logon name** is entered in the **Access** tab of *GoldMine’s [username] Properties* window.
3. In the **BLOBS TO CACHE** field, type 256, 512, or 1024. If you view a large number of entries in *GoldMine’s Activity List*, select 1024.
4. To enter 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]?**
5. Select the **Configuration** tab.
6. Double-click **Drivers**, then double-click **Native**.
7. Select **ORACLE**.
8. In the **DLL32** field, type SQLORA8.DLL.
9. In the **VENDOR INIT** field, type OCI.DLL.

10. To enter 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]?**

11. To set up the BDE connection to the new database alias, select **OK**.
12. Close the **BDE Administrator**.

## Rehosting GoldMine Data

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

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 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.

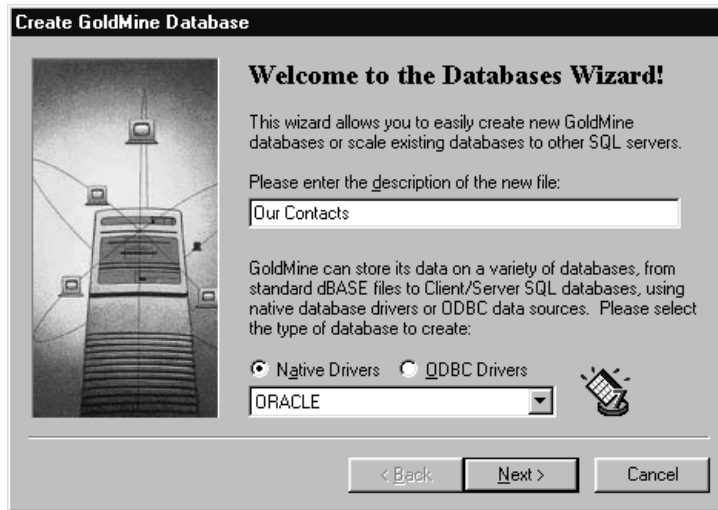
The **Create GoldMine Database Wizard** can rehost either one or two databases:

- **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, instructing *GoldMine* to utilize the new SQL database when accessing these files.

To create a database in *GoldMine*:

1. From the Main Menu, select **File|Open File**, then select **New** 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 to list the file in the **Contact Files** dialog box. However, when you *only* rehost other *GoldMine* files, such as the **Calendar**, **InfoCenter™**, etc., you can leave this field blank. *GoldMine* does *not* list these files in the **Contact Files** dialog box.
3. Designate a driver and database type as follows:
  - a. Select **Native Drivers**.
  - b. Select **ORACLE** from the drop-down list.
4. When done, select **Next>**. The second dialog box of the **Create GoldMine Database Wizard** appears. Continue with “Setting Database Options.”

## Setting Database Options

Once you advance from the first dialog box of the **Create GoldMine Database Wizard**, the second dialog box appears, as shown below.

### Create GoldMine Database Wizard

**Create GoldMine Database**

To create a new SQL or ODBC contact database, select the appropriate database alias and enter its database owner. For standard dBASE files enter the database directory path.

Create a new contact database: Database owner:  
GoldMine\_Oracle8

You may host the base GoldMine databases on a different database server by specifying a database alias below:

Host GoldMine files to another server: Database owner:  
GoldMine\_Oracle8

Copy the data from the current files to the new databases  
 Create empty tables     Rehost individual tables

< Back    Next >    Cancel

To create or rehost a database on Oracle 8.0:

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



---

When rehosting databases from dBASE to an SQL server for the first time, 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 *rehost the GoldMine files only 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 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 as follows:

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>**.

6. *GoldMine* may prompt you for the SQL login to gain access to the database server. Enter the username created earlier in “Creating Users” that has permission to create tables. Do not use the **INTERNAL** login.

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*.

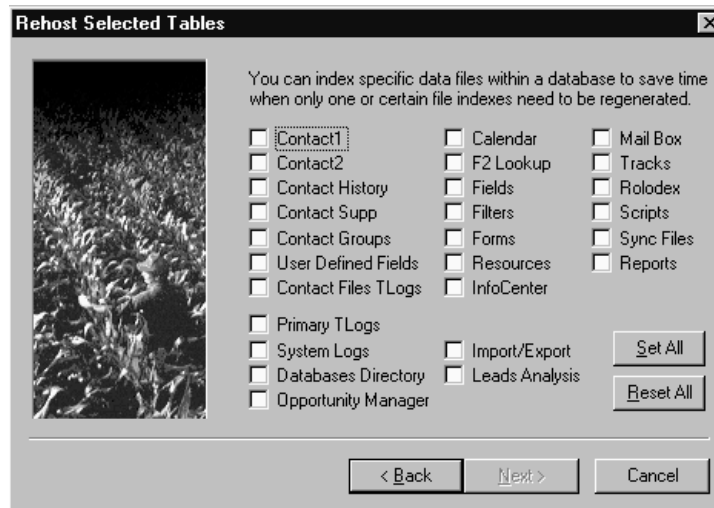
If you selected *either* **Copy the data from the current files to the new databases** *or* **Create empty tables** and did not select **Rehost individual tables**, the **Database Access** dialog box appears. Go to “Setting Access Options” on page 27.

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*



1. Check the box corresponding to each data file 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

**Database Access**

In addition to the security enforced by the database server, GoldMine can restrict access to only certain users. Below you can specify access to a User Group, or allow access to everyone by selecting (public):

Allow access to: (public)

To allow synchronization of multiple contact sets, enter a unique file code to identify this contact set.

Contact set code:

You can set access to this database to only the current system's serial number. This restricts access when attaching to this database from other GoldMine installations.

Allow database access only from this GoldMine installation

< Back   Next >   Cancel

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 you are unsure, do not modify the default.
2. To set up a database for synchronization, type a unique **Contact set code** value for the *database* that *GoldMine* can use when associating transfer set data. This value is only important if you plan to synchronize multiple contact sets.



---

For details on contact set codes, please refer to “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. 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 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 set *GoldMine* to open the newly rehosted SQL databases whenever the program is run.

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

## Configuring GoldMine User Names for SQL Servers

As an administrator, you are responsible for ensuring the security of your organization's data while permitting appropriate access to each user. To allow 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*.

---

In addition to assigning a unique user name to each individual, each user also needs a login to the SQL database server. You can assign SQL logins as follows:

- Unique SQL login for each user
- One SQL login for all *GoldMine* users
- Two logins: one for administrators, and one for standard users

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.



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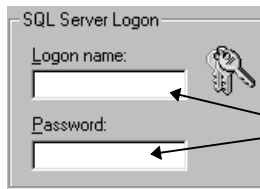
**Prerequisite:** Before you can complete the following procedure, you must create your SQL server logins for your database server—see “Creating Users” on page 17.

---

To specify the SQL login for each user:

1. Within *GoldMine*, 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.
4. In the **SQL Server Logon** section, specify the **Logon Name** of up to 15 alphanumeric characters.
5. Type a **Password** of up to 15 alphanumeric characters. Each character appears as an asterisk (\*).

**Entering an SQL login and password**



Depending on where you enter the values, you can designate a **Logon name** and **Password** for *either* an individual user, or for a contact set.

*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. By leaving the **Logon name** field blank, users can maintain only one **Username** and **Password**, instead of remembering multiple logins.



---

If you have contact sets residing on multiple SQL database servers, you can enter an additional SQL login for the contact set in the **Contact File Profile** dialog box. You can access the **Contact File Profile** dialog box from *GoldMine's* Main Menu by selecting **File|Open File**, selecting the contact set in the browse window, then selecting **Properties**. The **Contact File Profile** dialog box has an **SQL Server Logon** section identical to the illustration shown above.

---

## Configuring the Workstations

To configure each workstation to run *GoldMine*:

1. Install the Oracle client software.
2. Create the Oracle SQL Net Easy Config Alias.

3. Create a shortcut to GMW4.EXE installed on the network.

4. Start *GoldMine*.

Each workstation must have access to the BDE on the network. When *GoldMine* was installed on the network, the **Workstation Setup Files** option must have been selected. This option ensures the BDE will be installed in the \GoldMine\Setup\BDEShare\ folder.

Checking that the workstations all refer to the BDE on the network ensures that each workstation can access the same BDE alias created in “Configuring the BDE Administrator for an Oracle 8 SQL Server” on page 21.

After you start *GoldMine* at least once on the workstation, you can verify the path from which *GoldMine* is loading the BDE by checking two keys in the system registry:

- HKEY\_LOCAL\_MACHINE\SOFTWARE\Borland\Database Engine\CONFIGFILE01
- HKEY\_LOCAL\_MACHINE\SOFTWARE\Borland\Database Engine\DLLPATH

*Viewing or modifying the system registry should only be performed by someone experienced with the Windows registry.* If the above two keys do not refer to the BDEShare folder of the network installation of *GoldMine*, you can modify the entries yourself.



---

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

---

## **Configuring the Client Software**

For the BDE to communicate with Oracle 8 SQL server, you must install the client software package included with Oracle, and configure the client software to connect to the database server.

### **Installing the Client Software**

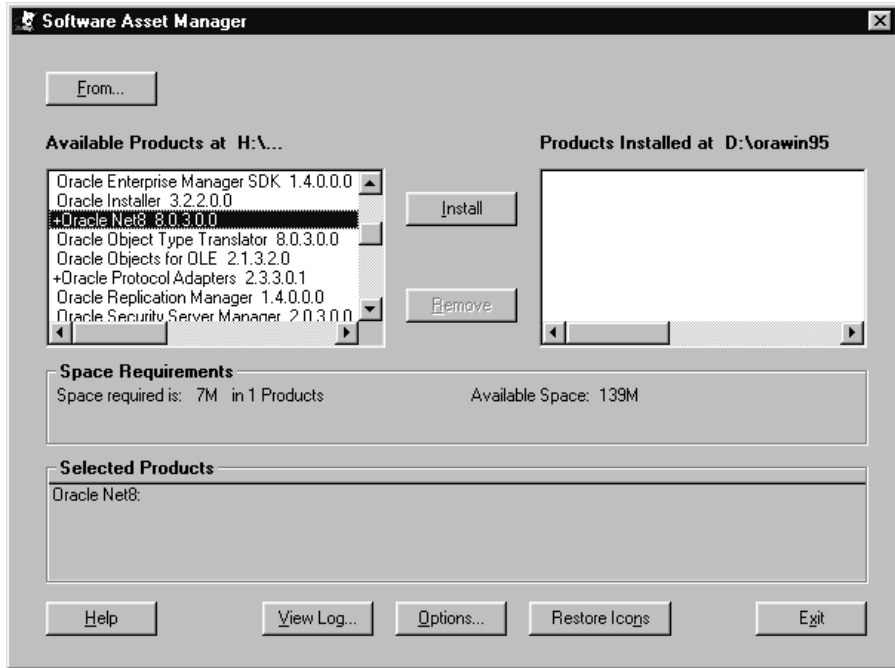
**Minimum client installation space requirements: 60 MB**

During the Oracle8 installation, specify the value for the directory for the **Oracle Home**. A few messages dealing with your autoexec.bat path environment variable may appear. The messages are very important to functionality of the BDE. Be sure to follow the instructions exactly as written.

1. When prompted, select **Custom Installation**, then select **OK**.

- To enable the client to access an Oracle8 server, select **Oracle Net8 8.0.4.0.0**. The version of Net8 will vary on your version of Oracle 8. The current minimum version required is Oracle 8.0.4.
- Select **Install**.

*Installing the Oracle client software*



- Allow the installation to complete, then reboot the computer.

### Connecting to the Database Server

Once the client software is installed, you will need to configure the client software to connect to your database server.

1. From the Windows task bar, select **Start|Programs|Oracle For Windows 95|Oracle Net8 Easy Config**.

Configuring the  
Oracle client  
software



2. Select **Add New Service**.
3. In the **New Service Name** field, type a name for this client.

Oracle allows this name to be different for any of the workstations accessing the data. Since all clients will be accessing a network installation of the BDE, maintaining a single name for all clients will enable you to use just one BDE alias to refer to your database. Select **Next>**.

4. Select the desired **Networking Protocol**, then select **Next>**.
5. In the onscreen fields, enter protocol-specific information, then select **Next>**.
6. Enter the **Database SID** in the field provided. The **Database SID** corresponds to the value specified when the database was created. Select **Next>**.
7. To test your setting, select **Test Service**. Enter a valid user name and password for the database, then select **Test**. Oracle indicates when the connection is successful.
8. From the testing screen, select **Done, Next>**, then **Finish**.

## 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*, browse 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 Appendix III, “Troubleshooting Guide,” on page 39.

# 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

## Modifying the LISTENER.ORA File

After creating the instance as described in “Creating Databases in Oracle,” you may need to manually make changes to listener.ora file. If you selected to not automatically modify the listener.ora during the database creation setup, then continue with this section.

The listener.ora file defines network protocols and also defines which Oracle databases can be accessed. The following example illustrates a listener.ora file.

```
Sample #####  
listener.ora file # Filename.....: listener.ora  
# Node.....: local.world  
# Date.....: 24-MAY-94 13:23:20  
#####  
LISTENER =  
  (ADDRESS_LIST =  
    (ADDRESS=  
      (PROTOCOL= IPC)  
      (KEY= oracle.world)  
    )  
    (ADDRESS=  
      (PROTOCOL= IPC)  
      (KEY= ORCL)  
    )  
    (ADDRESS=  
      (COMMUNITY= NMP.world)  
      (PROTOCOL= NMP)  
      (SERVER= ACID)  
      (PIPE= ORAPIPE)  
    )  
    (ADDRESS=  
      (PROTOCOL= TCP)  
      (Host= acid)  
      (Port= 1521)  
    )  
  )
```



# Appendix III

## 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 45.

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 Oracle</li> </ol>	<ol style="list-style-type: none"> <li>1. Install required client utilities on the workstation.</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 Oracle.</li> </ol>

Error Message/Symptom	Probable Cause	Action
<p><b>No aliases appear in Create Database Wizard</b></p> <p>No aliases have been created in the BDE.</p>	<ol style="list-style-type: none"> <li data-bbox="540 197 867 228">1. No alias exists.</li> <li data-bbox="540 359 867 506">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="899 197 1226 260">1. Create the BDE alias—see page 21.</li> <li data-bbox="899 359 1226 684">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>	<p>Although the login is correctly entered, the alias is not entered in the IDAPI32.CFG used by your BDE.</p>	<p>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>.</p>
<p><b>Contact Files NOT Found in ORACLE: 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 data-bbox="540 1035 867 1119">1. Tables have been dropped, or deleted, and no longer exist.</li> <li data-bbox="540 1129 867 1276">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 data-bbox="899 1035 1226 1098">1. Check for the tables in a backup of <i>GoldMine</i>.</li> <li data-bbox="899 1119 1226 1297">2. Grant the permissions to the <i>GoldMine</i> tables to the user—see the chapter corresponding to your database server in this guide.</li> </ol>
<p><b>Service Handle Not Initialized</b></p>	<p>The database alias specified in the BDE for the Oracle server name has not been created in the SQL Net Easy Configuration.</p>	<p>Create the database alias in the SQL Net Easy Configuration as described on page 21.</p>

Error Message/Symptom	Probable Cause	Action
<p><b>Cannot Load IDAPI Service Library</b></p>	<ol style="list-style-type: none"> <li data-bbox="776 195 1112 310">1. The DLL32 BDE configuration is incorrect for your version of Oracle.</li> <li data-bbox="776 464 1112 548">2. The Borland Database Engine directory is not in your system path.</li> </ol>	<ol style="list-style-type: none"> <li data-bbox="1136 195 1472 426">1. Change the DLL32 specified in the <b>Configuration</b> tab of the BDE to correspond with your version of Oracle—see “Required Edits to the Default Entry for Oracle” as described on page 22.</li> <li data-bbox="1136 464 1472 579">2. Edit your autoexec.bat path environment variable to include the path to your BDE directory.</li> </ol>



# 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

***Teach Yourself Oracle 8 in 21 Days***

Ed Whalen and Steve Adrien DeLuca

© 1998

SAMS Publishing

Indianapolis, IN



# 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

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\* 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.

users can post technical issues for response by other users and GoldMine Technical Support staff.

### **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 4:00 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 45, 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 45, 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 45. 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.

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