

# Installing GoldMine on a Network

This addendum contains instructions for installing and upgrading *GoldMine* 4.0 in the following network environments:

- Windows NT 4.0/Windows 95
- Novell NetWare
- Windows NT 3.51

If you are upgrading to *GoldMine* 4.0, be sure to continue with "Upgrading to *GoldMine* 4.0" before starting the installation.



Indexing errors have been linked to VREDIR.VXD, which is shipped with Windows 95 version 4.00.950B, and is contained in some Microsoft patches. Microsoft has since fixed this problem. You can download a fixed version of this file from the Internet. A self-executable update patch is available from Microsoft's FTP site at the following address: <ftp://ftp.microsoft.com/Softlib/MSLFILES/VRDRUPD.EXE>. Be sure to verify that all systems that will run *GoldMine* have a copy of VREDIR.VXD that will not cause these errors.

During installation, *GoldMine* automatically installs the Borland Database Engine with a configuration applicable to most network uses. If you want to customize the BDE settings, see "Working with the Borland Database Engine (BDE)" at the end of this document.

## Upgrading to GoldMine 4.0

***If you are upgrading from a previous version of GoldMine, you must make a backup of your existing GoldMine system before continuing.*** Make sure that you have at least 2.5 times the size of your largest database free. For example, if your largest database is CONTHIST, which has a 85 MB .DBF and a 15 MB .DBT for 100 MB total, you should have 250 MB free disk space before continuing (2.5 x 100).

If you are installing on a Novell or Windows NT 3.51 network, you must perform the installation from a workstation (a computer other than the server console). During the upgrade process, temporary space will be used on the workstation which will be removed when the upgrade completes successfully. For this reason, you should also ensure as much free disk space as possible on the local C: drive of the installing workstation.

An upgrade installation uses the same installation instructions as a new installation of *GoldMine* 4.0; you should install to the same directory as the previous version of *GoldMine*.

***GoldMine 4.0 is not compatible with previous versions of GoldMine Software products***, including *GoldSync* 1.x, *GoldMine* 1.x, *GoldMine* 2.x, and *GoldMine* 3.x. We recommend upgrading all *GoldMine* and *GoldSync* licenses at the same time. For more

information, please contact your Authorized GoldMine Solutions Partner, or GoldMine Software Corporation.

### ***Installing GoldMine on a Windows NT 4.0 or Windows 95 Network***

A Windows NT 4.0/95 Network environment has no dedicated server because of the peer-to-peer nature of this environment. With *GoldMine*, however, you must select a workstation to act as your nondedicated *GoldMine* server. Select a workstation based on which machine has the best processor speed, disk speed, and amount of RAM. All of the other computers connected to the server are referred to in this document as "workstations."

### ***Starting the Installation***

Insert the CD-ROM into the CD-ROM drive of the server. On most systems the installation will start automatically. If installation does not start automatically after a few seconds, select **Start|Run**. The **Run** dialog box appears. Type d:\gm4setup (replace d: with the drive letter of your CD-ROM drive, if necessary).

The **Welcome to GoldMine** dialog box will introduce the installation process.

When you have read the introduction, select **Next>**

The License agreement will be displayed. If you agree, click **Yes**.

Click **Custom**.

Click **Browse**.

Type C:\APPS\GOLDMINE then click **OK**.

Click **Next>**

Check **Workstation Setup Files, Program Files, Help Files and Reports & Form Templates**.

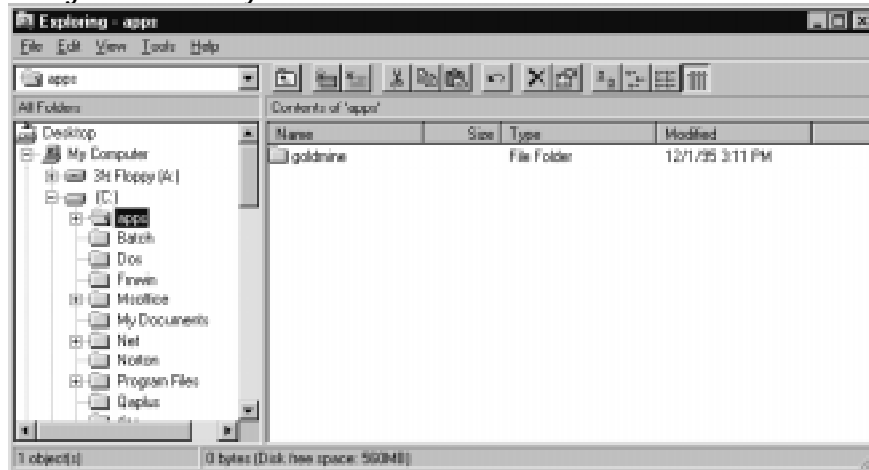
Click **Next>**

Once the files are copied, a prompt will request your registration information. *You must enter the required information to complete the installation.* You will be prompted for your serial number, which can be found on the License Certificate included in the software package.

### Sharing the Directory

From the server system, right-click on **Start**, then select **Explore**. If directories on the C drive do not appear, click **+** beside the C drive so that they appear. Select the APPS directory.

### Finding the APPS directory



Right-click, then select **Sharing**.

### Sharing folder



Select **Shared As**. In the **Share Name** field, type APPS. In the **Comments** field, type Shared for GoldMine. For **Access Type**, select **Full**.

When done, select **OK**. Windows will place a graphical "hand" icon underneath the **APPS** folder in **Explorer** to indicate that the directory has been correctly shared, as shown in the following figure.

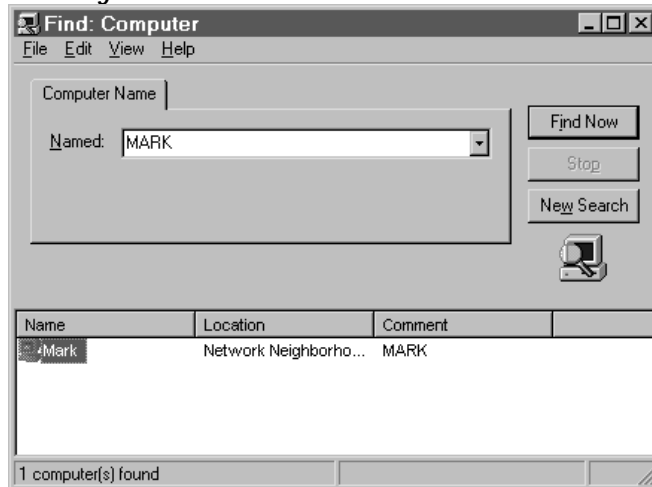
### Sharing a Directory



### Configuring the Workstations

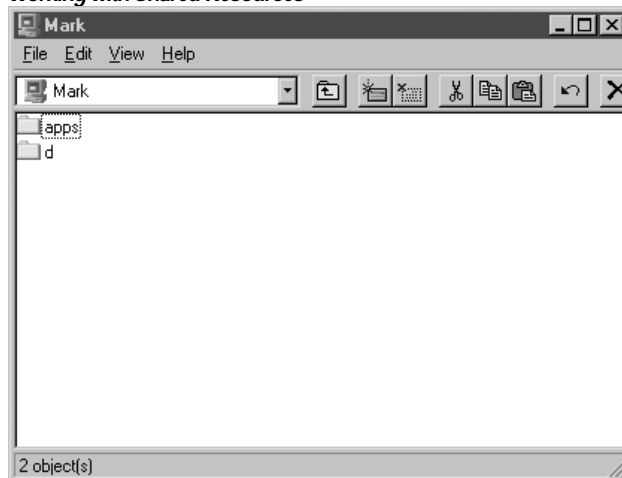
At each workstation, launch **Explorer**. Select **Tools|Find|Computer**. Select the computer that is working as the *GoldMine* server. As shown in the following figure, the computer is called MARK.

#### Find dialog box



Double-click on the name of the computer designated as the server. A dialog box with available shared resources appears.

#### Working with Shared Resources



Select **APPS**, then right-click, and select **Map Network Drive**. Use the same drive letter for all workstation computers; for example, use G: for all workstations. Select **Reconnect at logon**.

### Map Network Drive dialog box



Repeat this procedure for each workstation.

### Creating the GoldMine Icon

At each workstation, minimize all programs. On the workstation desktop, right-click, then select **New|Shortcut**. In the **Command Line** field, type G:\GOLDMINE\GMW4.EXE. In the **Name** field, type GoldMine 4.0.



Your shortcut(s) can be configured to populate the **Username** field with the appropriate username for each workstation by adding a `/u:username` switch to the command line such as G:\GOLDMINE\GMW4.EXE /u:BOB.

The *GoldMine* icon appears on the desktop. Repeat this procedure for each workstation.

### Adding Contact File Mapping for the Workstations



To complete the installation and be able to run *GoldMine*, you *must* enter contact file listings for the workstations as described below.

Double-click on the *GoldMine* icon. In the **Username** field, type MASTER. In the **Password** field, type ACCESS. Press and hold Ctrl, then select **OK**. The **GoldMine Contact Files** window appears with a list of available contact files.

Position the mouse pointer within the **GoldMine Contact Files** window, and right-click. Select **Attach Database**. In the **Description** field, type Workstations map for Common. In the **Files Path** field, type G:\GOLDMINE\COMMON. (If you mapped the server as a different drive, substitute that letter) Select **OK**.

Highlight this entry, then select **Open**.

To add users to *GoldMine*, see "Setting up *GoldMine* Users" in the *GoldMine Reference Manual*.

### Installing GoldMine on a Novell NetWare Network

To install *GoldMine* on a Novell NetWare network system, you must modify the network configuration, both on the file server and on the workstations that will access *GoldMine*. Therefore, to install *GoldMine* on the network, you should be familiar with using the NetWare command line utilities and have a supervisor-equivalent account.

Log into the network with *either* the supervisor account, *or* an account that has security rights equivalent to a supervisor. On Novell NetWare 386 systems, you can use a group manager account if your system administrator has already set up a *GoldMine* group.

Prior to starting the installation, read this entire network installation section to best determine which sections are necessary for your network configuration and security requirements. The following sections describe a complete network installation of *GoldMine*. Depending on how you want *GoldMine* configured on your network, many of these steps might be unnecessary.

### ***Creating the GoldMine Group***

To add a new network group for *GoldMine* users, use the SYSCON System Configuration Utility. You can select any name for this group; however, the group will be called *GoldMine* in the following sections of this procedure. Assign membership to the *GoldMine* group to each network user who will access *GoldMine*.

### ***Selecting the Installation Drive***

In a network environment, physical disk volumes, such as SYS:, are redirected, or "mapped," into a logical drive designator, such as F:. When *GoldMine* is installed, the logical drive designator containing the program files is recorded so that *GoldMine* can find these files when the program is running.

For this reason, install *GoldMine* on a logical drive that all *GoldMine* users can access. For example, if *GoldMine* is being installed on volume SYS:, using drive G:, then all *GoldMine* users will need to map drive G: to volume SYS: on the network.

*GoldMine* can be executed from any drive designator that is mapped into the volume containing the *GoldMine* files. However, for *GoldMine* to operate correctly, the drive designator selected during installation *must* be mapped into the volume containing the program files. If the drive designator used during the installation process is mapped differently, *GoldMine* will not work properly.



You cannot run *GoldMine* from a root directory or a "mapped root" directory. For example: If *GoldMine* is in the SYS:APPS\GOLDMINE directory, you could map *GoldMine* by MAP ROOT G:=SYS:APPS (you would run *GoldMine* from G:\GOLDMINE). But, you would not MAP ROOT G:=SYS:APPS\GOLDMINE, because that would cause *GoldMine* to be mapped to the G:\ root directory.

Once you have selected the drive designator to be used to install *GoldMine*, make sure users accessing *GoldMine* map that drive designator to the volume containing *GoldMine* files. You can map the drive designator by *either* of the following methods:

- **Method 1:** Modify the system login script using the SYSCON system configuration utility. The following sample will map drive G: to the GoldMine directory on volume SYS:, whenever a member of the *GoldMine* group logs into the network:

```
IF MEMBER OF "GOLDMINE" THEN BEGIN
MAP G: =<fileserv>/SYS:GOLDMINE
END
```

When this method is employed, you will need to modify some users' private login scripts, if another MAP command overrides the initial mapping of drive G: in the system login script. NetWare will assign the drive designator to the volume to which it was last mapped.

- **Method 2:** Modify the login script for each *GoldMine* user to contain a MAP command similar to the sample above. This method should be used only if access to the system login script is restricted.

### ***Configuring Workstation Drivers***

You can use *either* Microsoft's drivers for Novell, *or* the existing ODI driver. You *cannot* use NETX or VLM drivers. We do *not* recommend using Novell's Client32 drivers, as users at some sites have found them problematic. If you must use Client 32 or Intranetware client drivers, be sure to follow the instructions in Factsback #348. To order a bulletin, use your FAX machine to dial 310-459-1222, then press 3 for ***Factsback***. Factsback documents are also available in Word 6 format from the following resources:

- GoldMine Software World Wide Web site at <http://www.goldminesw.com>
- GoldMine Software forum on Compuserve (go GoldMine)
- GoldMine Software Bulletin Board System (BBS) at 310-459-3443-see Bulletin #383 for more information about the GoldMine BBS

Contact your system administrator, network consultant, or Microsoft Technical Support for assistance in making these changes. GoldMine Software Technical Support cannot provide support in setting or troubleshooting network settings.



### ***Installing GoldMine to the Server***

***Be sure to read "Upgrading to GoldMine 4.0" on page 1 before continuing.***

Make sure that you are logged into the network as Supervisor or with Supervisor Equivalent security.

Insert the CD-ROM into the CD-ROM drive of a workstation. On most systems, the installation will start automatically. If it does not start automatically after a few seconds, select **Start|Run**. The **Run** dialog box appears. Type d:\gm4setup (replace d: with the drive letter of your CD-ROM drive, if necessary).

The **Welcome to GoldMine** dialog box will introduce the installation process.

When you have read the introduction, select **Next>**

The License agreement will be displayed. If you agree, click **Yes**.

Click **Custom**.

Click **Browse**.

Type G:\GOLDMINE then click **OK**.

Click **Next>**

Check **Workstation Setup Files, Program Files, Help Files and Reports & Form Templates**.

Click **Next>**

Once the files are copied, a prompt will request your registration information. *You must enter the required information to complete the installation.* You will be prompted for your serial number, which can be found on the License Certificate included in the software package.

### ***Setting Trustee Rights***

*GoldMine*'s installation program copies the *GoldMine* program and data files to the appropriate directories. To maintain adequate security while allowing maximum flexibility, the following trustee rights should be granted to the *GoldMine* group using the SYSCON system configuration utility:

#### **GOLDMINE**

This directory contains the *GoldMine* program files and system data files, such as the user database, reports database, printer database and help files. Grant the following trustee rights in the directory:

#### **NetWare v2.x:**

- Search for files in the directory (S)
- Open existing files (O)
- Read from files (R)
- Write to files (W)
- Create new files and directories (C)
- Modify (M)
- Delete (D)

#### **NetWare 3.x and 4.x:**

- Scan for files in the directory (F)
- Open and read existing files (R)
- Write to files (W)
- Create new files and directories (C)
- Erase existing files (E)
- Modify files and directories (M)

When contact databases are created as subdirectories of the GOLDMINE directory, the new directories will automatically inherit the trustee assignments of the parent directory. Otherwise, you will need to manually assign the above rights to a new directory once the directory is created.

### ***Setting File Attributes***

*GoldMine* program and data files need the attributes listed below. Use the FLAG command to modify the file attributes in the *GoldMine* directory and all subdirectories, as indicated below:

- All .DBF and .DBT files should be flagged as Shareable and Read/Write
- All .MDX and .INI files should be flagged as Read/Write
- All .EXE and .DLL files should be flagged as Shareable.
- All other files should be flagged as Nonshareable and Read/Write



*Do not flag any GoldMine files as Transactional.* System problems can result from using the Transactional flag, including corrupted indexes and errors.

### ***Setting Up Workstations***

At each workstation, minimize all programs. On the workstation desktop, right-click, select **New|Shortcut**. In the **Command Line** field, type G:\GOLDMINE\GMW4.EXE.

In the **Name** field, type GoldMine 4.0. The *GoldMine* icon appears on the desktop.

Repeat this procedure for each workstation.

To add users to *GoldMine*, see "Setting up *GoldMine* Users" in the *GoldMine Reference Manual*.

### ***Installing GoldMine to a Windows NT 3.51 Network***

*GoldMine 4.0* uses Windows 95 features, such as calling Windows 95 API to access TAPI to dial telephone numbers. However, Windows NT 3.51 does *not* provide support for the entire Windows 95 API. Therefore, *GoldMine 4.0* will *not* run on a Windows NT 3.51 workstation. Although *GoldMine 4.0* will not run on a Windows NT 3.51 workstation, you can use Windows NT 3.51 as the file server for *GoldMine* files. You can run *GoldMine 4.0* from that server on Windows NT 4.0 and Windows 95 workstations.



You can also run *GoldMine 4.0* on Windows NT 4.0-see "Installing *GoldMine* on a Windows NT 4.0 or Windows 95 Network" in this document.

### ***Configuring the Server for GoldMine***

In a Windows NT environment, you must decide which station is to become your *GoldMine* server. This decision should be based on which machine has the best processor speed, disk speed, and amount of RAM. All of the other computers connected to the server are referred to in this document as "workstations."

If you do not have a C:\APPS directory on the file server, you must create this directory before installation. From the server system, in the Program Manager, select **File|Run**. The **Run** dialog box appears.

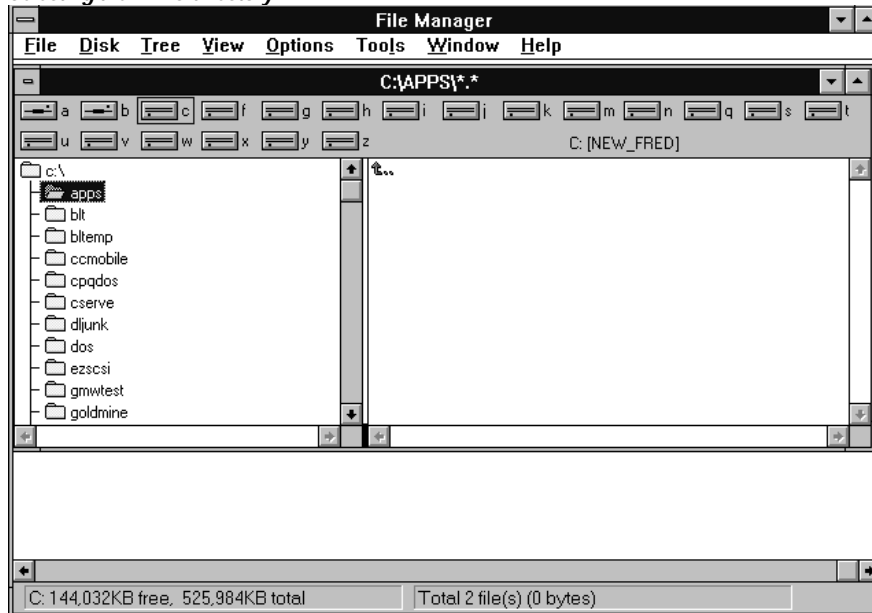
Type COMMAND, then select **OK**. Type the following at the prompt:

```
C:          <enter>
MD \APPS   <enter>
EXIT       <enter>
```

## Sharing the Directory

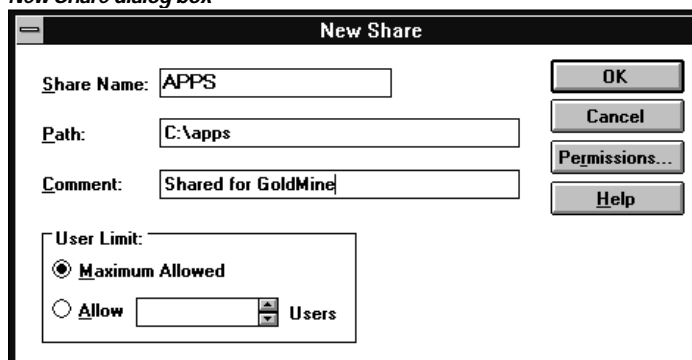
From the server system, in Program Manager, double-click on the File Manager icon. Select the **Apps** directory. The **File Manager** window will look like the following figure.

### Selecting the APPS directory



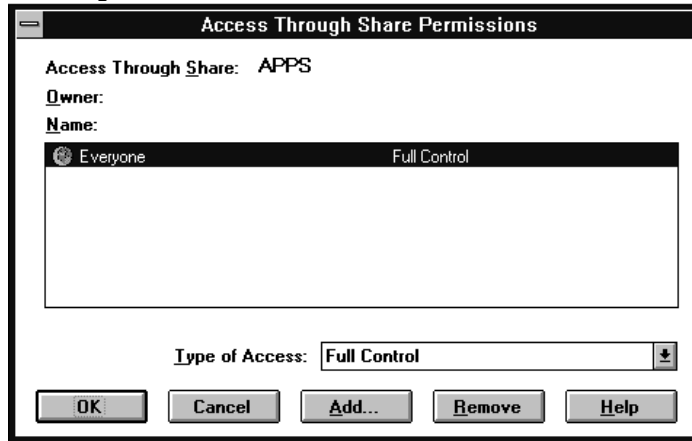
Select **Disk|Share As**. The **New Share** dialog box appears. In the **Share Name** field, type APPS. In the **Path** field, type c:\apps. In the **Comment** field, type Shared for GoldMine. When done, the **New Share** dialog box will look like the following figure.

### New Share dialog box



After these settings have been entered, select **Permissions**. Make sure that everyone has Full Control permission for APPS. When done, the screen will look like the following figure.

*Find dialog box*

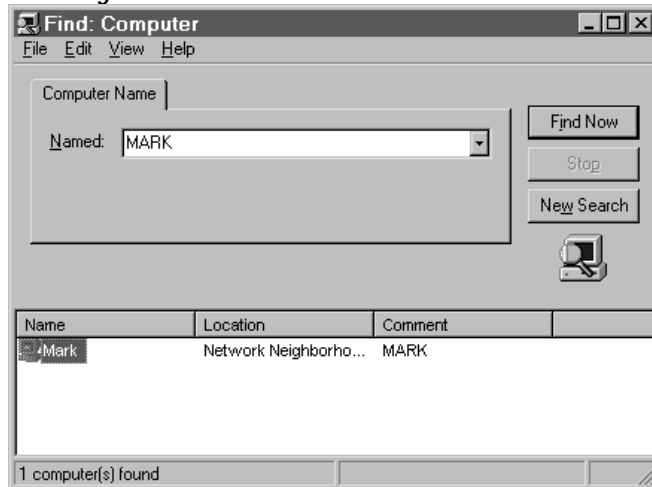


To set the access permissions, select **OK**. To set the New Share, select **OK**.

***Configuring the Installation for Workstations***

At the workstation, launch **Explorer**. Select **Tools|Find|Computer|Find Now**. Select the computer that is working as the *GoldMine* server. As shown in the following figure, the computer is called **MARK**.

*Find dialog box*



Double-click on the name of the computer designated as the server. A dialog box with available shared resources appears. Select **APPS**, then right-click, and select **Map Network Drive**. The drive letter used should be consistent between all workstation computers, that use G: for all workstations. Select **Reconnect at Startup**. For example:

*Map Network Drive dialog box*



### ***Installing GoldMine to the Server***

The installation must be performed from a workstation (a computer other than the server) that is running Windows 95 or Windows NT 4.0.



***Be sure to read "Upgrading to GoldMine 4.0" on page 1 before continuing.***

Insert the CD-ROM into the CD-ROM drive of a workstation. On most systems, the installation will start automatically. If installation does not start automatically after a few seconds, select **Start|Run**. The **Run** dialog box appears. Type d:\gm4se tup (replace d: with the drive letter of your CD-ROM drive, if necessary).

The **Welcome to GoldMine** dialog box will introduce the installation process.

When you have read the introduction, select **Next>**

The License agreement will be displayed. If you agree, click **Yes**.

Click **Custom**.

Click **Browse**.

Type G:\GOLDMINE then click **OK**.

Click **Next>**

Check **Workstation Setup Files, Program Files, Help Files and Reports & Form Templates**.

Click **Next>**

Once the files are copied, a prompt will request your registration information. *You must enter the required information to complete the installation.* You will be prompted for your serial number, which can be found on the License Certificate included in the software package.

### ***Creating the GoldMine Icon***

At each workstation, minimize all programs. On the workstation desktop, right-click to display a local menu. Select **New\Shortcut**. In the **Command Line** field, type G:\GOLDMINE\GMW4.EXE. In the **Name** field, type GoldMine 4.0.



Your shortcut(s) can be configured to populate the **Username** field with the appropriate username for each workstation by adding a `/u:username` switch to the command line such as G:\GOLDMINE\GMW4.EXE /u:BOB.

The *GoldMine* icon appears on the desktop. Repeat this procedure for each workstation.

To add users to *GoldMine*, see "Setting up *GoldMine* Users" in the *GoldMine Reference Manual*.

### ***Working with the Borland Database Engine (BDE)***

*GoldMine* uses the *Borland Database Engine (BDE)* to access the databases. For *GoldMine* to run properly, each workstation must have access to the BDE. Other applications also use the BDE, such as Delphi and other applications written by Borland or with Borland compilers. Most of these applications require the BDE to be installed to each workstation that uses the application.

If BDE is already installed on some of your workstations, check that *GoldMine* supports the installed version. At publication time, we currently *support only version 4.01*. You can get information about the current version, as well as supplemental BDE information, from Factsback bulletin #500. To order a bulletin, use your FAX machine to dial 310-459-1222, then press 3 for **Factsback**..Factsback documents are also available in Word 6 format from the following resources:

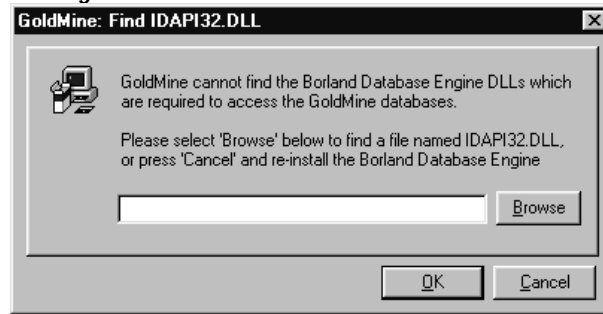
- GoldMine Software World Wide Web site at <http://www.goldminesw.com>
- GoldMine Software forum on CompuServe (go GoldMine)
- GoldMine Software Bulletin Board System (BBS) at 310-459-3443-see Bulletin #383 for more information about the GoldMine BBS

### ***Finding the BDE in Setup\BDEShare***

*GoldMine* does not require you to install BDE to each workstation. We have simplified the administration of BDE installation and upgrading the BDE by allowing all *GoldMine* users on a LAN to use a shared installation of BDE. When *GoldMine* is installed across a network, the Setup\BDEShare directory is automatically created under the GoldMine directory.

When launched on a workstation, *GoldMine* checks the registry for the location of the BDE. If *GoldMine* finds the BDE, then *GoldMine* will load the BDE from that location. If the BDE is *not* found in the registry, *GoldMine* will check Setup\BDE; once the BDE is found, *GoldMine* will load the BDE, then update the registry to reference that location. If the BDE cannot be found, *GoldMine* displays a dialog box, similar to the following figure.

#### **Locating the BDE**



To correctly designate the location of the BDE, you must select the IDAPI32.DLL; for example C:\[*directory*]\idapi32.dll, then select **OK**.

#### **Finding the BDE with GM.INI**

If you do not have the BDE in Setup\BDE and have many workstations to configure, use the command statement `NetIDAPI32DLL=` in GM.INI to reference the location of IDAPI32.DLL. By using this INI entry, you can avoid having to manually select the directory for IDAPI32.DLL on each workstation. After loading, *GoldMine* will update the registry with this location. Add the following lines to GM.INI (located in the GoldMine directory):

```
[GoldMine]
NetIDAPI32DLL=g:\apps\shared\bde\idapi32.dll (replace this with the
location of idapi32.dll)
```

#### **Registry Settings**

*GoldMine* can use different methods to initially locate the BDE. Regardless of the method used to locate the BDE when *GoldMine* is run for the first time on a workstation, the registry will be updated with this location. When *GoldMine* is launched subsequently, it will attempt to load the BDE from the registry location first.