

***GOLDMINE*[®] 5.0**

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Section One: Overview

The *GoldMine 5.0 Installation Guide* is designed for use as an “on-the-job” aid. The *Installation Guide* assumes familiarity with basic Windows terminology. Each section is designed in a modular format to minimize references to other sections, and to help you get your work done quickly and successfully.

Before installing GoldMine 5.0, it is essential that you plan your implementation ahead of time, in order to optimize setup across your organization.

After installation, GoldMine 5.0 will open the **Common Contact File database**. A **Demo File database** is also available. As you work through the procedures, you can use the sample data in the Demo database file, and create your own practice contact records and activities.

To open the Demo File, from the Main Menu, select **File|Open File**. The **Contact Files** dialog box appears. To open the Demo file, highlight the **Demo File** entry in the browse window, then select **Open File**.



For detailed descriptions of GoldMine’s screens, fields, and functions, see the online Help.

Customer Management for You and Your Workgroup

GoldMine offers small and medium-sized businesses a powerful, comprehensively integrated, sales and marketing solution. GoldMine was developed as a **workgroup customer manager**. Using this program, you can pull together both contact information and the users of that information. Most organizations, particularly those with a sales team, need to track not only the contacts, but their histories and pending activities as well. GoldMine relates all communications and activities back to the contact to help you manage your prospects and customers.

Unlike low-end Personal Information Managers (PIMs), and contact managers, GoldMine recognizes that organizations depend on various activities that are directly or indirectly tied to the selling process. From telemarketers to marketing and management, contacts and their information are constantly being tracked and/or supported by those within your company.

Understanding GoldMine's Database Structure

Each time you, or any user in your organization, adds a contact to GoldMine's database, a **contact record** is created. This contact record is the standard unit of information, the basic building block from which all other information is generated. Each contact record is like an individual index card—similar to those that make up a traditional Rolodex®. Each contact record has all the standard Rolodex information, such as name, company, phone and address. Each of these different line items on the Rolodex card translates to a corresponding **field** on the contact record. While GoldMine is based on this simple model, the amount of detail you can store and track is virtually unlimited. GoldMine maintains information according to your needs and requirements.

The contact record is also the basis for most scheduled work in GoldMine. The contact record acts as the central link between GoldMine's calendar and history—it contains all past and pending events related to the individual contact records in your GoldMine database. These events are defined as **activities**. These activities range from messages and calls, to appointments and to-dos. They define work routines for you and other GoldMine users.

Activities that you schedule for a future date and time are stored as records in GoldMine's **Calendar**. The model here is similar to a traditional day planner. Once appointments are kept, calls are made or messages are received, they're removed from the **Calendar**, and stored as completed activity records in a **History** tab folder.

Activities
are linked
to contacts



GoldMine links each activity record, whether it's still pending on the **Calendar** or completed in the history file, to both a GoldMine user, and a specific contact record. Whenever you display a contact record, you can view a list of what needs to be done for a contact in the **Pending** tab folder. You can also view a chronological log of all completed activities related to the contact in the record's **History** tab folder. With this relational structure, GoldMine ties all the basic elements of your contact relationships together. For each contact, you can track historical data, pending work, and general contact information.

Automating your Organization

GoldMine's customer management and sales force automation tools can increase productivity and promote communication for individuals or for any size and type of organization. However, larger organizations with extensive, multi-site networks and/or numerous remote users, may need to make extra efforts. Organizations with MIS departments should take measured steps before implementing the system.

To fully capture the potential benefits of GoldMine in such an organization, we suggest that you perform the following:

- Define information needs
- Assign roles for the implementation
- Win support from your entire organization
- Provide training

Defining Information Needs

Prior to installing and using GoldMine, you should clearly define the sales and marketing information needs of your organization. Whether you're the only user or one of multiple users, it's critical to determine your information requirements. Call upon a Solutions Partner or form an internal task force that includes representatives from groups within the organization that are essential to accomplishing this goal. By employing the Solutions Partner and/or task force to define your needs, you can predetermine how GoldMine can best meet those needs.

Assigning Roles

Once your organization has carefully established its information requirements, select project coordinators or managers and technical staff to implement these requirements in the installation, setup, and design of GoldMine.

Winning Support

Ensure that GoldMine is introduced to, and supported by, all the potential users of the information. Even if your automation project originates from a single group, the effect of workgroup-based information and communication management will be felt throughout the organization. Other groups whose functions will rely on the information and input provided by any individual group must have a stake in developing and maintaining the system.

Providing Effective Training

After dedicating a great deal of time, energy and resources to finding a system, defining your needs and implementing the new technology, be sure to invest the necessary resources to provide training and support. The more skilled you and your work force are at using GoldMine, the more effective this tool will be. An Authorized GoldMine Solutions Partner can be an invaluable resource. For a list of Authorized Solutions Partners, visit the GoldMine Software Corporation Web Site at <http://www.goldmine.com>.

Once the system is up and running, users should provide continued input on GoldMine's effectiveness based on their daily use of the system.

Section Two: Before You Begin

This chapter contains a list of prerequisites you should meet before installing GoldMine 5.0, including system requirements for stand-alone and network systems.

GoldMine System Requirements

The following minimum hardware components are required for a workstation:

- Pentium or higher
- 32 MB RAM
- Video capable of displaying 800x600 resolution in 256 colors

The Operating System requirements are Windows 95/98/2000, NT4, or Terminal Server.



GoldMine Technical Support does not support or recommend using Windows emulators, either on MACs or under Linux.

Upgrading to GoldMine 5.0

If you are upgrading from a previous version of GoldMine, you must make a backup of your existing GoldMine system before continuing. In addition to the 50MB required for installation, please make sure that you have additional free space on your hard disk of at least 2½ times the size of your largest database. For example, if your largest database is CONTHIST, which has an 85 MB .DBF and a 15 MB .DBT for 100 MB total, you should have 250 MB free disk space before continuing (2½ x 100 MB).

A database conversion is required when upgrading from GoldMine v2.5a, v3.x, or v4. This should occur automatically when GoldMine is installed into the path of the existing GMW.exe, GMW32.exe, or GMW4.exe. Naturally, a backup and full measure of database maintenance is highly recommended before an upgrade should proceed.

Section Three: Installing GoldMine on a Single-User System

This chapter gives instructions for installing GoldMine on a single-user system.

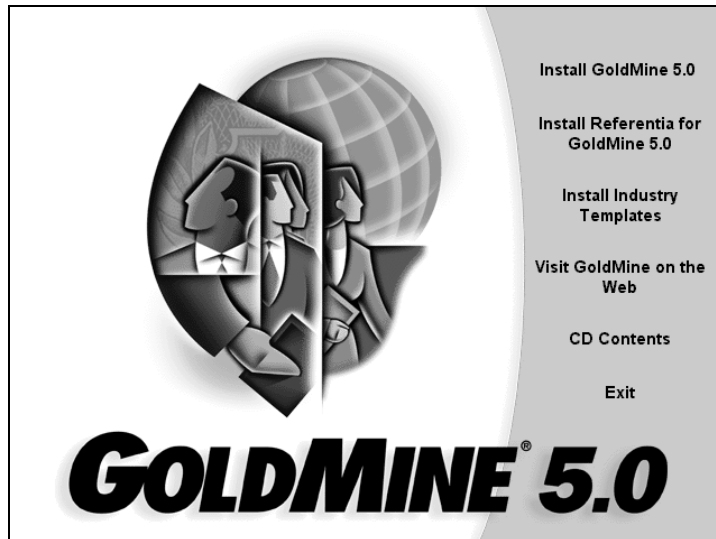
Opening and Welcome to GoldMine

All GoldMine 5.0 program files are installable from a single CD-ROM.

Before starting to install GoldMine, exit any programs running on your system.

1. Insert the CD-ROM into the drive. The opening screen should display the following image. If so, go to step 5.

GoldMine 5.0
installation
opening
display





If the **GoldMine 5.0** screen does not appear after a few seconds, from the Windows Taskbar, select **Start | Run**. The **Run** window appears.

In the **Open** field, type **D:\GM5SETUP**, substituting the letter name of the CD-ROM drive, if necessary. Select **OK**.

2. To start the installation, select **Install GoldMine 5.0**. The **Welcome to GoldMine 5.0 Setup!** screen should appear.
3. When you have read the introduction, select **Next>**. The **Software License Agreement** dialog box appears.
4. When you have read and agreed to the license agreement, select **Yes** to continue the installation.

Setup Type dialog box



5. Select the type of installation that you want from the following options:
 - **Typical:** installs GoldMine with complete functionality. This is the default selection, which is recommended for most users.
 - **Compact:** installs the minimum files needed to run GoldMine.
 - **Custom:** displays the **Select Components** dialog box, from which you can select the individual GoldMine modules that you want to install. Advanced users or administrators installing on a network should select this option.

- You can accept the default **Destination Folder**, or designate a different installation destination.



If you are upgrading from a previous version of GoldMine, you *must* install GoldMine 5.0 into the same directory as your existing GoldMine system.

- To specify a different installation destination, select **Browse**. From the **Choose Folder** dialog box, you can either type in a new path, or browse to an existing path.
- If the specified directory does not exist, the installation program will create the directory.
- When done, select **Next>**. GoldMine copies files to your hard disk. The **Setup** status bar displays the progress of the installation. When GoldMine 5.0 is fully installed, the **Welcome to GoldMine** window introduces online product registration.
- Select **Next>** to display the **Enter License Information** window.

Enter License Information dialog box



To advance to each field by using the keyboard, press **Tab**. Do *not* press **ENTER** until you are ready to advance to the next dialog box of the wizard.

- Type your personal information and when done, select **Next>**.

Enter License Information dialog box

12. On the second **Enter License Information** dialog box, complete the information that describes your GoldMine purchase. When done, select **Next>**.

Enter GoldMine Serial Number dialog box

13. Type the **GoldMine Serial Number** that appears on the License Certificate included in the GoldMine package. Be sure to include the **Key Code** value. The following figure shows where to locate the complete **Serial Number** and the **Key Code** information on your License Certificate.

Finding your
GoldMine 5.0
Serial Number
and Key Code
from the
License
Certificate



Place the stickers with your
serial Numbers in a safe place.

When you have filled each segment of the field, the cursor advances automatically to the next field.



Important! The License Certificate is the *only* place that your GoldMine Serial Number and Key Code values appear. You must have *both* the Serial Number *and* Key Code values to reinstall GoldMine. After installation, be sure to place the License Certificate in a safe location, and affix the stickers (placed on the right side of the License Certificate) to your GoldMine *At a Glance* Guide. You'll need this information if you call for technical support.



Please take special care when entering Serial Number and Key Code as the letter "O" and the number "0" can appear to be similar.

If you are installing GoldSync, continue with step 14.

If not, go to step 15.

14. To install GoldSync, type the serial number that appears on the License Certificate in the **GoldSync Serial Number** field. When you have filled each segment of the field, the cursor advances automatically to the next field. Be sure to include the **Key Code** value.
15. When done entering the serial number(s), select **Next>**.

Enter Your Username dialog box



16. In the Username field, type a designation for yourself of up to eight characters, which can be your first name, last name, etc. GoldMine adds that name to the **Users Master File**.



By default, GoldMine installs a **MASTER** account. The Password entry for the default **MASTER** account is `access`.

17. To enhance the security of your personal GoldMine account, you can enter an optional password. To include a password in your GoldMine startup, type a combination of up to eight letters and/or numbers in the Password field. If you do not want a password, you can leave the field blank.

18. To complete the installation, select **Finish**. The GoldMine login banner appears with your username in the Username field.




To automatically bypass the login banner for users without passwords, select **E**dit|P**r**eferences, then select the **L**ogin tab. Check **B**ypass **l**ogin banner. If a user *has* a password, but checks **B**ypass **l**ogin banner, and tries to start GoldMine, the following message appears:

Invalid Username or Password

19. To start GoldMine, type your password if necessary, then select **O**K.

Starting GoldMine

1. Start Windows, if necessary.
2. Once Windows is running, you can start GoldMine in one of two ways:
 - If you have placed a GoldMine shortcut icon on your desktop, double-click  .
 - Select the Windows **S**tart menu, then select **P**rograms. If GoldMine is not a listed item on the **P**rograms menu, then navigate through the menus—such as selecting **A**pplications—to reach the location where the GoldMine icon and program name appears. Select the GoldMine entry.

**GoldMine 5.0
login banner**

3. In the Username field, GoldMine displays the user who installed the program. In a single-user copy of GoldMine, that entry is your name. If you are using a multi-user copy, type your user name in the field if necessary, then *either* press to advance to the Password field, *or*, if no password entry is required, select OK.
4. If a password is required, in the Password field, type your unique password. Asterisks represent each character in the field as you type. When done, select OK.

If your user name and password are correct, GoldMine starts.

Section Four: Installing GoldMine on a Network

This chapter contains instructions for installing and upgrading GoldMine 5.0 on the following network systems:

- Windows NT 4.0/Windows 95/98/2000
- Novell NetWare
- Windows NT 3.51

If you are upgrading to GoldMine, be sure to continue with “Upgrading to GoldMine 5.0” 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 Microsoft’s FTP site at:

<ftp://ftp.microsoft.com/Softlib/MSLFILES/VRDUPD.EXE>. **Be sure to verify that all Windows 95 version 4.00.950B systems that will run GoldMine have the copy of VREDIR.VXD, which eliminates these errors.**

Upgrading to GoldMine 5.0

If you are upgrading from a previous version of GoldMine, you must make a backup of your existing GoldMine system before continuing.

In addition to the 50MB required for installation, please 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 freed up 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 instructions as a new installation of GoldMine 5.0; you should install to the same directory as the previous version of GoldMine. Always create a complete backup and perform maintenance before upgrading.

GoldMine 5.0 is not compatible with previous versions of GoldMine Software products, including GoldSync 1.x, GoldMine 1.x, GoldMine 2.x, GoldMine 3.x and GoldMine 4.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, Windows 95, Windows 98 or Windows 2000 Network

A Windows 95/98/2000 or NT 4.0 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 non-dedicated GoldMine server. Select a workstation based on which machine has the best processor speed, disk speed, and the most RAM and disk space. All of the other computers connected to the server are referred to in this document as “workstations.”

GoldMine Server Considerations

The minimum requirements for your GoldMine server are highly dependent on the specific load requirements. The minimum recommended server requirements are a Pentium 133 with 32Mb RAM and a 10-Mbits, network card running Windows 95. Note, these requirements would not suffice for a 300-user installation. GoldMine Software Corp. recommends that you work with an Authorized Solutions Partner to plan your network requirements accordingly.

Operating Systems

The operating systems currently recommended and supported are as follows:

- Windows NT 4.0
- Windows 95/98/2000
- Microsoft Terminal Server

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)” on page 32.

Starting the Installation

To begin the installation process on the server, perform the following steps:

1. Insert the CD-ROM into the CD-ROM drive of the server. On most systems, the installation wizard starts automatically, displaying the **GoldMine 5.0** screen.

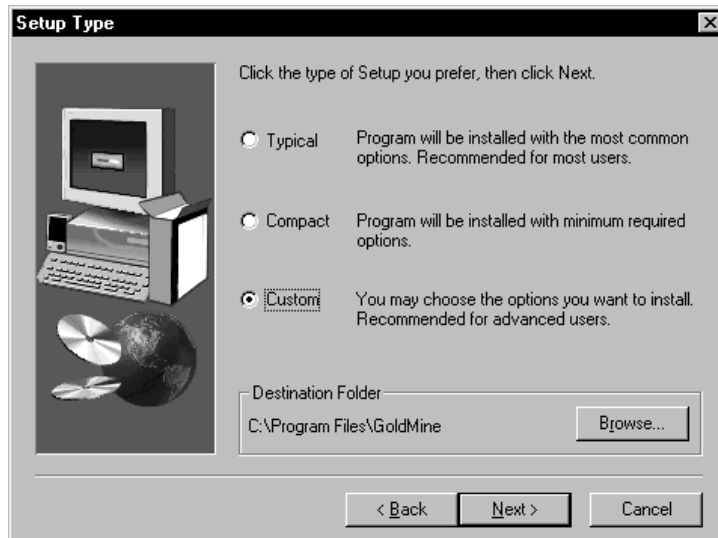


If the **GoldMine 5.0** screen does not appear after a few seconds, from the Windows Taskbar, select **Start | Run**. The **Run** window appears.

In the **Open** field, type **D:\GM5SETUP**, substituting the letter name of the CD-ROM drive, if necessary. Select **OK**.

2. From the **GoldMine 5.0** screen, select **Install GoldMine 5.0**. The **Welcome to GoldMine 5.0 Setup!** dialog box introduces the installation process. When done reading the introduction, select **Next>**.
3. The **Software License Agreement** appears. If you agree with the terms stated, select **Yes**.
4. The **Setup Type** dialog box appears, as shown below. Select **Custom**.

Setup Type dialog box



5. Select **Browse**.
6. Type **C:\Apps\GoldMine**, then select **OK**. If upgrading, navigate to the location of your current GoldMine system.

7. Select **N**ext>.
8. Select **P**rogram Files, Help Files, Reports & Form Templates and Workstation Setup Files.



Uncheck Database Engine.

9. Select **N**ext>.

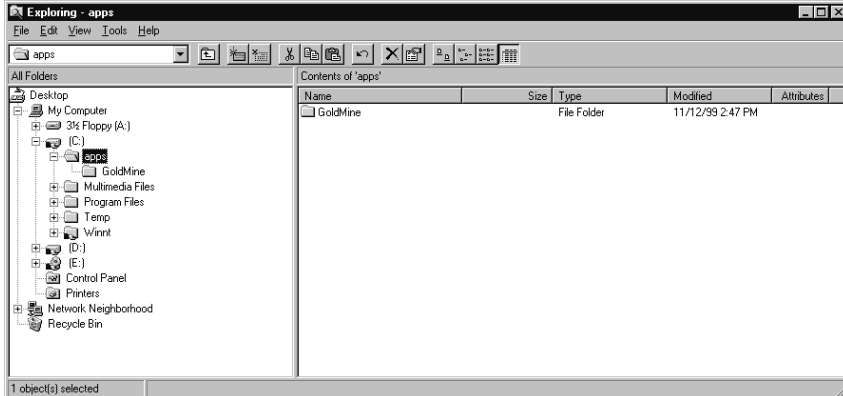
Once the files are copied, a prompt requests your registration information. *You must enter the required information to complete the installation.* You will be prompted for your serial number, which can be found on the License Certificate included in the software package.

Sharing the Directory

To allow other users to access the directory, follow these steps:

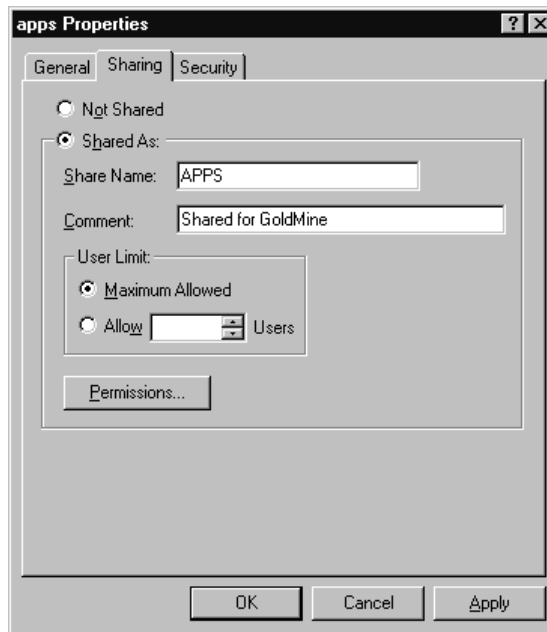
1. From the server system, right-click on **S**tart, then select **E**xplore. If directories on the C drive do not appear, click \pm beside the C drive so that they appear.
2. Select the **apps** directory.

Finding the Program Files directory



3. Right-click to display the local menu, then select **S**haring.

Sharing tab
(NT 4.0 screen)



4. Select *one* of the following steps depending on your system:
 - **Windows 95/98:** Select Shared As. In the Share Name field, type Apps. In the Comments field, type Shared for GoldMine. For Access Type, select Full.
 - **Windows NT 4.0/2000:** Select Shared As. In the Share Name field, type APPS. In the Comment field, type Shared for GoldMine. Click Permissions. Make sure that all users (or a group that includes all GoldMine users) has Full Control.
5. Select **OK**. Windows will place a graphical “hand” icon underneath the **apps** tab in **Explorer** to indicate that the directory has been correctly shared.

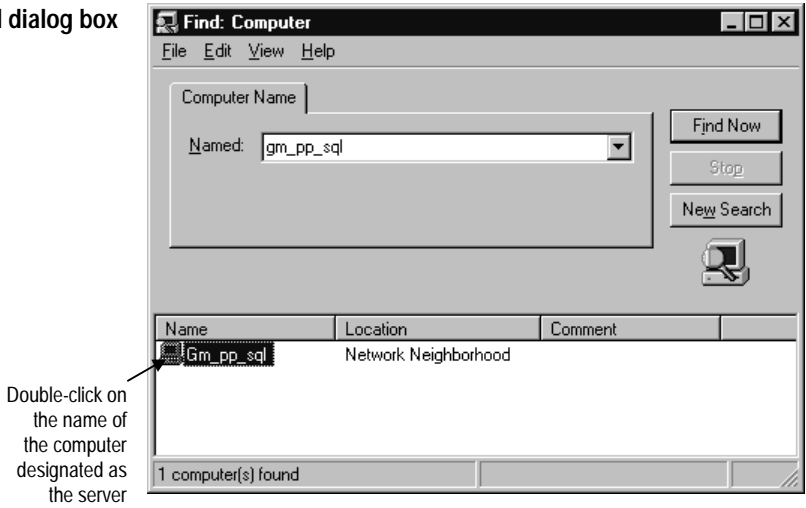
Configuring the Workstations

To configure each workstation to communicate with the GoldMine server, perform the following steps:

1. At each workstation, launch **Windows Explorer**.
2. Select Tools|Find|Computer.

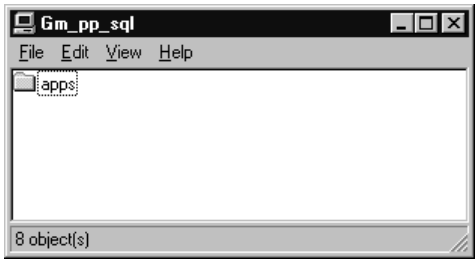
3. Select the computer that is acting as the GoldMine server. In the following figure, this computer is called gm_pp_sql.

Find dialog box



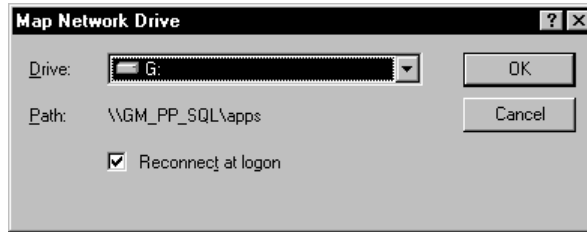
4. Double-click on the name of the computer designated as the server. A dialog box with available shared resources appears.

Working with shared resources



5. Select **Program Files**, then right-click to display a local menu, and select **Map Network Drive**.
6. Select drive **G :**, then select **Reconnect at logon**.

Map Network Drive dialog box



Repeat this procedure at all workstations. Be sure the users specify the same Drive letter—for example, G:—at all workstations.

Creating the GoldMine Icon

To create the GoldMine icon on the users' desktops:

1. At each workstation, minimize all programs.
2. On the workstation desktop, right-click, then select **New|Shortcut**.
3. In the **Command Line** field, type `G:\GOLDMINE\GMW5.EXE`.
4. In the **Name** field, type `GoldMine 5.0`, then select **Finish**.



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\GMW5.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, you *must* enter contact file listings for the workstations as described below.

1. Double-click on the GoldMine icon.
2. In the Username field, type `MASTER`. In the Password field, type `ACCESS`.
3. Press and hold **CTRL**, then click **OK**. The **Contact Set Databases** window appears with a list of available contact sets.
4. Position the mouse pointer within the **Contact Set Databases** window, then right-click to display the local menu.

5. Select **A**ttach Database. In the **D**escription field, type Workstations map for Common.
6. In the **P**ath (**A**lias) field, type G: \GOLDMINE\COMMON (If you mapped the server as a different drive, substitute G: with that letter).
7. Select **O**K.
8. Highlight this entry, then select **O**pen.

To add users to GoldMine, see the “Maintaining GoldMine” section of the online Help.

Installing GoldMine on a Novell NetWare Network

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.

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.

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 guide. 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
```

Using Method 1, you must modify some users' private login scripts if another MAP command overrides the initial mapping of drive G: in the system login script. NetWare assigns 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 or support using Novell's Client32 or Intranetware drivers, as users at some sites have found them problematic. If you must use Client 32, be sure to follow the instructions in technical Factsback bulletin #348. To order bulletins, use your fax machine to dial 310-459-1222, then press 3 for Factsbacks. Factsback documents are also available in Word 6 format from the following resources:

GoldMine Software World Wide Web site at
<http://www.goldmine.com>

GoldMine Software FTP site at
<ftp://ftp.goldminesw.com/pub/faxback/tech/>

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 up or troubleshooting network settings.

Installing GoldMine to the Server

Be sure to read "Upgrading to GoldMine 5.0" on page 49 before continuing.

Insert the CD-ROM into the CD-ROM drive of the server. On most systems, the installation wizard starts automatically, displaying the GoldMine 5.0 screen.



If the GoldMine 5.0 screen does not appear after a few seconds, from the Windows Taskbar, select **Start | Run**. The Run window appears.

In the **O**pen field, type `D:\GM5SETUP`, substituting the letter name of the CD-ROM drive, if necessary. Select **OK**.

1. From the GoldMine 5.0 screen, select **Install GoldMine 5.0**. The **Welcome to GoldMine Setup!** dialog box introduces the installation process. When done reading the introduction, select **N**ext>.
2. The **Software License Agreement** appears. If you agree with the terms stated, select **Y**es.
3. Select **C**ustom.

4. Select **B**rowse.
5. Type **G : \GOLDMINE**, then select **O**K.
6. Select **N**ext>.
7. Select **P**rogram Files, **H**elp Files, **R**eports & **F**orm Templates, and **W**orkstation Setup Files then select **N**ext>.



Uncheck the **Database Engine** option.

Once the files are copied, a prompt requests 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:

The ... \GoldMine\ directory contains the GoldMine program files and system data files, such as the user database, license, and help files. Grant the following trustee rights in this 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 Shared and Read Only.
- All other files should be flagged as Non-shared 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

To set up individual workstations, perform the following:

1. At each workstation, minimize all programs. On the workstation desktop, right-click, select **New|Shortcut**. In the **Command Line** field, type `G:\GOLDMINE\GMW5.EXE`.
2. In the **Name** field, type `GoldMine 5.0`, then select **Finish**. The GoldMine icon appears on the desktop.

Repeat this procedure for each workstation.

To add users to GoldMine, refer to the “Maintaining GoldMine” topic in the online help.

Installing GoldMine to a Windows NT 3.51 Network

GoldMine 5.0 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 5.0 will *not* run on a Windows NT 3.51 workstation. Although GoldMine 5.0 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 5.0 from that server on Windows NT 4.0 and Windows 95/98 workstations.



You can also run GoldMine 5.0 on Windows NT 4.0—see “Installing GoldMine on a Windows NT 4.0 or Windows 95/98/2000 Network” on page 16.

Configuring the Server for GoldMine

The Windows NT PC or workstation that you select as your GoldMine server should have the best processor speed, disk speed, and the most RAM and disk space. See “GoldMine System Requirements” on page 5.

All of the other computers connected to the server are referred to herein 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 **F**ile|**R**un. The Run dialog box appears.

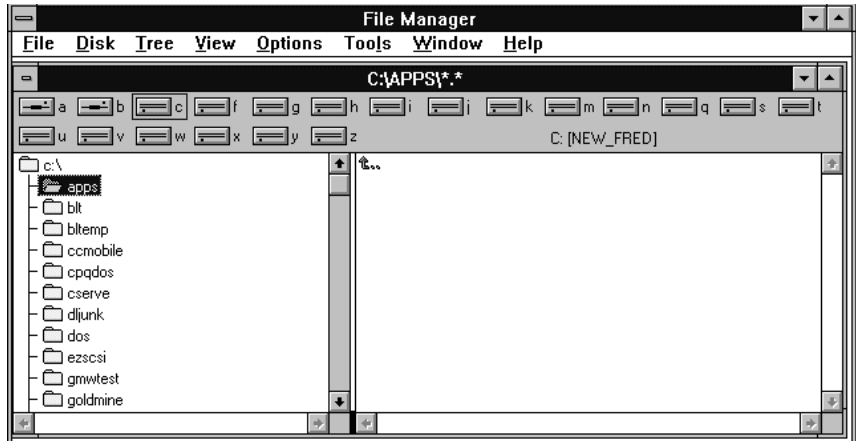
Type **C**OMMAND, then select **O**K. Type the following at the prompt:

```
C :            
MD  \APPS     
EXIT       
```

Sharing the Directory

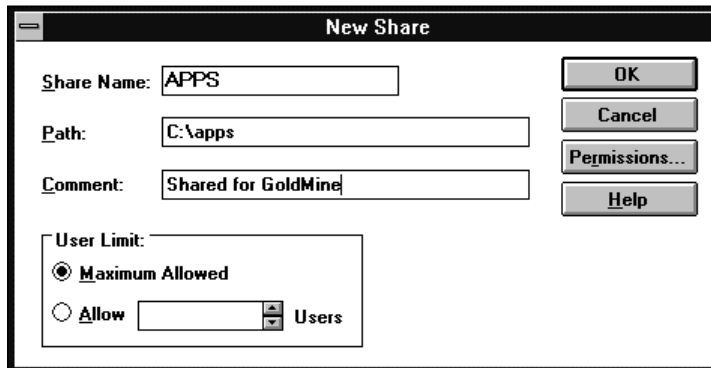
From the server system, in Program Manager, double-click on the **File Manager** icon. Select the **APPS** directory. The **File Manager** window will look like the following figure.

Selecting the APPS directory



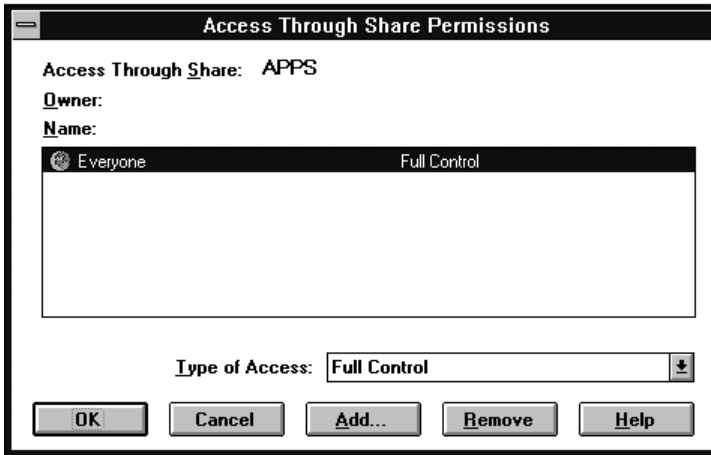
1. Select **Disk|Share As**. The **New Share** dialog box appears.
2. In the **Share Name** field, type **APPS**. In the **Path** field, type **C : \APPS**.
3. In the **Comment** field, type **Shared for GoldMine**.
4. When done, the **New Share** dialog box will look like the following figure.

New Share dialog box



5. 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.

Access Through Share Permissions dialog box



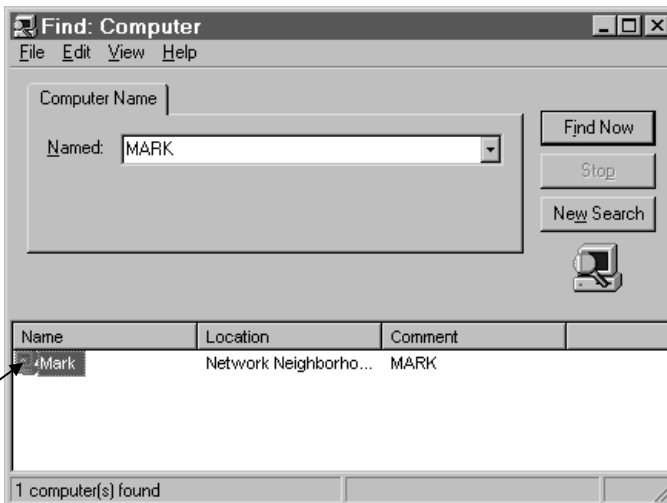
- 6. To set the access permissions, select OK.
- 7. To set the New Share, select OK.

Configuring the Installation for Workstations

To configure the workstations prior to installation, perform the following:

- 1. At the workstation, start Explorer.
- 2. Select Tools|Find|Computer|Find Now. Select the computer that is acting as the GoldMine server. As shown in the following figure, this computer is called MARK.

Find dialog box



Double-click on the name of the computer designated as the server

3. A dialog box with available shared resources appears. Select **APPS**, then right-click, and select **Map Network Drive**.
4. Select drive **G :**, then select **Reconnect at Startup**.

Map Network
Drive
dialog box



Repeat this procedure at all workstations. Be sure the users specify the same Drive letter—for example, **G:**—at all workstations.

Installing GoldMine to the Server

The installation must be performed from a workstation (a computer other than the server) that is running Windows 95/98/2000 or Windows NT 4.0.



Be sure to read “Upgrading to GoldMine 5.0” on page 49 before continuing.

1. Insert the CD-ROM into the CD-ROM drive of the server. On most systems, the installation wizard starts automatically, displaying the **GoldMine 5.0** screen.



If the **GoldMine 5.0** screen does not appear after a few seconds, from the Windows Taskbar, select **Start | Run**. The **Run** window appears.

In the **Open** field, type **D: \GM5SETUP**, substituting the letter name of the CD-ROM drive, if necessary. Select **OK**.

2. From the **GoldMine 5.0** screen, select **Install GoldMine 5.0**. The **Welcome to GoldMine Setup!** dialog box introduces the installation process. When done reading the introduction, select **N**ext>.
3. The **Software License Agreement** appears. If you agree with the terms stated, select **Y**es.
4. Select **C**ustom.

5. Select **B**rowse.
6. Type `G:\GOLDMINE`, then select **O**K.
7. Select **N**ext>.
8. Select **P**rogram Files, **H**elp Files, **R**eports & **F**orm Templates, and **W**orkstation Setup Files then select **N**ext>.



Uncheck the Database Engine option.

Once the files are copied, a prompt requests 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

To create the GoldMine icon on the desktop:

1. At each workstation, minimize all programs.
2. On the workstation desktop, right-click to display a local menu.
3. Select **N**ew|**S**hortcut.
4. In the **C**ommand **L**ine field, type `G:\GOLDMINE\GMW5.EXE`.
5. In the **N**ame field, type `GoldMine 5.0`.
6. Select **F**inish. The GoldMine icon appears on the desktop

Repeat this procedure for each workstation.

To add users to GoldMine, refer to “Maintaining GoldMine” in the online help.

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 versions 4.51, 5.00 and 5.01*. You can get information about the current version, as well as supplemental BDE information, from Factsback Bulletin #500. To order bulletins, use your fax machine to dial 310-459-1222, then press 3 for Factsbacks. Factsback documents are also available in Word 6 format from the following resources:

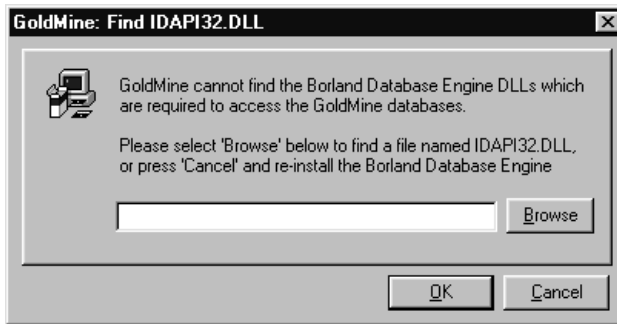
- GoldMine Software World Wide Web site at <http://www.goldminesw.com>
- GoldMine Software FTP site at <ftp://ftp.goldminesw.com/pub/faxback/tech/>

Finding the BDE in \Setup\BDEShare

GoldMine does not require you to install BDE to each workstation. Instead, all GoldMine users on a LAN can 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 its subdirectory \Setup\BDEShare. 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**.

Specifying the location of 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 again, GoldMine will first try to load the BDE from the registry location.

Working with the Borland Database Engine Configuration File(s)

Some situations require changes to the BDE configuration file(s) (`idapi32.cfg`) to enable all GoldMine users to access all databases, such as when making changes to the BDE configuration that are global to all users

If all users access the BDE located on the server, they should use the same configuration file, and therefore have the same list of aliases and settings. However, users may install or use an existing, compatible version of BDE on their workstation that successfully accesses GoldMine.



Unless other constraints require locating the BDE (or the configuration file) on the workstation(s), forcing the workstation(s) to use the server's BDE configuration is the easiest method to administer.

Copying the Server's BDE Configuration to a Workstation

You can make the configuration file of the server's BDE the default configuration for the workstation. Using this method, the workstation can access its local BDE with the server's configuration file.

1. From the Windows task bar, select **Start**, then select **S**ettings|Control Panel.



BDE
Administrator

2. Double-click **BDE Administrator**.
3. Quit GoldMine, *and* any other application(s) using the BDE.
4. From the BDE Administrator Main Menu, select **O**bject|**O**pen Configuration. The **O**pen dialog box appears.
5. Browse to the location of the IDAPI32.CFG that you want to select as the default configuration for this workstation. Select **O**pen.
6. Click **X** on the title bar to close the BDE Administrator.
7. The BDE Administrator asks:
8. Use G:\GoldMine\Setup\BDEShare\ as a default configuration?
9. Select **Y**es.

Changing the dBASE Level in the BDE

An incorrect dBASE level setting in the BDE Administrator can generate database errors. If your BDE was installed by another application, verify that the dBASE level setting is set appropriately for GoldMine's use.





Be sure to back up all GoldMine databases before proceeding. A change to the dBASE level setting requires you to rebuild all databases.

1. From the Windows task bar, select **Start**, then select **Settings|Control Panel**.

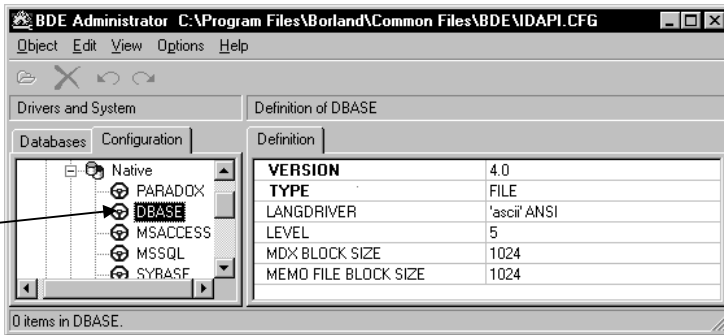



BDE Administrator .

2. Double-click **BDE Administrator**.
3. Quit GoldMine, *and* any other application(s) using the BDE.
4. Select the **Configuration** tab.
5. In the left pane, double-click  **Configuration**.
6. Double-click  **Drivers**.
7. Double-click **Native**.

Checking the dBASE LEVEL setting in the BDE

Select the **Native** driver **DBASE**



8. Select **DBASE**.
9. In the right pane, check that **LEVEL** is set to 5.
10. To save your change, from the BDE Administrator Main Menu, select **Object|Apply**.
11. Click  on the title bar to close the BDE Administrator.

Section Five: Setting up Databases

Using GoldMine's **Database Wizard**, you can create a blank database structure. Once created, you can later copy data into the database, by transferring contacts into it from other databases. You may either import data from dBASE, ASCII, Space Delimited Files, and SQL tables, or use synchronization to share information with other GoldMine users.

1. To create a database, select **File|New Database**.
2. The **Welcome to the Databases Wizard!** appears.

Create GoldMine Database Wizard



The first dialog box of the **Create GoldMine Database** wizard contains the following options:

Please enter the description of the new file

Type a descriptive title for the contact set. When creating a database a contact set, GoldMine uses this title when listing the file in the **Contact Files** dialog box. However, when you 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.

dBASE database files The only option available for GoldMine 5.0 is selected by default. For information on GoldMine® FrontOffice 2000™, which re-hosts to Microsoft SQL Server, please contact your GoldMine Solutions Partner.

3. When done, select **Next**>.

Setting Database Options

After you finish selecting options on the first dialog box of the **Create GoldMine Database** wizard, the second dialog box appears.

Create GoldMine Database wizard



To create a contact set:

1. Select the **Create a new contact database** option.
2. In the field below the option label, either type the path to the database directory, or select to search through directories on your system. The **Browse for Folder** dialog box appears, from which you can select a directory.
3. To specify whether or not you want to copy data from the open contact set into the new contact set, select from the following options:

- Copy the data from the current files to the new databases** Copies data from the currently open contact database file to the newly created database.
- Create empty tables** Creates a database structure that can receive data at a later time.
- Rehost individual tables** Displays the **Rehost Selected Tables** dialog box, which applies only to GoldMine FrontOffice 2000 users.

4. When done, select **Next>**.

If you selected *either* **Copy the data from the current files to the new databases** or **Create empty tables**, the **Database Access** dialog box appears. Continue with “Setting Access Options.”

If you selected **Copy individual tables**, the **Rehost Selected Tables** dialog box appears.

Setting Access Options

When you advance after selecting options on the second dialog box of the **Create GoldMine Database Wizard**, 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

The **Database Access** dialog box contains the following options:

- Allow access to** Grants access to only the selected user or user group. To select a user or user group, select a name from the drop-down list.
- To grant access to all users, accept the default entry of **(public)**.
- Contact set code** Unique value given to each *database* that GoldMine uses to associate synchronization data with the correct database(s). Using a contact set code allows remote synchronization of other databases, regardless of the name given locally to the database.
- For example, an east coast branch office and a west coast branch office might have virtually the same contact set. Each branch office wants to synchronize data from their local contact set with the other office.
- The east coast office named the contact set *Industrial*, while the west coast office named the same contact set *Manufacturing*. If each office assigns the same **Contact set code** value to the local copy of the database, the offices can synchronize data.
- Allow database access only from this GoldMine installation** Allows *only* the currently running GoldMine (as determined by serial number) to log into the database. A GoldMine system with a different serial number cannot log into the database.

When done defining access rights to the database, select **Next>**.

Creating Database Files

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

When ready to start the process, select **Finish**. If you are copying records as part of the process, creating a contact set can be a time-consuming process, depending on the number of records being copied. To stop the process at any time, select **Cancel**.

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

When GoldMine has finished creating the contact set, the **Creating Databases Files** status window closes.

Section Six: Upgrading your GoldMine or GoldSync License

As your company grows, you may need to change your GoldMine or GoldSync license. These changes may include:

- Adding more GoldMine and/or GoldSync sites to your existing license
- Generating a separate serial number to create a sublicense for those users who use GoldMine on an offsite PC
- Updating your registration information with GoldMine Software Corporation

Using the **GoldMine License Manager**, you can easily and quickly perform any of these upgrades. Before working with the **GoldMine License Manager**, continue with “GoldMine’s Flexible Licensing System” for details on working with the GoldMine license to meet the needs of your organization.

GoldMine’s Flexible Licensing System

The GoldMine 5.0 product family offers the utmost in licensing flexibility for both small businesses and large enterprises. GoldMine 5.0 is sold with one serial number license, the Master License. An organization can then create sublicenses for each remote office, and for each remote user, changing the licensing configurations as required over time. The single distributed Master License serves as the authentication mechanism for easy and secure synchronization across the entire organization.

Features and Benefits

The following scenario illustrates the features and benefits of the Master License:

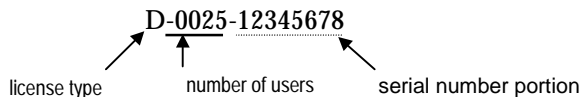
ABC Company's New York headquarters is a networked office of 15 users. ABC also has offices in Boston and Seattle with 5 users each. All 25 people in the organization have notebook PCs, and routinely synchronize.

ABC would purchase a 25-user GoldMine 5.0 license and a 25-site GoldSync 5.0 license. These licenses would be installed once, on the headquarters' network, and serve as the primary Master License. Using the License Manager in GoldMine 5.0, ABC will create two Site Licenses of five users each: one Site License for Seattle, and one Site License for Boston.

These sublicenses will be installed on the networks in those cities, and serve as Site Licenses of the original Master License. From the Master License, or any of the Site Licenses, ABC can then create sublicenses for each of the remote users' notebooks; that is, the Undocked License. All these licenses throughout the organization share the *same* GoldMine serial number.

This flexible licensing hierarchy simplifies GoldMine's licensing, and also enables the Master and Site Licenses to control the security and content of each of their remote undocked users!

A GoldMine 5.0 license looks like the following example:



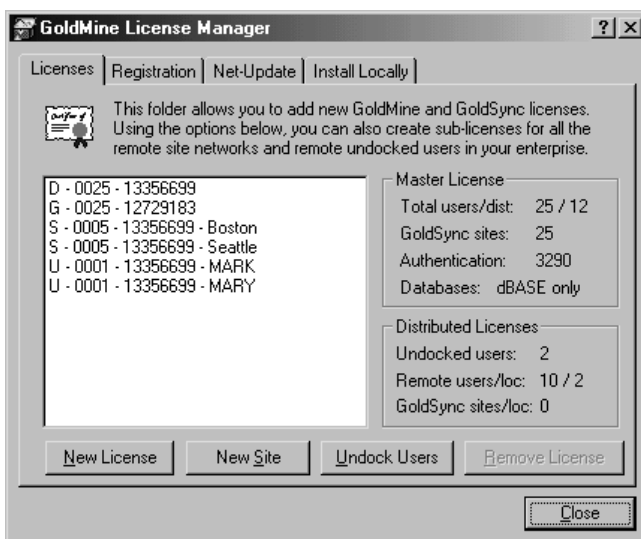
The first character denotes the license or sublicense type, D in this example. For a list of types, see "License Types" on the following page. The first set of numbers denotes the license count, 25 users in this example. The last set of numbers denotes the actual serial number, 12345678. The Site License for the Boston office would be S-0005-12345678-BOSTON. The Undocked Sublicense for user JON would be U-0001-12345678-JON.

Accessing the GoldMine License Manager

From the Main Menu, select **File|Configure GoldMine|License Manager**.

GoldMine's License Manager shows all the remote sites controlled by the current license. The License Manager of the GoldMine system running in ABC's New York headquarters will list entries similar to those shown in the following figure.

GoldMine License Manager



The License Manager of the Site License in Boston will show:

S-0010-12345678-BOSTON

U-0001-12345678-MARK

U-0001-12345678-MARY

Types of GoldMine Licenses

A Master License must be installed *only* on the organization's primary network.

The following Master License types are available:

GoldMine dBASE (D-xxxx users)

GoldSync (G-xxxx sites)

The Master License creates the following sublicense types for remote sites and remote users of the organization:

GoldMine Undocked (U-0001 user)

GoldMine Sublicense (S-xxxx users)

GoldSync Sublicense (Y-xxxx sites)

The Master License is inherited by all sublicenses to ensure that all the organization's sublicenses are authenticated properly during synchronization.

Creating and installing the sublicenses correctly is important because they control security for synchronization throughout the organization. From the **License Manager**, select *either* **New Site** or **Undocked User**. These options produce the sublicenses to use when installing GoldMine on the remote site networks and undocked notebooks.

Increasing the Master License

Only the Master License can be increased; that is, Site Licenses and Undocked Licenses *cannot* be increased. From the **License Manager**, select **New License**, then enter a new GoldMine or GoldSync serial number.

A Master License increase for GoldMine has a unique letter identification:

GoldMine dBASE (D-xxxx users)

However, a GoldSync license increase has the same letter identification as an original license:

GoldSync (G-xxxx sites)

Working with the License File

The license file, LICENSE.DBF, must exist only in the GoldMine “root” directory of each GoldMine installation. If the LICENSE.DBF file is deleted, GoldMine will prompt the user for a license number when he next logs in.

Do *not* delete and recreate the primary Master License file, since a new Master License file creates an authentication seed that will be incompatible with all the existing sublicenses currently using the authentication seed from the original Master License file. If you recreate the Master License, you must regenerate all site and undocked licenses.

Creating a Sublicense for a Remote Office or Site

An organization with multiple offices and users can create individual sublicenses for each site or user from the single Master License. A site sublicense will install that license on only *one* remote server. An undocked user sublicense will install that license on only *one* remote PC. However, you can create multiple, different site and undocked licenses up to the maximum permitted by the Master License. To create a sublicense for a remote user, see “Creating a Sublicense for an Undocked User” on page 46.



When installing GoldMine on each remote computer, the user *must* enter the remote site or sublicense number generated by the Master License. There are two methods of accomplishing this:

Highlight the sublicense that appears in *either* the **Sublicense for Remote Site** dialog box, *or* the **Sublicense for Undocked User** dialog box.

Press **CTRL - C** to copy the entry, then paste in this serial number when installing GoldMine on the remote system.

Write down the sublicense for the user with the remote system to type the entry when installing GoldMine.

Creating a Sublicense for a Remote Office

To create a sublicense for a remote GoldMine office:

From the **Licenses** tab, select **New Site**.

Create a Site License dialog box

The **Create a Site License** dialog box contains the following options:

- | | |
|---------------------------------|---|
| Distributed License Type | Generates a sublicense from your Master License for one of the following products: <ul style="list-style-type: none"> • GoldMine Site License • GoldSync Site License |
| Site Name | Name of the site of up to 12 characters and spaces, such as Los Angeles. |
| Number of Users | Total number of users included in the sublicense. |

Create Site License Displays the **Create Sublicense for Remote Site** dialog box, from which you can acknowledge your acceptance of licensing terms. Select **I AGREE**.

GoldMine will then display the new sublicense for the remote site in a field at the bottom of the dialog box. Select **C**lose.

GoldMine automatically adds the sublicense to the **Licenses** tab browse window under previously installed license(s). A site sublicense serial number appears with **S** as the initial character.

If you are finished, select **C**lose.

To add undocked users, continue with “Creating a Sublicense for an Undocked User.”

Creating a Sublicense for an Undocked User

GoldMine 5.0 enables any user to work with the same GoldMine license as *either* a **docked**, network user, *or* as an **undocked**, remote (mobile) user. To work on an undocked basis, a user must have an undocked sublicense on his notebook. You can create an undocked sublicense from either the Master License, or from a site sublicense.

Once an undocked user sublicense has been created, the same individual can work with a notebook PC on a remote basis or connect—dock—the notebook to his network in the office. That is, a single user who works with GoldMine on both a desktop PC and a notebook PC will *not* need two separate licenses.

Every user supported by the GoldMine license can have a sublicense to work on a remote PC, but GoldMine creates *only* one sublicense for each user. For example, on a five-user copy of GoldMine, each user can have a sublicense.

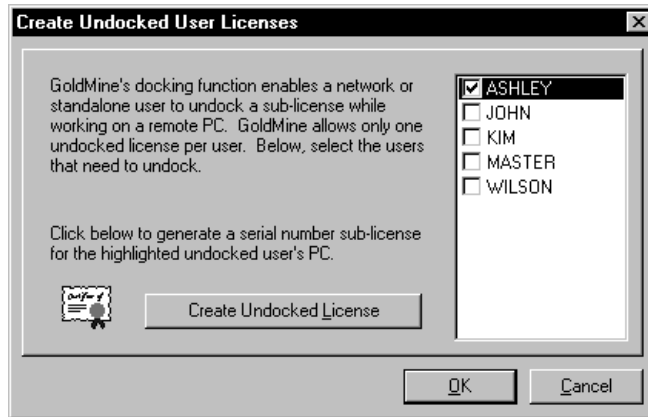
When GoldMine creates an undocked user sublicense, the total license count is reduced by one; that is, only the same number of users can log in concurrently as are allowed by the Master License, minus of the number of undocked sublicenses.

All undocked users can log in to GoldMine, as well as the total number of users that make up the difference in the total number allowed by the Master License. For example, on a five-user copy of GoldMine with three undocked users, those three undocked users plus two other users can log in to GoldMine.

To create a sublicense for an **undocked** GoldMine user:

From the **Licenses** tab, select **U**ndock Users.

Create Undocked User Licenses dialog box



To grant docking privileges to a user that appears in the list, place a check in the box corresponding to the user.

Select **C**reate Undocked **L**icense.

The **C**reate **S**ublicense for **U**ndocked **U**ser dialog box appears, from which you can acknowledge your acceptance of licensing terms.

If you agree with the license agreement terms, select **I** AGREE.

GoldMine will then display the new sublicense for the selected user in a field at the bottom of the dialog box.

Select **C**lose.

You can create another undocked user sublicense, if needed. Select **O**K to close the **C**reate **U**ndocked **U**ser Licenses dialog box.

Updating Registration Information

When you download the latest version of GoldMine 5.0, you can also change the registration information of your GoldMine license(s). This information is transmitted to GoldMine Software, as well as entered in the **Registration** tab and on the GoldMine banner display.

To change your registration information from the **GoldMine License Manager**:

From the **Net-Update** tab, select **Update Registration Information**. Select the **Registration** tab.

Registration tab

The **Registration** tab contains the following information:

- Organization** Name of the company or other organization entered when GoldMine was installed.
- Contact Name** Name of the individual to whom GoldMine is licensed.
- E-mail address** Internet address of the individual entered in **Contact Name**. This address was entered at the time of registration, and may not be the same as the individual's address as entered in the **Internet** tab of the **Preferences** window.
- Phone/Fax** First field displays the voice **Phone** number for the **Organization**; second field displays the **Fax** number for the **Organization**.
- Address** You can enter two lines of address data. Type two spaces after the first line entry to separate the first line entry from the second line entry.
- City/State** First field displays the **City** entry for the **Organization**; second field displays the **State** entry for the **Organization**.
- Zip/Country** First field displays the ZIP Code entry for the **Organization**; second field displays the **Country** entry for the **Organization**.

When you have finished reviewing and/or modifying your registration information, select the **Net-Update** tab.

To both permanently enter the changes, and to start the process to download the latest version of GoldMine, select **Net-Update Now**. Continue with "Installing the Update to GoldMine 5.0 Locally."

Installing the Update to GoldMine 5.0 Locally

You can install the GoldMine 5.0 update on your local hard disk to increase response speed, and/or to reduce network traffic. Installing locally increases performance by approximately 3–5% in most cases.

You can access the options for installing the update on your hard disk in the **Install Locally** tab. The **Install Locally** tab appears in the **GoldMine License Manager** *after* you successfully complete your first Net-Update process.

Updating local installations: To complete the update installation on a network, *either*:

- Manually update GoldMine workstations by copying *.EXE and *.DLL from a system that installed the Net-Update to the GoldMine directory (overwriting the files associated with the previous version) of each workstation
- or*
- Perform the following procedure at each workstation.



For network installations in which the GoldMine.EXE files are run from a local drive instead of a network drive, you *must* update *each workstation* with the new files when the server is updated.

For this reason, it is recommended that you do not install GoldMine locally.

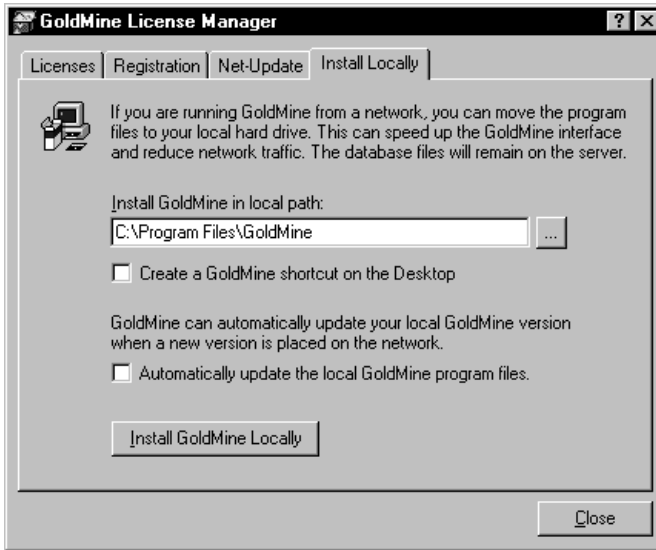
To install the update for GoldMine 5.0:

Start GoldMine. From the Main Menu, select **Help|Net-Update**.


To access the GoldMine License Manager window from the Main Menu, select **File|Configure GoldMine|License Manager**. GoldMine displays the GoldMine Net-Update window.

To install the file(s), select the **Install Locally** tab.


Install Locally tab



The **Install Locally** tab contains the following options:

Install GoldMine in local path Designates the path to the destination on your local system where GoldMine will copy program files from the network. You can *either* type a path, *or* select  to navigate through the directories on your system.

If you designate a path in this field, the database files remain on the network server. However, the GoldMine program files reside on your system.

Create a GoldMine shortcut on the Desktop Adds  to the desktop of your local system.

Automatically update the local GoldMine program files Updates the GoldMine program files on your local hard drive when you install the new version on a network.

Install GoldMine Locally Starts installing the update.

Network installation: To confirm that each workstation is running the same version of GoldMine, from the GoldMine Main Menu at each machine, select **Help|About**. The following figure shows where to locate the version number and revision date.

Checking the currently installed version of GoldMine

Version information appears just above the licensing details.



Appendix: Troubleshooting Installation Errors

Use the chart below to troubleshoot problems you encounter during installation. For further information, visit www.goldmine.com.

Installation Errors

Symptom	Probable Cause	Action
<p>Insufficient Memory to Run Application (error during or after installation)</p>	<p>Indicates that either the system does not have enough memory to start GoldMine, or that GMW5.EXE or a GoldMine DLL has been corrupted.</p>	<p>In Windows Explorer, select Help About to check that at least 65,000Kb physical memory is free. If not, close applications to free 65,000Kb memory.</p> <p>Replace the .EXE and .DLL files in the directory to which GoldMine is being installed, or from which GoldMine currently runs.</p>
<p>Merging the configuration file IDAPI32.CNF has failed, or</p> <p>GoldMine cannot dynamically load functions from IDAPI32.DLL (error after installation)</p>	<p>1. Other applications are currently using the Borland Database Engine (BDE).</p> <p>2. There is <i>either</i>:</p> <ul style="list-style-type: none"> • Improper use of the Registry Editor <i>or</i> • Incompatible or unusable version of BDE is installed. 	<p>1. Check that no other application is using the BDE. If so, exit from those programs, and try again.</p> <p>2. Remove the current BDE Registry entries—see “Removing Current BDE Registry Entries” on page i.</p> <p>For details about working with the BDE, see Factsback Bulletin #500.</p>

BDE Errors

GoldMine uses the Borland Database Engine to access your databases. For GoldMine to run properly, each workstation must have access to the BDE. The BDE may reside locally on the workstation, or across the network.

GoldMine supports *only* BDE version 4.51 or higher. Check each BDE installation to ensure that a supported version is running.

Problems with the BDE can often involve access issues, such as a failure by GoldMine to locate the BDE. Refer to the Troubleshooting Guide for detailed information on using the BDE.



A complete set of Borland error messages is available at
http://www.inprise.com/devsupport/bde/ti_list/TI3212.html.

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