

GoldMine 

Business Contact Manager
VERSION 6.0

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(Oct. 2002)

FrontRange Solutions Software Product: **GoldMine®**
(Rev. Sept. 2002)

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INTRODUCTION



Introduction

Welcome to GoldMine®

Welcome to GoldMine 6.0 (Business Contact Manager)! GoldMine is a business contact management tool with sales force and marketing automation functionality for individuals and teams.

About this Guide

This guide describes the basic components and steps for installing GoldMine 6.0 (Business Contact Manager) on your server, client workstations, undocked computers, or single-user license computers.

Audience and Expertise

The information in this manual is written for system administrators and GoldMine users performing installations. The manual describes the system requirements, step-by-step installation instructions, and tips for Shared Server, Shared Workstation, and Single-user installations.

This material assumes the user has a basic understanding of the Microsoft® Windows® operating system.




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- Menu bar commands and the corresponding menu item are presented as **File>>Print**. This means you should select the word **File** on the menu bar, and then click **Print** in the drop-down menu.
- Dialog box, window, menu, and menu bar names begin with uppercase letters and are referenced in bold text when they are the result of an action. For example: “Click **OK**. The **Select a Data Source** dialog box appears.” Bold text may also be used if needed for emphasis on the first mention of that item.
- Command buttons you click on-screen are referenced in bold text or pictured as they actually appear.

Example: **OK** or 

- **Tips** are presented in the margins to provide users with alternative procedures or with suggestions for using the feature.
- **Notes** are presented with a line above and below the paragraph; the word “Note” always appears in bold text. Notes provide information supplementing or emphasizing information in the text.

- **General Notes** are presented in the margins. General Notes contain additional information that can be pulled out of the text flow without affecting the actual content.
- **Important Notes** are presented with a line above and below the paragraph; the word “IMPORTANT” is always capitalized and appears in bold text. Important notes provide information essential to the text.
- **Cautions** are presented with an Exclamation icon  and contain bold text. Cautions alert users that failure to read and use information provided may result in data loss.
- **Warnings** are presented with an Exclamation icon  and contain bold text. Warnings alert users that failure to read and use information provided may result in functionality and/or data loss.
- **Cross-references** are presented with a book icon  . Cross-references inform users that related or additional information is available in another topic or manual.

Other GoldMine Resources

GoldMine Manuals

GoldMine offers the following manuals to help you get the information you need:

- **What’s New in GoldMine:** This guide provides an overview of the new features of each release.
- **Using GoldMine:** This guide provides an introduction to the main tools and features of GoldMine.
- **Administrating GoldMine:** This guide provides an introduction to the main concepts and features of GoldMine system administration.

IMPORTANT: These manuals are available in PDF format on our support Web site at <http://support.frontrange.com>.

Online Help

GoldMine provides an extensive online Help system. This convenient feature allows you to access step-by-step instructions, overviews, checklists, tips, notes, definitions, dialog box descriptions, and reference information without having to look past your computer screen.

The following Help is available:

- **Module Help:** This Help describes how to use GoldMine. Step-by-step instructions walk you through basic tasks while overviews, checklists, tutorials, and definitions explain general concepts and ideas.
- **Context-Sensitive Help:** This Help describes the feature currently being accessed.

To Access Module Help

Choose commands from the **Help** menu located in the module's main menu bar.

To Access Context-Sensitive Help

Click the **Help** button located in the active dialog box or press **F1**.

Our Support Site

Do you have a technical question about GoldMine® or HEAT® products?

FrontRange Solutions Support is there to answer your questions and make sure you get the help you need. Visit:

<http://support.frontrange.com>

Select the appropriate section on the navigation bar for quick solutions to technical issues.

Contacting FrontRange Solutions Inc.

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- Southern Europe (Italy, Spain, Portugal, Greece, Cyprus)
- South Africa



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System Requirements
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CHAPTER ONE

Installation Basics

Overview

Before you install GoldMine® 6.0 (Business Contact Manager) on a network server, client workstation, undocked computer, or single-user license computer, it is important to understand the basic components of the installation.

System Requirements

This section lists the baseline system requirements for successful installation and operation of GoldMine 6.0 (Business Contact Manager). Requirements are listed for the following:

- Servers
- Shared Workstations
- Single-user Systems (both single-user license computers and undocked user, sub-license computers)

Server Requirements

The following recommendations are made for GoldMine servers.

Network Operating Systems

FrontRange Solutions supports the following network operating systems:

- Microsoft® Windows® 2000 Server/Advanced Server
- Novell® NetWare® 5.0 and 6.0 (only with Microsoft Client for Netware, *not* Novell® intraNetWare® Client/Client 32)



Note: For more information on Novell NetWare, see "Appendix D: Installing on a Novell NetWare Network."

Network Protocols

- TCP/IP (recommended)
- IPX/SPX
- NetBEUI

Server System Requirements

- Microsoft Windows 2000 Server/Advanced Server
- SCSI or Ultra DMA Enhanced IDE hard drives: RAID Array or mirrored (recommended)
- 100 MBps network connection (recommended)

Server Memory Requirements

Database Size	Minimum RAM Allocation
50 MB	128 MB
100 MB	256 MB
500 MB < 2 GB	512 MB
2 -5 GB	1 GB
5-12 GB	2 GB
12+ GB	3 GB

Server CPU Requirements

Users	Minimum	Recommended
1-10	Pentium® III 300 MHz	Pentium III 700 MHz
11-50	Pentium III 300 MHz dual processor	Pentium III 700 MHz dual processor
51-149	Pentium III 700 MHz dual processor	Pentium III 700 MHz quad processor

Performance Considerations

Server RAM and CPU requirements vary depending on your database and the following factors:

- Number of Contact Records in the database (1k each)
- Number of Detail Records in the database (2k each)
- Number of History Records in the database (1k each)
- Number of user-defined fields in the database
- Number of simultaneous users on the network
- Database size

Shared Workstation Requirements

The following recommendations are made for client workstations connected to the server copy of GoldMine.

System	Minimum	Recommended
CPU	Pentium 166 MHz	Pentium II/III +
HDD	65 MB	125 MB +
RAM	32 MB	64 MB +

Operating Systems

FrontRange Solutions supports the following Microsoft operating systems:

- Microsoft Windows 98/98 SE
- Microsoft Windows ME
- Microsoft Windows 2000 Professional/Server/Advanced Server
- Microsoft Windows XP® (Home/Professional)

Note: FrontRange Solutions Technical Support does not support or recommend using Windows emulators, either on Macintosh® or under Linux®.

Single-user Requirements

The following recommendations are made for computers that run independently of other GoldMine computers (**single-user license computers**) or computers that often work disconnected from a GoldMine server but synchronize with the GoldMine server to update information (**undocked user, sub-license computers**).

System	Minimum	Recommended
CPU	Pentium 166 MHz	Pentium II/III +
HDD	65 MB	125 MB +
RAM	32 MB	64 MB +

Operating Systems

FrontRange Solutions supports the following Microsoft operating systems:

- Microsoft Windows 98/98 SE
- Microsoft Windows ME
- Microsoft Windows 2000 Professional/Server/Advanced Server
- Microsoft Windows XP (Home/Professional)

Note: FrontRange Solutions Technical Support does not support or recommend using Windows emulators, either on Macintosh or under Linux.

Performance Considerations

Your RAM and CPU requirements vary depending on your database and the following factors:

- Number of Contact Records in the database (1k each)
- Number of Detail Records in the database (2k each)
- Number of History Records in the database (1k each)
- Number of user-defined fields in the database
- Number of simultaneous users on the network
- Database size

Software Requirements

- Microsoft Internet Explorer 6.0
- If Borland® Database Engine (BDE) is installed on your target system, a minimum of BDE 5.01 is required. If no BDE is present on the target system, the installer installs it automatically.

Installation Wizard

The GoldMine Installation Wizard takes you step-by-step through the installation processes. Windows and dialog boxes clearly outline important information, features, and directions.

To navigate through the GoldMine Installation Wizard, simply follow the directions in the windows and dialog boxes. To cancel the installation and exit the wizard at any time, click **Cancel**.

IMPORTANT: After GoldMine is installed, you can go back and use the Installation Wizard to modify, repair, or remove the GoldMine program files. The wizard launches automatically when you access the Add/Remove Program feature on your computer.

Installation Types

Three installation types are available on the GoldMine 6.0 (Business Contact Manager) CD. They are:

- **Shared Server Installation:** This type installs a shared copy of GoldMine to a common location, usually a shared network drive. End users can then connect to the server copy from their local client workstations using shortcuts installed by running a Shared Workstation installation.

Recommendation: Run Shared Server installations on the primary GoldMine server and remote sites serving two or more users.

- **Shared Workstation Installation:** This type of installation installs shortcuts to the client workstation so that end users can connect to the server copy of GoldMine from their individual computers.

Recommendation: Run Shared Workstation installations on computers connected to a GoldMine server.

- **Single-user Installation:** This type of installation installs a full copy of GoldMine on a computer working disconnected from a network.

Recommendation: Run Single-user installations on computers that run independently of other GoldMine computers (single-user license computer) or computers that often work disconnected from a GoldMine server but synchronize with the GoldMine server to update information (undocked user, sub-license computers).

If you are:	Then run:
An individual with a one-seat license who does not need to share data in real-time with anyone else.	Single-user Installation
An individual who often works remotely on an undocked computer; who synchronizes with a GoldMine server to update information.	Single-user Installation
A company who needs to support multiple GoldMine users using a shared copy of GoldMine.	Shared Server Installation
An individual in a company with a multi-user environment who needs to connect to a shared copy of GoldMine.	Shared Workstation Installation

Installation Checklists

Review the following checklists before installing GoldMine. These checklists outline the basic steps for installing and running GoldMine in an efficient manner.

Shared Server Installation Checklist

1. **Back up your database and folders (upgrading customers only).** If you are upgrading, backup your GoldMine database. We also recommend backing up your GoldMine folder and any other folders containing files linked to GoldMine before beginning any installation. This prevents the loss of valuable contact information.
2. **Confirm all GoldMine users are logged out of the system.**
3. **Exit all programs running on your system.** This frees memory and alleviates potential conflicts between the installer and other software on your computer. This includes third-party utilities that integrate with GoldMine and other GoldMine add-on products. You should also exit the Microsoft Office Shortcut bar and stop all services.
4. **Share your GoldMine folder.** In order for client workstations to connect to the shared copy of GoldMine, you must first share folder in which GoldMine is installed (or will be installed). Users also need full control. For detailed steps on sharing the GoldMine folder, see the “Installing GoldMine 6.0 (Business Contact Manager)” chapter.

IMPORTANT: New customers installing GoldMine for the first time must first create a GoldMine folder on the server. We recommend you install GoldMine to **C:\Program Files\GoldMine\GoldMine**.

GoldMine should *not* be installed as a root folder of the drive (for example, C:\GoldMine) or directly to Program Files (for example, C:\Program Files\ GoldMine. Be sure to install the server copy of GoldMine to this folder.

5. **Install GoldMine on the computer serving as your GoldMine server.** Choose a Shared Server installation and follow the steps in the “Installing GoldMine 6.0 (Business Contact Manager)” chapter.

6. **License the server copy of GoldMine.** Licensing registers the shared server copy of GoldMine with the appropriate license. Step-by-step instructions for licensing are covered in the “Licensing and Registration” chapter.



Note: For detailed information on GoldMine Licensing, see the *Administering GoldMine* manual or GoldMine online Help.

7. **Verify that you can launch GoldMine on your GoldMine server.** This ensures the installation is functioning properly before you install to any workstations.

Shared Workstation Installation Checklist

1. **Exit all programs running on your system.** This frees memory and alleviates potential conflicts between the installer and other software on your computer. This includes third-party utilities that integrate with GoldMine and other GoldMine add-on products. You should also exit the Microsoft Office Shortcut bar and stop all services.
2. **Create a mapped drive to the shared GoldMine folder on the server.** This allows workstations to navigate and connect to the shared copy of GoldMine on server. For detailed steps on mapping a drive, see the “Installing GoldMine 6.0 (Business Contact Manager)” chapter.
3. **Install GoldMine on the Client Workstation.** Choose a Shared Workstation installation and follow the steps in the “Installing GoldMine 6.0 (Business Contact Manager)” chapter.
4. **Verify that you can launch GoldMine from the workstation.** This ensures the installation is functioning properly.

Single-user Installation Checklist

1. **Create an Undocked license (U-license) on the server (for undocked license users only).** This license type is created for users who work with GoldMine primarily at a remote location, on a laptop or workstation. To create an Undocked license, follow the steps in the “Licensing and Registration” chapter.



Note: For detailed information on GoldMine Licensing, see the *Adminstrating GoldMine* manual or GoldMine online Help.

2. **Exit all programs running on your system.** This frees memory and alleviates potential conflicts between the installer and other software on your computer. This includes third-party utilities that integrate with GoldMine and other GoldMine add-on products. You should also exit the Microsoft Office Shortcut bar and stop all services.
3. **Install GoldMine to the undocked laptop or home office computer.** Choose a Single-user installation and follow the directions in the “Installing GoldMine 6.0 (Business Contact Manager)” chapter.
4. **License GoldMine.** Licensing registers GoldMine with the appropriate license information.
5. **Verify that you can launch GoldMine.** This ensures the installation is functioning properly.



in this chapter...

- Running a Shared Server Installation
- Running a Shared Workstation Installation
- Running a Single-user Installation

CHAPTER TWO



2

Installing GoldMine 6.0 (Business Contact Manager)

Overview

This chapter contains step-by-step instructions for running:

- Shared Server installations
- Shared Workstation installations
- Single-user installations

IMPORTANT: The instructions in this chapter use the Shared Server installation as a standard while illustrating the individual differences between the installation types.

Running a Shared Server Installation

A Shared Server installation installs a full copy of GoldMine to a common location, usually a shared network drive. End users can then connect to the server copy from their local computers (after a Shared Workstation installation is run).

To Run a Shared Server Installation

1. Insert the GoldMine 6.0 (Business Contact Manager) CD into your CD-ROM drive. The Installation Wizard prepares to install GoldMine.

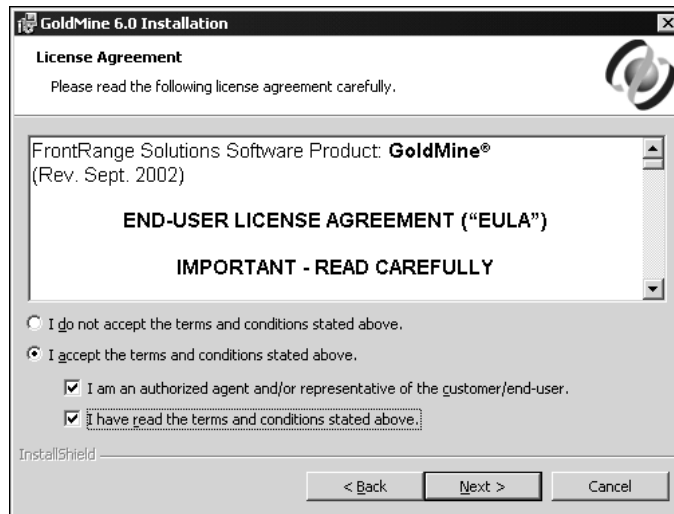
Note: The GoldMine CD is set up to autorun when inserted into your CD-ROM drive. If autorun is not enabled, select **Run** from the **Start** button on the **Windows** taskbar, and then type **X:\setup.exe** (where "X" is the letter of CD-ROM drive).

When the setup is ready, the **Welcome to the InstallShield Wizard for GoldMine 6.0** dialog box appears.



2. Click **Next**.

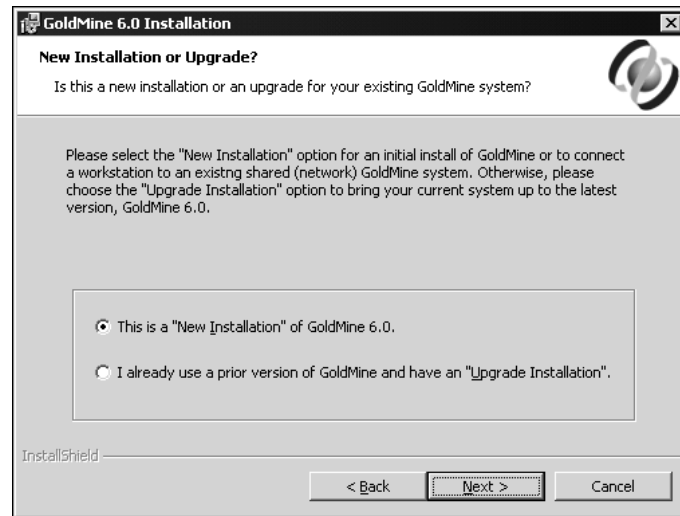
The **End-User License Agreement** dialog box appears.



3. Review the end-user license agreement (EULA). If you agree to the terms, select **I accept the terms and conditions stated above**. You must also indicate your status by selecting **I am an authorized agent and/or representative of the customer/end-user**. When you have finished reading the agreement, select **I have read the terms and conditions stated above**. Click **Next**.

Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms and conditions stated above**. Then, click **Cancel** to exit the installation.

The **New Installation or Upgrade?** dialog box appears.

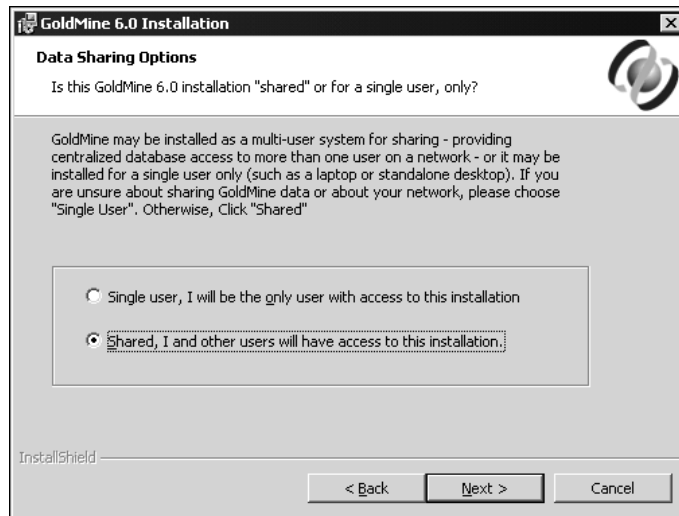


4. Select the kind of installation you want to run. You can select from the following options:

- **This is a “New Installation” of GoldMine 6.0:** Select this option if GoldMine has never been installed. Click **Next** and proceed to step 5.
- **I already use a prior version of GoldMine and have an “Upgrade Installation”:** Select this option if you are upgrading from a previous version of GoldMine. The following steps are for new installations of GoldMine. Click **Next**.

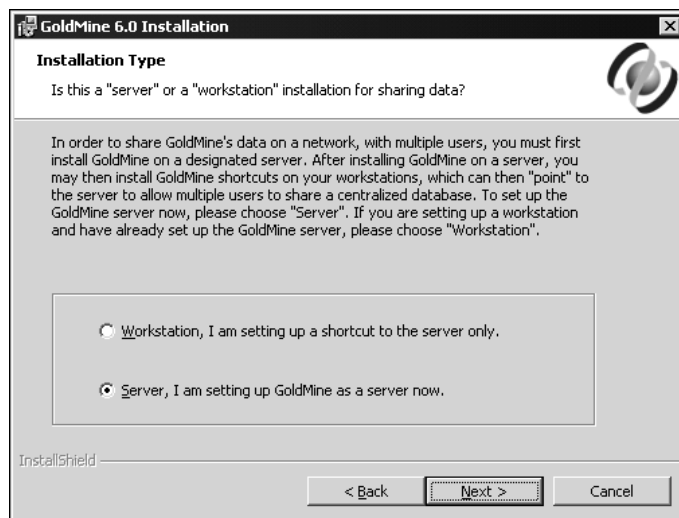
Note: The Upgrade steps are addressed in Appendix A, “Upgrading GoldMine.”

The **Data Sharing Options** dialog box appears.



5. Select the **Shared, I and other users will have access to this installation.** Click **Next**.

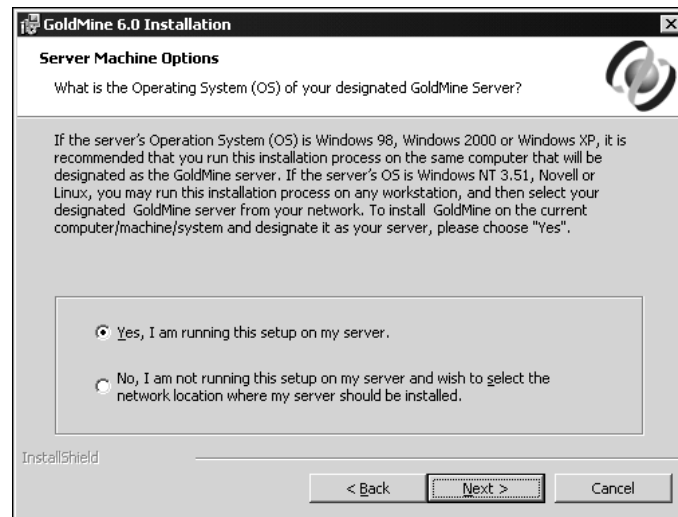
The **Installation Type** dialog box appears.



installing

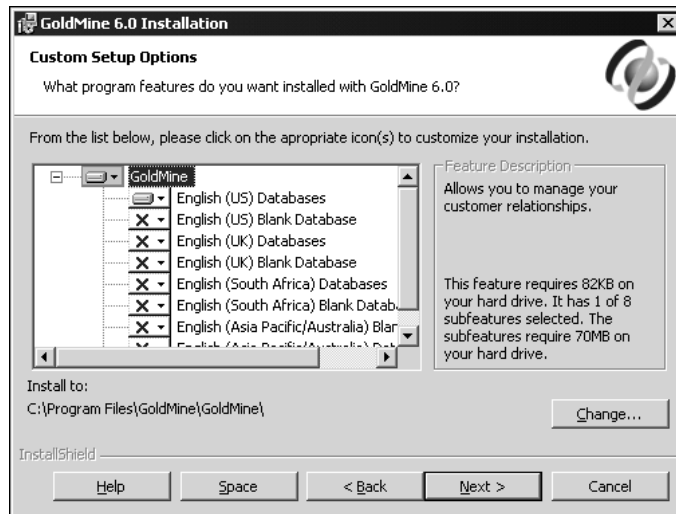
6. Select **Server, I am setting up GoldMine as a server now**. Click **Next**.

The **Server Machine Options** dialog box appears.




7. Select the server location where you want to install GoldMine. You can choose from the following options:
 - **Yes, I am running this setup on my server:** Select this option if you want to install GoldMine on the computer on which you are currently working (this is recommended for Microsoft Windows 98, 2000, ME, and XP operating systems).
 - **No, I am not running this setup on my server...:** Select this option if you want to install GoldMine to a different server location. The Installation Wizard then prompts you to browse to another location.
8. Click **Next**.

The **Custom Setup Options** dialog box appears.



Tip

To view a description of each feature, select the feature and read the text in the **Feature Description** box. Items displayed with a hard drive symbol are already selected for configuration. Items displayed with a red X are not selected.

9. Select the databases (both Common and Demo) you want to install. (Select the databases by clicking the arrow () to the immediate left of the database category. You must then select **This feature and all subfeatures will be installed on the local hard drive.**)

Note: By default, English (US) databases are selected.

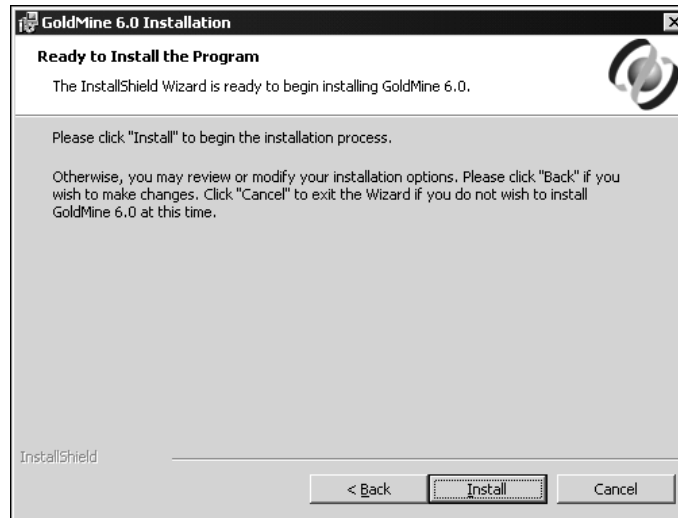
10. To compare disk space requirements against the space available in your destination location, click **Space**. To return to the **Custom Setup** window, click **OK**.
11. Select the folder location where you want to install GoldMine by clicking **Change**. The Installation Wizard launches the **Change Destination** dialog box where you can browse to a location. To return to the **Custom Setup** window, click **OK**.

IMPORTANT: We recommend you install GoldMine to C:\Program Files\GoldMine\GoldMine. GoldMine should not be installed as a root folder of the drive (for example, C:\GoldMine) or directly to Program Files (for example, C:\Program Files\GoldMine).

installing

12. Click **Next**.

The **Ready to Install the Program** dialog box appears.



13. Click **Install** to begin installing GoldMine.

14. When the installation process is finished, the License Wizard automatically launches. If you wish to continue, click **Next**; otherwise click **Cancel**. If you cancel the licensing process, the wizard automatically starts when you launch GoldMine for the first time.

CONGRATULATIONS! You have successfully installed a shared version of GoldMine on your server. You now need to license the program. Detailed instructions for licensing and registration are located in the "Licensing and Registration" chapter, in this manual.

Running a Shared Workstation Installation

A Shared Workstation installation installs shortcuts to the workstation so that end users can connect to the shared server copy of GoldMine from their individual computers.

To install a shared version of GoldMine on a workstation, you must first:

- Share the GoldMine folder on the server.
- Map a drive on each workstation to the shared GoldMine folder.

Sharing the GoldMine Folder on the Server

After GoldMine is installed on the server, you must share the GoldMine root directory in order for the workstations to function properly. All GoldMine users must have rights to read, write, modify, and delete files. If users do not have sufficient permissions to the GoldMine folder, GoldMine may not function on the workstations.

To Share the GoldMine Folder

1. Locate the GoldMine folder on the server (for example, C:\Program Files\GoldMine\GoldMine).
2. Right-click the folder, and then select **Sharing**. The **GoldMine Properties** dialog box appears.
3. Click the **Sharing** tab.
4. Select the **Share this folder** option.
5. Name the shared folder "GoldMine."
6. Set the **User Limit** to **Maximum Allowed**.
7. Click **Permissions**. All GoldMine users must have full control.
8. Click **OK** to save settings.

Note: These steps were documented on a Windows 2000 computer. If you are using a different operating system, your steps may vary.

Mapping a Drive on the Workstations

We recommend that you map the same network drive on all the workstations accessing the shared GoldMine folder. Using the same network drive letter on all the workstations facilitates GoldMine administration, and operations related to linked documents and synchronization.

Note: Users at all workstations must specify the same **Drive** letter (for example, **G:**) on all workstations.

To Map a Drive:

1. On the workstation computer, start **Windows Explorer** and then select **Tools>>Map Network Drive**.
2. In the **Drive** text box, select the drive letter you are mapping to the GoldMine folder on the server. This drive letter should be the same on all workstations.
3. In the **Path** text box, type the path to the shared GoldMine folder in the Shared Directories box or browse to the server name and shared folder. An example path: **\\GoldMine Server\GoldMine**.
4. Select **Reconnect at Logon**.
5. Click **OK**.
6. Repeat this procedure on each computer used as a client workstation.

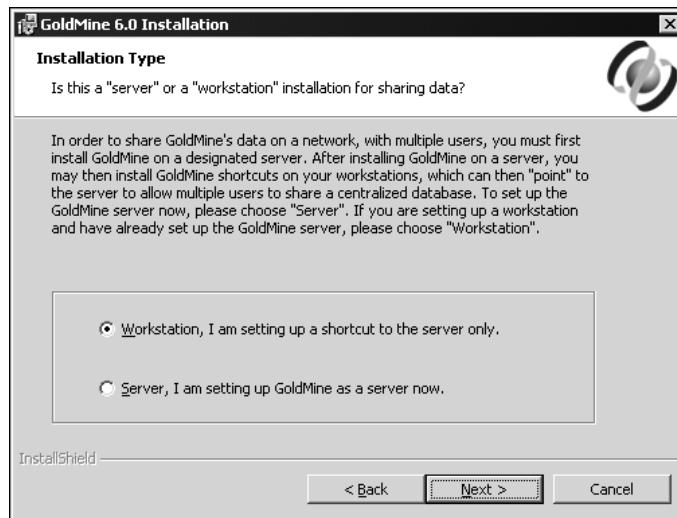
Running the Installation

Client workstations are installed across the network. The process installs a shortcut to the GoldMine installation on the server.

To Run a Shared Workstation Installation

1. Follow steps 1-5 of the Shared-Server installation.

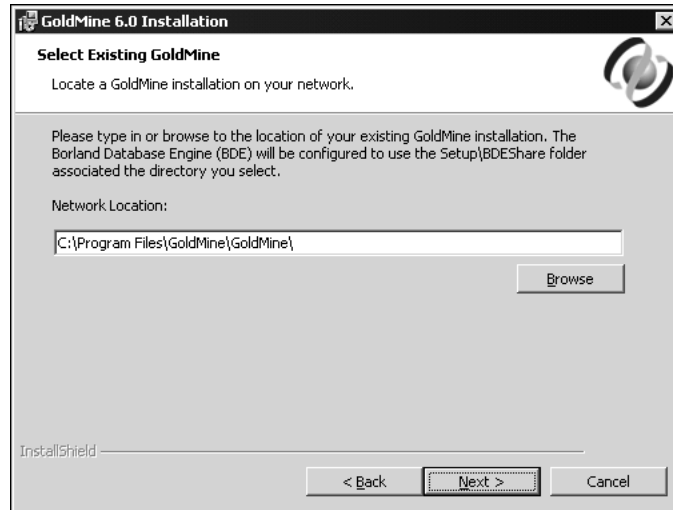
The **Installation Type** dialog box appears.



2. Select **Workstation, I am setting up a shortcut to the server only**. Click **Next**.

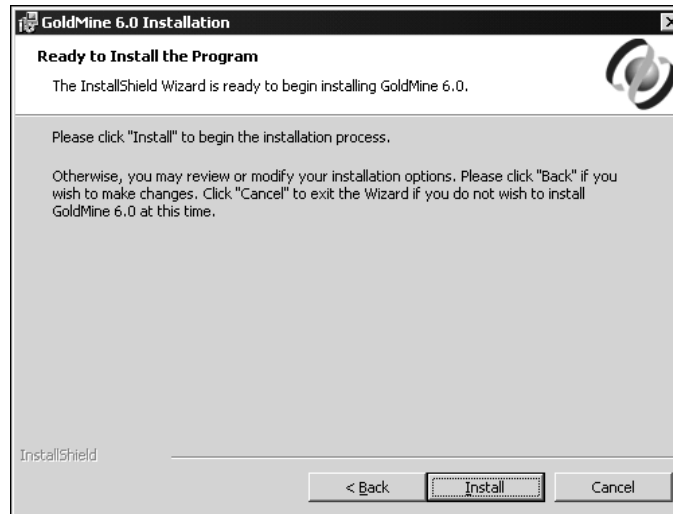
installing

The **Select Existing GoldMine** dialog box appears.



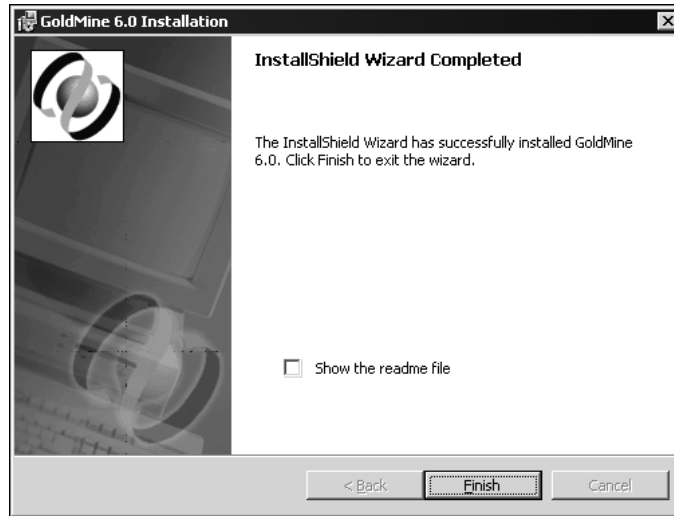
3. Locate the server copy of GoldMine by clicking **Browse**. The Installation Wizard launches the **Change Current Destination Folder** dialog box where you can navigate to the server location of GoldMine. To return to the **Select Existing GoldMine** window, click **OK**. Click **Next**.

The **Ready to Install the Program** dialog box appears.



4. Click **Install** to begin installing the shortcuts to the server copy of GoldMine.

When the installation process is finished, the **Install Wizard Completed** dialog box appears.



5. Click **Finish** to exit the Wizard.

CONGRATULATIONS! You have successfully installed the shortcuts to the server copy of GoldMine on your workstation. Repeat this procedure for each workstation accessing GoldMine.

installing

Running a Single-user Installation

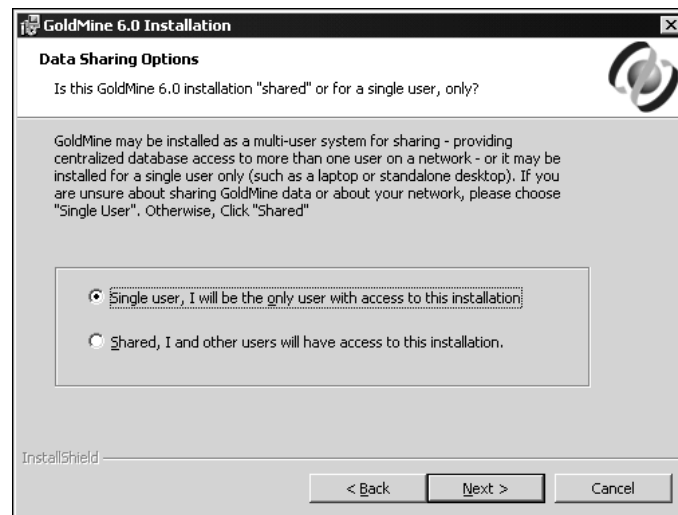
A Single-user installation installs a full copy of GoldMine on a computer working disconnected from a network. This type of installation is for computers that run independently of other GoldMine computers (single-user license computers) or computers that often work disconnected from a GoldMine server but synchronize with the GoldMine server to update information (undocked computers).

IMPORTANT: If you are installing an undocked version of GoldMine while it is in your office, disconnect the laptop from the network so that you install a completely independent copy on the computer.

To Run a Single-user Installation

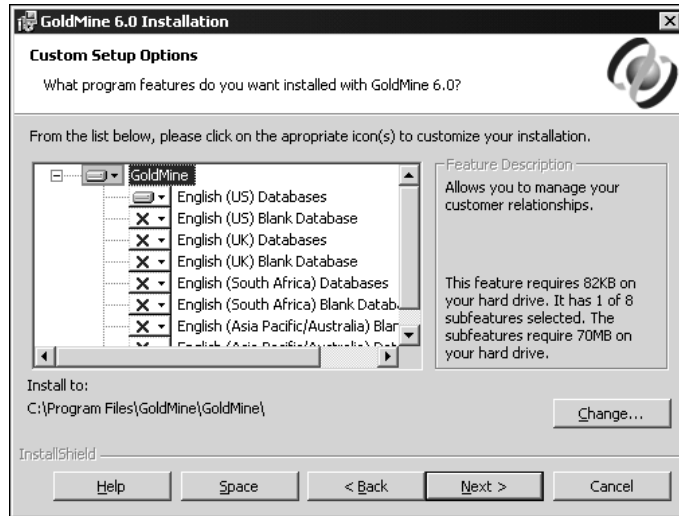
1. Follow steps 1-4 of the Shared Server installation.

The **Data Sharing Options** dialog box appears.



2. Select **Single user, I will be the only user with access to this installation**. Click **Next**.

The **Custom Setup Options** dialog box appears.



3. Continue with steps 9-13 of the Shared Server installation.

When the installation process is finished, the License Wizard automatically launches. If you wish to continue, click **Next**; otherwise click **Cancel**. If you cancel the licensing process, the wizard starts automatically when you launch GoldMine the first time.

CONGRATULATIONS! You have successfully installed GoldMine on your computer. You now need to license the program. Detailed instructions for licensing and registration are located in the "Licensing and Registration" chapter.

installing



in this chapter...

- The GoldMine License
- License Types
- Managing and Creating Licenses
- Licensing with License Types
- Licensing GoldMine



CHAPTER THREE

Licensing and Registration

Overview

GoldMine has a fully scalable licensing structure. Most organizations, regardless of their requirements, generally buy one license—a **Master License** with X number of seats.

An organization can then create **sub-licenses** for each remote office and Undocked sub-licenses for each remote (mobile) user. As the system matures, an organization can change the licensing configurations when required. The single, distributed Master License serves as the authentication mechanism for easy and secure synchronization across the entire organization.



Note: For detailed information on GoldMine licensing, see the *Administrating GoldMine* manual and the GoldMine online Help.

The GoldMine License

The following example illustrates what a GoldMine license serial number looks like:



The first character denotes the license type. The first set of numbers denotes the license count or seats available in the license. The license count determines the number of users who can log on to GoldMine at one time, but does not limit the total number of named users. The seats available may be increased by adding license counts in the License Manager.

The next set of numbers is an eight-digit serial number uniquely identifying the license for an organization. This eight-digit number is used for registration and support and identifies all sub-licenses as part of the same organization.

When purchasing a license from GoldMine, you receive a keycode with it. The keycode is a computer generated check used by GoldMine to verify the license is valid.

Note: The keycode is required during installation. Keep the license number and keycode in a safe place in the event it becomes necessary to reinstall the software.

License Types

A Master License must be installed *only* on the organization's primary network. A Master License is inherited by all sub-licenses to ensure that all the organization's sub-licenses are authenticated properly during synchronization.

Properly creating and installing the sub-licenses is important because they control security for synchronization throughout the organization.

Only the Master License can be increased, decreased, or sub-licensed. Site sub-licenses can be increased under specific circumstances.

Note

The GoldMine (Business Contact Manager) Master License is a Standard License and begins with the letter D.

Master Licenses		
D	Standard License	Supports dBASE only
G	GoldSync License	Adds GoldSync only
Sublicenses		
U	Undocked License	Single sublicense for a remote GoldMine user
S	Site License	Multiple-user sublicense for a remote office
Y	GoldSync License	GoldSync sublicense for a remote office
Increasing License Counts		
R	Standard License Increase	Increases the number of D-Licenses
N	GoldSync License Increase	Increases the number of G-Licenses

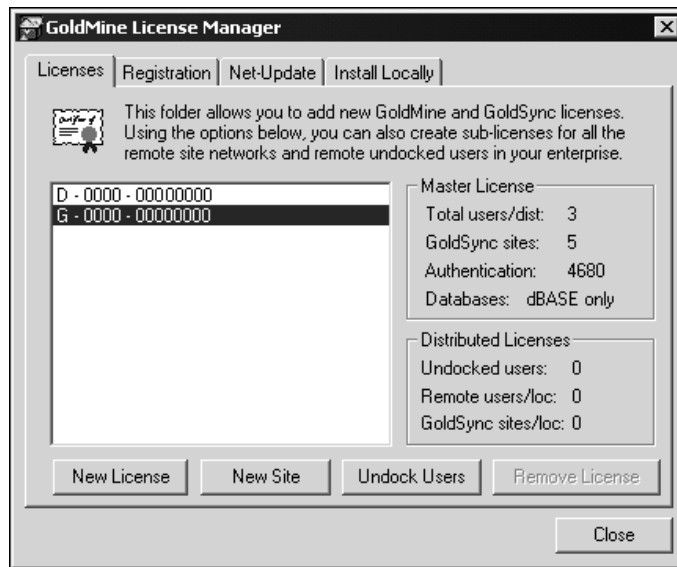
Undocked licenses (technically sub-licenses) are for remote users and can only be licensed for a single user. They can be sub-licensed from the main GoldMine system for a remote Site.



Note: For detailed information on License Types, see the *Administrating GoldMine* manual.

Managing and Creating Licenses

All GoldMine licensing information and related functions are available from the **License Manager**.



The central window lists all installed licenses and any sub-licenses created from this location.

The first letter of each license determines what type of license it is. Every GoldMine system begins with a Master License. This Master License determines what databases are supported by the master site as well as its synchronization capabilities. The database support of the Master License is inherited by the sub-licenses distributed throughout the organization. GoldSync Synchronization capabilities can be distributed to sub-licenses separately.

Note: Licensing information is stored in the license file, **License.dbf**. This file must exist only in the GoldMine root directory of each GoldMine installation.

Creating Sub-licenses for Remote Offices

From a Master License, you can create sub-licenses for remote offices. Office sub-licenses include **Site Licenses (S-licenses)** and **GoldSync Licenses (Y-licenses)**.

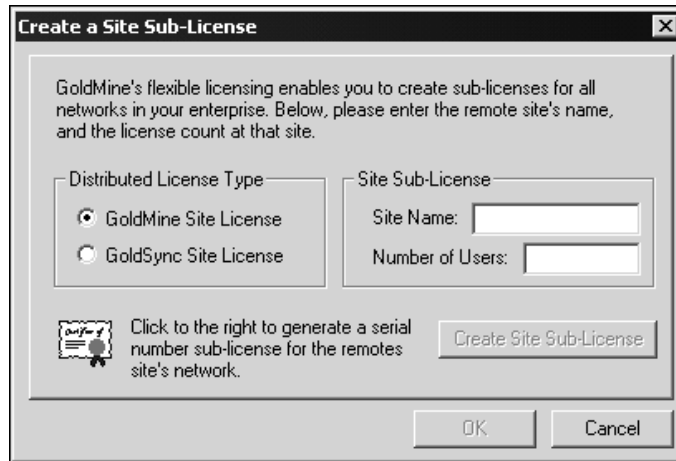
The available users on the Master License decrease by the number of users for whom the sub-license is created, reducing the maximum number of simultaneous users at that location.

Note: When creating any sub-license, note the entire license number created by GoldMine. The sub-license includes additional information that is needed when typing the license number on the remote machine and is only displayed in its entirety during the creation process.

To Create a Sub-license for a Remote Office

1. From the **GoldMine** main menu, select **File>>Configure>>License Manager**. The **License Manager** appears.
2. Click the **Licenses** tab, and then click **New Site**.

The **Create a Site Sub-License** dialog box appears.



3. In the **Distributed License Type** area, select the site license you want to create, either **GoldMine Site License (S-License)** for the number of seats the site needs or **GoldSync Site License (Y-License)** for the number of users at the site synchronizing.
4. In the **Site Sub-License** area, type the site name and the number of users.
5. Click **Create Site Sub-License**. The **Site-License for Remote Site** dialog box appears.
6. Review the information about the sub-license and then click **I Agree**. The sub-license number for the site appears in the **Sub-license for Remote Site [Name of Site]** dialog box.

Note: GoldMine automatically adds the sub-license to the Licenses tab under previously installed licenses.

Tip

Write the sub-license number down or copy it to Windows Notepad. The sub-license number is needed for each remote computer installation. Send the remote site license number to the remote user. The remote user can then type the license number during the GoldMine installation.

licensing

Creating Sub-licenses for Undocked Users

GoldMine has a sub-license for an individual user called an **Undocked License (U-License)**. This license type is created for users who work primarily with GoldMine at another location, on a laptop, notebook, or home office computer, but may also need to log onto the network occasionally. Creating an undocked user decreases the available users of the network site (Master License) by one; however, when an undocked user logs into the site from which they were sub-licensed, they do not take up an additional seat.

Every user supported by the GoldMine license can have an Undocked license to work on a remote computer. For example, on a five-user GoldMine system, five Undocked licenses can be created. The Undocked license automatically includes a GoldSync license so the undocked computer can synchronize data.

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

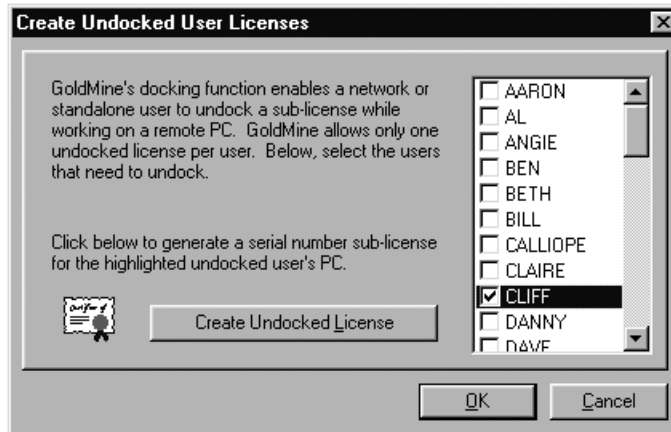
When used in combination with GoldSync, administrators can synchronize security settings to undocked users including new passwords, menu items, and preferences.

To work on an undocked basis, a user must have an Undocked license on his laptop. You can create an Undocked license from either the Master License or from a Site license.

To Create a Sub-license for an Undocked User

1. From the **GoldMine** main menu, select **File>>Configure>>License Manager**. The **License Manager** appears.
2. Click the **Licenses** tab, and then click **Undock Users**.

The **Create Undocked User Licenses** dialog box appears.



3. Select the check box next to the user for whom you want to create a sub-license and then click **Create Undocked License**. The **Sub-Licenses** dialog box appears.
4. Review the information about the sub-license and then click **I Agree**. The sub-license number for a remote user or an undocked user appears in the **Sub-license for Remote Site [Name of Site]** dialog box.

Tip

Write the sub-license number down or copy it to Windows Notepad. The sub-license number is needed for each undocked computer installation. Send the Undocked sub-license number to the remote user. The remote user can then type the license number during the GoldMine installation.

Licensing with License Types

After GoldMine is installed, you must register it using the **License and Registration** wizard. The License and Registration wizard automatically launches the first time you open GoldMine if you did not complete the license and registration information after installation.

Licensing with a Master License

The GoldMine (Business Contact Manager) Master License begins with the letter D (Example: D-0050-11111111). This is usually a multi-user license for a server installation of GoldMine, but may be a single-user license for a stand-alone computer. You need to provide this serial number and key code when licensing. If you plan to synchronize and have purchased the optional GoldSync license, you also need to provide the GoldSync serial number and key code.

Note: It is from the D-license that remote site sub-licenses (S and Y-licenses) and Undocked sub-licenses (U-licenses) are created.

Enter GoldMine Serial Number

Please enter your GoldMine 6.0 License Serial Number and Key Code below.

GoldMine Serial Number: Key Code

D - [] - [] - []

The GoldSync Administration Center offers automated remote synchronization capabilities for your organization. If you have a GoldSync license, please enter the corresponding Serial Number and Key Code below.

GoldSync Serial Number: Key Code

G - [] - [] - []

Automatically register

< Back Next > Cancel

To License GoldMine with a Master License

Type the D-license number and key code you received when you purchased the software.

To License GoldMine with GoldSync License

1. Type the complete D-license.
2. Type the GoldSync G-license and key code you received when you purchased the software (optional purchase).

Licensing with a Site License

Again, Site licenses are sub-licenses created from the Master License and begin with the letter S. You should have an **S**-license with the number of users. **Y**-licenses are only required if you want to synchronize and have purchased the optional GoldSync license. You should have a Y-license for the number of GoldSync licenses required to synchronize.

Enter GoldMine Serial Number

Please enter your GoldMine 6.0 License Serial Number and Key Code below.

GoldMine Serial Number: Key Code Site Code

S - - - - -

The GoldSync Administration Center offers automated remote synchronization capabilities for your organization. If you have a GoldSync license, please enter the corresponding Serial Number and Key Code below.

GoldSync Serial Number: Key Code Site Code

Y - - - - -

Automatically register

< Back Next > Cancel

To License GoldMine with a Site License

1. Type the **S-license**, key code, and Site code created in the License Manager.
2. Type the **Y-license**, key code, and Site code created in the License Manager.

Licensing with an Undocked License

Again, Undocked licenses (technically sub-licenses) are created from a Master License and begin with the letter U. This license type is created for users who work with GoldMine at another location, on a laptop or workstation but disconnected from the server copy of GoldMine.

The Undocked license does not require a separate GoldSync license to synchronize. The GoldSync license is included in the U-license.

Enter GoldMine Serial Number

Please enter your GoldMine 6.0 License Serial Number and Key Code below.

GoldMine Serial Number: Key Code Site Code

U - [] - [] - [] - []

The GoldSync Administration Center offers automated remote synchronization capabilities for your organization. If you have a GoldSync license, please enter the corresponding Serial Number and Key Code below.

GoldSync Serial Number: Key Code

[] - [] - [] - []

Automatically register

< Back Next > Cancel

To License GoldMine with an Undocked License

Type the **U**-license, key code, and site code created in the License Manager.



Note: Again, for detailed information on GoldMine licensing, see the *Administrating GoldMine* manual and the GoldMine online Help.

Licensing GoldMine

After GoldMine is installed, you must register it using the License and Registration wizard. The License and Registration wizard automatically launches the first time you open GoldMine if you did not complete the license and registration information after installation.

To License and Registration GoldMine

1. Launch the License and Registration wizard.

The **Welcome** dialog box appears.



2. Click **Next**.

The **Enter License Information-Contact** dialog box appears.

GoldMine can personalize your letters, faxes and e-mail templates. Please enter your contact data below:

Organization:

Contact Name:

E-mail address:

Phone / Fax: /

Address 1:

Address 2:

City / State:

ZIP / Country:

< Back Next > Cancel

3. Type your contact information in the designated text boxes. You must complete this information to continue. Click **Next**.

The **Enter License Information-Purchase** dialog box appears.

Please take a moment to tell us about your GoldMine purchase, so FrontRange Solutions can better assist you.

Place of purchase: Purchase Date:

How did you learn about GoldMine?

Your current contact manager, if any?

Your software dealer:

< Back Next > Cancel

4. Complete the purchase information. Click **Next**.

The **Enter GoldMine Serial Number** dialog box appears.

Please enter your GoldMine 6.0 License Serial Number and Key Code below.

GoldMine Serial Number: Key Code

GoldSync Serial Number: Key Code

Automatically register

< Back Next > Cancel

5. Type your GoldMine serial number and key code. Depending on what kind of license you have purchased or the kind of installation you are conducting, different options appear in this window. The options were discussed at the beginning of this chapter.
6. Click **Next**.

The **Import NT Server User Accounts** dialog box appears.

GoldMine can import the NT log-on accounts which are defined on your current NT domain server. Place a checkmark next to each user account you wish to import into GoldMine.

Administrator
 Guest

Optional password for imported names: _____

< Back Next > Cancel

Note: The **Import NT Server User Accounts** dialog box only appears if the installation is performed on a Microsoft Windows 2000 system.

7. Select each user account you want to import into GoldMine. If appropriate, type an optional password for imported names. Click **Next**.

The **Enter Your Username** dialog box appears.



8. Type the user name. It should not be more than eight characters. The password is optional. This user has Master rights in GoldMine. Click **Next**.

The **GoldMine Logon** window appears.



9. In the GoldMine window, type the user name and password. Click **OK** to launch GoldMine.

CONGRATULATIONS! GoldMine is licensed and the installation is now complete.



in this appendix...

Upgrading GoldMine on a Server

Upgrading GoldMine on a Client
Workstation

Upgrading GoldMine on a Single-
user System



APPENDIX A

Upgrading GoldMine

Overview

If you have a previous version of GoldMine installed and are upgrading, the Installation Wizard walks you through the steps for upgrading.

Upgrade Considerations

If you are upgrading from a previous version of GoldMine, you should make a backup of your existing GoldMine database and system before continuing. In addition to the 65 MB required for installation, please make sure you have at least two-and-a-half times the size of your largest database in additional free space on your hard disk.

Note: 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 ($2\frac{1}{2} \times 100$ MB).

A database conversion is required when upgrading from earlier versions of GoldMine. This conversion should occur automatically when GoldMine is installed into the path of the existing `gmw.exe`, `gmw32.exe`, `gmw4.exe`, or `gmw5.exe`. Before upgrading, we recommend performing a backup and full database maintenance using your current version of GoldMine.

Undocked users should be on the same version of GoldMine as the site with which they sync. If you are upgrading the server but are not upgrading undocked computers until a later time, disable their sync sites in the GoldSync Administration Center on the server. Reactivate their site when the undocked computer is upgraded and is running the same version of GoldMine as the server.

Note: If you have an Enterprise license (GMSM license) you *should not* upgrade to this version GoldMine 6.0 (Business Contact Manager) since the licenses are incompatible.

Upgrading GoldMine on a Server

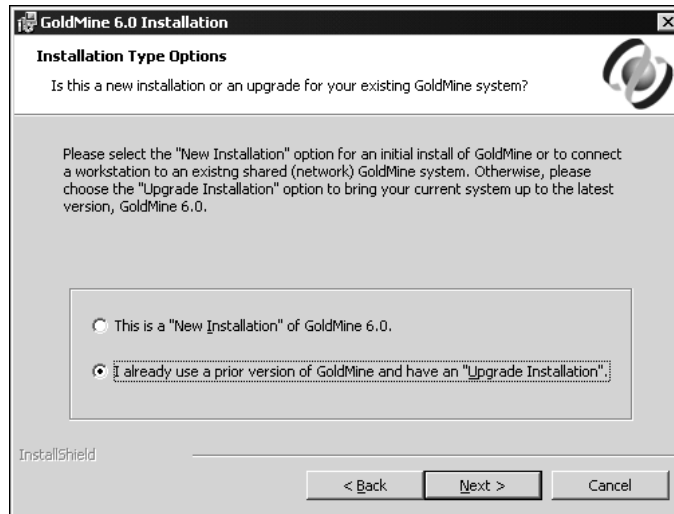


WARNING: Before upgrading, be sure to back up your database and the GoldMine directory. Also, be sure to close all applications running on your system, including all GoldMine add-on products.

To Upgrade GoldMine on a Server

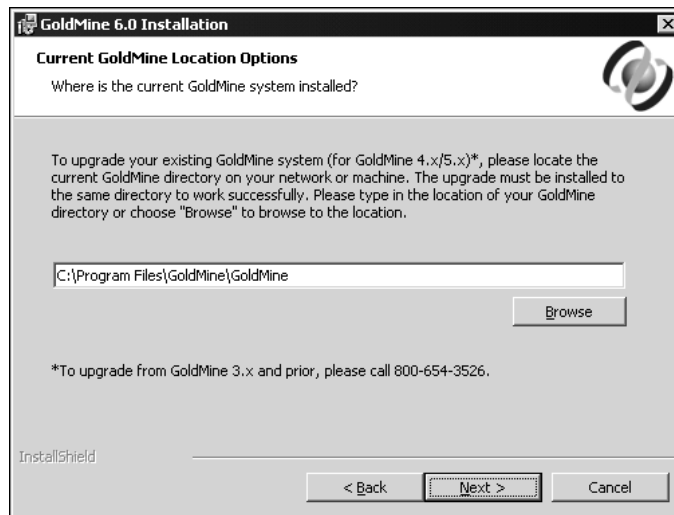
1. Follow steps 1-3 of the Server installation.

The **Installation Type Options** dialog box appears.



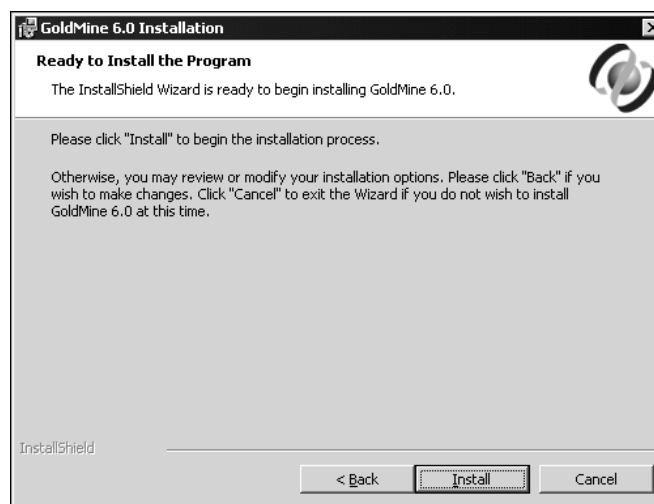
2. Select **I already use a prior version of GoldMine and have an "Upgrade Installation."** Click **Next**.

The **Current GoldMine Location** dialog box appears.



3. Locate the current version of GoldMine by clicking **Browse**. The Installation Wizard launches the **Change Current Destination Folder** dialog box where you can navigate to the current location of GoldMine. To return to the **Current Location of GoldMine** window, click **OK**. Click **Next**.

The **Ready to Install** dialog box appears.



4. Click **Install**. GoldMine installs the new version of GoldMine.

Upgrading GoldMine on a Client Workstation

A client workstation is a computer that is connected to and running a server copy of GoldMine. Because the computer is running GoldMine from the server, it automatically runs the upgraded version of GoldMine; however, the client workstations can have outdated versions of some necessary settings. We recommend uninstalling and reinstalling the workstations.

To Upgrade GoldMine on a Client Workstation

1. Uninstall the client workstation.
2. Follow the instructions for installing a shared workstation in the “Installing GoldMine 6.0 (Business Contact Manager)” chapter.

Upgrading GoldMine on a Single-user System

This type of upgrade is for computers that run independently of other GoldMine computers (single-user license computers) or computers that often work disconnected from a GoldMine server but synchronize with the GoldMine server to update information (undocked computers).

If you are upgrading from a CD, you need to upgrade the with the CD upgrade option. The same instructions apply for a single-user license computer, undocked computer, or remote site.

If you are part of the Upgrade Protection Program (UPP) and are upgrading through NetUpdate, you can send the user the gm6setup.exe file that was created during NetUpdate.

IMPORTANT: If you are upgrading the server, but are not upgrading an undocked user until a later date, disable the undocked user site in the GoldSync Administration Center until they are running the same version of GoldMine as the server.

To Upgrade GoldMine on a Single-user System

1. Upgrade the Master GoldMine site.
2. Once the Master site is upgraded, you can upgrade undocked users by sending them a GoldMine installation CD or, if you upgraded the server through NetUpdate, send them a copy of the gm6setup.exe by:
 - CD-ROM
 - FTP site
 - E-mail
 - Accessible network drive
3. The undocked user should run the installation CD or the gm6setup.exe on their computer following the upgrade instructions in this appendix.
4. After the undocked user upgrades to the same version of GoldMine as the server, they can begin synchronizing again.



in this appendix...

Finding the BDE in \Setup\BDEShare

Specifying the Location of the BDE
with GM.INI

Working with the BDE Administrator

Changing the dBASE Level in the BDE



APPENDIX B

Working with the Borland Database Engine

Overview

GoldMine uses the Borland® Database Engine (BDE) to access the databases.

For GoldMine to run properly, each computer must have access to the BDE. Other applications (such as Delphi) written by Borland or with Borland compilers can also use the BDE. Most of these applications require you to install the BDE on every computer using the application; however, client workstation installations of GoldMine can share the same BDE on the network. If you do not need the BDE on the local computer for other programs, you can use a shared installation allowing for easier management.

If the BDE is already installed on some of your computers, verify that GoldMine works with the installed version. We currently support only versions 5.0 and higher.

Note: For more information on BDE, see Document #500, “The Borland Database Engine with GoldMine” available at <http://support.frontrange.com>.

Finding the BDE in \Setup\BDEShare

In a network environment, GoldMine does not require you to install the BDE to each workstation. Instead, all GoldMine users on a LAN can use a shared installation of the BDE. When GoldMine is installed on the server, the **\Setup\BDEShare** folder is automatically created in the GoldMine folder.

When launched on a workstation, GoldMine checks the registry for the location of the BDE. If the BDE path is found in the registry, then GoldMine loads the BDE from that location. If the BDE is *not* found in the registry, GoldMine checks its subdirectory **\Setup\BDEShare**. Once the BDE is found, GoldMine loads the BDE and then updates the registry to reference that location. If the BDE cannot be found, GoldMine displays a dialog box that allows you to browse to the correct location of the BDE and select the IDAPI32.DLL (for example **G:[directory]\IDAPI32.DLL**).

Specifying the Location of the BDE with GM.INI

If you do not need to install the BDE locally on your workstations for other programs, and you have many workstations to configure, you can “refer” the workstations to the shared IDAPI32.dll. Add the following lines to GM.ini, which is located in the GoldMine folder:

```
[GoldMine]
```

```
NetIDAPI32DLL=g:\apps\shared\bde\idapi32.dll
```

Substitute the path with the location of idapi32.dll that you want the workstations to use.

By using this .ini entry, you can avoid having to manually select the directory for IDAPI32.dll on each workstation.

Registry Settings

GoldMine uses different methods to initially locate the BDE during installation. Once the installation selects an installation of the BDE to use, the registry is updated with this location. When GoldMine is launched again, it loads the BDE from the path in the registry.

Working with the BDE Administrator

Some situations require changes to the BDE configuration file(s) to enable GoldMine users to access all databases. For instance, you can add a new database or switch SQL to a new server. Both these actions would require that you update the BDE.

If all users access the BDE located on the server, they use the same configuration file and therefore have the same list of aliases and settings; however, users may install or use an existing version of BDE (v5.00 or higher) on their workstation to successfully access GoldMine.

Unless other constraints require using the BDE on the workstations, forcing the workstations to use the server's BDE configuration is the easiest method to administer.

To Copy the BDE Configuration to Workstations

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 but use the server's configuration file.

1. Close GoldMine and any other application(s) using the BDE.
2. From the **Windows** task bar, select **Start>>Settings>>Control Panel**.
3. Double-click the **BDE Administrator** icon.
4. Select **Object>>Open Configuration**.
5. Browse to the location of the IDAPI32.CFG that you want to use as the default configuration for this workstation.

Note: In most installations, idapi32.cfg is located in the **\Setup\BDE Share** folder under the server's GoldMine folder. However, you should verify the path to the idapi32.cfg on the server before proceeding.

6. Click **Open**.
7. Click **X** on the title bar to close the BDE Administrator. A dialog box asks if you want to save this setting as your default configuration.
8. Click **Yes**.

Note: The workstation will now use the new BDE configuration when launching GoldMine.

Changing the dBASE Level in the BDE

An incorrect dBASE level setting in the BDE Administrator can generate database errors. If your BDE is installed by another application, verify the dBASE level.

To Change the dBASE Level in the BDE:

1. Close GoldMine and any other application(s) using the BDE.
2. From the **Windows** task bar, select **Start>>Settings>>Control Panel**.
3. Double-click the **BDE Administrator** icon.
4. In the **BDE Administrator**, click the **Configuration** tab.
5. Expand **Configuration**, then **Drivers**, and then **Native**.
6. Select **DBASE**.
7. Ensure that **LEVEL** is **5**.

Note: If the **LEVEL** setting is not **5**, stop this procedure, and perform the following:

- Back up all GoldMine files
 - Complete all the steps in this section
 - Rebuild all databases in GoldMine
-

8. Ensure the **MDX BLOCK** size is at least **1024**.
9. Expand **Configuration**, then **System**, and then **INIT**.
10. Ensure that **LOCAL SHARE** is **true**.
11. Ensure **MAXFILEHANDLES** is at least **255**.
12. Select **Object>>Apply**.
13. Click **X** on the title bar to close the BDE Administrator.



in this appendix...

Changing GoldMine Ownership in
Windows XP

Granting Permission to Use
GoldMine in Windows XP



APPENDIX C

Granting Access Privileges in Windows XP

Overview

Microsoft® Windows XP® Professional® has enhanced system security restricting access to applications to all users except the installing user. Having a Windows XP logon does not grant access to an application. Access privileges must be granted to any additional users who want to use an application on the system.

To grant access to GoldMine® running on Microsoft Windows XP (Professional version), you must:

- Change GoldMine ownership.
- Grant permission to use GoldMine.

Note: If you are upgrading from GoldMine 5.7 (Business Contact Manager) installed on Windows XP Professional, consult your GoldMine 5.7 documentation regarding the “realini” setting in the GM.ini file.

Changing GoldMine Ownership in Windows XP

Windows XP (Professional version) enhances system security by restricting access to installed applications to all users other than the installing user. If GoldMine was installed on your system using a different Windows XP logon user name and password and you do not know the Windows XP logon that was used, you can change the permission settings with an administrator-level account.

To Change GoldMine Ownership in Windows XP

1. Log on as an administrator or as a user with equivalent rights.
2. Navigate through your system to **Program Files\GoldMine**. Right-click to display the local menu, then select **Properties**.
3. Click the **Security** tab.
4. Click the **Advanced** button.
5. Click the **Owner** tab.
6. In the **Change Owner To** area, select the user you want to make the owner.
7. Select **Replace owner on subcontainers and objects**.
8. Click **OK**.
9. On the **GoldMine Properties** dialog box, click **OK** to save and close.

Granting Permission to Use GoldMine in Windows XP

Windows XP's enhanced security requires the administrator to grant privileges to each additional user who wants to use an application on the system.

To Grant Permission to use GoldMine in Windows XP

1. Navigate through your system to **Program Files\GoldMine**. Right-click to display the local menu, then select **Properties**.
2. Click the **Sharing** tab.
3. Select **Share this folder**.
4. Click **Permissions**.
5. On the **Share Permissions** tab, select **Add**.
6. Select the user or user group to whom you want to grant access.
7. Click **OK** to return to the **Share Permissions** window.
8. Select the data access permissions that you want to allow or deny to the selected users or user groups. GoldMine users must have full control. Click **OK**.
9. Click the **Security** tab.
10. In the **Group or user names** area, select the users for which you want to define access privileges.
11. Select the GoldMine application permissions that you want to allow or deny to the user or user group. GoldMine users must have full control.
12. Click **OK**.

granting access



in this appendix...

- Creating the GoldMine Group
- Configure the Workstation Drivers
- Setting Trustee Rights
- Setting the File Attributes



APPENDIX D

Installing on a Novell NetWare Network

Overview

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 are to 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 on to the network with either the supervisor account or an account having 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.

IMPORTANT: Although you can select any name for this group, in this appendix the group is called *GoldMine*. Each GoldMine user on the network should be assigned to the GoldMine group.

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 installed on volume SYS: using drive G:, then all GoldMine users 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, you must map the drive designator selected during installation into the volume containing the program files. If the drive designator used during the installation process is mapped differently, GoldMine does not work properly.

Running GoldMine from a Root Directory

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). You would not, however, MAP ROOT G: =SYS: APPS\ GOLDMINE, because that would cause GoldMine to be mapped to the G:\ root directory.

After you select 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 logon script using the SYSCON system configuration utility. The following sample maps drive G: to the GoldMine directory on volume SYS: whenever a member of the GoldMine group logs on to the network:

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

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 the Workstation Drivers

You can use either Microsoft's drivers for Novell, or the existing ODI driver.

NETX or VLM Drivers

You cannot use NETX or VLM drivers. We do not recommend or support using Novell's Client32 or Intranetware drivers due to inconsistent behavior with GoldMine.

Note: Client32 drivers are not supported; if you must use Client32, please see Technical Document #348 available at <http://support.frontrange.com>

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

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 in the \GoldMine\ directory to the GoldMine group using the SYSCON system configuration utility:

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:

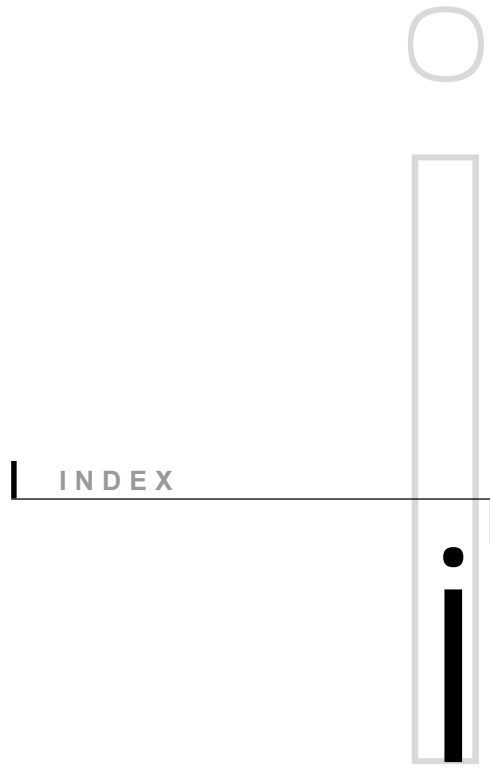
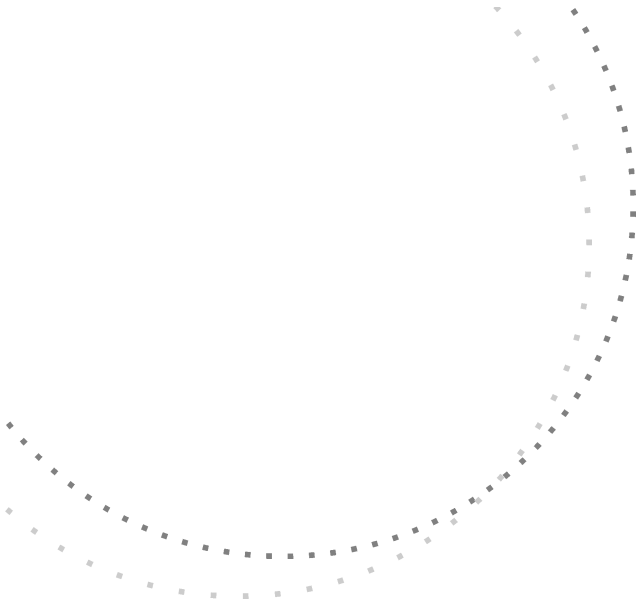
- Scan for files in the directory (F)
- Open and read existing files (R)
- Write to files (W)
- Create new files and directories (C)
- Erase existing files (E)
- Modify files and directories (M)

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

Setting the 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:

- Flag all .dbf and .dbt files as Shareable and Read/Write.
- Flag all .mdx and .ini files as Read/Write.
- Flag all .exe and .dll files as Shared and Read Only.
- Flag all other files 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.



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