

GoldMine®

VERSION 6.7

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INTRODUCTION



Introduction

Welcome to GoldMine 6.7

Welcome to GoldMine 6.7. GoldMine is a business contact management tool with sales force and marketing automation functionality for individuals and teams. GoldMine 6.7 enhanced functionality includes a new Lookup Wizard, advanced security and control features for PDA synchronization, and strengthened logic for data records, with developer enhancements such as an XML wrapper for the API as well as compatibility with .NET development environments.

The new GoldMine Lookup Wizard helps users build SQL query strings to locate specific records and contact information across the GoldMine application. Users can then launch actions and campaigns directly from those results. Query storage features allow users to save and reuse custom query parameters.

Enhanced logic makes it easier for users to work with data records. Users can now perform searches for record types instead of field names, making it easy for users to find information without identifying a particular field name. Logical pick lists display field names for the selected record type. Linked documents can now be assigned by category for quick identification. And an intuitive auto-fill feature allows automated city and state field population when users type in a zip code.

GoldMine 6.7 enhances PDA Sync security and control for Palm OS3 and above. Users can now exercise more control when synchronizing between GoldMine and PDAs with the enhanced ability to select from the specific activity types they need. To enhance security, improved features for multi-user environments keep critical contact information from upload, modification, or deletion by unauthorized users or groups. Additional security allows administrators to restrict advanced synchronization options.



For developers, a new wrapper integrates with the existing API, translating it into XML format. GoldMine 6.7 now also includes .NET compatibility for developers using the .NET development environment to integrate with GoldMine.

About this Guide

Audience and Expertise

The information in this manual is written for GoldMine users and system administrators reviewing the new features and enhancements. It assumes the user has a basic understanding of databases and the Microsoft Windows operating system.

Document Conventions

Example	Description
File>>Print	Menu bar commands (in this example, select File on the menu bar, then select Print in the drop-down menu)
The Select a Data Source dialog box appears.	Dialog boxes and menu items in bold
OK 	Button names
Note	Additional information
CAUTION/WARNING	Critical information to prevent functionality or data loss
	Reference to another topic or resource

Resources

- **GoldMine Help** (access from the Help menu)
- **What's New in GoldMine**
- **GoldMine Installation Guide**
- **Using GoldMine**
- **Administrating GoldMine**
- **Manager's Console/Answer Wizard**

IMPORTANT: Manuals are available in PDF format from the Installation CD-ROM or NetUpdate download or from **support.fronrange.com** for maintenance customers.

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Server Requirements
Shared Workstation Requirements
Undocked/Single-user
Requirements
Software Requirements

CHAPTER ONE

1

System Requirements

Overview

Before you install GoldMine on a network server, a client workstation, or an undocked/single-user computer, it is important to make sure your system meets the system requirements.

Minimum and recommended requirements are provided for various environments. Performance considerations are noted to assist you in establishing your business needs.

IMPORTANT: This installation guide provides information for installing either GoldMine Standard 6.7 with a D-License and dBASE database or GoldMine Corporate Edition 6.7 with an E-License and a Microsoft SQL Server 2000 database. Pay particular attention to the system requirements that apply to your license type.

System Requirements

This section lists the baseline system requirements for successful installation and operation of GoldMine. Requirements are listed for the following:

- Servers
- Workstations
- Undocked/Single-user Systems

Level of Windows Security

Members of the Power Users group can create user accounts, but can modify and delete only those accounts they create. They can create local groups and remove users from local groups they have created. They can also remove users from the Power Users, Users, and Guests groups.

They cannot modify the Administrators or Backup Operators groups, nor can they take ownership of files, back up or restore directories, load or unload device drivers, or manage the security and auditing logs.

CAUTION: If you are running the following operating systems: Windows XP, Windows 2000 Professional, Windows 2000 Server, or Windows 2003 Server, you must be logged on as a Power User or part of a Power User group.

Note: Consult Microsoft Windows online help for further information.

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;
Microsoft Windows 2003 Server

Note: Microsoft XP is supported, but not recommended, as a server. See <http://support.frontrange.com> for more information.

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

CAUTION: Ensure that Microsoft SQL Server is installed to a Windows 2000 Server that is a member of your Novell network. A Windows 2000 or 2003 Server is required for Enterprise and Standard versions of SQL Server 2000.

 For more information on Novell NetWare, see Appendix C, "Installing on a Novell NetWare Network."

Network Protocols

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

Server System Requirements

- Microsoft Windows 2000 Server/ Advanced Server;
Windows 2003 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 or P4 1-GHz or 2-GHz
51–149	Pentium III 700-MHz dual processor	Pentium III 700-MHz quad processor or P4 1-GHz or 2-GHz

Performance Considerations

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

- Number of Contact Records in the database (1 KB each)
- Number of Detail Records in the database (2 KB each)
- Number of History Records in the database (1 KB 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 GoldMine server.

System	Minimum	Recommended for Standard	Recommended for Corporate Edition
CPU	Pentium 200 MHz	Pentium I/III +	Pentium III/4
HDD	65 MB	165 MB +	300 MB
RAM	64 MB	128 MB +	256 MB

Operating Systems

FrontRange Solutions supports the following Microsoft operating systems:

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

Note: FrontRange Solutions Technical Support neither supports nor recommends using Windows emulators on Macintosh, Linux, or other operating systems.

Undocked/Single-user Requirements

The following recommendations are made for computers working disconnected from a GoldMine server.

Operating Systems

FrontRange Solutions supports the following Microsoft operating systems:

- Microsoft Windows 2000 and 2003 Professional/Server/Advanced Server
- Microsoft Windows XP (Home/Professional)

Note: FrontRange Solutions Technical Support neither supports nor recommends using Windows emulators on Macintosh, Linux, or other operating systems.

Performance Considerations

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

- Number of Contact Records in the database (1 K each)
- Number of Detail Records in the database (2 K each)
- Number of History Records in the database (1 K 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, GoldMine installs it automatically.

in this chapter...

- Overview
- Upgrade Considerations
- Installation Types
- Installation Checklists
- Running a Server Installation
- Running a Workstation Installation
- Running an Undocked
Computer Installation
- Upgrading Remote Systems

CHAPTER TWO

2

Installing or Upgrading GoldMine 6.7

Overview

GoldMine 6.7 is available as a Net-Update option. In most cases, you have an earlier version of GoldMine installed on your server. Using GoldMine Net-Update, you can upgrade your existing version to GoldMine 6.7.

This chapter contains information about upgrading different installation types as well as information for new users to help you determine the type of installation you must run, provides checklists to ensure success, and includes step-by-step installation instructions for each installation type.

GoldMine provides various types of installations. Review the upgrade considerations, determine the type of installation you are running, and use the associated checklist to ensure a successful installation.

IMPORTANT: The instructions in this chapter use the Server installation as a baseline installation and then details the specific actions for different installation types.

Upgrade Considerations

Review the following upgrade considerations:

IMPORTANT: You can use this upgrade process with GoldMine 5.7 or higher. If you are upgrading a prior version, you must upgrade to 5.7 before upgrading to 6.7. If you are running 5.5 or earlier, contact support at 800.776.7889.

CAUTION: If you are upgrading from a previous version of GoldMine, make a backup of your existing GoldMine database and system before beginning the upgrade.

- In addition to the 65 MB of disk space required for installation, please make sure you have at least two-and-a-half times the size of your largest table in additional free space on your hard disk.

Example: If your largest table 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 may be 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.
- 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.

- If you have a previous version of GoldMine Link for Microsoft Word, uninstall this version prior to upgrading. The upgrade installs the new GoldMine Link for Office.

Installation Types

The Wizard allows you to select an installation type. Various types are available depending upon your needs.

Which one should you use?

If you are:	Then run:
<p>Shared Server: A company that needs to support multiple GoldMine users using a shared copy of GoldMine. Users can then connect to the server copy from their local client workstations using shortcuts installed by running a Workstation installation.</p>	<p>Server Setup</p>
<p>Shared Workstation: An individual in an organization with a multi-user environment who needs to connect to a shared copy of GoldMine. Installs shortcuts to the client workstation so the end user can connect to the server copy of GoldMine from his or her individual computer.</p>	<p>Workstation Setup</p>
<p>Undocked: An individual who often works remotely on a computer with an Undocked sub-license; who synchronizes with a GoldMine server to update information. Installs a full copy of GoldMine, with a dBASE database, on a computer working disconnected from a network.</p>	<p>Undocked Setup (with U-License)</p>

Installation Checklists

Review the following checklists before installing GoldMine. These checklists outline the basic steps for efficiently installing and running GoldMine.

Server Installation Checklist

- Back up your database and folders (upgrading customers only). If you are upgrading, back up 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.
- Confirm all GoldMine users are logged out of the system (upgrading customers only).
- Uninstall GoldMine Link for Word (upgrading customers only).
- Exit all programs running on your system. This frees memory and alleviates potential conflicts between the installer and other software on your computer, including 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 that integrate with GoldMine or use BDE.
- Install Microsoft SQL Server (E-license only). You can install SQL Server on the computer serving as the GoldMine server or on another computer on your network. See Appendix D, "Installing Microsoft SQL Server 2000."
- Install GoldMine on the computer serving as your GoldMine server. Select the Server Setup installation and follow the directions described in "Running a Server Installation" on page 2-7. GoldMine should *not* be installed as a root folder of the drive (for example, C:\GoldMine).
- 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 Chapter 3, "Licensing and Registration." For detailed information on GoldMine Licensing, see the *Administrating GoldMine* manual.
- Verify you can launch GoldMine on your GoldMine server. This ensures the installation is functioning properly before you install any workstations.

- ❑ Share the GoldMine folder. In order for the client workstations to connect to the shared copy of GoldMine, you must first share the folder in which GoldMine is installed (or will be installed). Users also need "Full Control" privileges to the shared folder. New customers installing GoldMine for the first time must first create a GoldMine folder on the server. Sharing may expose other applications, so do not install GoldMine as a root folder of the drive (for example, C:\GoldMine) or directly to Program Files (for example, C:\Program Files\GoldMine). We recommend you install GoldMine to **C:\Program Files\GoldMine\GoldMine**. Be sure to install the server copy of GoldMine to this folder. For detailed steps on sharing the GoldMine folder, see "Sharing the GoldMine Folder on the Server" on page 2-16.

Shared Workstation Installation Checklist

- ❑ Exit all programs running on your system. This frees memory and alleviates potential conflicts between the installer and other software on your computer. You should exit any third-party utilities integrating with GoldMine and other GoldMine add-on products. You should also exit the Microsoft Office Shortcut bar and stop all services that integrate with GoldMine or use BDE.
- ❑ 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 "Mapping a Drive on the Workstations" on page 2-17.
- ❑ Install GoldMine on the Client Workstation. This creates the necessary shortcuts to access GoldMine from a client workstation. Follow the steps in "Installing GoldMine 6.7 on Windows XP" on page 2-15.
- ❑ Verify you can launch GoldMine from the workstation. This ensures the installation is functioning properly.

Undocked Computer Installation Checklist

- Create an Undocked license (U-license) on the server (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, Chapter 3, "Licensing and Registration." for steps to follow. For detailed information on GoldMine Licensing, see the *Administering GoldMine* manual or GoldMine online Help.
- Exit all programs running on your system. This frees memory and alleviates potential conflicts between the installer and other software on your computer. You should exit any third-party utilities integrating with GoldMine and other GoldMine add-on products. You should also exit the Microsoft Office Shortcut bar and stop all services that integrate with GoldMine or use BDE.
- Disconnect the laptop from the network. This ensures GoldMine configures the laptop to connect only with the database on the local computer and not with the network.
- Install GoldMine to the undocked laptop or home office computer. Follow the directions described in "Running an Undocked Computer Installation" on page 2-20.
- License GoldMine. License GoldMine with the appropriate U-license information. See Chapter 3, "Licensing and Registration." for more licensing information.
- Verify you can launch GoldMine. This ensures the installation is functioning properly.

Running a Server Installation

A shared Server Setup installs a full copy of GoldMine to a common location—usually a shared network drive. Workstation-based users can then connect to the server copy from their local computers (after running a Shared Workstation installation).

The following steps provide instructions for using the Installation Wizard to install a new copy of GoldMine or upgrading your existing copy.

To Run a Server Installation

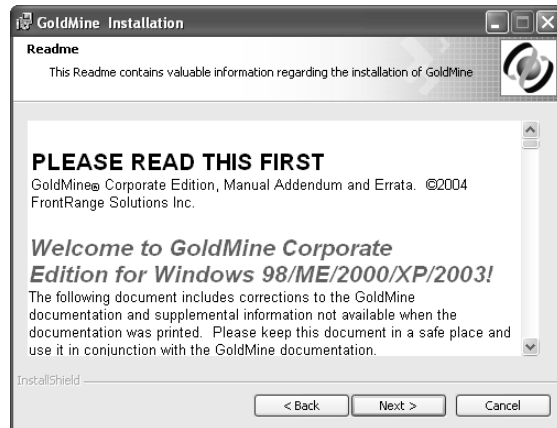
1. Run the **gm6setup.exe** downloaded to your server installation of GoldMine during the Net-Update process. The file is downloaded to **GoldMine\Setup\GoldMine**. For example, C:\Program Files\GoldMine\GoldMine\ Setup\GoldMine.

When the setup is ready, the **Welcome to the GoldMine Installation Wizard** dialog box appears.



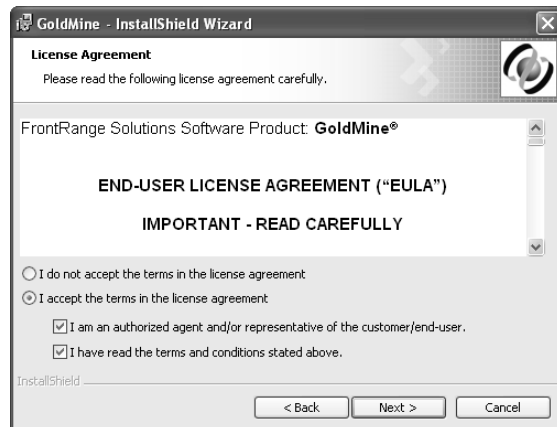
2. Click **Next**.

The **Readme** dialog box appears.



3. Click **Next**.

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



4. Review the licensing information carefully, and if you agree to the terms, select **I accept the terms in the license agreement**.

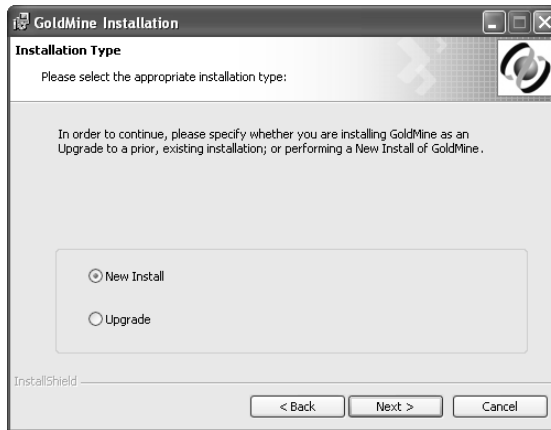
Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms in the license agreement**. Click **Cancel** to terminate the installation.

5. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

IMPORTANT: Select **I am an authorized agent and/or representative of the customer/end-user** and **I have read the terms and conditions stated above** to continue.

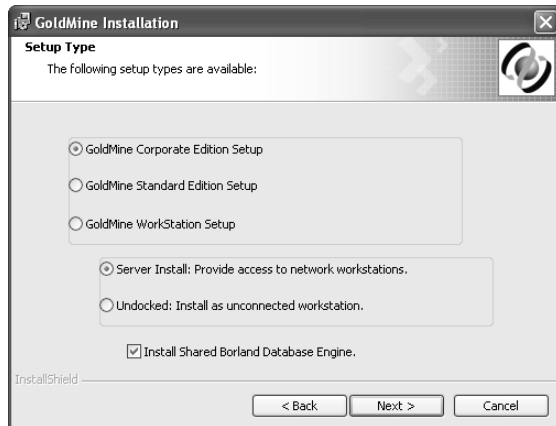
6. Click **Next**.

The **Installation Type** dialog box appears.



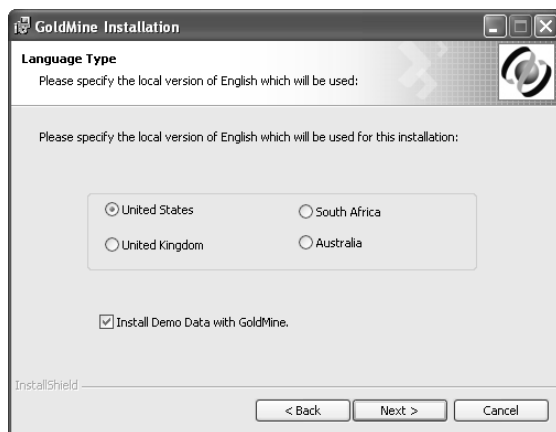
7. Select one of the following installation types:
 - **New Install:** Select this option if GoldMine has never been installed.
 - **Upgrade:** Select this option if you are upgrading from a previous version of GoldMine.
8. Click **Next**.

The **Setup Type** dialog box appears.



9. If you are running GoldMine with an E-license on SQL Server, select **GoldMine 6.7 Corporate Edition Setup**.
10. Select **Server Install**.
11. Select **Install Shared Borland Database Engine** to add the Borland Database Engine (BDE) to your GoldMine directory. Click **Next**.

The **Language Type** dialog box appears.



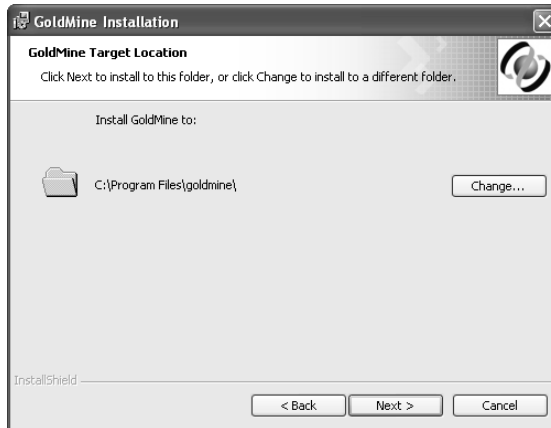
12. Select the language of your choice.

13. If you are installing new and wish to add the demonstration data to the database, select **Install Demo Data with GoldMine 6.7**.

IMPORTANT: If you are upgrading, do not install the demonstration data.

14. Click **Next**.

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



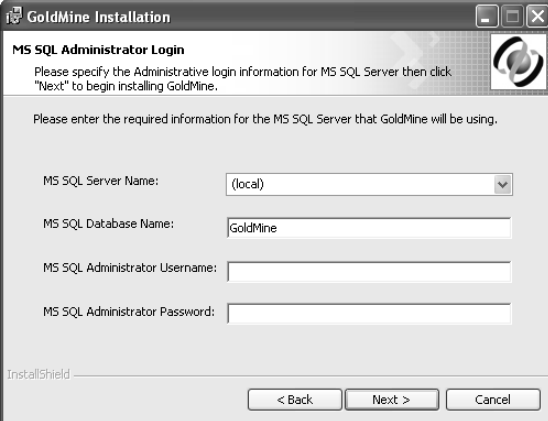
15. If you are upgrading, click **Change** to locate your existing GoldMine installation. The **Change Current Destination Folder** dialog box appears. Type a path or browse to the folder where you want GoldMine installed. To return to the **Existing GoldMine Location** window, click **OK**.

If you are installing new and wish to install GoldMine to a different location, click **Change**. The **Change Current Destination Folder** dialog box appears. Type a path or browse to the folder where you want GoldMine installed. To return to the **Existing GoldMine Location** window, click **OK**.

IMPORTANT: New customers installing GoldMine for the first time must first create a GoldMine folder on the server. Sharing may expose other applications, so do **not** install GoldMine as a root folder of the drive (for example, C:\GoldMine) or directly to Program Files (for example, C:\Program Files\GoldMine). We recommend you install GoldMine to **C:\Program Files\GoldMine\GoldMine**. Be sure to install the server copy of GoldMine to this folder.

16. Click **Next**.

If you are upgrading or installing GoldMine Corporate Edition new, the **MS SQL Administrator Login** dialog box appears; otherwise, the **Ready to Install the Program** dialog box appears.



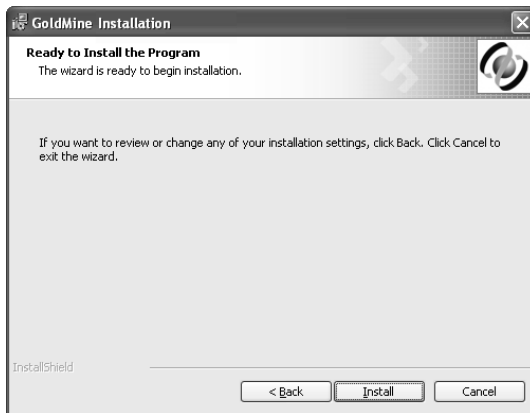
The screenshot shows a dialog box titled "GoldMine Installation" with a sub-header "MS SQL Administrator Login". The main text reads: "Please specify the Administrative login information for MS SQL Server then click 'Next' to begin installing GoldMine." Below this, it says: "Please enter the required information for the MS SQL Server that GoldMine will be using." There are four input fields: "MS SQL Server Name" with a dropdown menu showing "(local)", "MS SQL Database Name" with the text "GoldMine", "MS SQL Administrator Username" with an empty text box, and "MS SQL Administrator Password" with an empty text box. At the bottom left, it says "InstallShield". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

17. Complete the following SQL Server text boxes:

- **MS SQL Server Name:** Type or select the name of the computer on your network where SQL Server is installed.
- **MS SQL Database Name:** GoldMine creates and installs the demo data in a SQL database called GoldMine. If you want your database to have a different name, type it in the text box.
- **MS SQL Administrative Username:** The default login in SQL is **sa**. If your SQL user name is different, your SQL administrator must provide the information.
- **MS SQL Administrative Password:** There is no default password in SQL. If your SQL password is different, your SQL administrator must provide the information.

18. Click **Next**.

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



19. Click **Install** to begin installing GoldMine. The **Installing GoldMine** dialog box appears.

20. When the installation completes, the **Installation Completed** dialog box appears.



21. Click **Finish**.

CONGRATULATIONS! You have successfully installed GoldMine on your computer. If this is a new installation, you now need to license the program. For detailed instructions for licensing, see "Licensing Following Installation" on page 3-7.

Installing GoldMine 6.7 on Windows XP

Some users may encounter issues with the auto-run installation.

- For users of GoldMine 5.0-5.7 who backup GoldMine by copying the GoldMine folder at C:\Program Files, this means they are not copying their data files and must browse to Documents and Settings\All Users\Application Data\GoldMine to find their data folders.
- Customers using a Windows XP system as a server will have problems with the client workstations accessing the data on the network due to the “split”.

Note: Windows XP is not a recommended platform for a server.

- Users may also encounter license errors when performing NetUpdates.

Running a Workstation Installation

A shared workstation setup installs shortcuts on the workstation, enabling workstation users to 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:

1. Share the GoldMine folder on the server.
2. Map the same drive on each workstation to the shared GoldMine folder on the server.
3. Run the workstation installation.

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.

IMPORTANT: New customers installing GoldMine for the first time must first create a GoldMine folder on the server. Sharing may expose other applications, so do **not** install GoldMine as a root folder of the drive (for example, C:\GoldMine) or directly to Program Files (for example, C:\Program Files\GoldMine). We recommend you install GoldMine to C:\Program Files\GoldMine\GoldMine. Be sure to install the server copy of GoldMine to this folder.

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 operating system. If you are using a different operating system, your steps may vary.

Mapping a Drive on the Workstations

We recommend mapping 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** text box or browse to the server name and shared folder. An example path is: \\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

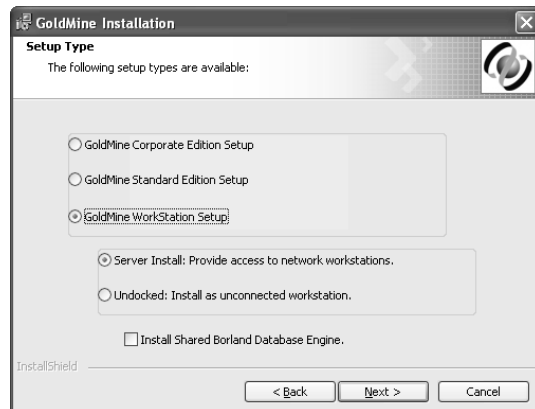
The workstation setup installs as a process that creates a shortcut to the server copy of GoldMine.

The following steps provide instructions for using the Installation Wizard to set up a new GoldMine workstation or upgrade an existing workstation connection.

To Run a Shared Workstation Installation

1. From the workstation computer, locate the **gm6setup.exe** file and follow steps 1 through 8 for a server installation.

The **Setup Type** dialog box appears.



2. Select **GoldMine 6.7 WorkStation Setup**.

3. Click **Next**.

The **GoldMine 6.7 Server Location** dialog box appears.



4. In the **Network Location** text box, type the UNC or network path for the shared GoldMine server installation on your network. You may also click **Change** and browse the network for your shared GoldMine server.

The **Change Current Destination Folder** dialog box appears. Type a path or browse to the folder where you want GoldMine installed. To return to the **Existing GoldMine Location** window, click **OK**.


5. When the path is correct, click **Install**. The network shortcuts are installed on your workstation computer.
6. When the installation process is finished, the **Installation Completed** dialog box appears.
7. 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.

Running an Undocked Computer Installation

An Undocked setup installs a full copy of GoldMine with a dBASE database on a computer working disconnected from a network but synchronizing with the GoldMine server to update information.

The following steps provide instructions for using the Installation Wizard to install a new copy of GoldMine or upgrading your existing copy.

 If the undocked computer you are upgrading or installing works remotely, see "Upgrading Remote Systems" on page 2-22.

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

To Run an Undocked User Installation

1. Follow steps 1 through 8 for a server installation.

The **Setup Type** dialog box appears.



2. Select **GoldMine 6.7 Corporate Edition Setup**.
3. Select **Undocked**.


4. If you do not have the Borland Database Engine installed on your computer, select **Install Shared Borland Database Engine**.
5. Click **Next**. The **Language Type** dialog box appears.
6. Select the language of your choice.
7. To install the demonstration data in the database, select **Install Demo Data with GoldMine 6.7**.
8. Click **Next**. The **Existing GoldMine Location** dialog box appears.
9. To install GoldMine to a location other than the path displayed, click **Change**. The **Change Current Destination Folder** dialog box appears. Type a path or browse to the folder where you want GoldMine installed. To return to the **Existing GoldMine Location** window, click **OK**.
10. Click **Next**. The **Ready to Install the Program** dialog box appears.
11. Click **Install** to begin installing GoldMine. The **Installing GoldMine** dialog box appears.
12. When the installation completes, the **Installation Completed** dialog box appears. Click **Finish**.

CONGRATULATIONS! You have successfully installed GoldMine on your computer. If this is a new installation of GoldMine, you now need to license the program. For detailed instructions for licensing, see "Licensing Following Installation" on page 3-7.


Upgrading Remote Systems

This type of upgrade is for computers working disconnected from a GoldMine server but synchronizing with the main GoldMine server to update information – a remote Site or an Undocked computer.

If you are upgrading a Site, the Master installation should provide the site administrator with the gm6setup.exe.

 Follow the instructions for "Running a Server Installation" on page 2-7.

If you are updating an undocked computer, the Master installation should provide the undocked computer user with the gm6setup.exe.

 Follow the instructions for "Running an Undocked Computer Installation" on page 2-20.

IMPORTANT: If you are upgrading the server but are not upgrading a remote system until a later date, disable the site in the GoldSync Administration Center until it is running the same version of GoldMine as the server.

To Upgrade GoldMine on an Remote Computer

1. Upgrade the Master GoldMine site.
2. Once the Master site is upgraded, you can upgrade remote computers by sending them a gm6setup.exe installation file using one of the following methods:
 - One-Button Synchronization
 - CD-ROM
 - FTP site
 - E-mail
 - Accessible network drive
3. The remote user should run the installation CD or the gm6setup.exe on his or her computer following the upgrade instructions in this chapter.
4. After the remote user upgrades to the same version of GoldMine as the server, the user can begin synchronizing again.

in this chapter...

General Licensing Information
Licensing Following Installation
Creating Sub-licenses
Licensing with Sub-licenses


CHAPTER THREE

Licensing and Registration

Overview

GoldMine has a fully scalable licensing structure to meet the needs of both individuals and organizations. As your business matures and GoldMine expands, your organization can change the licensing configurations.

This chapter presents general information on licensing and specific instructions on how to license GoldMine following installation.

 Additional information on GoldMine licensing can be found in the *Administering GoldMine* manual.

General Licensing Information

The single, distributed Master License serves as the authentication mechanism for easy and secure synchronization across the entire organization, and the License Manager keeps track of your licensing configurations.

Most organizations, regardless of their requirements, generally buy one license – a **Master License** with X number of seats. These seats can be then parsed to users in various combinations of sub-licenses. For example, an organization can create Site sub-licenses for their remote office(s) and Undocked sub-licenses for individual remote (mobile) users. One seat should always be set aside for administrators.

License Types

Three categories of license types are available: the Master License, the Sub-license, and those licenses used to increase seat counts.


The Master License is the primary license and is a precursor to executing any sub-licenses or increases which stem from the Master License. Only the Master License can be increased, decreased, or sub-licensed.

To facilitate the use of sub-licenses and/or increases, GoldMine with a Master License can only be installed on an organization's primary network. This ensures all sub-licenses and/or increases maintain security and are authenticated properly during synchronization.

The "Undocked" license (a special sub-license) is for remote users and can only be licensed for a single user. An Undocked License can be sub-licensed from the main GoldMine system or from a Site sub-license.

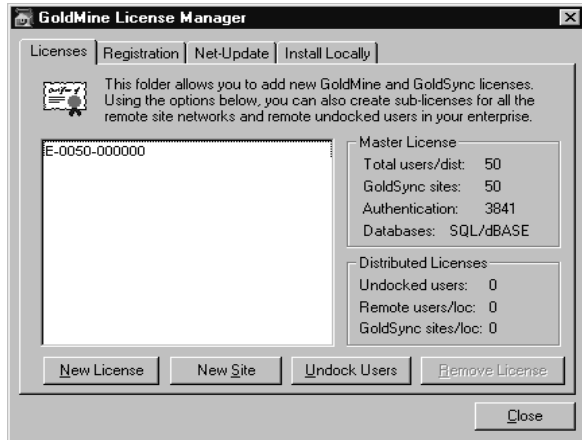
This Master License determines what database types are supported by the master site as well as its synchronization capabilities. There are three types of Master Licenses: E, D, and G (see table).

Master License		
E	Enterprise License	Supports SQL and dBASE databases and includes GoldSync
D	Standard License	Supports dBASE only; GoldSync purchased separately
G	GoldSync Master License	GoldSync seats purchased separately and can be added to D- or E-Licenses
O	GoldMine Outlook Integration Services License	Outlook integration purchased separately for a D- or E-Licenses
Sub-licenses		
U	Undocked License	Single sub-license for a remote GoldMine user
S	Site License	Multiple-user sub-license for a remote office
Y	GoldSync License	GoldSync sub-license for a remote office
Increasing License Counts		
J	Enterprise License Increase	Increases the number of GoldMine seats and GoldSync sites on an E-License
R	Standard License Increase	Increases the number of D-Licenses
N	GoldSync License Increase	Increases the number of G-Licenses

 For additional information on License Types, see the *Adminstrating GoldMine* manual.

License Manager

All GoldMine licensing information and related functions are accessed through the **License Manager**.



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

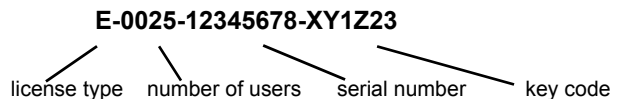
The first letter of each license determines what type of license it is. Every GoldMine system begins with a Master License.

The database support of the Master License is inherited by the site sub-licenses distributed throughout the organization. GoldSync Synchronization capabilities can be distributed separately to sub-licenses.

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

License Serial Number

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



The first character denotes the license type. The first set of numbers indicates 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 key code with it. The key code is a computer-generated check used by GoldMine to verify the license's validity.

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

Licensing with a Master License

The Master License serial number for GoldMine begins with the letter D (*Example:* D-0050-11111111). A GoldMine Corporate Edition Master License begins with the letter E (*Example:* E-0050-11111111).

The latter 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 the serial number and key code when licensing. A D-license does not include GoldSync licenses. The necessary number of GoldSync licenses (G-licenses) can be purchased and added as needed.

An E-license does include a GoldSync license for each purchased GoldMine seat.

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

To License GoldMine with a Master License

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

IMPORTANT: If you type an E-license serial number into the text boxes, the GoldSync text box area remains unavailable because GoldSync is included. Because GoldSync must be purchased separately with a D-License, if you type a D-license serial number into the text boxes, the GoldSync area becomes available and you can type your G-license information into the text boxes. However, you do not need to type the G-License number to proceed with licensing GoldMine.

To License a D-License GoldMine with GoldSync License

1. Type the complete **D-license** serial number and key code first. The GoldSync area becomes available.
2. Type the GoldSync **G-license** and key code you received when you purchased the software (optional purchase).

Licensing Following Installation

After GoldMine is installed, you must register it using the License and Registration wizard. The License and Registration wizard launches automatically after the installation wizard finishes.

If you did not complete the license and registration information after installation, the licensing wizard launches prior to first use of GoldMine.

Note: General information about GoldMine licensing is presented at the beginning of this chapter.

To License and Register GoldMine

1. Launch the **License and Registration Wizard**.

The **Welcome** dialog box appears.



Note: This Welcome dialog box will vary depending upon the Master License you are using.

2. Click **Next**.

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

Enter License Information

Accurate registration information will help us assist you more effectively and will be used for internal license auditing purposes. Please take a few moments to provide us your registration information below:

Organization: Contact Name:

E-mail address: Phone: Fax:

Address 1: Address 2:

City: State(Prov): ZIP: Country:

Checking this box indicates your consent for FrontRange Solutions to use this information to send product, services and promotional information from time to time. See <http://www.frontrange.com/goldmine/privacy.html> for details.

< 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.

Enter License Information

So that we may better assist you, please take a moment to tell us about your GoldMine purchase below:

Place of purchase: Purchase Date:

How did you learn about GoldMine?:

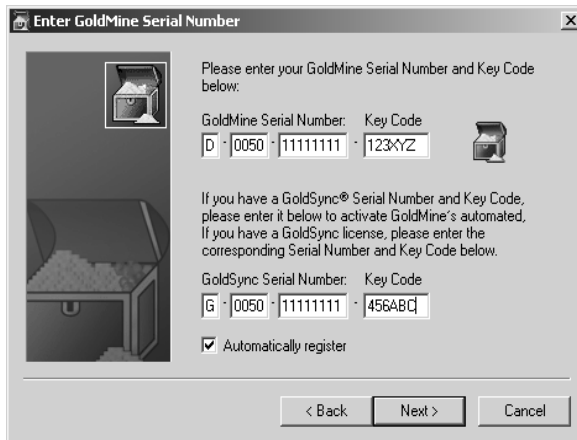
Your current contact manager, if any?:

Your software dealer:

< Back Next > Cancel

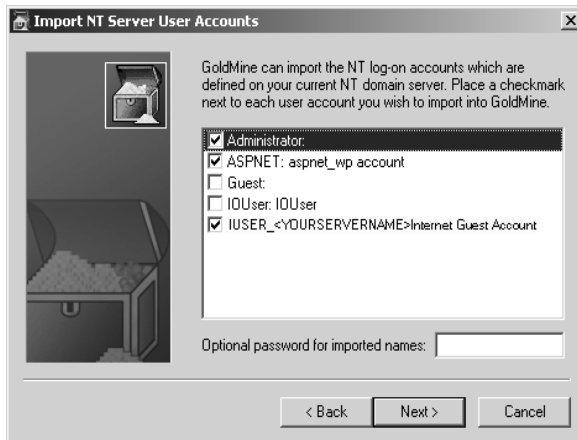
4. Complete the purchase information. Click **Next**.

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



5. Type your GoldMine serial number and key code. Depending upon what kind of license you 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.



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.

Creating Sub-licenses

After GoldMine is installed and licensed, you can parse seats to your end users with sub-licenses using the License Manager. You must have a Master License to create sub-licenses.

CAUTION: Plan before creating sub-licenses, keeping in mind that each sub-license transfers seat availability which affects how many users can log in on the network system. For example, on the License tab of the License Manager, if the **Total users/dist:** shows a total number of seats and the total number of sub-licenses as “50\20,” only 30 seats are available to users. At a minimum, one seat should always be set aside for administrators only.

Creating Sub-licenses for Remote Offices

From a Master License, you can create sub-licenses for remote offices. Remote office sub-licenses can be a **Site License (S-license)** and/or a **GoldSync License (Y-license)**.

Each “S” and/or “Y” sub-license transfers seat availability from non-remote users. A minimum of one seat must remain available to non-remote users. For example, you must have at least five seats to make GoldMine available to four remote offices. Headquarters retains the fifth seat.

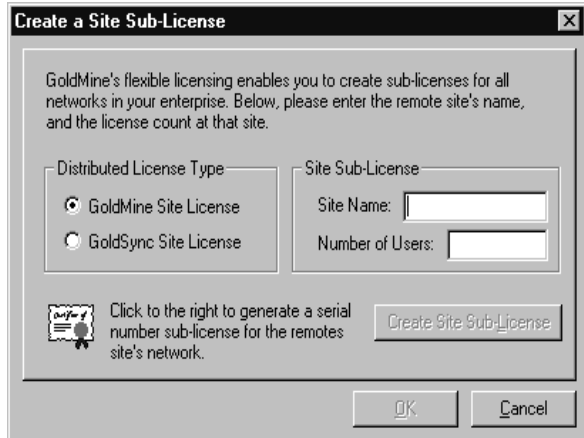
Note: When creating any sub-license, note the entire license number created by GoldMine. The sub-license includes the key code and additional information needed when licensing the remote computer. The information is only displayed in its entirety during the creation process.

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, then click **New Site**.

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



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.

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 who are synchronizing, including at least one for the site.
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.

7. If you created a Site license, repeat the above process to create the necessary GoldSync license and select GoldSync Site License.

Note: GoldMine automatically adds the sub-license to the list of licences on the Licenses tab of the License Manager.

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 a remote location on a laptop, notebook, or home office computer but who may also need to log on to the network occasionally. Keep the following considerations in mind:

- Creating an undocked user decreases the available users of the network site (Master License or Site License) by one; however, when an undocked user logs on to 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. This is in contrast to creating an “S” sub-license, which requires one seat remain available from the Master License.
- 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.

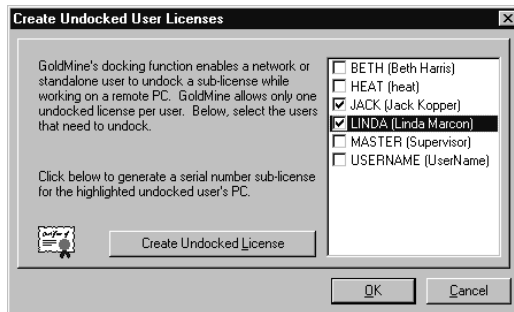
WARNING: If you undock all users, only those users will be able to login. If you have not assigned master rights to any of those undocked users, administration of GoldMine cannot take place.

- When used in combination with GoldSync, administrators can synchronize security settings to undocked users including new passwords, menu items, and preferences, in addition to data.
- To work on an undocked basis, a user must have an Undocked license on his or her 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, then click **Undock Users**.

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



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.

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.

Licensing with Sub-licenses

Licensing with a Site License

A “Site License” is a multiple-user sub-license for a remote office and is designated with the letter “S.” You should have an **S-license** for each user at the remote site.

A GoldSync License (**Y-license**) is required only if you are using an S-license and want to synchronize using GoldSync. You should have one Y-license to synchronize with the Master License and additional Y-licenses for Undocked users synchronizing with your site.

Enter GoldMine Serial Number

Please enter your GoldMine Serial Number and Key Code below:

GoldMine Serial Number: Key Code Site Code

S · [] · [] · [] · []

If you have a GoldSync® Serial Number and Key Code, please enter it below to activate GoldMine's automated. If you have a GoldSync license, please enter the corresponding Serial Number and Key Code below.

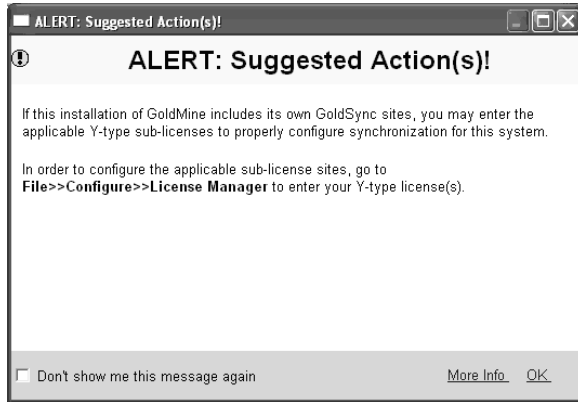
GoldSync Serial Number: Key Code Site Code

Y · [] · [] · [] · []

Automatically register

< Back Next > Cancel

Note: Y licenses are not entered in the Enter GoldMine Serial Number dialog box. Only S licenses are entered during registration (GoldSync Section remains disabled). Clicking **Next** displays the following alert if you attempt to enter Y licenses in the Enter GoldMine Serial Number dialog box.



If this installation of GoldMine includes its own GoldSync sites, you may enter the applicable Y-type sub-licenses to properly configure synchronization for this system.

In order to configure the applicable sub-license sites, select **File>>Configure>>License Manager** to enter your Y-type license.

To License GoldMine with a Site License

1. In the **GoldMine Serial Number** text boxes, type the **S-license**, **Key Code**, and **Site Code** you created in the License Manager of the main GoldMine system.
2. In the **GoldSync Serial Number** text boxes, type the **Y-license**, **Key Code**, and **Site Code** you created in the License Manager.

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 A

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 version 5.0 only.

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

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**.

When the BDE is found, GoldMine loads it and then updates the registry to reference that location. If the BDE cannot be found, GoldMine displays a dialog box allowing 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\GoldMine\Setup\
BDEShared\idapi32.dll
```

Substitute the path with the location of idapi32.dll 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. When the application 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 files to enable GoldMine users to access all databases. For instance, you can add a new database or switch SQL to a new server. Both of these actions require you to update the BDE.

The BDE consists of a list of database names, called aliases, to connect to SQL Server. GoldMine accesses the BDE alias to connect with the SQL database.

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 to administer.

Copying 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 the local BDE but use the server's configuration file.

To Copy the BDE Configuration to Workstations

1. Close GoldMine and any other applications using the BDE.
2. From the **Windows** task bar, select **Start>> Settings>>Control Panel**.
3. Double-click **BDE Administrator**. The **BDE Administrator** window appears.
4. Select **Object>>Open Configuration**. The **Open** dialog box appears.

5. Browse to the location of the Idapi32.cfg you want to use as the default configuration for this workstation.

Note: In most installations, Idapi32.cfg is located in the server's GoldMine\Setup\BDEShare\ folder. However, you should verify the path to the Idapi32.cfg on the server before proceeding.

6. Click **Open**. The BDE Administrator updates to the new configuration.
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**.

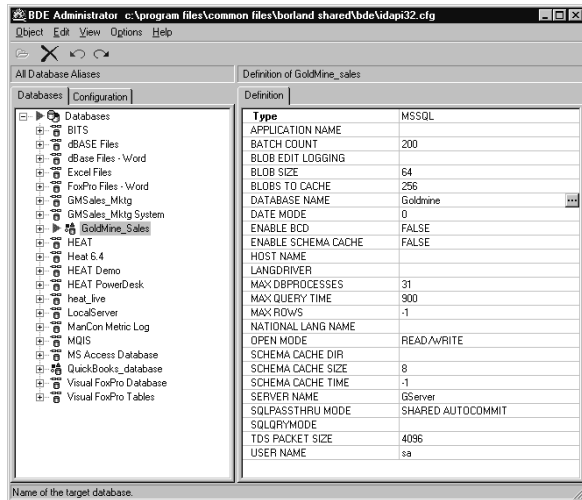
Note: The workstation will now use the new BDE configuration when launching GoldMine.

Changing the BDE Settings

You may be required to add or change the database alias settings. You can manually add a database BDE alias to the workstation's BDE or copy the configuration from the server to the workstation.

To Manually Add Aliases to a Workstation BDE

1. On the workstation Windows taskbar, select **Start>>Settings>>Control Panel**.
2. Double-click **BDE Administrator**.
3. Click the **Databases** tab. In the **Database** pane, right-click and select **New**.
4. In the **New Database Alias** dialog box, select **MSSQL** from the drop-down list. Click **OK**.
5. Type the alias name you want to use to connect to the SQL database. If you are configuring a workstation BDE to point to the main SQL database, use the same alias used in the BDE on the server. For example, **GoldMine**.



6. After the database alias is created in the left-hand pane, update the following lines in the **Definition** pane on the right:

- **Blobs to cache:** 256
- **Database Name:** The name of the GoldMine SQL database you are adding.
- **Server Name:** The name of the server where SQL is installed.
- **User Name:** The SQL user name on the SQL server. (The default is **sa**.)

7. From the **BDE Administrator** menu bar, select **Object>>Apply** to save the changes.
8. To test the connection, double-click the database alias you added. Type the SQL user name and password, then click **OK**.
9. A green box appears around the icons beside the database alias. Verify that the definition labels are boldfaced type.

CONGRATULATIONS! You have successfully created a new BDE alias.

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**, then **Native**.
6. Select **DBASE**.
7. Ensure **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 **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 B

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 granting access to installed applications only to 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.

CAUTION: If you are running the following operating systems: Window XP, Windows 2000 Professional, Windows 2000 Server, or Windows 2003 Server, you must be logged on as a Power User or part of a Power User group. Consult Microsoft Windows online help for further information.

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.

CAUTION: If you are running the following operating systems: Window XP, Windows 2000 Professional, Windows 2000 Server, or Windows 2003 Server, you must be logged on as a Power User or part of a Power User group. Consult Microsoft Windows online help for further information.

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 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 whom you want to define access privileges.
11. Select the GoldMine application permissions you want to allow or deny to the user or user group. GoldMine users must have full control.
12. Click **OK**.



in this appendix...

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



APPENDIX C

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 doing so would map GoldMine 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.

 Client32 drivers are not supported; if you must use Client32, please see Technical Document #348 available at <http://support.fronrange.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 folder (S)
- Open existing files (O)
- Read from files (R)
- Write to files (W)
- Create new files and folders (C)
- Modify (M)
- Delete (D)

NetWare 3.x and 4.x:

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

When contact databases are created as subfolders of the GoldMine directory, the new folders automatically inherit the trustee assignments of the parent folder. Otherwise, you must manually assign the above rights to a new folder once the folder 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 folder and all subfolders 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.

in this appendix...


Installing Microsoft SQL
Server 2000
Registering the SQL Server
Troubleshooting SQL Errors
when Installing GoldMine

APPENDIX D

Installing Microsoft SQL Server 2000

Overview

The GoldMine Server Setup requires you to install Microsoft SQL Server 2000 before installing GoldMine.

 The Microsoft SQL Server 2000 CD included with your GoldMine Corporate Edition package provides complete installation instructions in the Microsoft online Help.

The following instructions include installation procedures and settings pertinent to GoldMine but should not be considered a SQL Server 2000 administrator's guide. Only experienced SQL administrators should configure SQL Server with anything other than the settings described in these instructions.

Installing Microsoft SQL Server 2000

The server on which you are installing Microsoft SQL Server 2000 *must* have Windows NT 4.0 Server (SP5) or Windows 2000 Server or Windows 2003 Server operating system installed prior to installing SQL Server 2000. Windows 2000 Server (any version) is required for some SQL Server 2000 features.

If you are using an NT 4.0 Server as your SQL 2000 Server, you cannot install GoldMine to the same computer. GoldMine requires a Windows 2000 or higher operating system.

Note: SQL Server 2000 on Windows NT 4.0 Terminal Server is not supported by Microsoft.

To Install SQL Server 2000

1. Insert the Microsoft SQL Server 2000 Installation CD into the CD-ROM drive of the computer on which you are installing SQL.

Note: The SQL Server 2000 Installation 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:\autorun.exe` (where "x" is the letter of the CD-ROM drive).

The main dialog box appears.



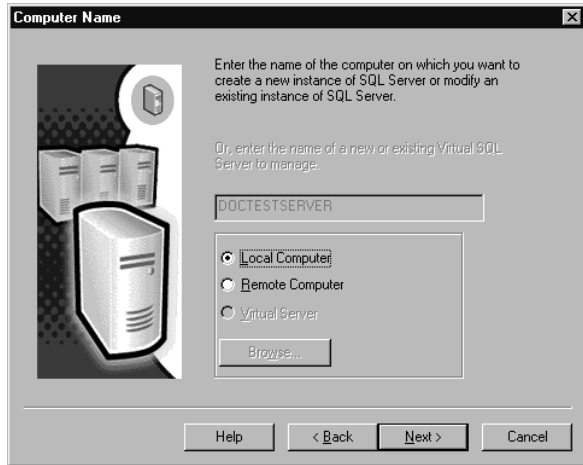
2. Select **SQL Server 2000 Components**.

The **Install Components** dialog box appears.



3. Select **Install Database Server**. The Standard Edition installation window appears with a Welcome dialog box.
4. On the **Welcome to Microsoft SQL Server Installation Wizard** dialog box, click **Next**.

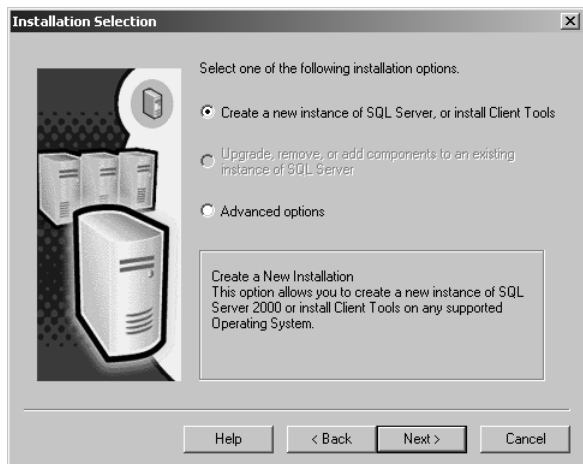
The **Computer Name** dialog box appears.



5. Select **Local Computer**. Click **Next**.

Note: Although the installer permits installation from a workstation to the server, we do not recommend using this procedure. Please install directly on the server.

The **Installation Selection** dialog box appears.



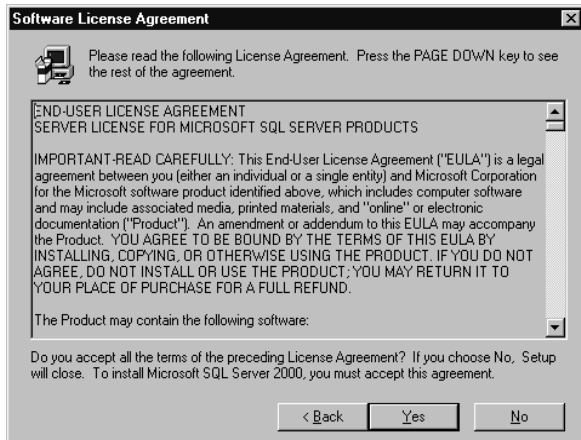
6. Select **Create a new instance of SQL Server, or install Client Tools**. Click **Next**.

The **User Information** dialog box appears.



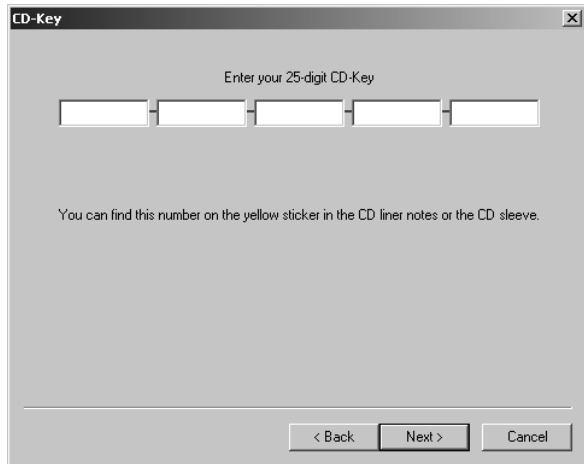
7. Type your name and company, and then click **Next**.

The **Software License Agreement** dialog box appears.



8. Read the licensing information. Click **Yes** to agree with the terms of the license agreement or **No** if you do not agree and wish to cancel the installation process.

If you select Yes, the **CD-Key** dialog box appears.



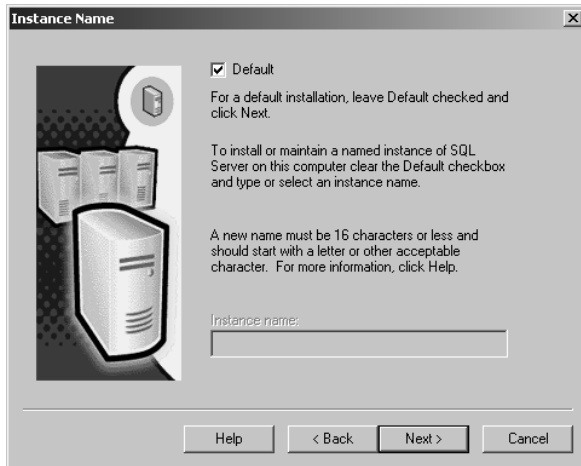
9. Type the SQL license number as it appears on your Delivery Notes and License Certificate, then click **Next**.

The **Installation Definition** dialog box appears.



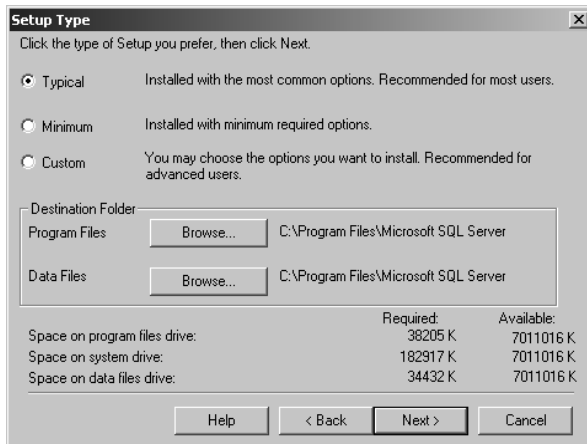
10. Select **Server and Client Tools**. Click **Next**.

The **Instance Name** dialog box appears.



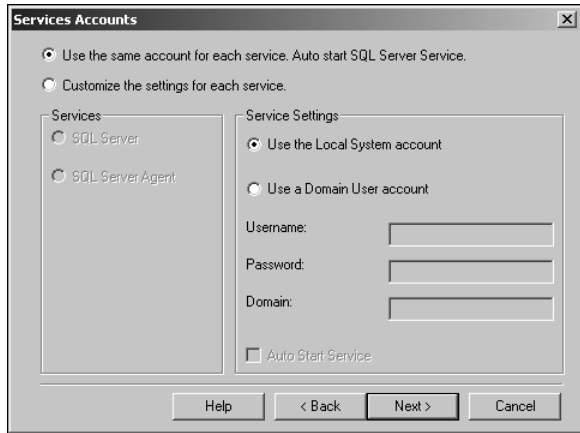
11. Leave **Default** selected. Click **Next**.

The **Setup Type** dialog box appears.



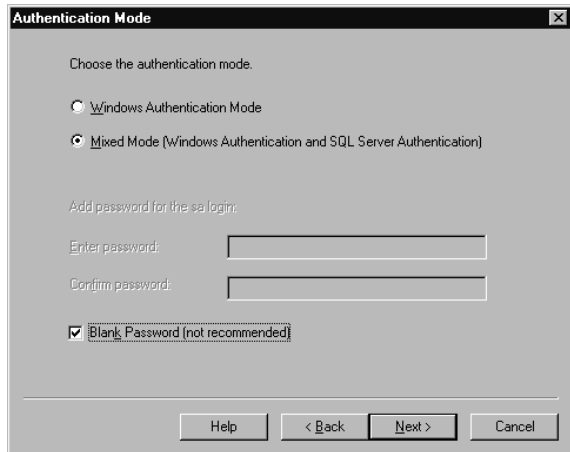
12. Select **Typical** with no changes to the default destination folders. Click **Next**.

The **Services Accounts** dialog box appears.



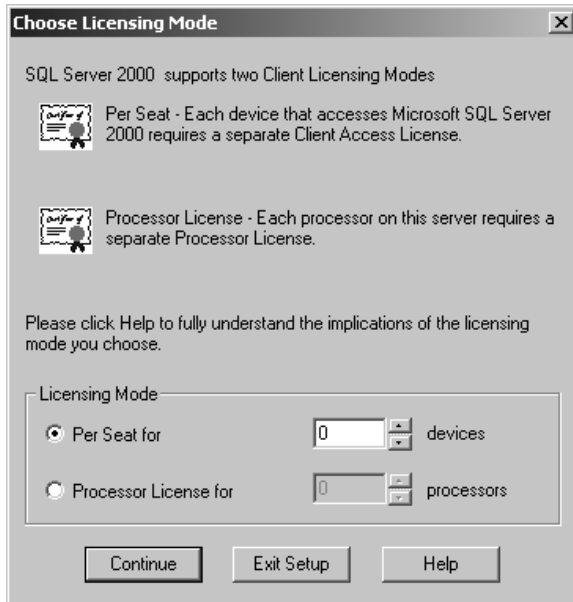
13. Select **Use the same account for each service. Auto start SQL Server Service** and **Use the Local System account**. Click **Next**.

The **Authentication Mode** dialog box appears.



14. Select **Mixed Mode**. Select **Blank Password**. Click **Next**. The **Start Copying Files** dialog box appears.

15. On the **Start Copying Files** dialog box, click **Next**. The **Choose Licensing Mode** dialog box appears.



16. Select **Per Seat**. In the **devices** text box, type the number of GoldMine licenses you purchased. Click **Continue**. The SQL Server begins installing.

When the process is finished, the **Setup Complete** dialog box appears.



17. Select **Yes, I want to restart my computer now**, and then click **Finish**.

Registering the SQL Server

Once SQL Server is installed, you may need to register the server. If it is not registered, the GoldMine Installation Wizard cannot locate it and you cannot install GoldMine.

To Register the SQL Server

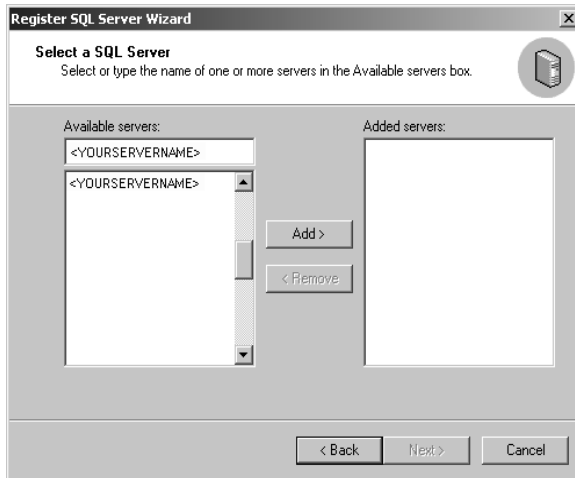
1. To open SQL Server Enterprise Manager, select **Start>>Programs>>Microsoft SQL Server>>Enterprise Manager**. The **SQL Server Enterprise Manager** window appears.
2. In the Tree pane on the left, expand Microsoft SQL Servers and expand SQL Server Group. Right-click **SQL Server Group** and select **New SQL Server Registration**.

The **Welcome to the Register SQL Server Wizard** dialog box appears.



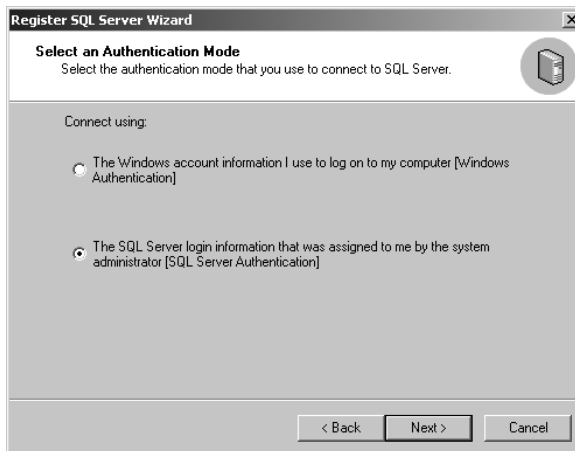
3. Review the information and click **Next**.

The **Select a SQL Server** dialog box appears.



4. Select the server from the **Available servers** list or type the server name in the text box if it is not listed. Click **Add** to move the server to the added servers list.
5. Click **Next**.

The **Select Authentication Mode** dialog box appears.



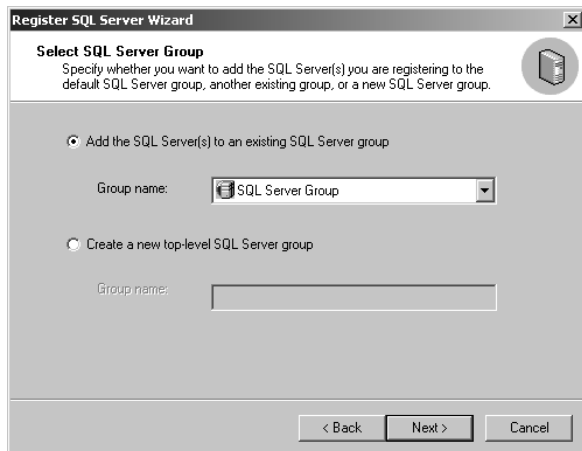
6. Select **SQL Server login information that was assigned to me by the system administrator [SQL Server Authentication]**. Click **Next**.

The **Select Connection Option** dialog box appears.



7. Select **Login automatically using my SQL Server account information**. Type the default password in the **Login name** text box. Leave the **Password** text box blank. Click **Next**.

The **Select SQL Server Group** dialog box appears.



8. Select **Add the SQL Server(s) to an existing SQL Server group**. In the **Group name** drop-down list, select **SQL Server Group**. Click **Next**.

9. The **Completing The Register SQL Server Wizard** dialog box appears. Review the information and then click **Finish**.
10. The **Register SQL Server Messages** window appears informing you of successful server registration. Click **Close**.

CONGRATULATIONS! Microsoft SQL Server 2000 is now installed. You can now install GoldMine Corporate Edition.

Troubleshooting SQL Errors when Installing GoldMine

If you receive an error message such as **MSSQL Login Failed** during the installation of GoldMine, check the following:

- *Is the SQL server running? If not, start SQL Server.*

Open the MSSQL Enterprise Manager and find **SQL Server Enterprise Manager**. Expand the servers until you see your server name. Right-click your server name and select **Start** in the local menu.

- *Is the SQL administrative name and password you typed when installing GoldMine different from the name and password in SQL? Are you using **sa** with no password, or did you change it in SQL?*

Open the SQL Server Enterprise Manager. Expand Microsoft SQL Server and then expand SQL Server Groups. Right-click your server name and select **Edit SQL Server Registration properties**. Verify the login name and password.

- *When you installed SQL, did you select **Mixed Mode** for the authentication mode?*

If you do not know, go to the server name in the MSSQL Enterprise Manager. Expand Microsoft SQL Server and then expand SQL Server Groups. Right-click your server name and select **Properties**. Select the **Security** tab. Select **SQL**

Server and Windows. Stop and restart SQL Server. The installation continues.

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