Setting up the Initial Synchronization for an Undocked User

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Introduction

This document explains how to create an undocked user from the GoldMine network, setup the "remote" system (the single user, typically on a laptop) as an undocked user system, and how to synchronize information to the new system. Copying the database files from one system to another by using DOS or Windows Explorer as a substitute for the synchronization process is not recommended or supported by GoldMine Technical Support as it will cause problems with synchronization and may result in loss of data.

The synchronization process for GoldMine does not require the use of GoldSync®. However, the use of GoldSync is recommended for automating the synchronization of multiple users. Additionally, GoldSync includes the ability to create a one-button sync installation file which simplifies the setup of undocked systems and subsequent synchronizations. For more information on GoldSync or how to create a GoldMine user please refer to the GoldMine Help Topics or the GoldMine Administrator manual available in the Online Manuals area of the FrontRange Support Site located at http://support.frontrange.com.

Customizations

Customizations to the GoldMine database can be synchronized to remote systems. To avoid confusion, customizations should be performed by the GoldMine Administrator at the main GoldMine installation only. If your site plans to synchronize with another GoldMine site, the customizations should only be performed on one main GoldMine installation, as opposed to allowing multiple remote users to customize local copies and synchronize them with the network version.

User Defined Fields

If new User Defined Fields have been created and populated with data on your main/network GoldMine installation, and you want to synchronize them to another GoldMine system for the first time, synchronization of **Custom Views** (Fields5 table) and **Custom Fields** (ContUdef and Contact2 table) should be performed first. Following the procedures outlined in this document will ensure correct synchronization of user defined fields, as well as all data.

Creating the Undocked User on the Main GoldMine Installation

This document assumes that the users to be undocked have already been created on the GoldMine Server.

1. Create the username on the server version of GoldMine.
2. Select **File>>Configure>>License Manager**.
3. Click the **Undock Users** button.

4. Check the box next to the username created in step 1 above. (Only one undocked license can be created at a time).
5. Select the button marked **Create Undocked License**, read the license agreement, then select **I AGREE**.
6. The next window that pops up will display the newly created undocked user license. **Be sure to write down or copy/paste the entire serial number as displayed** After closing this window, it will not be possible to view the entire license string again unless you remove and recreate the license.

Setting Up GoldMine on the Undocked System

Installation of GoldMine on the remote system can be accomplished using one of the following methods:

- Use a GoldMine CD
- Use the gmXsetup.exe file (X = version number) found in the GoldMine/Supplemental folder of the server install. This executable file can be placed on the remote system and run to perform the installation.

When GoldMine asks you for the serial number, enter the undocked user license serial number created on the server. When GoldMine asks you for the username and password, enter the information for the user created for the remote system.

Creating Databases on the Undocked System

File Codes

All databases on the server must have a contact set file code assigned before synchronization can occur. Additionally, these databases need to be duplicated on the remote before the synchronization of those databases can take place. File codes are a unique value assigned to each database on the server to help ensure data transferred from the server database is written to the correct remote database regardless of other factors such as database name or description. File codes also allow synchronization of multiple databases at once.

For example, an east coast branch office and a west coast branch office might have virtually the same database. Each branch office wants to synchronize data from their local contact set (database) with the other office. The east coast office named the database *Industrial*, using the file code of "1A2B" while the west coast office named the same database *Manufacturing*, using the file code of "1A2B". Since each office assigned the same file code value to the local copy of the database, the changes made to the *Industrial* database will synchronize to the *Manufacturing* database.

To add a file code to a pre-existing database:

1. Select **File>>Open Database**
2. Highlight the database and select **Properties**
3. In the *Contact File Profile* dialog box, insert a file code of your choice in the **File Code** box.
4. Click **OK**

Databases on the Remote System

If the only database being used on the server is the default **Common Contact Set**, these steps will not be required. The Common and Demo contact sets (databases) are created by default on the remote system during installation. It is not recommended you utilize the Demo contact set as a live database since it is pre-populated with 16 demo records.

If however, the server installation is using a contact set of a different name or is using multiple contact sets which will be synchronized to the remote user, you will need to proceed with these instructions in order to duplicate those databases on the remote.

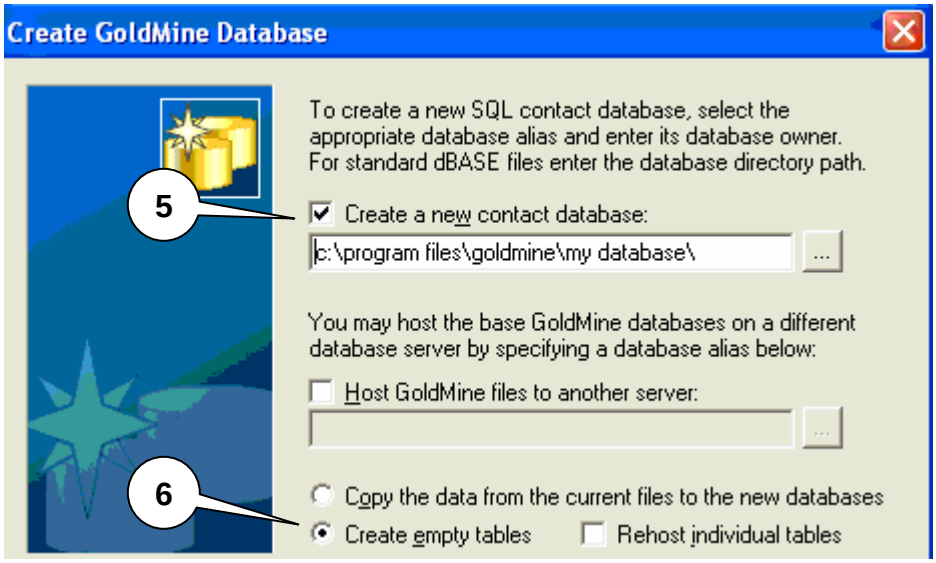
1. To begin creating databases, use Windows Explorer to create a folder in the GoldMine directory. The name can only contain letters and numbers, no spaces. It is recommended the name be descriptive in nature and for reasons of easy identification, it is best to use the same name as the corresponding contact set on the server.

   Note that this method is for <u>dBASE databases only</u>; if the remote is using SQL MSDE for databases, the SQL Database Administrator will need to create the empty database shells on the remote. Please refer to the GoldMine Administrator manual or GoldMine Help Topics for more information.

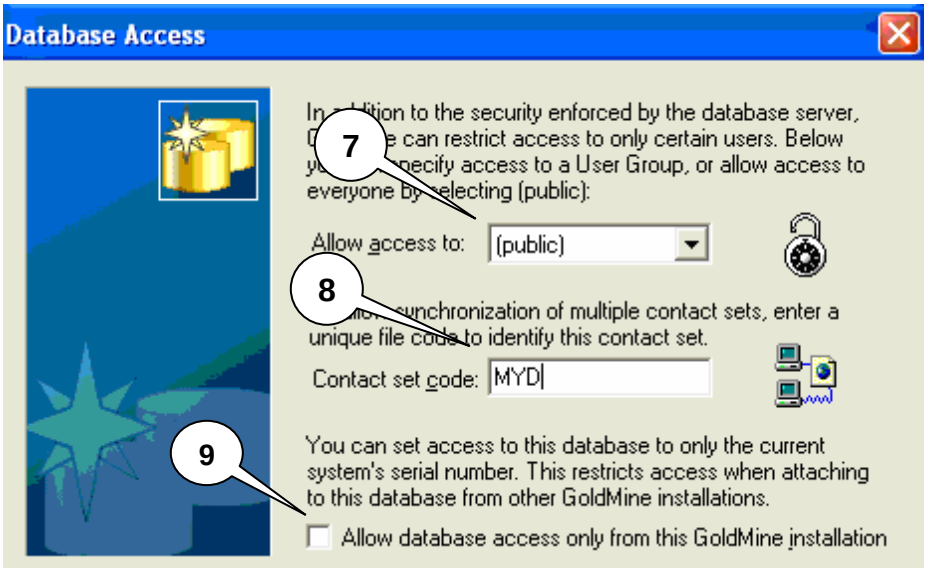
2. Open GoldMine, select **File**>>**New Database**.
3. Enter a descriptive name in the *Please enter the description of the new file* box (preferably the same name as the corresponding database on the server). Be sure that the radio button '**dBASE database files'** is selected.

4. Select **Next**.

5. Check the box marked *Create a new contact database*. Insert the path of the folder you created in step 1 above or browse to the newly created folder.
6. Select the radio button **Create empty tables** and then select **Next.**



7. Set access to the new database as desired using the *Allow access to* selector. To allow access by all GoldMine users, leave the setting as (public); otherwise, select the desired user or user group that should have access.
8. Add a contact set code (<u>must</u> match the code for the matching database on the server) in the *Contact set code* box. If unsure, please check the properties of the corresponding contact set on the server.
9. If you wish to set access for this database to only the current system's serial number, check the *Allow database access only from this GoldMine installation* box. This would prevent another GoldMine installation, licensed under an entirely different serial number than yours, to synchronize with your database.

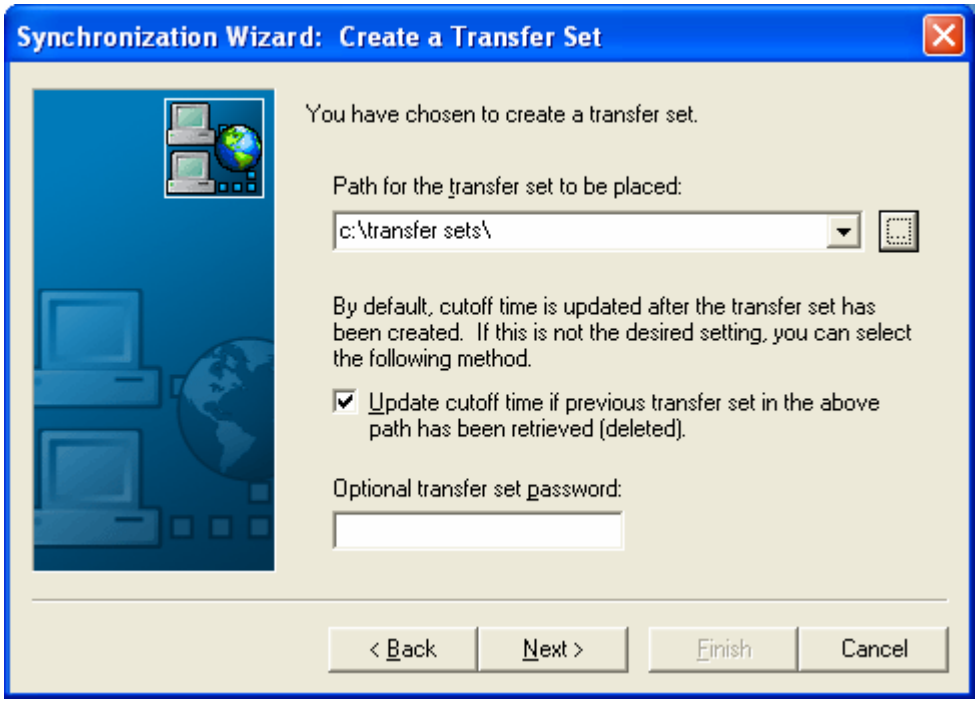


10. Select **Next** then select **Finish**.
11. Repeat this process for all databases (all server databases that the remote will be accessing).

Creating the First Transfer Set on the Server

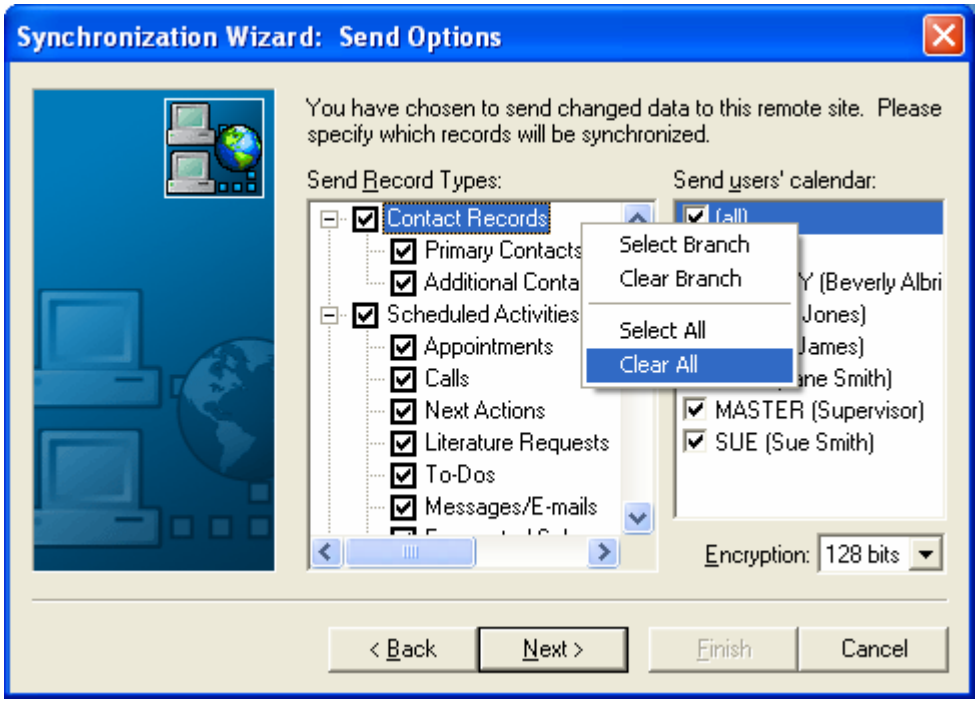
If new User Defined Fields have been created and populated with data on your main/network GoldMine installation, and you want to synchronize them to another GoldMine system for the first time, synchronization of **Custom Views** (Fields5 table) and **Custom Fields** (ContUdef and Contact2 table) should be performed first. The steps listed below show how to synchronize manually.

1. To begin synchronizing, from the server, select **File>>Synchronize>>Synchronization Wizard**.
2. Select **Start a new session**, then select **Next**.
3. Select **Create a transfer set**, then select **Next**.
4. In the *Path for the transfer set to be placed* dialog box**,** type in the location, or select the browse button and browse to the location to place the transfer set. **Note**: The transfer set can be placed anywhere, for example C:\transfer sets\.

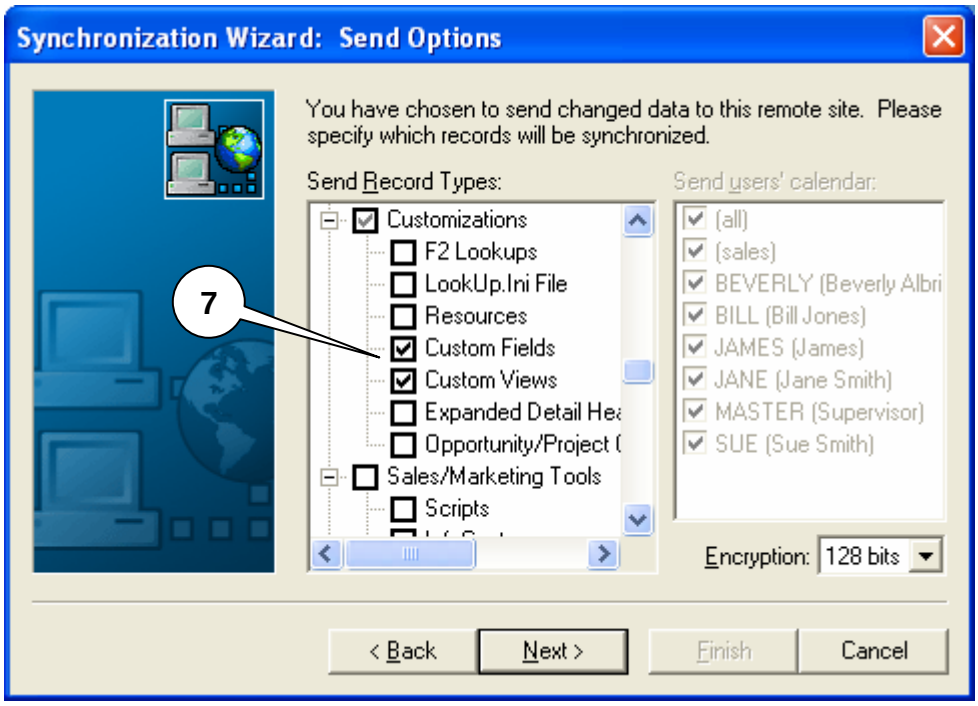


5. Select **Next**.

6. Under the *Send Record Types* column, right click and select **Clear All**.

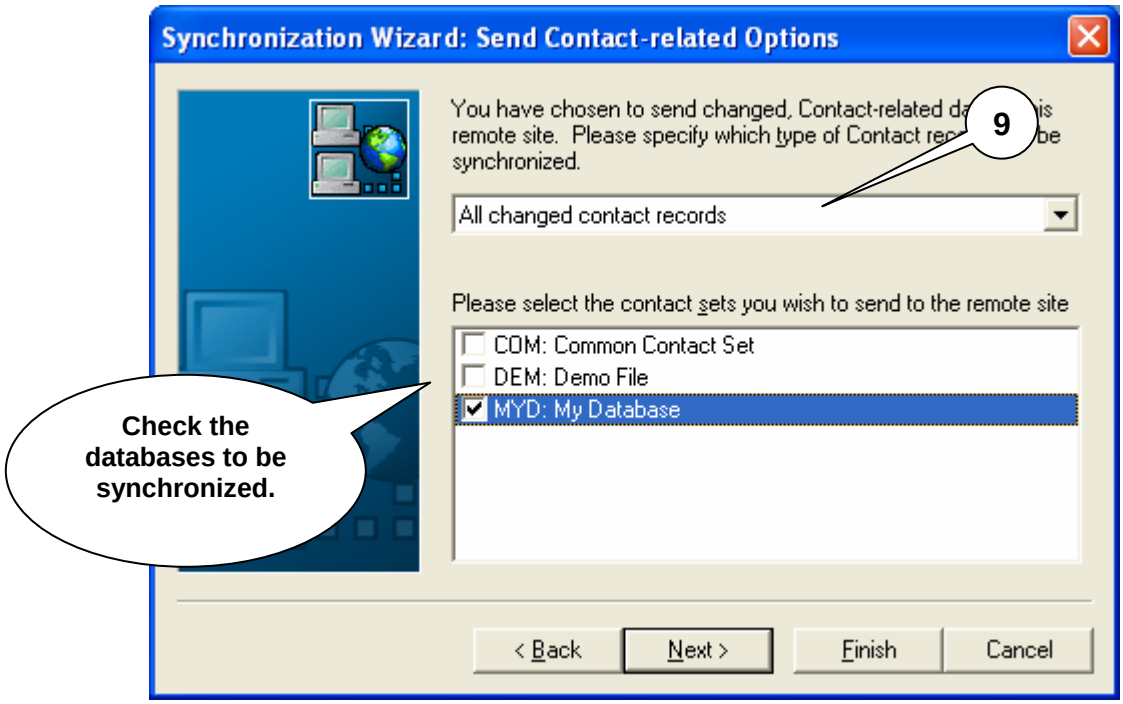


7. Scroll through the list to the Customizations section and check the boxes next to **Custom Fields** and **Custom Views.**

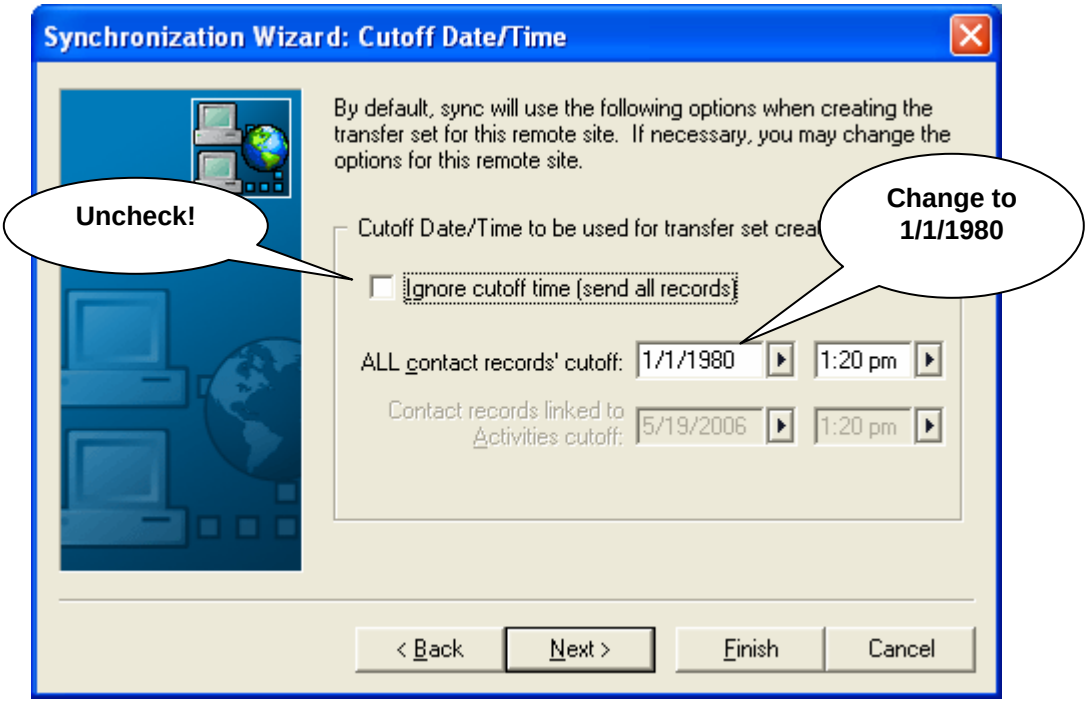


8. Select N**ext**.

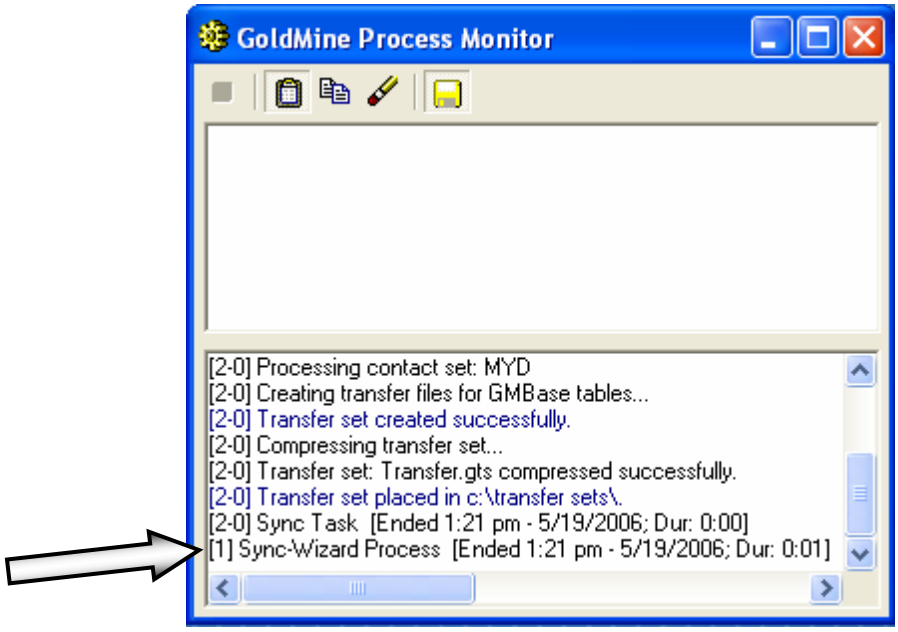
9. Select *All changed contact records* from the drop down list. Then place a checkmark in front of each contact set that will be synchronized. Select **Next**.



10. Select **Next** on the *Send Filter Options* window without making any changes to what is shown (leave "*All contact records. . . .*" selected).
11. **Uncheck** the *Ignore cutoff time....* option, and change the *All contact records' cutoff* date to **1/1/1980**.



12. Select **Next**.
13. Select the **No** radio button in response to *Would you like to save this synchronization profile?* **Note**: If more than one undocked system needs to be configured then you may save the resulting transfer set (*transfer.gts*) and copy it to each system for retrieval
14. Select **Finish.**
15. The *GoldMine Process Monitor* window opens and displays the progress of the transfer set creation. The process is complete when the last line indicates the Sync-Wizard Process ended, as seen below.

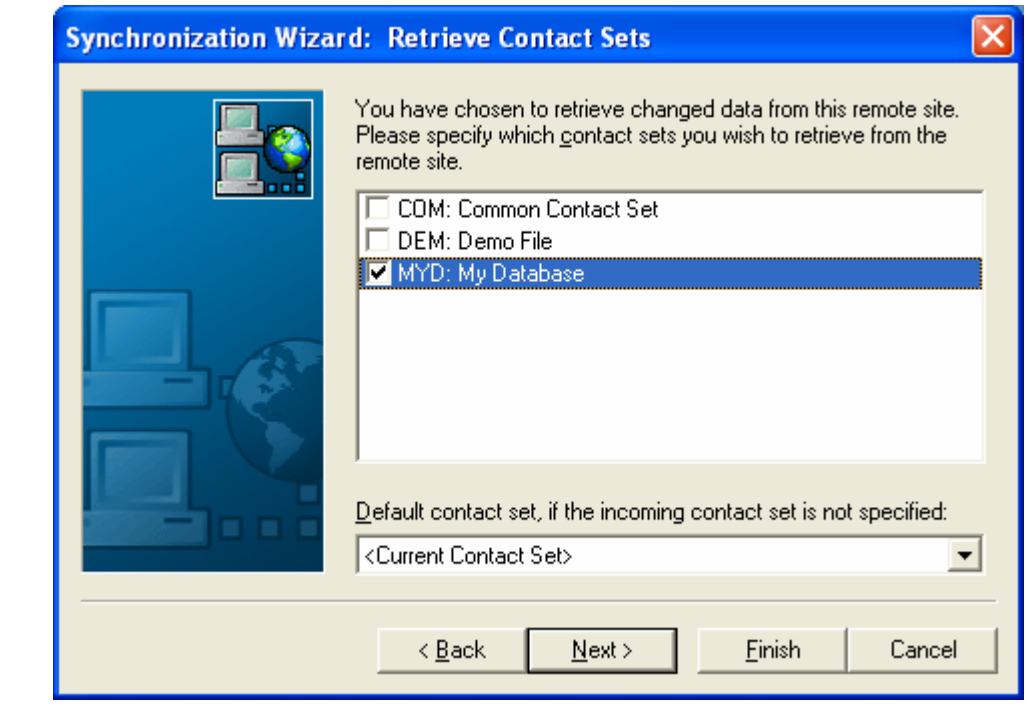


Retrieving the First Transfer Set on the Remote

Once the **transfer.gts** (the file name of any transfer set) has been created, copy the file from the server to the remote system for retrieval. You may place the file anywhere on the remote system.

1. To retrieve the first transfer set on the undocked machine, select **File>>Synchronize>> Synchronization Wizard**.
2. Select **Start a new session**, then select **Next**.
3. Select **Retrieve a transfer set**, then select **Next**.
4. Type in the path of the location of the transfer.gts file or select the browse button next to *Path for the transfer set to be retrieved*, and browse to the location of the file.
5. Do not select any options.

6. Select **Next**.
7. Select **Next**. (Because this first transfer set contains only custom fields and views, it's okay to leave all the checkboxes under *Retrieve record types* selected.)
8. Check the box(es) for the contact set(s) to be retrieved.



9. Select **Next**.
10. Select the **No** radio button in response to *Would you like to save this synchronization profile?*
11. Select **Finish**.

12. When retrieval of the transfer set has been completed, GoldMine will automatically rebuild the files. This is done because the Contact2 Table must be rebuilt any time a User Defined Field is created.

Creating the Second Transfer Set on the Server

Once the customizations have been synchronized to the remote system, the actual data can be synchronized. The steps listed below show how to synchronize manually.

1. From the server select **File>>Synchronize>>Synchronization Wizard**.
2. Select **Start a new session**, then select **Next**.
3. Select **Create a transfer set**, then select **Next**.
4. In the *Create a transfer set* dialog box**,** type in the location, or select the browse button and browse to the location to place the transfer set. **Note**: The transfer set can be placed anywhere, for example C:\transfer sets\.
5. Select **Next**.
6. Under the *Send Record Types* column, right click and select **Select All**.
7. Select N**ext**.
8. Select *All changed contact records* from the drop down list. Then check each contact set that will be synchronized and select **Next**.
9. Select **Next** on the *Send Filter Options* window without making any changes to what is shown.
10. **Uncheck** the *Ignore cutoff time....* option, and change the *All contact records' cutoff* date to **1/1/1980**.
11. Select **Next**.
12. Select the **No** radio button in response to *Would you like to save this synchronization profile?* **Note**: If more than one undocked system needs to be configured then you may save the resulting transfer set (*transfer.gts*) and copy it to each system for retrieval
13. Select **Finish.**

Retrieving the Second Transfer Set on the Remote

Prior to retrieving the second transfer set on the undocked machine, the path for linked documents must be configured on the remote.

1. Select **File>>Configure>>Synchronization Settings**
2. Select the **Linked Documents** tab

There are two options available in the *Attempt to retrieve linked files to* section.

- *File's original drive and folder* will attempt to place the linked documents in the original path of the document as it existed on the copy of GoldMine that created the transfer set. When choosing this option, be sure all folders in this path exist on the remote.

  Warning: If the remote has access to the server network and the linked documents are using a mapped drive or UNC path then it is likely the transfer set retrieval process will

place the linked documents back on the server if this option is selected and there will be no local copy of the linked documents on the local database.
- *Specified default drive and folder* will place the linked document in the path specified, ignoring the original path.

Once the **transfer.gts** (the file name of any transfer set) has been created, copy the file from the server to the remote system for retrieval. You may place the file anywhere on the remote system.

1. To retrieve the second transfer set, select **File>>Synchronize>> Synchronization Wizard**.
2. Select **Start a new session**, then select **Next**.
3. Select **Retrieve a transfer set**, then select **Next**.
4. Type in the path of the location of the transfer.gts file or select the browse button next to *Path for the transfer set to be retrieved*, and browse to the location of the file.
5. Do not select any additional options.
6. Select **Next**.
7. Right click in the column underneath *Retrieve Record Types*, and choose **Select all**.
8. Check the boxes for the contact sets to be retrieved.
9. Select **Next**.
10. Select the **No** radio button in response to *Would you like to save this synchronization profile?*
11. Select **Finish**.
12. When the transfer set has been retrieved, GoldMine will automatically rebuild the files.

Once these procedures have been completed, the remote system will be ready for use.

Synchronizing IP to IP from Remote to Server <u>after</u> Initial Synchronization

Synchronizing with the built in Synchronization Wizard was designed to support a single synchronization profile and is not designed to synchronize with multiple remote sites. While it is possible to do so, this can lead to eventual conflict in the GoldMine TLogs which in turn can cause incorrect synchronization of data or data loss and therefore not recommended or supported. If you intend to synchronize with more than one remote site then it is recommended you use *GoldSync*. For more information on setting up and using *GoldSync* please refer to the GoldMine Administrator manual or your GoldMine Help Topics.

If the laptop is not connected to the Server's network or if a user needs to synchronize while out of the office, the server will need to be set up as the listener for incoming connections and the laptop will be set up to initiate the connection. In order to setup synchronization on the server as the listener by IP address, the following steps need to be performed on the server or host machine

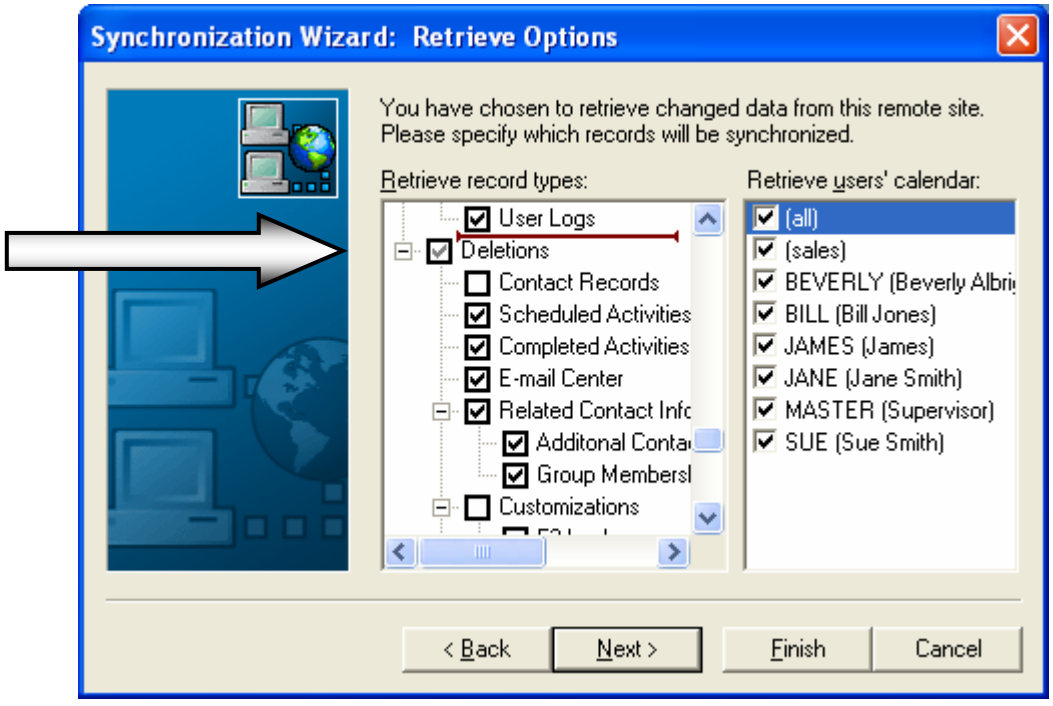
On the server (host machine):

1. Select **File>>Synchronize>>Synchronization Wizard**
2. Select **Start a new session** and then select **Next**
3. Select **Answer an Incoming Connection**

4. Select **Next**
5. Select *Send Changed Data From Remote* and *Retrieve Changed Data From Remote*
6. Select **Next**
7. Under the *Send Record Types* column and *Send Users' Calendar*, right click and select **Select All**.
8. Select **Next**.
9. Select *All changed contact records* from the drop down list. Then check each contact set that will be synchronized.
10. Select **Next** without making any changes to this window.
11. **Uncheck** the *Ignore cutoff time....* option, and change the *All contact records' cutoff* date to **1/1/1980** or the date from the last synchronization
12. Select **Next**
13. Under *Retrieve Record Types* and *Retrieve Users' Calendar*, right click and select **Select All**.

    Important: It is recommended you carefully consider whether or not you wish to retrieve deletions from remotes. Should a remote user delete a record and that deletion is retrieved into the server, the record will be deleted and can only be retrieved through a restore of a backup. In order to prevent the retrieval of deletions from your remotes after selecting all entries under the *Retrieve record types:*

    a. Scroll down the entries until you reach the **Deletions** entry.
    b. Deselect the entries corresponding to the types of records for which you <u>do not</u> want to retrieve deletions.



14. Select **Next**
15. Select Contact Sets to be retrieved
16. Select **Next**

17. If desired, select the options to log the details of the session and the retrieved records.
18. If desired, you can save this profile or select the *No* option.
19. Select **Finish**

On the Remote:

The following steps should be performed from the remote when the user is ready to synchronize with the server. Ensure an Internet connection has been established before proceeding.

1. Select **File>>Synchronize>>Synchronization Wizard**
2. Select **Start a new session**, then select **Next**
3. Select **Connect to Remote**
4. Select **Next**
5. Select *Send changed data to remote* and *Retrieve changed data from remote*
6. Type in the **IP Address of the Server** in *Remote's Internet IP Address* box
7. TCP port should be 5993
8. Under the *Send Record Types* column and *Send Users' Calendar*, right click and select **Select All**.
9. Select **Next**.
10. Select *All changed contact records* from the drop down list. Then check each contact set that will be synchronized and select **Next**.
11. Select **Next**. (Make no changes to this window.)
12. Uncheck the *Ignore cutoff time....* option, and change the *All contact records' cutoff* date to the date and time you began the creation of the second transfer set on the server per the "*Creating the Second Transfer Set on the Server*" instructions or the date from the last successful synchronization.
13. Select **Next**
14. Under *Retrieve Record Types* and *Retrieve Users' Calendar*, right click and select **Select All**.
15. Select **Next**
16. Select the Contact Sets to be retrieved
17. Select **Next**
18. Ensure the *Immediately* radio button is selected.
19. Select **Finish**