

Using the Goldmine Backup Wizard

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Author: Michael Ruch
Department: Technical Support
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 IMPORTANT POINTS TO REMEMBER 13

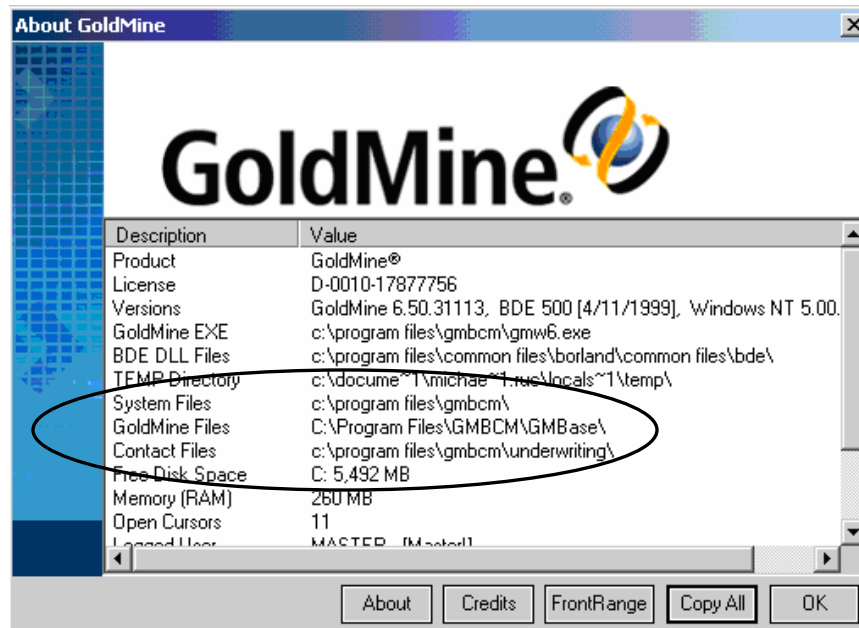
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Using the GoldMine Backup Wizard

Important Points to Remember

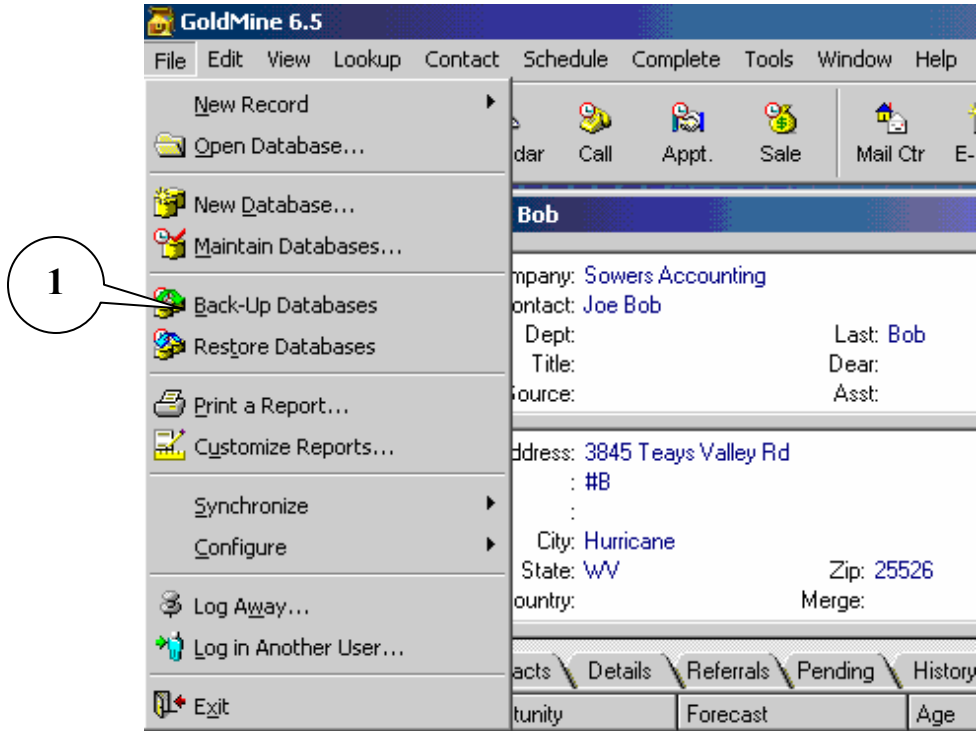
- The Backup Wizard cannot be used for Goldmine Corporate Edition.
- The Backup Wizard function is not intended to be used to transfer files to another computer or copy of Goldmine.
- Before starting any backup process find out where your Goldmine files are stored. Select **Help>>About** in GoldMine and then click the **System** button.



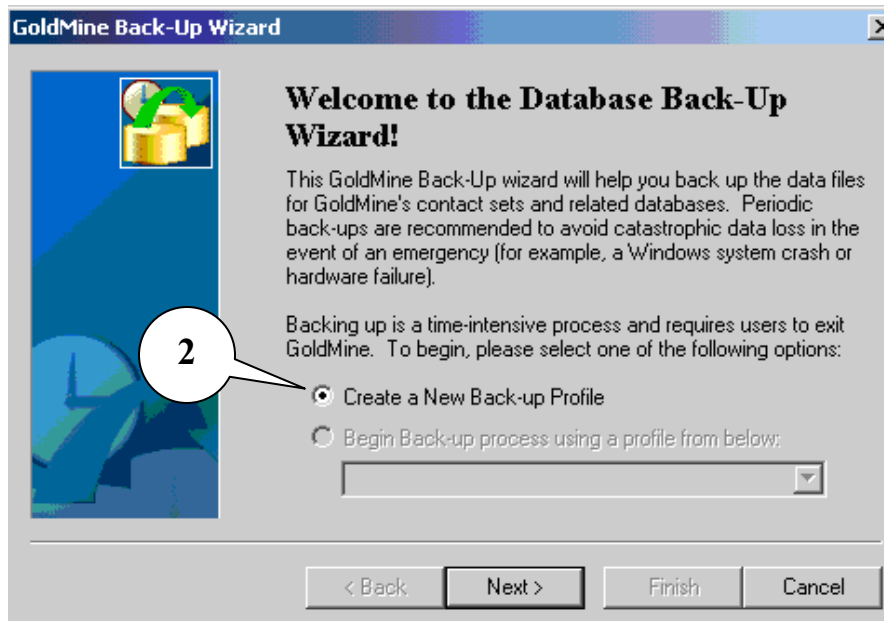
- This window is a very useful tool and the most important items to review are the locations for System Files, Goldmine Files and Contact files. It is recommended that a screenshot be made of this window and printed out or the information be written down in case you cannot open Goldmine and need to access this information.
- The ability to use the Backup Wizard requires Master Rights in Goldmine.

Backup Wizard Process

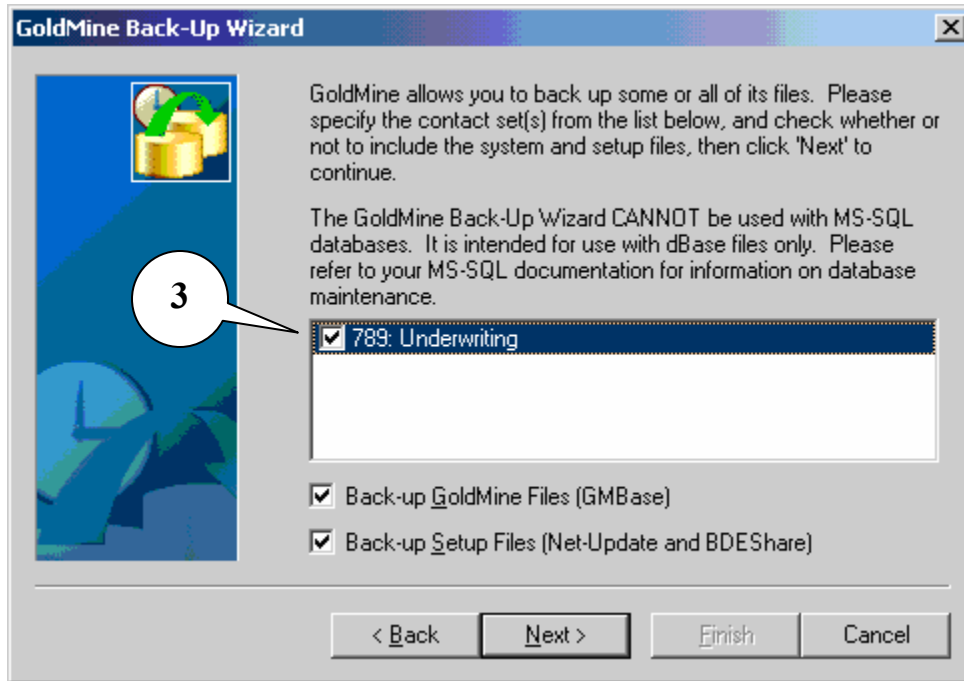
1. Select **File>>Back-up Databases**.



2. Select *Create a New Back-up profile*, unless there is one already saved that you want to re-use. Click **Next**.

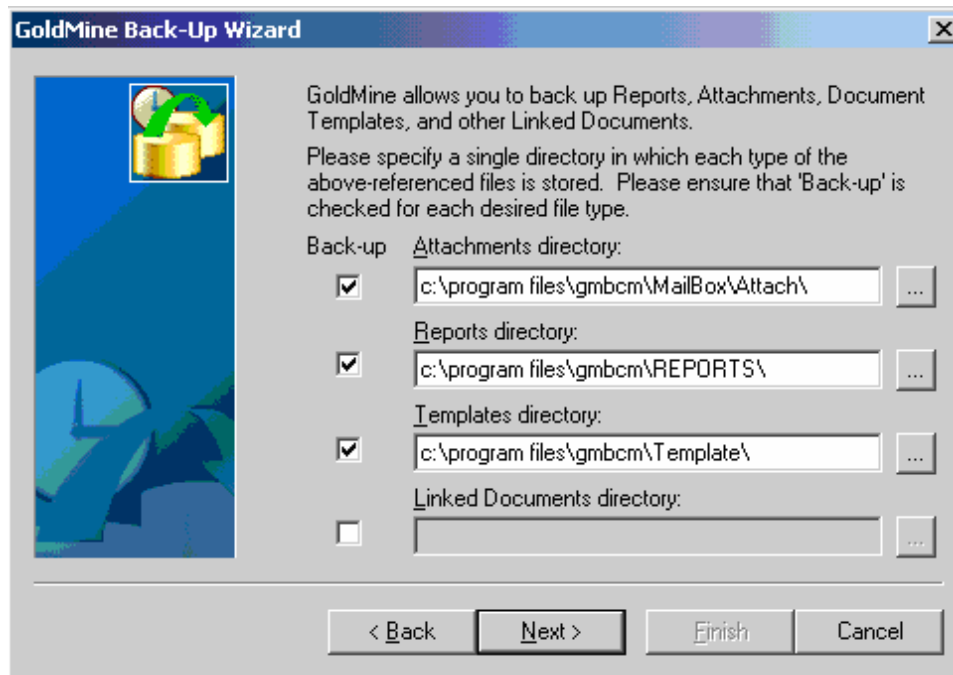


3. Select the contact sets you wish to backup. If you are not sure which contact set to select, select the one noted in the System window mentioned above. Also, be sure to leave the *Backup-up Goldmine files (GMBase)* option selected. It is recommended you also leave the *Backup Setup Files (Net-Update and BDEShare)* option checked.



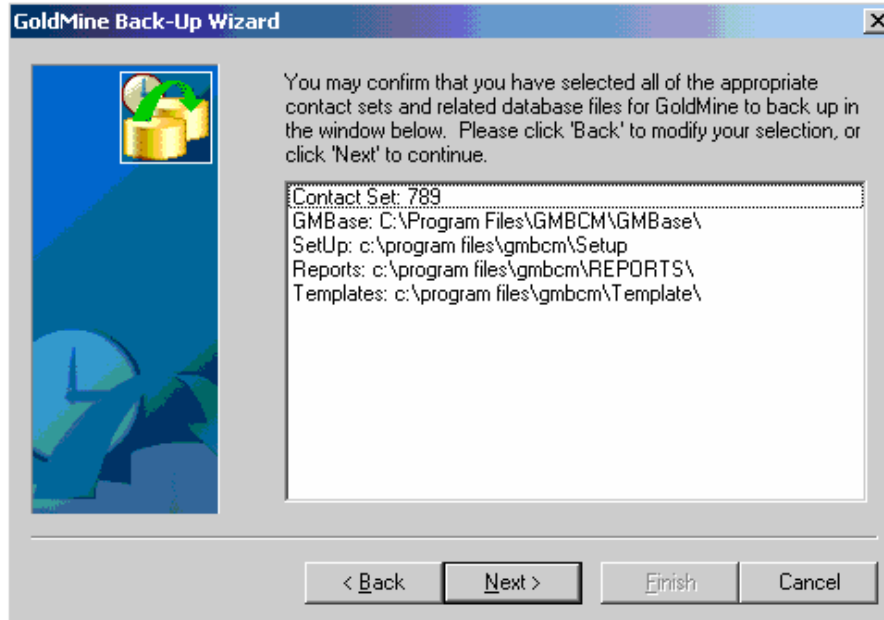
4. Click **Next**.

5. Select the additional directories you wish to backup. These are the directories that Goldmine uses to store file attachments from e-mail, reports, MS Word templates that are used by the Mail merge function, and any documents that have been linked to your Goldmine database. These typically reside in the GoldMine root directory indicated for System Files in the System window mentioned at the beginning of this document.

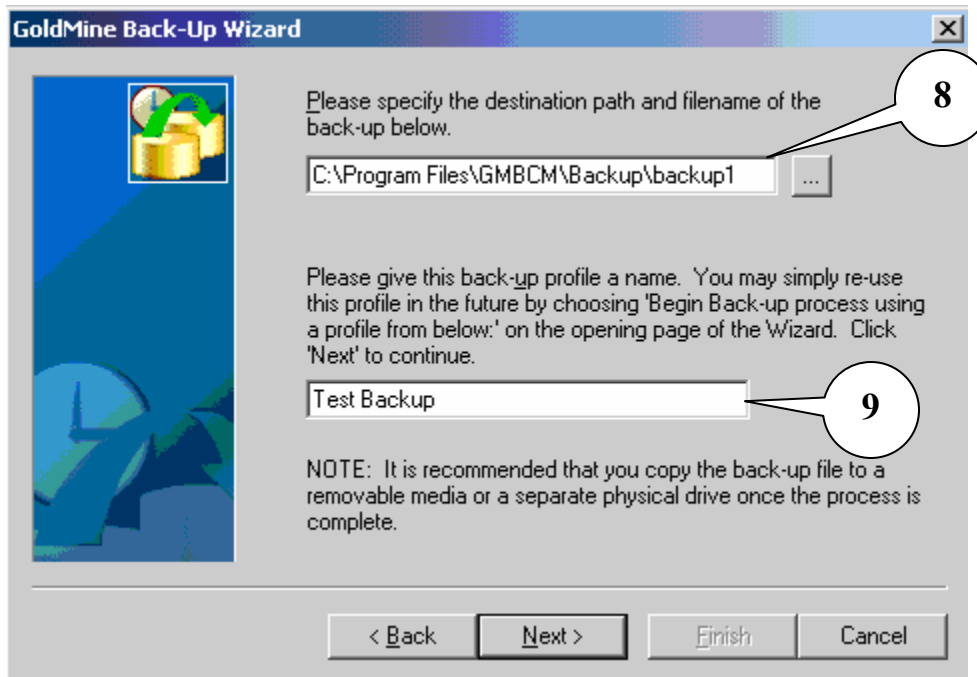


6. Click **Next**.

7. Confirm your selections and then click **Next**.

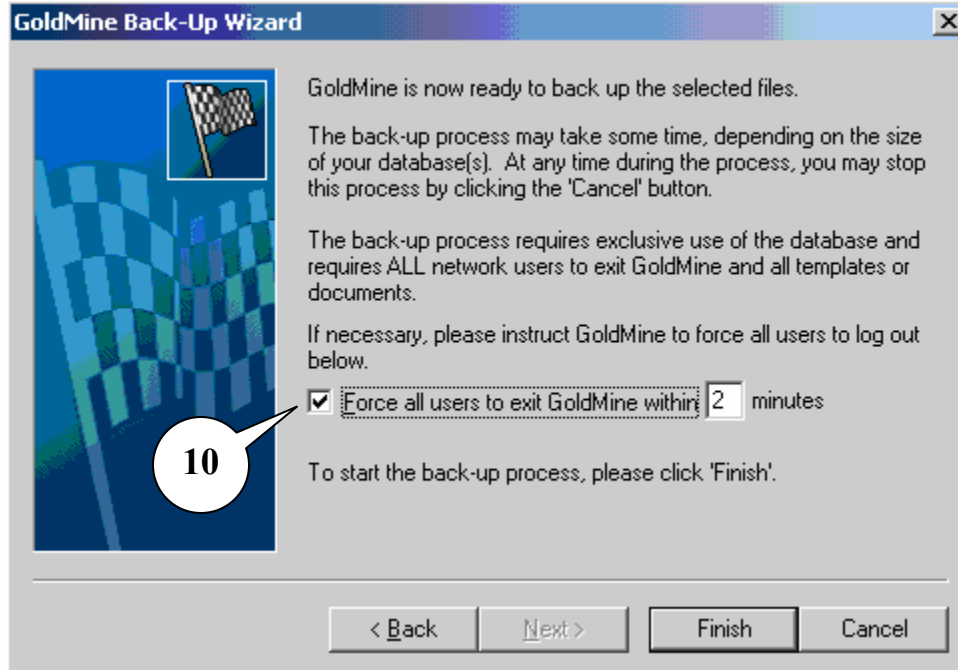


8. Enter or select a destination for the backup. It is recommended that the file not be copied onto the computer on which GoldMine resides in case of a catastrophic failure on the computer. Use an alternate media such as a CD-Rom or Zip disk for better protection.



9. If you want to save this Backup Profile for re-use, enter a Profile name. Click **Next**.

10. All users must be logged out of Goldmine in order to backup the database. If necessary, you can force users to exit by selecting the *Force all users to exit GoldMine within X minutes* and entering the number of minutes. Click **Finish** to start the backup.



Restoring your Goldmine Database from Backup

Important! The Restore wizard will only work correctly if the copy of Goldmine you are restoring to is installed in the exact same directory structure as the program used when the backup was made! In order to find out if the structure is the same please refer to the System window in the current install of Goldmine and compare to the information that was recorded at the time the backup was made. If the locations of the files are different the Restore function will not only fail to work properly but continuing with the restore will overwrite your existing copy of Goldmine and make it unusable.

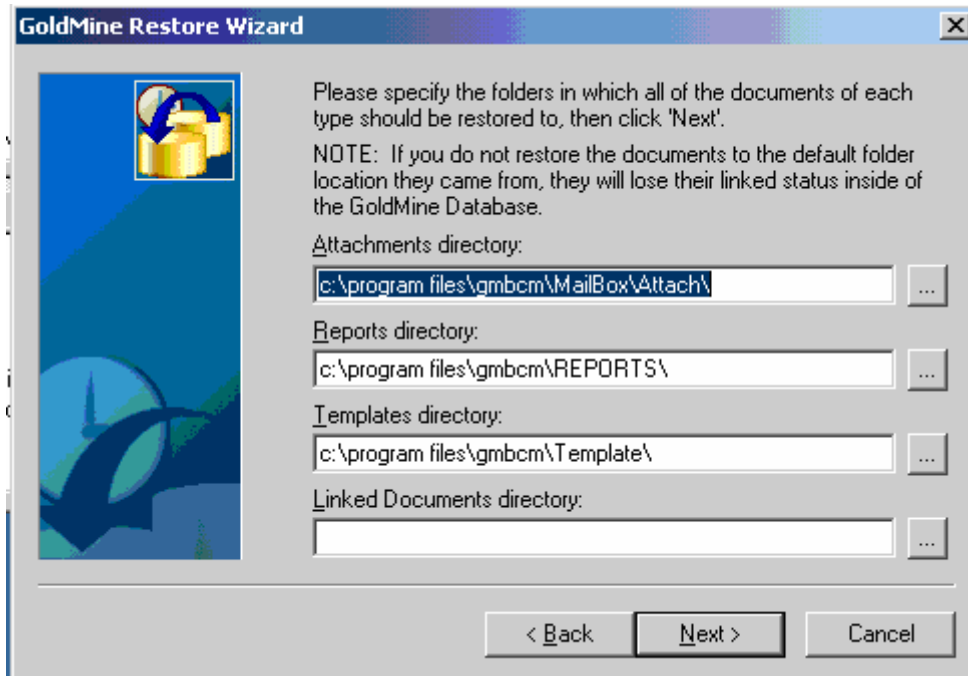
Restore Wizard Process

1. Select location of the backup file. It is recommend that if your backup file is on a CD or Zip disk that you copy that file to your hard drive before selecting the file for restoration.
2. Enter the username & password used when the backup file was created.

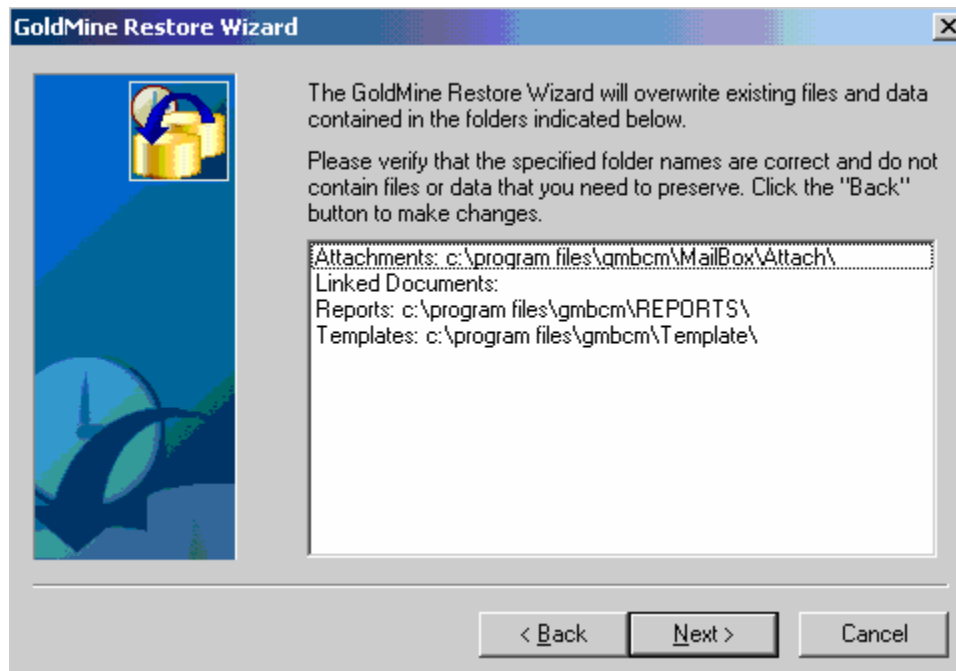


3. Click **Next**.

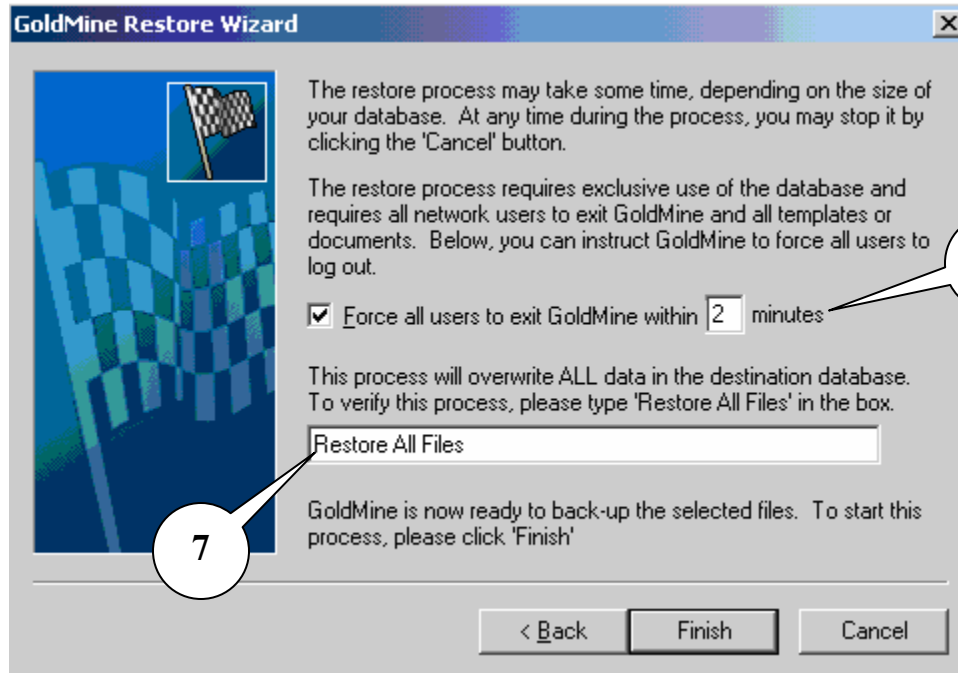
4. Select locations where the e-mail attachments, links and word templates will be placed during the restore. This will overwrite files of the same name in those directories.



5. Verify the files that will be restored and where they will be placed. Click **Next**.



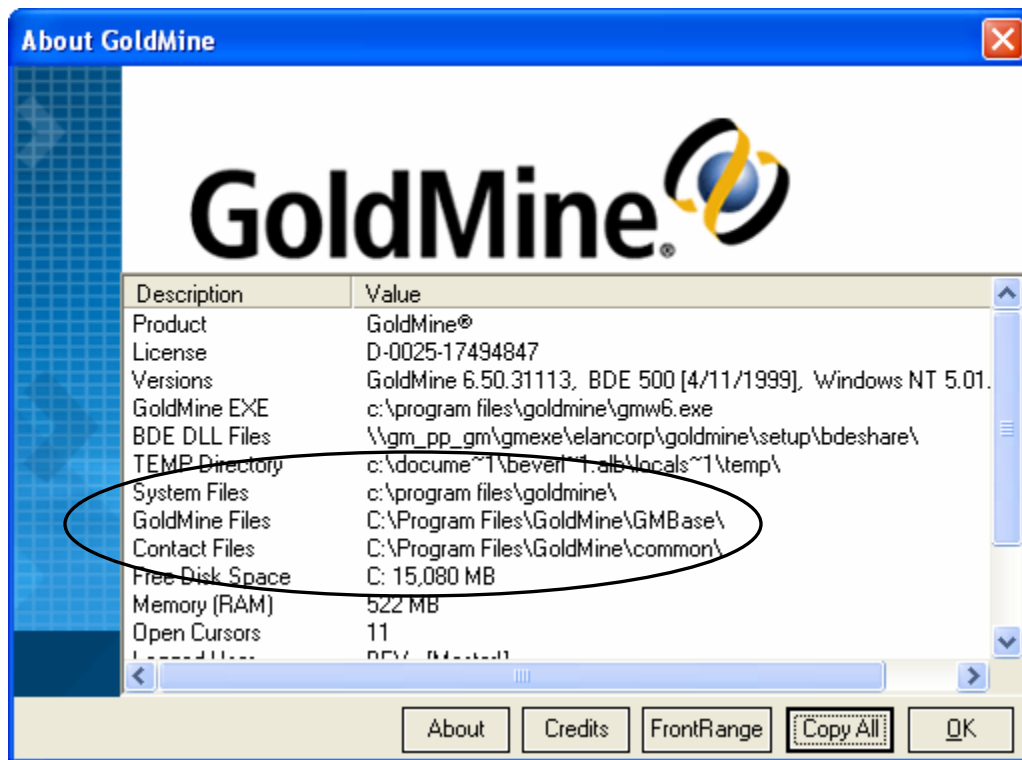
6. All users must be logged out of Goldmine before the restore can begin. If necessary, you can force users to exit by selecting the *Force all users to exit GoldMine within X minutes* and entering the number of minutes.
7. The phrase **Restore All Files** must typed into the window.
8. Click **Finish**.



Backing Up GoldMine Manually

Important Points to Remember

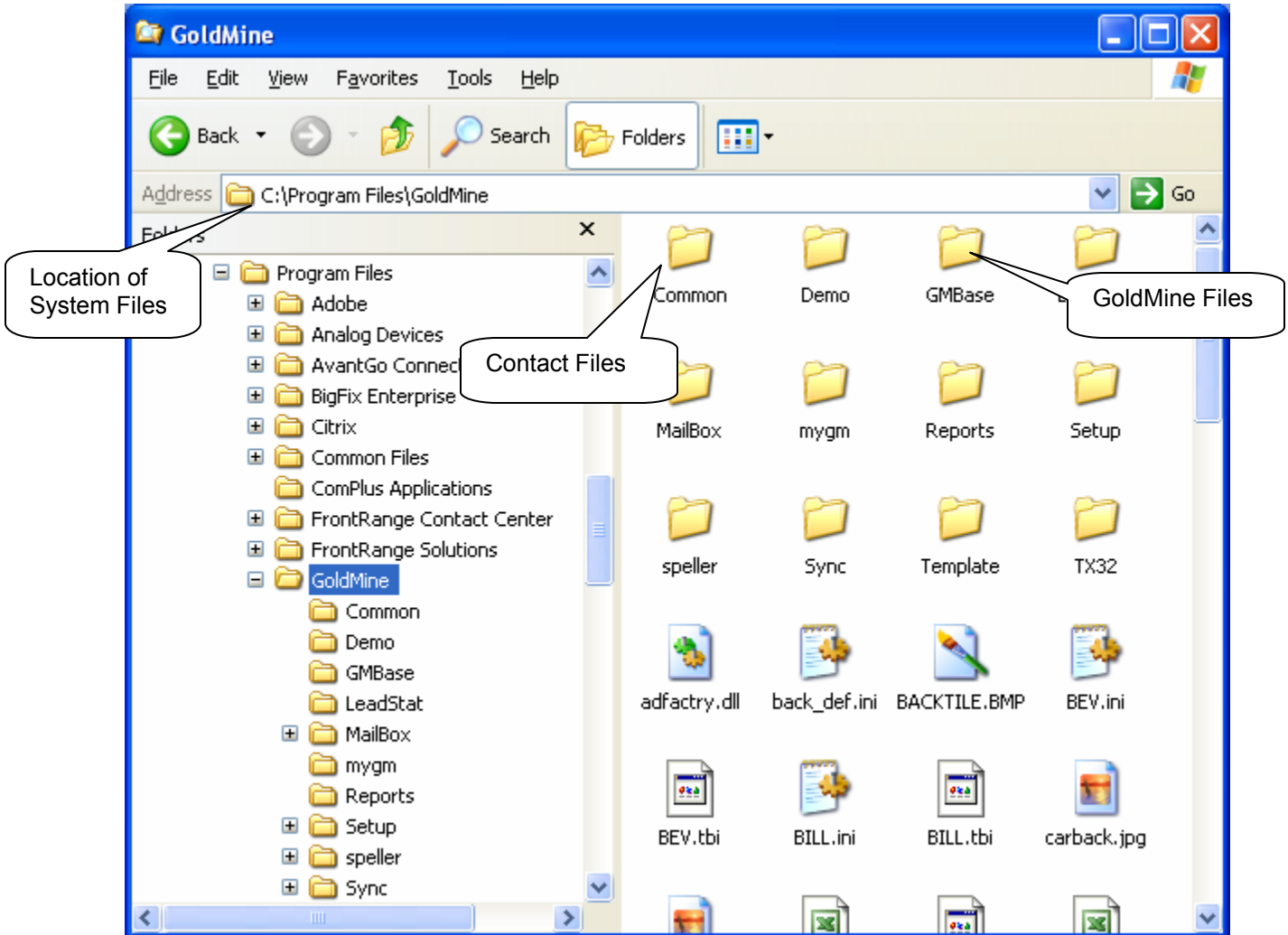
- Before starting any backup process find out where your Goldmine files are stored. Select **Help>>About** in GoldMine and then click the **System** button.



- This window is a very useful tool and the most important items to review are the locations for System Files, Goldmine Files and Contact Files. It is recommended that a screenshot be made of this window and printed out or the information be written down in case you cannot open Goldmine and need to access this information.

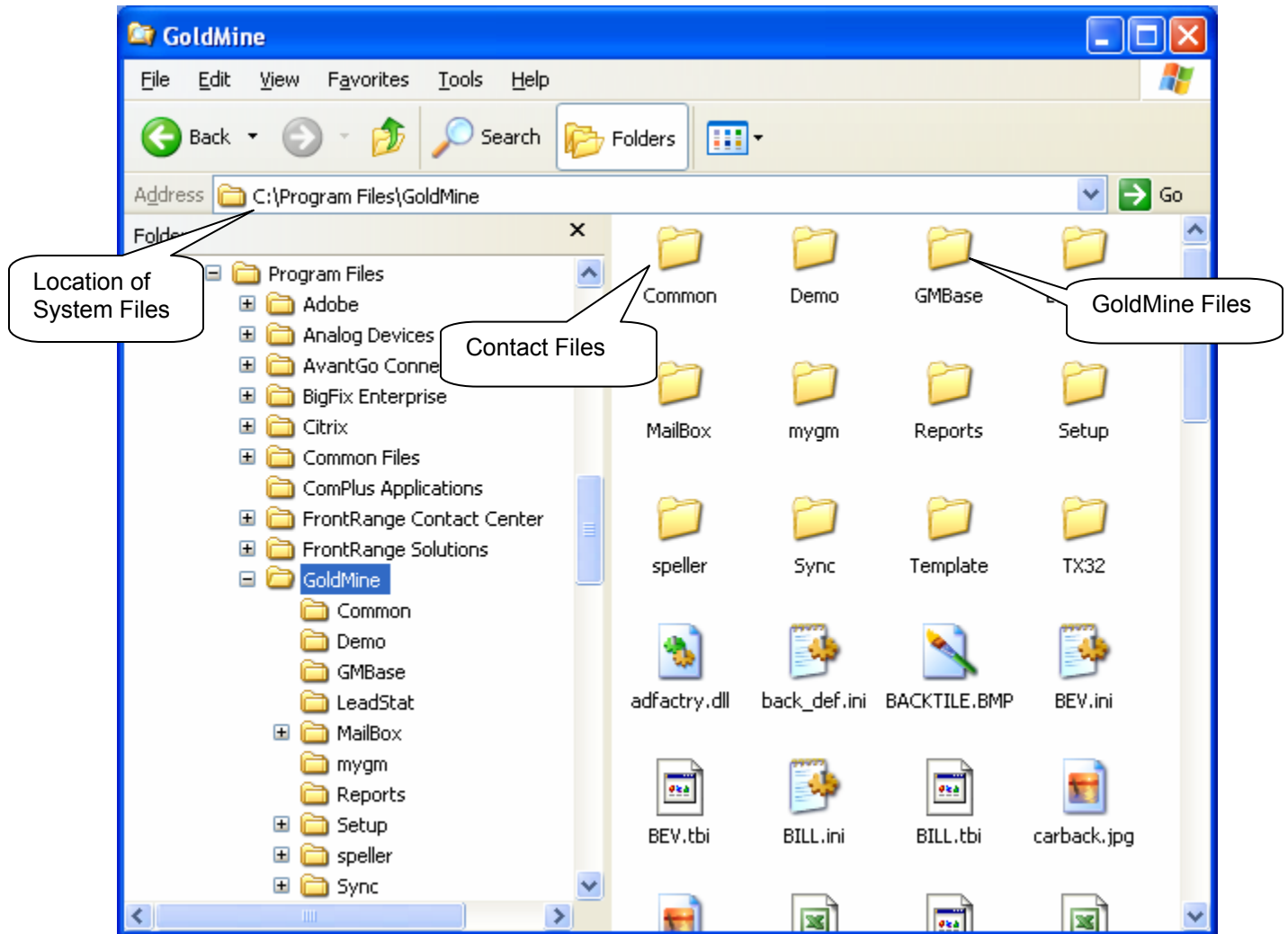
Manual Backup Process

1. Determine the location of your data files as noted above.
2. Copy each of the folders noted for the System, GoldMine and Common files. Place these copies in an alternate location, preferably on a removable media such as CD-Rom or Zip disk.

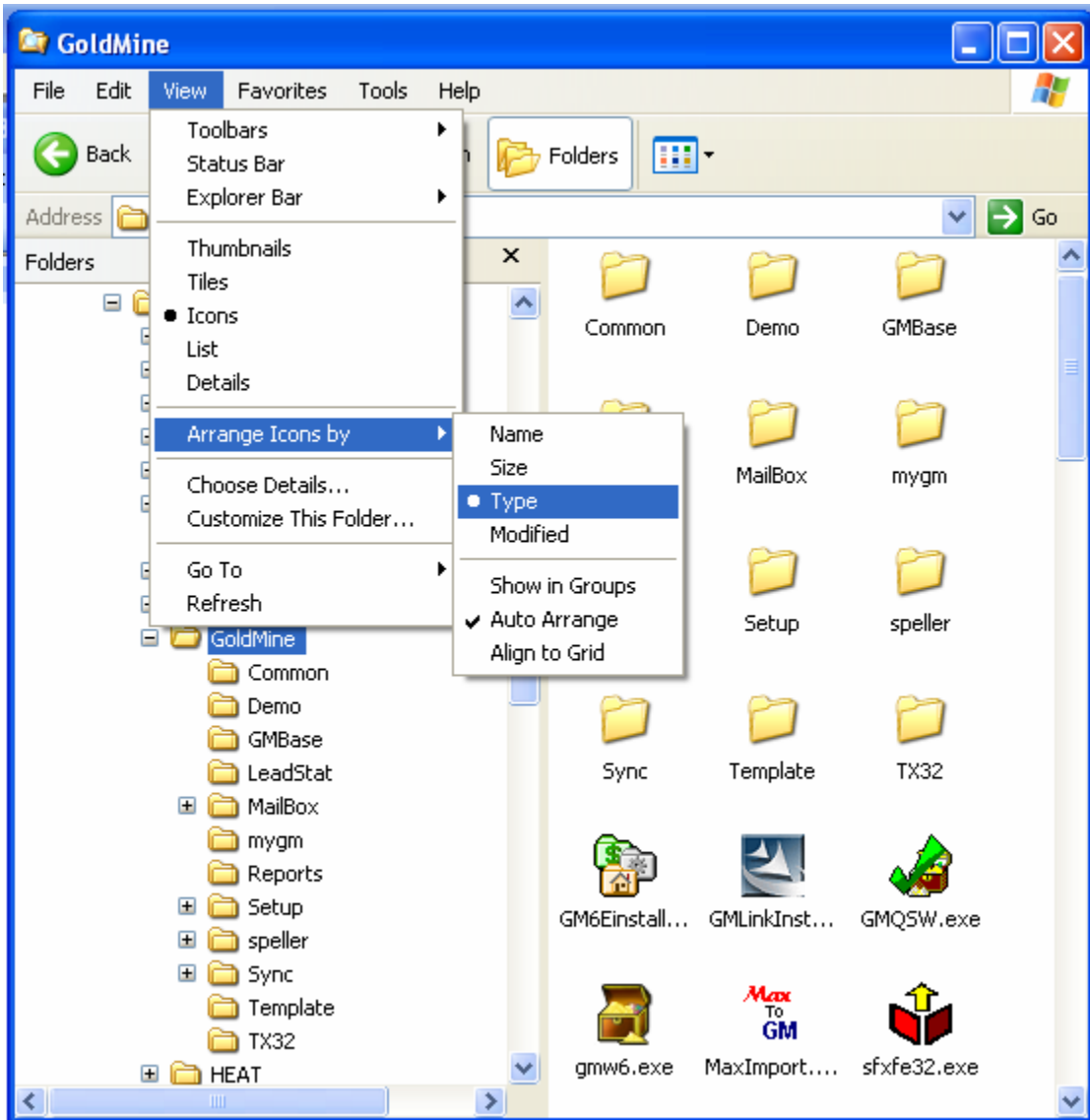


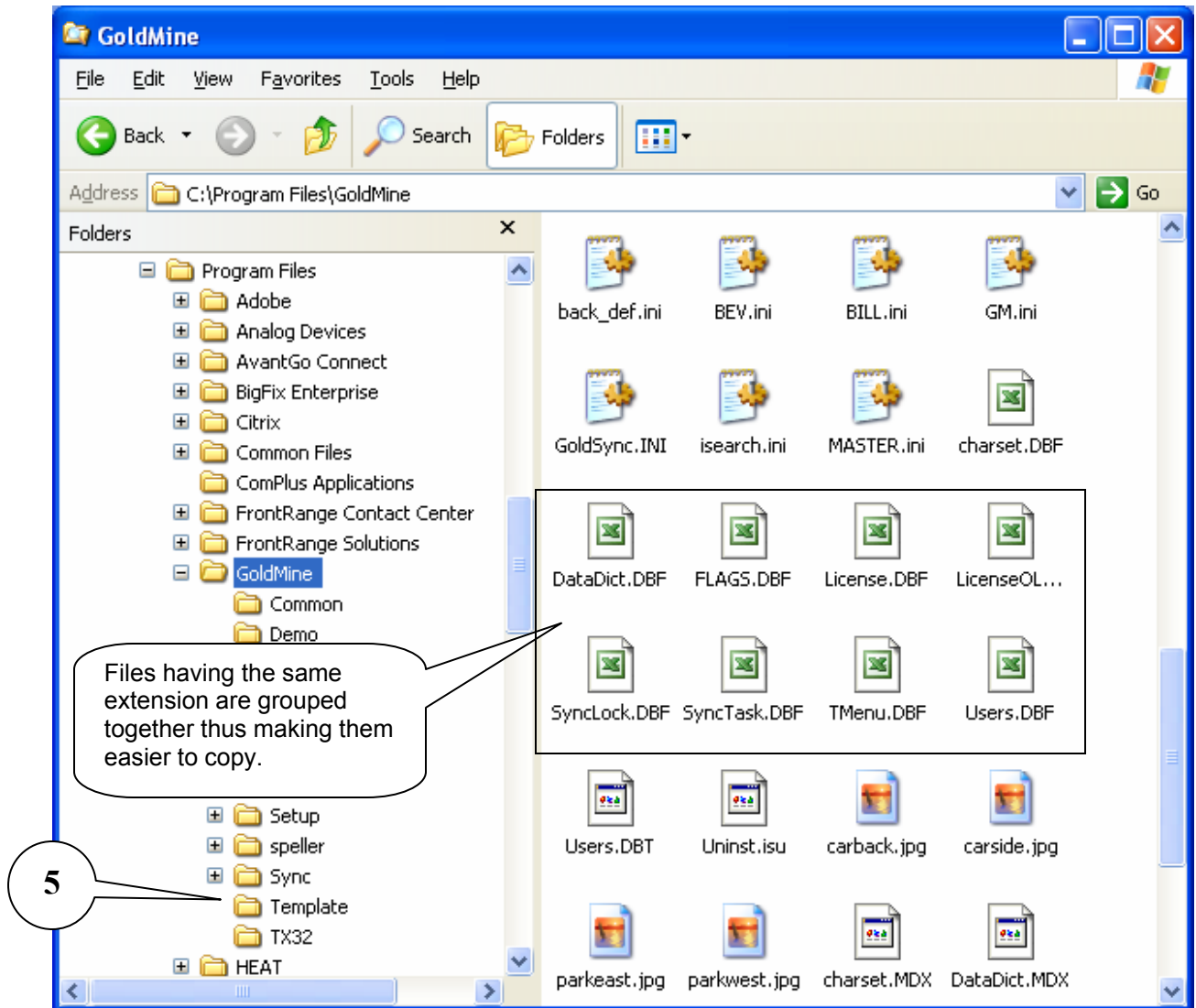
Manual Restore Process

1. After locating the backup files you wish to restore, browse to the location of your GoldMine installation.
2. From the backup files, copy the **contents only** of the Contact and Goldmine files into the respective folders in your existing installation, overwriting what is there. Do not copy the entire folder from the backup to the existing installation as this will result in a folder within a folder.



3. Open the folder containing the backup of the System Files (in this example it is GoldMine). Group the files according to file type by selecting **View>>Arrange Icons by>>Type**





4. Copy the files with extension **.dbf**, **.dbt**, **.ini**, **.mdx** into the Goldmine folder, overwriting what is there.
5. If there are templates, custom reports, mailbox attachments copy the *contents* of the folders into the respective locations in the new server.