

Moving GoldMine to a New Server

Copyright © 2004 FrontRange Solutions, Inc.

Author: Hipolito Luis
Department: Technical Support
Created: April 19, 2004
Last Updated: October 20, 2004

Copyright

Copyright © 2004 FrontRange Solutions Inc... All Rights Reserved. GoldMine, HEAT, and other FrontRange products and brands are registered trademarks or trademarks of FrontRange Solutions Inc... in the U.S. and/or other countries. Other products and brands are registered trademarks or trademarks of their respective owners/companies.

USE OF THE SOFTWARE DESCRIBED IN THIS PAPER AND ITS RELATED USER DOCUMENTATION ARE SUBJECT TO THE TERMS AND CONDITIONS OF THE APPLICABLE END-USER LICENSE AGREEMENT (EULA).

The information contained in this document is provided “as is” without warranty of any kind. To the maximum extent permitted by applicable law, FrontRange Solutions disclaims all warranties, either express or implied, including the warranties for merchantability and fitness for a particular purpose; and in no event shall FrontRange Solutions or its suppliers be liable for any damages whatsoever including direct, indirect, incidental, consequential, loss of business profits or special damages, even if advised of the possibility of such damages.

Table of Contents

COPYRIGHT 2

MOVING GOLDMINE TO A NEW SERVER 4

 INTRODUCTION 4

 GETTING STARTED 4

 THE NEW SERVER 5

 STEP 1: REMOVE ANY CURRENT BDE REGISTRY ENTRIES 7

 STEP 2: INSTALL GOLDMINE 9

 STEP 3: BACK UP YOUR CURRENT DATA 9

 STEP 4: MOVE YOUR INSTALLATION 9

 STEP 5: GOLDMINE SETTINGS 11

 STEP 6: TEST GOLDMINE 13

 CLEAN UP 13

USING A DIFFERENT SERVER NAME 14

 DATA UPDATES 14

 GOLDSYNC SETTINGS 14

 WORKSTATION SETTINGS 15

Moving GoldMine to a New Server

Introduction

As your company grows, it may become necessary to migrate your GoldMine installation from one server to another. This operation is not as simple as copying files from one place to another because of intricately intertwined elements that make up GoldMine and their relationship with your current server. Care must be taken to adjust the properties, paths and pointers of various areas of concern including, but not limited to:

- The Windows® Registry
- The Windows directory
- The GM.INI
- The Borland Database Engine
- Linked Documents
- Synchronization settings

Failure to properly adjust the settings of any of the above may lead to a situation of dependency on the old server for some functions and a decentralization and fragmentation of your data and installation, and possibly a loss of data.

Getting Started

It is highly recommended that a knowledgeable GoldMine Certified Solutions Partner be involved with both the planning and implementation phases of your server move. The FrontRange Solutions Inc.. Customer Care department can help you to locate a GoldMine Certified Solutions Partner in your area. Customer Care can be reached at (800)755-2100.

FrontRange Solutions Inc.. cannot be held responsible for loss of data, damages or other adverse results encountered as a result of following the directions in this document. These steps are provided *as is*.

NOTE: It is not recommended that you synchronize the data from your current GoldMine installation to the new one, unless you plan on continuing to use the old installation in the production environment. Please also note that synchronization was not designed as a server migration tool.

This document assumes that a number of things are true:

- The new server will have the same name as the old one
- Your original GoldMine installation was not a custom install

- Your original GoldMine databases were the default databases created by the GoldMine installation procedure
- Your GoldMine installation is running build v6.50.40321 or higher of GoldMine
- Your original GoldMine installation was installed to the default local path, C:\Program Files\GoldMine\

If any of these assumptions are incorrect, the procedures outlined below must be adjusted accordingly.

The New Server

Your new Windows server should meet the server system requirements:

Network Operating System

- Microsoft® Windows® 98/Me
- Microsoft® Windows® 2000
- Microsoft® Windows® XP (GoldMine 5.7 and higher only)
- Microsoft® Windows® 2000 Server/Advanced server
- Microsoft® Windows® 2003 Server (GoldMine 6.5 and higher only)
- Novell® NetWare® 5.0 and 6.0 (Only with Microsoft client for NetWare®, *not* Novell® intraNetWare Client/Client32)

NOTE: FrontRange Solutions Inc Support Services does not support the installing of GoldMine on a Novell NetWare server. Please refer to Appendix “D: Installing on a Novell NetWare Network” of the Installing BCMCE 6.5 manual for more information.

Network Protocols

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

Server System Requirements

- Microsoft® Windows® 98/Me
- Microsoft® Windows® 2000
- Microsoft® Windows® XP* (GoldMine 5.7 and higher only)
- Microsoft® Windows® 2000 Server/Advanced server
- Microsoft® Windows® 2003 Server (GoldMine 6.5 and higher only)
- Microsoft® Internet Explorer 6.0
- 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 < 2GB	512 MB
2 - 5 GB	1 GB
5-12 GB	2 GB
12+ GB	3 GB

Server CPU Requirements

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

Performance Considerations

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

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

Other Server Considerations

- Your new Windows server should be named the same as the old server and should not currently have any network contact with the older server.

If it is not possible to name the new server the same name as the old server, the steps in this document will fail and data may be lost or rendered inaccessible. If you must migrate to a differently named server, the information on pages 9 and 10 should be reviewed before going any further.

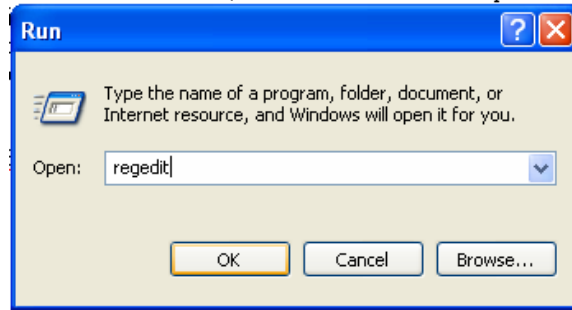
- The new server should not be configured to run any part of GoldMine on the old server.
- If GoldMine or BDE have previously been installed on the new server, they should be uninstalled and all legacy folders removed before continuing.
- For best results, the old server should be offline or not connected to the network while GoldMine is installed on the new server.
- To ensure that the installation does not see your old installation's databases, follow Step 1 below to remove existing BDE entries that may point to the old server's databases. If the new server does not have these registry entries, then move on to Step 2.
- If installing to a Microsoft® Windows® XP Professional operating system, be aware of security rights that make it very difficult to share out entire drives, or any files under the Program Files directory. In Microsoft® Windows® XP Home Edition it may be difficult to share out any files not in the directory "Documents and Settings". Please refer to the Installing GoldMine 6.x manual on XP installation instructions, or contact Microsoft® Support for more information.
- If installing to a Microsoft® Windows® 2003 Server be aware of security rights that make it very difficult to share out an entire drive to network users. Only folders should be shared out. Please contact Microsoft® Support for more information.

Step 1: Remove Any Current BDE Registry Entries

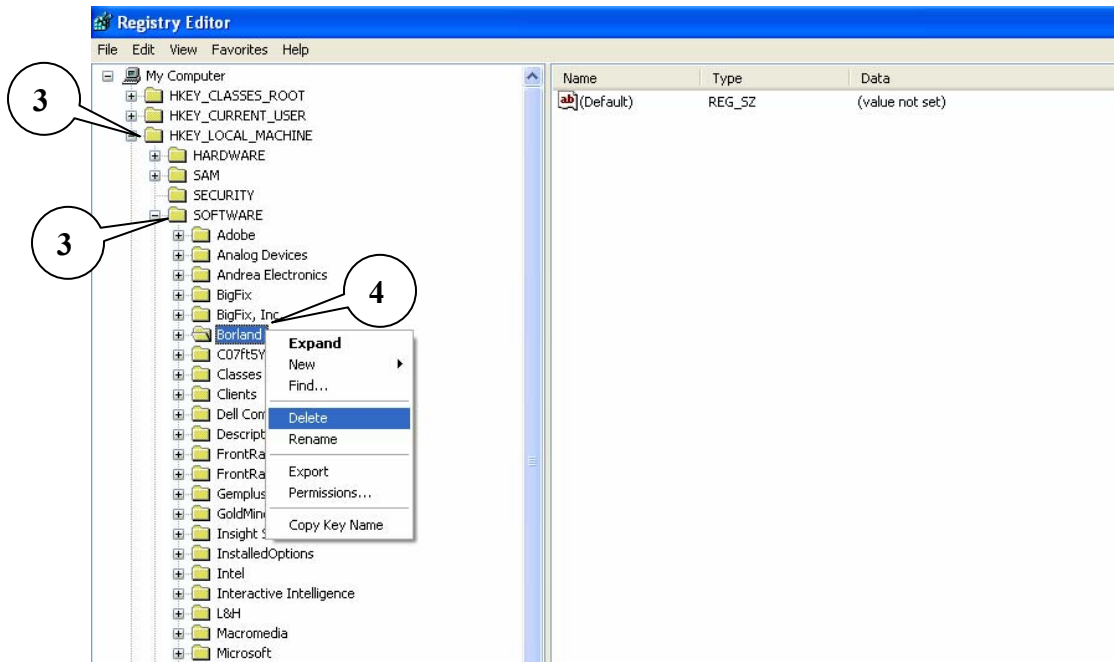
WARNING: Improper use of the Registry Editor can render your system unusable to the extent that you may have to reinstall Windows, and/or restore from backup. **It is strongly recommended that you backup or export the registry by going to Registry>>Export Registry in the Registry Editor.** FrontRange Solutions Inc.. cannot guarantee that problems

resulting from the improper use of the Registry Editor can be fixed. Use the Registry Editor with caution and at your own risk.

1. Click on **Start>> Run**
2. Type in **regedit** and click on **OK** to start the Registry Editor



3. Expand **HKEY_LOCAL_MACHINE>>Software**
4. Right click on the **Borland** key and select **Delete**.
5. Click **Yes** to confirm the deletion.



Step 2: Install GoldMine

Install GoldMine on your new server as outlined in the “Installing GoldMine 6.x” Guide: <http://support.frontrange.com/>

When choosing options in the installer, be sure to choose the shared server installation option and the same location on the new server.

Example: if GoldMine was installed to C:\Program Files\GoldMine\ on the old server, it is recommended that you install it to the same path on the new server and share it in the same manner. Refer to the GoldMine installation guide for details on sharing your GoldMine server’s files.

Step 3: Back up Your Current data

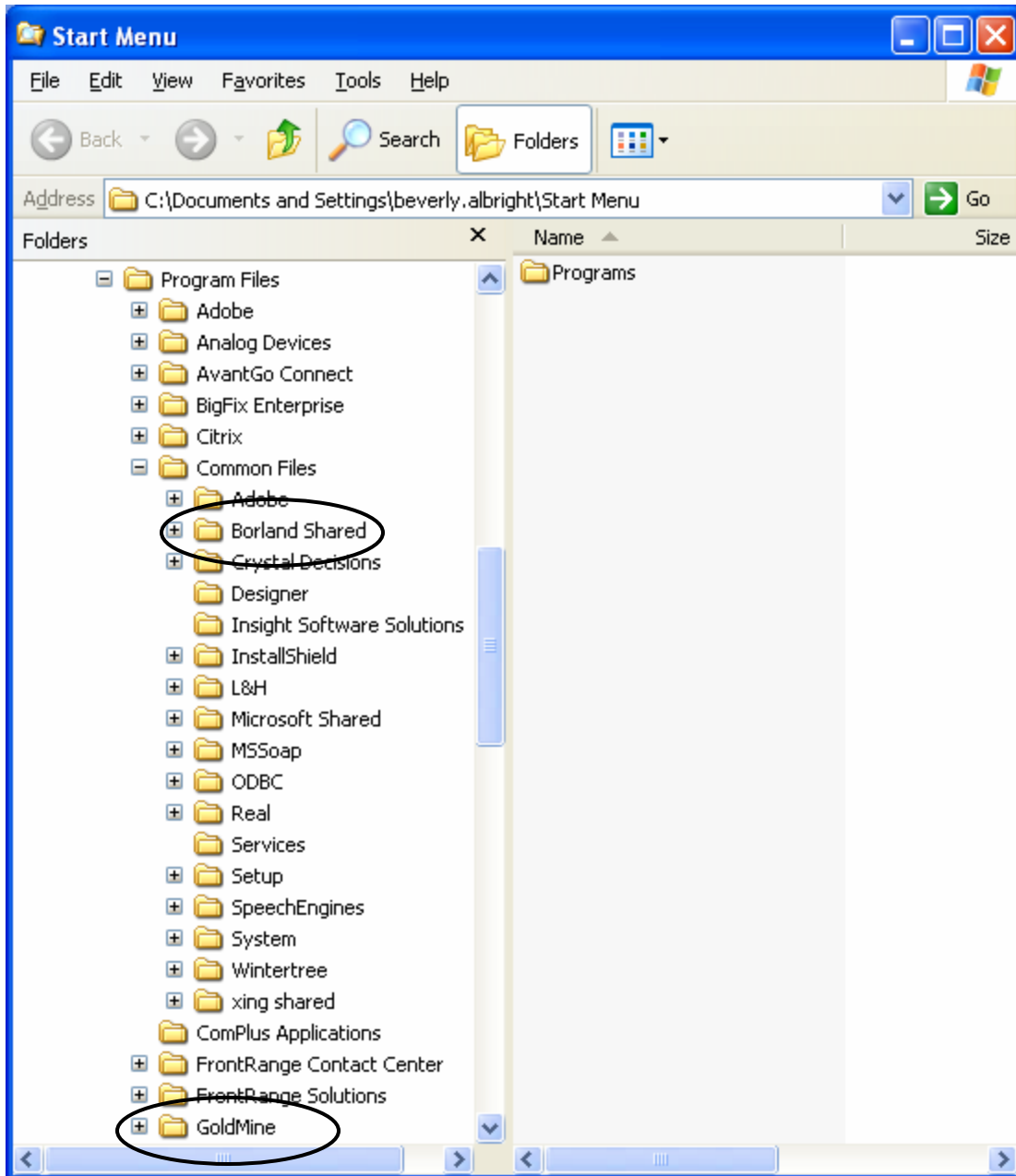
We recommend you create a backup of the GoldMine system and database files on the old server before proceeding with these instructions.

Step 4: Move Your Installation

To properly move all of your system files from your old server to the new one, you will need to make sure that all users are logged out of both installations and that no files in either location are in use by any running services or applications, including GoldSync.

1. Rename the C:\Program Files\Goldmine\ and C:\Program Files\Common Files\Borland Shared\ folders on the NEW server to *GoldTEMP* and *BorlandTEMP* by right clicking on each and selecting *Rename*. If an error message is received or the system reports that it could not rename either folder, double check that all users are out of GoldMine and/or reboot the machine and ensure that all applications that use the Borland Database Engine are closed. If file locks persist, the server’s Windows administration tools should prove helpful in locating and releasing them properly

2. Copy the C:\Program Files\Goldmine\ and C:\Program Files\Common Files\Borland Shared\ folders on the OLD server by right clicking on each in Windows Explorer and selecting *Copy*, then pasting them each to a shared location on the network.

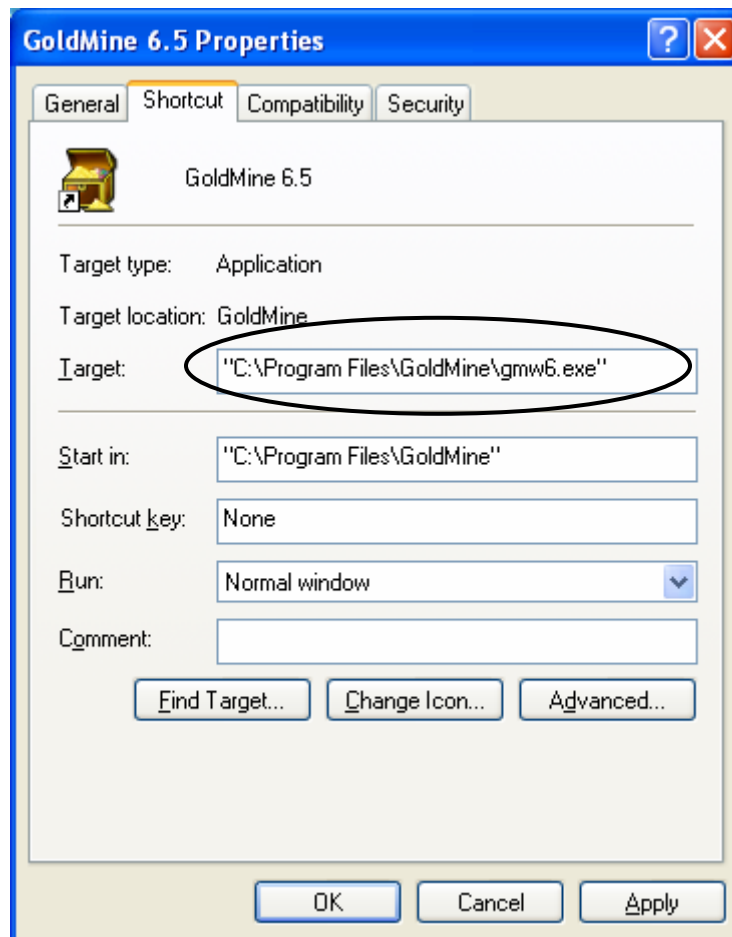


3. If possible, temporarily shut down the OLD server at this point
4. Copy the GoldMine and Borland folders from the network location and paste them into the C:\Program Files\ folder on the NEW server

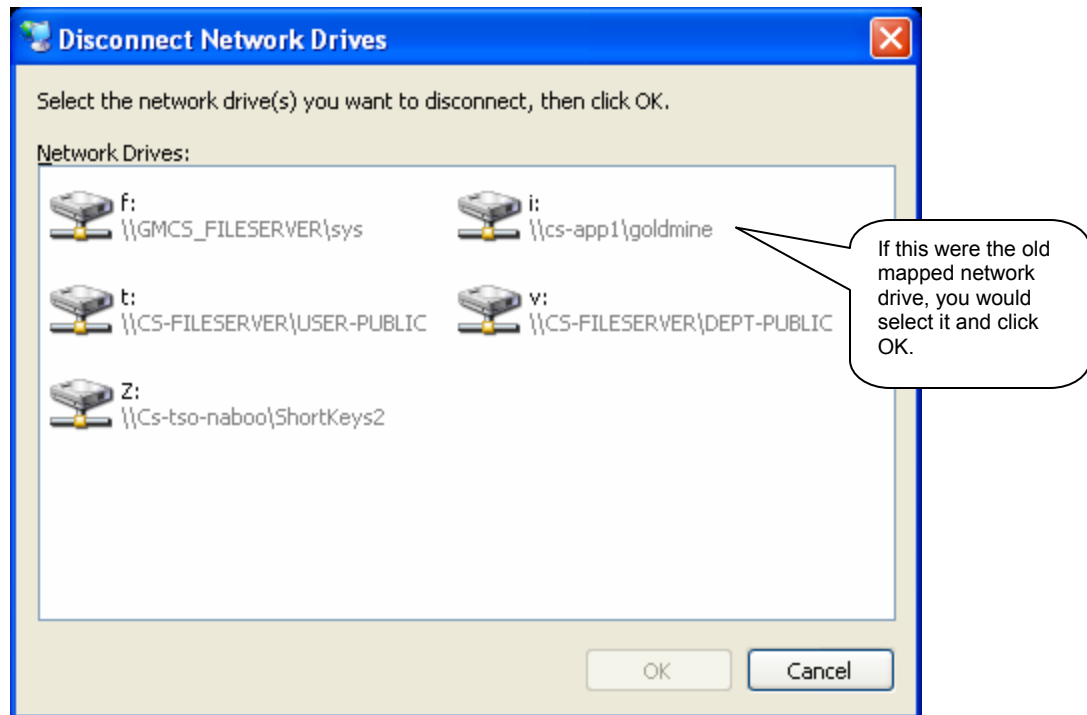
5. Run Regedit on the NEW server and delete the BORLAND registry key. See **Step 1: Remove Any Current BDE Registry Entries** for details on this procedure

Step 5: GoldMine Settings

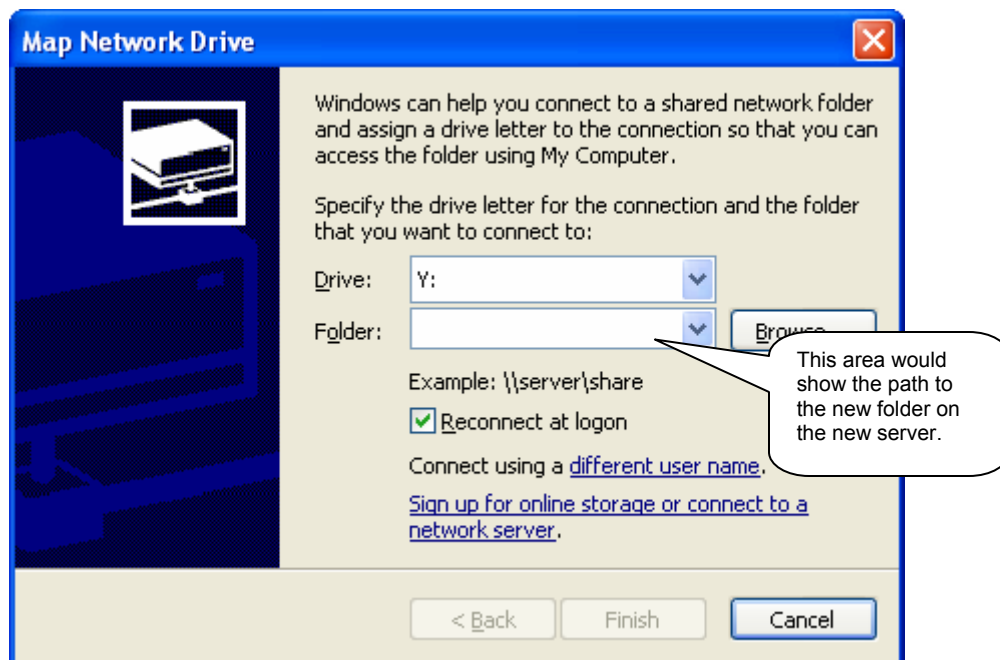
1. Verify that your shortcut to “gmw6.exe” on the new server is correct and points to the executable file on the NEW server. Right click on the shortcut and select *Properties*, and check the Target path as shown in the screenshot below. Do not attempt to open GoldMine yet.



2. Verify that you have disconnected the old mapped network drive that clients used to connect to the old GoldMine server.



3. Be sure you have mapped the new drive to connect to the new GoldMine shared folder (or other shared folder that GoldMine is under) on the new server.



4. Open the GM.ini file located in your new server's C:\Program Files\GoldMine\ folder (or your custom location). Verify the following:
 - SYSDIR settings reflect the new server's proper path using the correct mapped drive that points to the GoldMine root folder
 - GOLDDIR reflects the appropriate path to the GMBase folder in the GoldMine root folder
 - COMMONDIR reflects the appropriate path to the contact set database folder

Example of GM.ini file:

```
[GoldMine]
SysDir=G:\goldmine\
GoldDir=G:\goldmine\gmbase\
CommonDir=G:\goldmine\common\
```

Note: Not all GM.ini files will contain all three settings. In most cases it is not necessary to add them.

Step 6: Test GoldMine

Double-click on the GoldMine desktop icon on the server. You should be presented with the login screen, which should accept your existing GoldMine username and password and log you into your databases without error..

Clean Up

It is recommended that a pervasive check of your data be performed to verify that all data is available in the calendar and contact files before the temporary files and directories created throughout this process can safely be removed. For reference, these include:

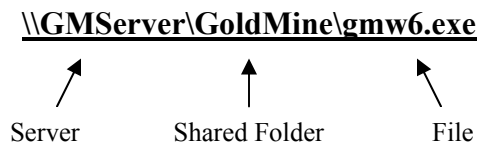
- The temporarily installed GoldMine and Borland Files renamed to *GoldMineTemp* and *BorlandTemp* in Step 4.1
- Your old server's GoldMine installation(s)
- The copies of your GoldMine and Borland installations sitting in your temporary network location

Using a Different Server Name

It is highly recommended that you name your new server the same as the old server. If this is impractical or impossible in your situation, the following information details important data-related incongruities that can wreak havoc with your installation if they are not corrected. It is highly recommended that a knowledgeable GoldMine Certified Solutions Partner be involved in evaluating the scope of your data issues when moving to a differently named server. The FrontRange Solutions Customer Care department can help you to locate a GoldMine Certified Solutions Partner in your area, and can be reached at (800)755-2100.

Data Updates

UNC paths are constructed by using the server's name plus the shared folder(s) and subfolder(s) down to specific files, such as the path below:



Your Linked Documents, e-mail attachments, Crystal reports, signature files, files linked to InfoCenter entries, and merge forms may contain pointers to UNC paths on the OLD server. If this is the case, one option available to update them is a third party utility called **GoldBox**.

A popular third party utility distributed by Redstone Softbase Company, GoldBox is capable of performing mass-updates on your data in a synchronization-friendly manner. This is crucial if the above-mentioned items are to synchronize properly in the future. A Solutions Partner familiar with GoldBox should be consulted to gauge the scope and difficulty of your data update needs and making the decision as to whether or not GoldBox is the proper tool for the job.

Note: GoldBox is not supported by FrontRange Solutions Support Services staff.

GoldSync Settings

GoldSync sites on your server may point to paths located on the old server. Any paths should be corrected manually to insure correct updates. GoldSync processes on your new server will need to be created to match those defined for your old server or GoldSync will not properly listen for incoming connections on the new server.

Workstation Settings

Unless the new server has the exact same name as the old server AND the GoldMine folder is shared on the NEW server EXACTLY as it was on the OLD server, all the BORLAND registry entries and GoldMine shortcuts on every workstation will be wrong.

The easiest thing to do is to delete the old registry entry for BORLAND and delete the GoldMine shortcut, then create a new shortcut and launch it to re-install the BORLAND registry entries on each of the workstations. Savvy Network administrators may also wish to make use of NT's network login script to copy a shortcut to the new GoldMine executable and import a .REG (registry key) containing only the **\HKEY_LOCAL_MACHINE\Software\Borland** key on each workstation upon login to the network.