



GoldMine Connect Installation Guide

For GoldMine Mobile and GoldMine Web

Release 2015.1

May 2015

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Updated: May 2015

Installation

GoldMine Mobile and GoldMine Web are designed to help manage your day-to-day business activities, maintain business relationships, manage time, establish and achieve goals.

Use GoldMine Connect (**gmconnect.exe**) to install both GoldMine Mobile and GoldMine Web.

The installation process for GoldMine Connect involves several prerequisites depending on your Windows Server version. You must first have GoldMine Premium installed. GoldMine Connect (**gmconnect.exe**) installs GoldMine Mobile and GoldMine Web, and allows Google Apps Integration.

GoldMine Mobile can be used for a 60 day evaluation period. Following the evaluation, a license must be entered in GoldMine Premium to continue use. GoldMine Mobile is licensed for named users configured in GoldMine Premium. GoldMine Web requires no additional licensing and can be used by any user of GoldMine Premium.

Before you Install GoldMine Connect

Following are some requirements and recommendations to ensure a successful installation of GoldMine Connect:

- If you have GoldMine Mobile installed you must uninstall it completely before installing GoldMine Connect (**gmconnect.exe**). This includes deleting all associated files and folders.
- Using HTTPS protocol to access either GoldMine Mobile or GoldMine Web is highly recommended for network security and may require an SSL (Secure Sockets Layer) certificate and configuration in IIS.
- Using IMAP is recommended for GoldMine Premium settings.

See the GoldMine Administrator's Guide for information on how to configure GoldMine Premium Edition for use with GoldMine Mobile or GoldMine Web.

Prerequisites

The following table lists the prerequisites for specific versions of Windows Server. In addition you must also determine an installation process based on your set up (see [Installation Options](#)).

All supported Windows Server versions require PE 2014.2 and .Net 4.5.

Different versions of IIS are included on different versions of Servers:

Windows Server 2008	Internet Information Services (IIS) 7.0
Windows Server 2008 R2	Internet Information Services (IIS) 7.5
Windows Server 2012	Internet Information Services (IIS) 8.0

NOTE: GoldMine Connect is not supported for use on Domain Controller, unless the operating system on the Domain Control is “Small Business Edition.”

Hardware requirements

The following minimum requirements are based on number of users accessing GoldMine Connect.

Small environments, with 5 to 10 GoldMine Connect users.

Typically single server environments, where the server is used as both the GoldMine application server, and the Microsoft SQL server. For these environments Microsoft SQL Express 2008 or newer is required.

Operating System	CPU	RAM
Server 2008	2.0 GHz using 2 Processors with 2 Cores each.	4GB RAM, plus what is needed for your SQL database.
Server 2012	3.0 GHz using 2 Processors with 2 Cores each.	4GB RAM, plus what is needed for your SQL database.

Medium environments, with 10 to 25 GoldMine Connect users.

Two servers are required. One server will operate as the Web Server for GoldMine Connect and the second server will have Microsoft SQL installed. You may use either the Web Server or the Microsoft SQL server as the GoldMine Application Server. Microsoft SQL Standard edition is required to support this number of GoldMine Connect users, in conjunction with your network workstation clients for GMPE.

Server Role / Operating System	CPU	RAM
GoldMine Connect / Web Server.	2.0 GHz using 2 Processors with 2 Cores each.	4GB RAM.
Microsoft SQL Server	2.0 GHz using 2 Processors with 2 Cores each.	2GB RAM, plus what is needed for your SQL database.

NOTE: Using a single server environment to support 10 to 25 GoldMine Connect users is not recommended. This may lead to loss of connectivity between the Web client users and the Web Server due to high CPU usage generated by the IIS application and the SQL server activity when multiple records are created or updated at the same time. This will be further impacted by activity generated from your network workstation running GoldMine Premium.

Large environments, with 25 to 50 GoldMine Connect users.

Two servers are required. One server will operate as the Web Server for GoldMine Connect, and the second server will have Microsoft SQL. Microsoft SQL Standard edition is required to support this number of GoldMine Connect users, in conjunction with your network workstation clients for GMPE. An additional server is recommended for use as application server, this is particularly important if you have a large number of internal desktop clients or you are using GoldSync to synchronize with other GoldMine sites or undocked installations of GoldMine.

Server Role / Operating System	CPU	RAM
GoldMine Connect / Web Server.	3.0 GHz using 2 Processors with 2 Cores each.	4GB RAM.
Microsoft SQL Server	3.0 GHz using 2 Processors with 2 Cores each.	4GB RAM, plus what is needed for your SQL database.

Additional Factors That Will Impact Performance.

It is not recommended to use GoldMine Connect on a Server where iGoldmine, Terminal Server or Citrix is actively used. This may result in poor performance of the Web Server when responding to requests from the GoldMine Web and/or GoldMine Mobile when accessed by users.

Both GoldMine Mobile and GoldMine Web have a minimum connection speed requirement for the device, and for the server from where the web application is published. Using speeds lower than the required speed may lead to loss of data, a disconnect between the device and the server, or a general failure when loading on the end-users device.

A Smartphone or Tablet device must have a cellular mobile connection type of 3G, or higher, with a connection speed of 3mb download and a 2mb upload. For devices using a WiFi connection, a 100mb connection or faster is required. For both Cellular and WiFi connections, at least 2 bars of radio signal should be present when either application is used.

For the Web Server there should be at least a consistent 3mb download, and 2mb upload connection speed to support 10 to 15 users. The more users that access the GoldMine Web and or GoldMine Mobile applications via the Web Server, the more bandwidth will be needed between the Web Server and your ISP.

Installation Options

There are three installation options available for installing and configuring GoldMine PE with GoldMine Mobile or GoldMine Web. Each option contains different configurations for the database, the GoldMine Application Server, and GoldMine Connect. The diagrams that follow depict a few variations of these scenarios, and the associated installation procedures:

- [Installation on a Local Server](#)
- [Installation in a Workgroup](#)

- Installation in a Domain

Configuration

Once you have completed the Installation on the selected Windows Server platform, the GoldMine Connect server and the GoldMine PE application must both be configured to allow access by GoldMine Mobile or GoldMine Web. These steps include the following topics:

- Grant Access to the GoldMine Connect Web Server
- Configure Alarm Messages for GoldMine Mobile. For more information see the GoldMine Administrator's Guide.

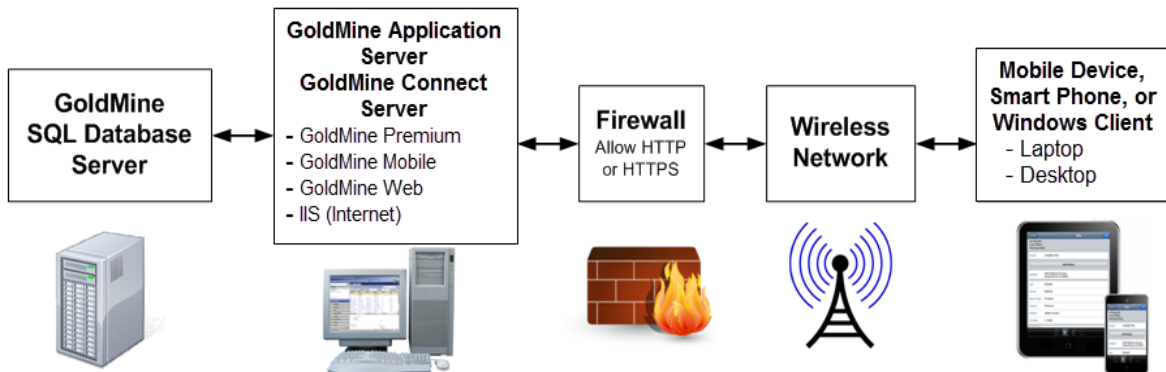
NOTE: If you receive error messages after completing the installation and configuration, refer to [Error Messages and Troubleshooting](#).

Installation on a Local Server

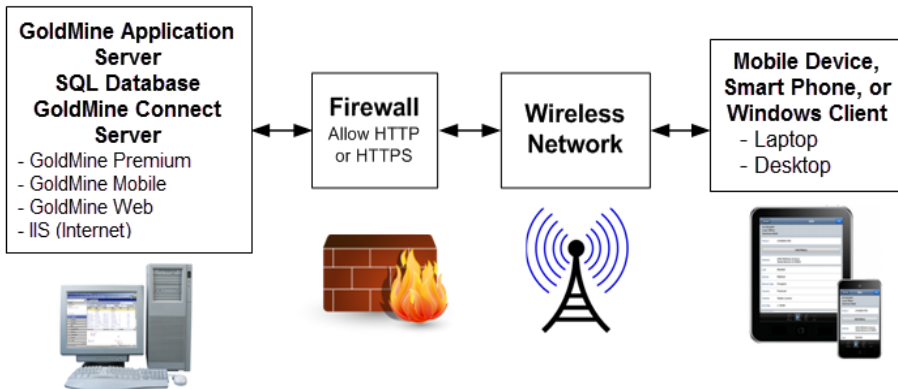
A **Local** installation is one where GoldMine PE and GoldMine Mobile are both installed on the same local computer. However, the GoldMine database can be on a different location. Refer to the GoldMine Premium Edition Installation Guide for installation details.

Installation Scenarios

- Local Installation (with Remote Database)



■ Local Installation (on a Single Server)



Installing on Windows Server 2008/2008 R2, or 2012/2012 R2 on a Local Server

The following instructions apply to both 32-bit and 64-bit (R2) versions of Windows Server 2008 or Windows Server 2012 installed on a Local Server.

IMPORTANT: SQL Server must be running for GoldMine Connect to access the database.

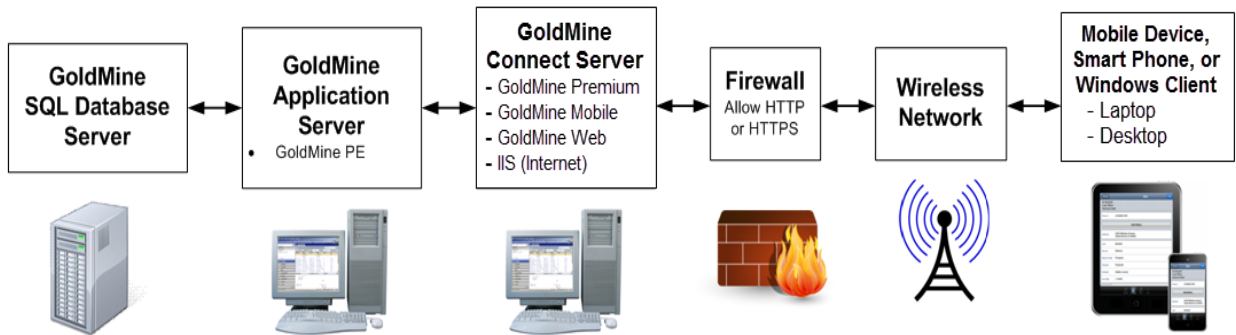
1. Configure IIS.
 - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
 - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
2. Install **GoldMine Connect** for access to GoldMine Mobile or GoldMine Web.
 - a. Run the **gmconnect.exe** file to start the wizard, and then click **Next**.
 - b. Accept the license agreement and confirmation options, and then click **Next**.
 - c. Choose the **Complete** installation type, and then click **Next**.
 - d. Click **Install** to start the installation process.
3. Click **Finish** to complete the installation.
4. Grant the **Users** group permissions to modify the **\ProgramData\GoldMine** directory.
5. See the GoldMine Administrator's Guide for information how to add the GoldMine Mobilelicense to GoldMine Premium Edition.
6. See the GoldMine Administrator's Guide for information how to set GoldMine Mobile User options
7. See the GoldMine Administrator's Guide for information how to configure Alarm Notifications for GoldMine Mobile.
8. Restart IIS.
 - a. **Start > Run**
 - b. Type **iisreset** and click **OK**.

Installation in a Workgroup

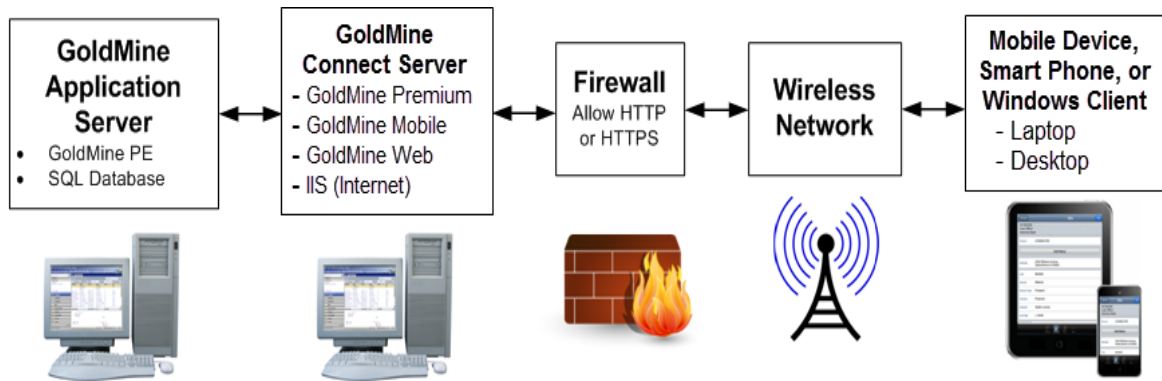
A **Workgroup** installation is an accessible server where the **GoldMine Application Server** (installed GoldMine Premium Edition connected to the GoldMine Database) and **GoldMine Mobile Server** (installed GoldMine Premium Edition and GoldMine Mobile) are installed on separate computers located in the same workgroup. Refer to the GoldMine Premium Edition Installation Guide for installation details.

Installation Scenarios

■ Workgroup Installation (with Remote Database)



■ Workgroup Installation (with Local Database)



Installing on Windows Server 2008/2008 R2, or 2012/2012 R2 in a Workgroup

The following instructions apply to both 32-bit and 64-bit (R2) versions of Windows Server 2008 or Windows Server 2012 installed in the same workgroup.

In this example, the GoldMine Application Server and GoldMine Connect Server are part of the same workgroup, but on different computers in the Workgroup. For additional installation details, refer to the GoldMine Premium Edition Installation Guide.

IMPORTANT: The following steps use **gmmobile** as the user added in each step. If you choose to use a different user name, substitute that name instead of **gmmobile**. Ensure that the user name and passwords you enter, are consistent across all locations where the user is added.

1. On the GoldMine Connect Server, Install GoldMine Premium Edition using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server.
2. Configure IIS on the GoldMine Web Server.
 - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
 - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
3. Install **GoldMine Connect** for access to GoldMine Mobile or GoldMine Web.
 - a. Run the **gmconnect.exe** file to start the wizard, and then click **Next**.
 - b. Accept the license agreement and confirmation options, and then click **Next**.
 - c. Choose the **Complete** installation type, and then click **Next**.
 - d. Click **Install** to start the installation process.
4. Click **Finish** to complete the installation.
5. Add a user (e.g, **gmmobile**) at the GoldMine Connect Server to the **Users** group.
 - a. **Start > Programs > Administrative Tools > Computer Management.**
 - b. On the Computer Management tree, expand **Local Users and Groups**.
 - c. Select the **Users** folder, then right click and select **New User**.
 - d. Add the **User name** (e.g, **gmmobile**) and a **Password** that you remember.
 - e. Click the **Create** button.
6. Add the user (e.g, **gmmobile**) to the GoldMine Connect Server **IIS_IUSRS** group.
 - a. On the Computer Management tree, expand **Local Users and Groups**.
 - b. Select the **Groups** folder.
 - c. In the panel on the right, select the **IIS_IUSRS** group, then right-click and select **Properties**.
 - d. Click the **Add** button and add the user (e.g, **gmmobile**) created in the previous step.
 - e. Click **OK** and then **OK**.
7. Add the user (e.g., **gmmobile**) at the GoldMine Application Server to the **Users** group.
 - a. **Start > Programs > Administrative Tools > Computer Management.**
 - b. On the Computer Management tree, expand **Local Users and Groups**.
 - c. Select the **Users** folder, then right click and select **New User**.
 - d. Add the **User name** (e.g, **gmmobile**) and a **Password** that you remember.
 - e. Click the **Create** button.
8. Grant the user (e.g., **gmmobile**) permission to modify the appropriate **~\GoldMine** application folders on both the GoldMine Application Server and the GoldMine Mobile Server.
9. On the GoldMine Connect Server, assign the application pool identity to the user .
 - a. Open IIS Manager.
 - b. Right-click on the **GMMobileAppPool** application pool.
 - c. Select **Advanced Settings**, then **Process Model > Identity**.
 - d. Click the ellipses button (...) next to **ApplicationPoolIdentity**.
 - e. Select the **Custom account** radio button.
 - f. Click **Set**.

- g. Enter the Windows **User name** (e.g., **gmmobile**) and **Password**.

NOTE: The **User name/Password** combination must be the same in all locations where the User (e.g, **gmmobile**) is added.

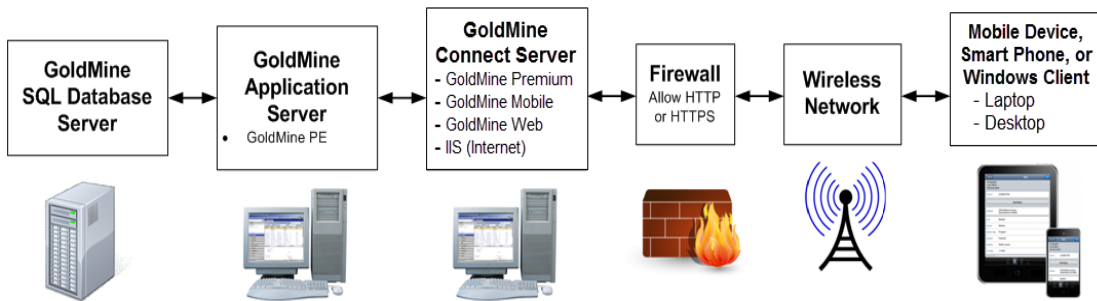
- 10. See the GoldMine Administrator's Guide for information how to add the GoldMine Mobilelicense to GoldMine Premium Edition.
- 11. See the GoldMine Administrator's Guide for information how to set GoldMine Mobile User options
- 12. See the GoldMine Administrator's Guide for information how to configure Alarm Messages for GoldMine Mobile.
- 13. Restart IIS.
 - a. **Start > Run**
 - b. Type `iisreset` and click **OK**.

Installation in a Domain

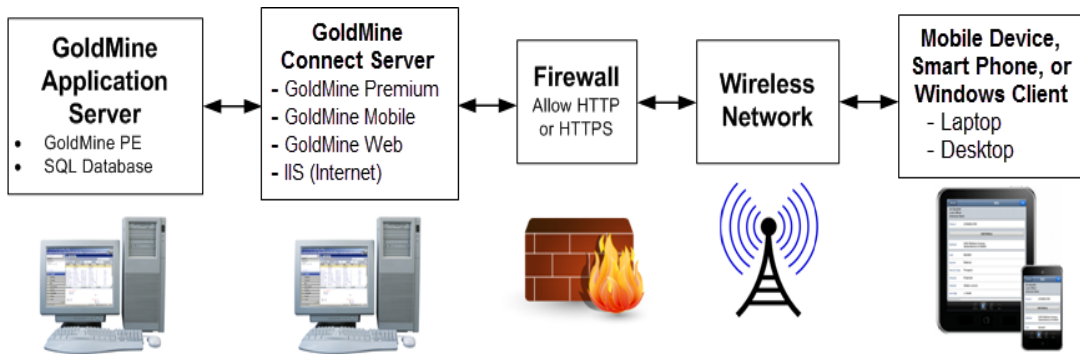
A **Domain** installation is an accessible server where the **GoldMine Application Server** (installed GoldMine PE connected to the GoldMine Database) and **GoldMine Mobile Server** (installed GoldMine PE and GoldMine Mobile Edition) are installed on separate computers located in the same domain. Refer to the *GoldMine Premium Edition Installation Guide* for further information.

Installation Scenarios

■ Domain Installation (with Remote Database)



■ Domain Installation (with Local Database)



Installing on Windows Server 2008/2008 R2 or 2012/2012 R2 in a Domain

The following instructions apply to both 32-bit and 64-bit (R2) versions of Windows Server 2008 and Windows Server 2012 in the same domain.

In this example, the GoldMine Application Server and GoldMine Connect Server are part of the same domain. For additional installation details, refer to the GoldMine Premium Edition Installation Guide.

NOTE: GoldMine Connect is not supported for use on Domain Controller, unless the operating system on the Domain Control is “Small Business Edition.”

1. On the GoldMine Connect Server, Install GoldMine PE using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server (refer to the GoldMine Premium Edition Installation Guide).
2. Configure IIS.
 - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
 - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
3. Install **GoldMine Connect** for access to GoldMine Mobile or GoldMine Web.
 - a. Run the **gmconnect.exe** file to start the wizard, and then click **Next**.
 - b. Accept the license agreement and confirmation options, and then click **Next**.
 - c. Choose the **Complete** installation type, and then click **Next**.
 - d. Click **Install** to start the installation process.
4. Click **Finish** to complete the installation.
5. Grant the **Users** group **Modify** permissions on the **\ProgramData\GoldMine** folder on the GoldMine Application Server and the GoldMine Connect Server.
6. See the GoldMine Administrator's Guide for information how to add the GoldMine Mobile license to GoldMine Premium Edition.
7. See the GoldMine Administrator's Guide for information how to set GoldMine Mobile User options
8. See the GoldMine Administrator's Guide for information how to configure Alarm Messages for GoldMine Mobile.
9. Restart IIS.
 - a. **Start > Run**
 - b. Type **iisreset** and click **OK**.

Grant Access to the GoldMine Connect Web Server

Users access GoldMine Mobile or GoldMine Web through a web server, which must be accessible from the Internet. By default, the **GoldMine Connect** installer creates the virtual directory **/goldmine**.

- The URL used by GoldMine Mobile users will be **http://<server-IP-address>/goldmine** (or **https://** if you are using SSL). To use a URL (such as, **mycompany.com**) you must configure the DNS server.
- The URL used by GoldMine Web users is specified as **http://<server-IP-address>/goldmine/web** (or **https://** if you are using SSL). To use a URL (such as, **mycompany.com**) you must configure the DNS server.

server-IP-address refers to the IP address of the server where **GoldMine Connect** is installed .

Use **https://** only if you are using SSL for a secure connection.

IMPORTANT: HTTPS (HyperText Transfer Protocol Secure) is optional and requires an SSL (Secure Sockets Layer) certificate and configuration in IIS. It is strongly recommended to use HTTPS in order to protect your data and to prevent network sniffing.

In this case, ensure that the following items are set:

- The server has a public IP address that is reachable by the Internet.
- The Domain Name System (DNS) should be able to resolve the web server name to an IP address.
- The web server firewall needs to allow data exchange using HTTP or HTTPS protocols.

NOTE: For information about setting up your Firewall, refer to the documentation provided by the manufacturer.

Login to GoldMine Mobile

The first time you open the GoldMine Mobile application, you will be required to login before you can access the database. Your login and password is the same one used when logging in to GoldMine Premium Edition, and contains all the rights defined for your login role.

NOTE: Passwords are sent in encrypted form when using either HTTP or HTTPS. HTTPS provides a higher level of security and also encrypts customer data sent over the network.

To Open GoldMine Mobile from a Link

If you were sent a link to the URL in a message, follow the steps below.

1. Open the message (email or text) and tap the link.
2. Your default mobile web browser opens to the GoldMine Mobile login screen.
3. Enter your Username and Password and then tap **Login**.
4. [Create a Shortcut on the Home Screen](#)

To Open GoldMine Mobile from the Home Screen

1. Tap the **GoldMine Mobile** shortcut on the Home screen
2. Your default web browser opens to the login screen.

3. Enter your Username and Password and then tap **Login**.
4. [Create a Shortcut on the Home Screen](#)

Create a Shortcut on the Home Screen

If you do not have a shortcut to GoldMine Mobile on the Home screen of your mobile device, follow these steps to create one.

NOTE: The shortcut is created from the GoldMine Mobile Login screen. You must logout before creating the shortcut.

1. Open the GoldMine Mobile location in your mobile browser.
2. Tap the **Bookmarks** button on the tab bar.
3. Tap **Add to Home Screen**.
4. Enter **GoldMine Mobile** as the title, and click **Add**.

Error Messages and Troubleshooting

After installation and configuration of GoldMine PE and GoldMine Mobile, any error messages that appear in the GoldMine Mobile application are logged by the Event Viewer to the server where GoldMine Mobile is installed. If there is a system error (such as an error message shown to an end user) the administrator can check the Event Viewer (Application log) for troubleshooting information. Administrators can use this information to troubleshoot the problem or provide it to technical support for further assistance.

For troubleshooting information and viewing logs, see the GoldMine Administrator's Guide.

To Access the Event Viewer

Use one of the following methods to open the Event Viewer:

- Open **Administrative Tools** and double-click **Event Viewer**
- Open a **Command Prompt**, type eventvwr, and then press ENTER.

NOTE: For more information about the Event Viewer, refer to the Server documentation provided by the manufacturer.