

# GoldMine Premium Edition Installation Guide

Version 9.0.4



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# Introduction

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## Welcome to GoldMine

Program Name (GoldMine for short) provides your organization with a powerful, comprehensive, integrated, automated solution to managing customer relationships. It offers effective tools to develop contacts, conduct activities, and track progress. With GoldMine's synchronization features, users working remotely can stay current with the main company database.

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## About this Guide

The *GoldMine Installation Guide* describes the basic components and steps for installing GoldMine on your Server, Networked Workstations, and Undocked Workstation, and helps you integrate GoldMine smoothly with your other technology tools.

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## Audience and Expertise

The information in this manual is written for GoldMine users and system administrators performing installations. It describes the system requirements, step-by-step installation instructions, and tips for server setup, workstation setup, and undocked user installations.

This material assumes the user has an understanding of the Microsoft Windows operating system.





# System Requirements

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## Overview

This chapter provides the GoldMine system requirement information you need before you begin a Server, Networked Workstation, or Undocked Workstation installation.

**NOTE:** Before installing GoldMine, review the most current version of the compatibility matrix document available for download from: [support.frontrange.com](http://support.frontrange.com).

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## Permissions

### GoldMine

- Only users with local Administrator rights, or users who belong to the Administrator group, can install GoldMine.
- If you are running Windows XP you must have Admin or Power User rights in order to install GoldMine.
- The MS SQL Administrative Username must have permissions to create a new database (for new installations and Firebird migrations only).

### GoldMine Plus!

- You must have Windows administrator permissions when you install GoldMine Plus for Microsoft Office, in order for GoldMine Plus to be available globally for all users.
  - GoldMine Plus! must be installed under the user profile of the user that will have the integration.
- 

## Environments

Pay particular attention to the system requirements that apply to your environment and license type.

GoldMine can be installed and run in various environments. For example, you can install GoldMine on a dedicated Server, or select a regular computer running a server operating system to host a server installation (see "[Server Requirements](#)" on [page 10](#)). Environment is influenced by database size and capabilities, performance considerations, number of shared/undocked users, etc.

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# Host Requirements

Requirements are listed for the following:

- [Software Requirements \(see page 10\)](#)
- [Server Requirements \(see page 10\)](#)
- [Workstation System Requirements \(see page 12\)](#)
- [Undocked Workstation Requirements \(see page 12\)](#)

## Software Requirements

- Microsoft Internet Explorer 7.0 or newer
- Microsoft Windows Installer 4.5 or later (For SQL 2008 - might require server restart).

## Server Requirements

### *Operating Systems*

FrontRange Solutions supports these operating systems for the GoldMine Application Server:

- Microsoft Windows Server 2008 R2 (64 bit)
- Microsoft Windows Server 2008 (32 bit or 64 bit)
- Microsoft Windows Server 2003 R2 (32 bit or 64 bit)

If you are using Microsoft Small Business Server (SBS 2003 - supported or 2008 - recommended), it must be installed and working prior to installing GoldMine. Ensure that SBS service packs are current and applied.

### *Network Protocols*

- TCP/IP (recommended)

### *Database Requirements*

**NOTE:** For Microsoft Server 2003/2008, SQL Express is not supported as a database option.

- **Server Database** (must be installed and configured)
  - **Microsoft SQL Server 2005 SP2** (supported)
  - **Microsoft SQL Server 2005 SP3** (recommended)
  - **Microsoft SQL Server 2008** (recommended)
  - **Microsoft SQL Server 2008 SP2** (supported)
  - **Microsoft SQL Server 2008 R2** (recommended)
  - **Microsoft SQL Server 2008 R2 SP1** (supported)
- **Reporting Services** (must be installed and configured to use the Scheduled Reports feature)
  - **Microsoft SQL Server 2005**
  - **Microsoft SQL Server 2008**
- **Full Text Search** (must be installed and configured to use Full Text Search feature)
  - **Microsoft SQL Server 2005**
  - **Microsoft SQL Server 2008**

- **Client Tools** (must be installed prior to initiating the GoldMine installation process if you intend to perform a Server installation to share your database.)
  - **Microsoft SQL Server 2005**
  - **Microsoft SQL Server 2008**



**IMPORTANT:** A minimum of Microsoft SQL 2005/2008 Express with Advanced Services is required for the GoldMine database. SQL Express editions have a maximum database size:

- SQL Express 2005 = 4GB
- SQL Express 2008 = 10 GB

## Additional Server System Requirements

- Microsoft Data Access Components (MDAC) 2.6 or higher. MDAC is installed automatically with SQL Server.
- SCSI or Ultra DMA Enhanced IDE hard drives: RAID Array or mirrored (recommended).
- 1GB/100 MBps network connection (recommended).

## Server Memory Requirements

**NOTE:** The following table listed recommended RAM allocations. Your actual RAM requirement can vary depending on other [Performance Considerations](#) (see page 11). Insufficient RAM might cause you machine to process data more slowly.

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

**NOTE:** You might also need to increase your RAM allocation when using Universal Search and Full Text Search in GoldMine.

## Performance Considerations

The amount of RAM you have in your Server and the CPU speed requirements vary depending upon your database size and these factors:

**NOTE:** These factors are in addition to the database size and RAM recommendation listed in the table for "[Server Memory Requirements](#)" on page 11. For example, if you have 2 GB of mailbox records, you would likely increase your RAM to match the recommendations accordingly.

- Number of items in the database:
  - Contact Records (1 KB each)
  - Detail Records (2 KB each)
  - History Records (1 KB each)
  - User-defined fields
- Number of simultaneous users on the network
- Database size
- Mailbox records (often the largest table and most used)

# Workstation System Requirements

**Microsoft Data Access Components (MDAC) 2.6 or higher** must be installed on any shared or undocked workstation to enable database functionality. MDAC is installed automatically with SQL Server.

**NOTE:** FrontRange Solutions neither supports nor recommends using Windows emulators on Macintosh, Linux, or other operating systems.

## Operating Systems

FrontRange Solutions supports these operating systems for the GoldMine Network Clients:

- Microsoft Windows 7 (32 bit & 64 bit)
- Microsoft Windows Vista (32 bit)
- Microsoft Windows XP (32 bit)

If you are using Microsoft Small Business Server (SBS 2003 - supported or 2008 - recommended), it must be installed and working prior to installing GoldMine. Ensure that SBS service packs are current and applied.

## Hardware Requirements

Operating System	CPU (Intel or AMD)	RAM
Windows Microsoft Windows 7	3.0 GHz or faster	2 GB RAM (3GB or more RAM depending on your database)
Microsoft Windows Vista	3.0 GHz or faster	2 GB RAM (3GB or more RAM depending on your database)
Microsoft Windows XP	1.5 GHz or faster	1 GB RAM (2 GB or more RAM depending on your database)

# Undocked Workstation Requirements

**Microsoft Data Access Components (MDAC) 2.6 or higher** must be installed on any shared or undocked workstation to enable database functionality. MDAC is installed automatically with SQL Server.

The following recommendations are made for computers operating when disconnected from a Server.

## Operating Systems

FrontRange Solutions supports these operating systems for the GoldMine Undocked Clients:

- Microsoft Windows 7 (32 bit & 64 bit)
- Microsoft Windows Vista (32 bit)
- Microsoft Windows XP (32 bit)

If you are using Microsoft Small Business Server (SBS 2003 - supported or 2008 - recommended), it must be installed and working prior to installing GoldMine. Ensure that SBS service packs are current and applied.

**NOTE:** FrontRange Solutions neither supports nor recommends using Windows emulators on Macintosh, Linux, or other operating systems.

## Hardware Requirements

Operating System	CPU (Intel or AMD)	RAM
Microsoft Windows 7	3.0 GHz or faster	2 GB RAM (3GB or more RAM depending on your database)
Microsoft Windows Vista	3.0 GHz or faster	2 GB RAM (3GB or more RAM depending on your database)
Microsoft Windows XP	1.5 GHz or faster	1 GB RAM (2 GB or more RAM depending on your database)

## Performance Considerations

The amount of RAM you have in your Workstation and the CPU speed requirements vary depending upon your database size and these factors:

- Number of items in the database:
  - Contact Records (1 KB each)
  - Detail Records (2 KB each)
  - History Records (1 KB each)
  - User-defined fields
- Number of simultaneous users on the network
- Database size
- Mailbox records (often the largest table and most used)

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## Additional Requirements

- **Microsoft .NET Framework 1.1** must be installed and configured to use the Scheduled Reports feature.
- **Microsoft .NET Framework 2.0** is required for two add-ons: GoldMine Plus (add-on for Microsoft Office) and GISME (GoldMine integration with Microsoft Exchange).
- **Microsoft Visual Studio 2005 .NET** (*for use with MS SQL 2005*) must be installed and configured to create reports for the Scheduled Reports feature. End users do not require this application.
- **Microsoft Visual Studio 2008 .NET** (*for use with MS SQL 2008*) must be installed and configured to create reports for the Scheduled Reports feature. End users do not require this application.
- **Microsoft XML Core Services 6** (*for Windows XP SP2 only*) is an upgrade but not replacement for versions 3 and 4. Versions 3 and 4 still provide legacy features not supported in version 6. Multiple versions can all be installed and running concurrently.

**NOTE:** MSXML6 is included with **Microsoft SQL Server 2005, Visual Studio 2005, .NET Framework 3.0, Windows Vista, Windows 7, and Windows XP SP3.**

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# GoldSync Requirements

GoldSync automates the synchronization of data between a host GoldMine system and multiple remote GoldMine systems.

GoldSync supports multi-user/multi-site environments and includes support for many simultaneous connections. As the amount of data and number of users increase, GoldSync scales as needed for the workload demand.

**TIP:** For details on GoldSync implementation and functionality, see "About GoldSync" in the Online Help.

## GoldSync System Requirements

Item	Recommended
● Operating System	Microsoft Windows Server 2008 R2 (64 bit) Microsoft Windows Server 2008 (32 bit) Microsoft Windows Server 2003 R2 (32 bit) Microsoft Windows Server 2003 (32 bit)
● Disk Subsystem	RAID Array or mirrored (for larger databases or heavy synchronization load)
● RAM Allocation	1 GB (for < 2 GB database with 10 concurrent sync sessions)
● Network Connection	100 Base-TX TCP/IP

# Installing GoldMine

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## Overview

GoldMine provides various types of installations, whether from netUpdate or CD, a new installation or upgrade, on a server or workstation, in network or remote location. Review the planning items and considerations, determine the type of installation you are running, and use the associated checklist to ensure a successful installation.

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## Planning Your Installation

When planning a GoldMine installation consider:

- ❑ **Who will be the designated GoldMine administrator?** The GoldMine administrator must have access to network and office resources and be able to address the business-related implementation issues regarding configuration and customization.
- ❑ **Do you have the proper license and registration information for the version of GoldMine you are installing?** For detailed information on licensing, see "[Licensing and Registration](#)" on page 37

**TIP:** GoldMine Solutions Partners are GoldMine Certified in installation and setup. To locate a partner in your area, go to [www.frontrange.com](http://www.frontrange.com) and use the Partner Locator.

- ❑ **Are you going to import data?** Verify that you can import the source data into GoldMine.
- ❑ **Does the system administrator have full administrative rights?** To install GoldMine on a network, the GoldMine administrator must have full administrative rights on the network.
- ❑ **Are your service packs compatible and current?** Check the version and service pack number for your Microsoft Windows operating system. Verify no issues exist with your current service pack. Go to [www.frontrange.com/support](http://www.frontrange.com/support), log in, and navigate to **Technical Support > Support Documentation > Technical Manuals > GoldMine**. Select **GoldMine Premium Edition**.
- ❑ **Have you reviewed the network structure?**
  - Are there multiple domains? Do users have the rights on the GoldMine domain to access GoldMine?
  - Is the server outside the regular network? There may be connectivity issues the network administrator needs to address.
- ❑ **What type of database are you using?** GoldMine supports both Microsoft SQL Server or SQL Server Express.
- ❑ **Will you be integrating GoldMine with Microsoft Office?** Microsoft Office 2003/2007/2010 is required when integrating with GoldMine, and must be installed/configured before installing the GoldMine Plus! component.

**NOTE:** GoldMine does not support the Microsoft Office 2010 64 bit version.

## Installation of GoldMine on Windows XP

- Windows XP is not a supported platform for a GoldMine application server.
- Some users may encounter issues with the auto-run installation.

## Installation of GoldMine on Windows Vista and Windows 7

- Although the install process for Vista is very similar to Windows XP, it is not supported as a GoldMine application server environment. You can install and run GoldMine on Vista, but you can not share your installation with other Networked Workstation over a network.
- You can override the default installation folder for GoldMine executables and libraries. However, if you choose a location outside of the [\Program Files](#) directory, certain functionality will be lost, such as macro recording. This is due to security requirements within Vista, which connects certain privileged functions with the locations where their associated executables are launched from. If User Account Control (UAC) is on, GoldMine macros will not work if not installed in [\Program Files](#) directory.
- The installer will offer customized path settings for GoldMine's program files. The installer, by default, creates the destination folders with correct permissions set for proper use. If the destination folders you will install to already exist, or if you create them yourself, you must ensure that the selected folders have the correct access permissions.
- Customers using a Windows Vista system as a server may have problems with the Networked Workstation accessing the data on the network due to the "split." Users might encounter license errors when performing NetUpdates (see ["Changes to System Files for Microsoft Windows 7, Vista, and Server 2008" on page 18](#)).

## Installation of Universal Search

The Universal Search feature provides a single view to quickly find out what information is in your system and how to navigate to it. Universal Search can be installed by selecting **Yes** at the end of the Licensing Wizard (see ["Licensing Following Installation" on page 40](#)), or by using one of the following procedures:

- [To Install Universal Search from Within GoldMine](#)
- [To Install Universal Search from a Command Prompt](#)



**IMPORTANT:** MS SQL Full Text Search must be correctly installed and configured prior installing Universal Search.

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For information about using Universal Search, refer to the "Universal Search" topic in the *GoldMine Premium Edition User Guide* pdf or in the Online Help.

### [To Install Universal Search from Within GoldMine](#)

1. Logon to GoldMine as user with Master rights.
2. Open the **Tools** menu and select **Configure > System Settings**.
3. Click the **Advanced** tab.
4. Click the **Install** button.
5. Click the **Yes** button.

### [To Install Universal Search from a Command Prompt](#)

1. Logon to GoldMine as an administrative user when prompted for logon data
2. Open the Windows **Start** menu and select **Run**.
3. In the Open textbox, type `gmw /us: i nstal l` and then click **OK**.
4. Login to GoldMine as an administrative user when prompted for logon data.
5. Install Universal Search by selecting **Yes** in the **Do you want to install Universal Search?** message box.



# Searching E-mails in Windows Vista and Windows 7

There is an issue when searching information in emails that occurs only when GoldMine is installed on Microsoft Vista and Windows 7.

After installing Universal Search you might see the following messages:

- **Message in the Application Event log:**

Errors were encountered during full-text index population for table or indexed view '[gm81\_35].[dbo].[MAILBOX]', database 'gm81\_35' (table or indexed view ID '309576141', database ID '20'). See full-text crawl logs for details."

- **Message in the full text log:**

"2009-09-12 19:12:30.13 spid18s Error '0x8007007e' occurred during full-text index population for table or indexed view '[gm81\_35].[dbo].[MAILBOX]' (table or indexed view ID '309576141', database ID '20'), full-text key value 0x354C4F4A583248263B3F563D20573C. Attempt will be made to re-index it.

2009-09-12 19:12:30.13 spid18s The component 'MSFTE.DLL' reported error while indexing. Component path 'C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\MSFTE.DLL'

To fix this condition, perform the following procedure.



**WARNING:** It is recommended that you create a backup of your Windows Registry before making any changes.

1. Find the registry key:

**HKEY\_LOCAL\_MACHINE\SOFTWARE\Classes\CLSID\{5645C8C2-E277-11CF-8FDA-00AA00A14F93}**

2. Change the default value from

**(%systemroot%\system32\mimefilt.dll) to (c:\WINDOWS\system32\mimefilt.dll)**

where %systemroot% is the path where Windows is installed.

3. Restart the computer (or at minimum restart the Microsoft SQL Server).

4. Restart the Microsoft Fulltext service

5. Re-install the Universal Search (see ["Installation of Universal Search" on page 16](#)).

After installing Universal Search you might see the following message:

*"You can see this message only in the Application Event Log"*

## System Files Changes

Located in the GoldMine folder, these files store user and licensing information. System files typically have a .BIN, .XML, or .INI file extension.

- **DataDict.xml** includes database and field definitions for creation of required databases and maintenance operations.
- **flags.bin** controls the number of users logged on to GoldMine.
- **LicenseGM.bin** stores License Manager information and validates incoming sync connections.
- **Users** is a table the collects the user's information such as user login and permission information.
- **USER\_info.bin** stores SQL login information.
- **GM.ini** controls how GoldMine launches.
- **dbalias.ini** stores the database username and password.
- **gmbase.bin** is used to maintain system integrity.
- **gmexp.bin** stores revoked licenses.
- **SyncLock.bin** is used to maintain system integrity.
- **USER.ini** stores how GoldMine launches for the user.

## Changes to System Files for Microsoft Windows 7, Vista, and Server 2008

When installing GoldMine onto a Microsoft Windows Vista, Windows 7, or Windows Server 2008 system, a *split-path* installation is used. This is due to security changes in these versions of Window's architecture. The split-path installation will place executables and program libraries into [\Program Files\GoldMine](#), while database files, [.INI](#) files, reports, and templates will be placed in [\ProgramData\GoldMine](#).

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## Installation Checklists

If you are:	Then run:
<b>Networked Workstation:</b> An individual in an organization with a multi-user environment who must connect to a shared copy of the GoldMine database. Install GoldMine on the client workstation so the end user can connect to the server copy of the GoldMine database from his or her individual computer.	Full Setup, connected to an existing database
<b>Undocked Workstation:</b> An individual who often works remotely on a computer with an Undocked sublicense, who synchronizes with a Server to update information. Install a full copy of GoldMine with a database on a computer working disconnected from a network.	Full Setup (with U-License)
<b>GoldSync Server:</b> This can be also the Server and does not need to be an extra machine.	Full Setup, connected to an existing database
<b>Server:</b> A company that must support multiple GoldMine users using a shared system. Users can then connect to the server copy from their local Networked Workstation using shortcuts installed by running a Workstation installation.	Full Setup

## 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 linked and integrated programs:** (*Upgrading customers only*) Uninstall GoldMine Plus for Microsoft Office.
- ❑ **Exit all running system programs and stop services:** Includes third-party utilities that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine, including GoldMine Integration Services for Microsoft Exchange (GISME), if applicable.
- ❑ **Install ancillary programs:** Install necessary programs on the computer serving as the Server or on another computer on your network (see ["Additional Requirements" on page 13](#)). On an Undocked machine, MS SQL must be installed prior the GoldMine installation.
- ❑ **Install GoldMine:** Install on the computer serving as your Server. Select the Server Setup installation and follow the directions in this manual.
- ❑ **License the server copy of GoldMine:** Licensing registers the Server copy of GoldMine with the appropriate license (see ["Licensing and Registration" on page 37](#)).
- ❑ **Verify you can launch GoldMine:** Ensure the server installation is functioning properly before installing any Networked Workstation.
- ❑ **Share the GoldMine folder:** In order for the Networked Workstation to connect to the shared copy of GoldMine, you must first share the folder in which GoldMine is installed (see ["Sharing the GoldMine Folder on the Server" on page 28](#)).

## Networked Workstation Installation Checklist

- ❑ **Uninstall linked and integrated programs:** (*Upgrading customers only*) Uninstall GoldMine Plus for Microsoft Office.

- ❑ **Exit all running system programs and stop services:** Includes third-party utilities that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine, including GoldMine Integration Services for Microsoft Exchange (GISME), if applicable.
- ❑ **Create a mapped drive to the shared GoldMine folder:** See ["Sharing the GoldMine Folder on the Server" on page 28](#).
- ❑ **Install GoldMine on the Client Workstation:** See ["Installation on a Networked Workstation" on page 28](#).
- ❑ **Verify you can launch GoldMine:** Ensure the workstation installation is functioning properly.

## Undocked Computer Installation Checklist

- ❑ **Create an Undocked license:** (undocked license users only) See ["Licensing and Registration" on page 37](#).
- ❑ **Uninstall linked and integrated programs:** (*Upgrading customers only*) Uninstall GoldMine Plus for Microsoft Office.
- ❑ **Exit all running system programs and stop services:** Includes third-party utilities that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine, including GoldMine Integration Services for Microsoft Exchange (GISME), if applicable.
- ❑ **Disconnect the laptop from the network:** Disconnect to ensure GoldMine configures the laptop to connect only with the database on the local computer and not with the network.
- ❑ **Install GoldMine to the undocked computer:** See ["Installation on an Undocked Computer" on page 34](#).
- ❑ **License GoldMine:** Use the appropriate U-license information. See ["Licensing and Registration" on page 37](#).
- ❑ **Verify you can launch GoldMine:** Ensure the undocked installation is functioning properly.

---

## Installation on a Server

A *full setup* installs GoldMine to a common location, usually a shared network drive. Workstation-based users can connect to the server copy from their local computers after ["Installation on a Networked Workstation" \(see page 2-28\)](#).



**IMPORTANT:** If you are installing a new version of GoldMine after uninstalling a previous version, you might have entries left in the Windows Registry which will cause GoldMine to assume you are upgrading. These entries must be removed to allow you to install GoldMine. Consult with your System Administrator before you attempt to remove any entries from your Windows Registry.

---

**NOTE:** Windows Vista, Windows Server 2008, and Windows 7 have a split path installation. The [gm.ini](#) file installs into the `\ProgramData\GoldMine`, which needs to be shared because this folder contains [gm.ini](#) to which `realini` setting from workstation [gm.ini](#) should point. (`realini=path to shared gm.ini`)

### *To Install GoldMine on a Server*

The following steps are for a **New Installation**. If upgrading, use the steps in ["Upgrading GoldMine" on page 49](#).

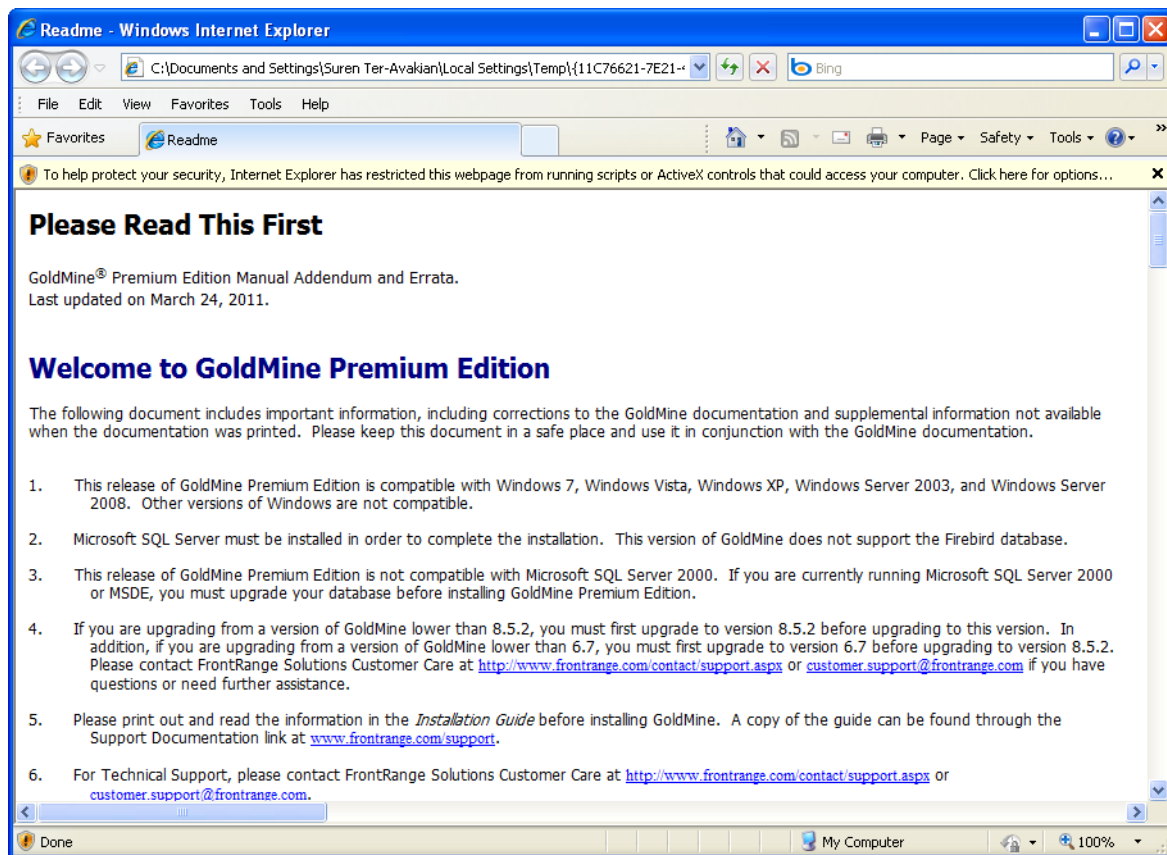
**NOTE:** 110MB of disk space is required for installation (plus 45MB more if adding GoldMine Plus!).

1. Log directly into the server as a local administrator.
2. The installation CD is set up to autorun when inserted into your CD-ROM drive or run the [gmsetup.exe](#) downloaded to your server installation of GoldMine during the Net-Update process.

The **Welcome to the GoldMine Installation Wizard** dialog box appears.



3. Click **Next**. The **Readme** dialog box appears.

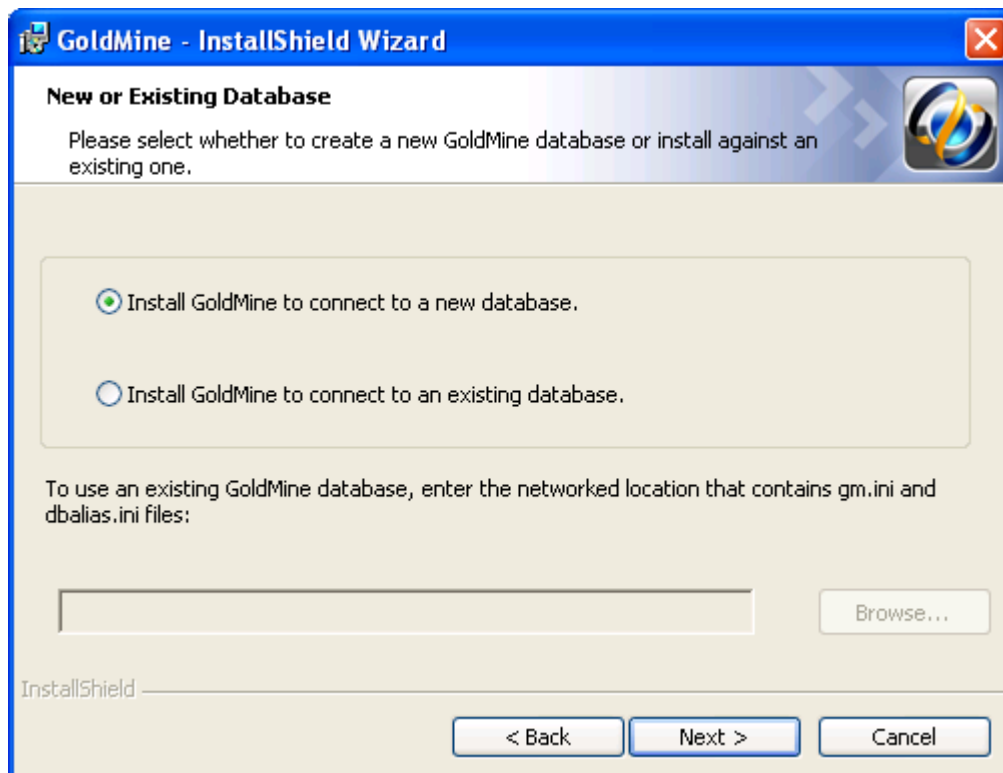


**NOTE:** The README file contains the most recent information about this version of GoldMine. A copy of the [README.htm](#) (as well as the [ReleaseNotes.rtf](#)) can be found in the [\Goldmine](#) folder after the installation has completed.

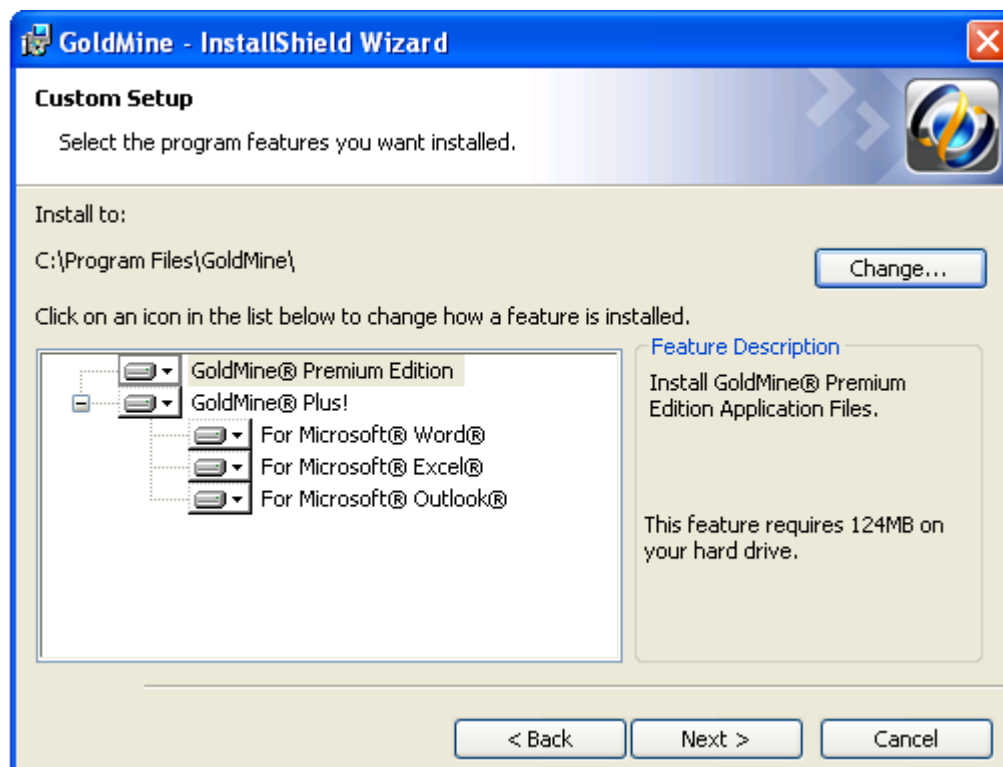
4. Close this dialog box after reviewing the most recent information about this version of GoldMine to proceed with the installation.
5. The **License Agreement** dialog box appears.



6. Review the licensing information carefully; 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.
7. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.  
**NOTE:** 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.
8. Click **Next**. The **New or Existing Database** dialog box appears.
9. Choose the **Install GoldMine to connect to a new database** option.



10. Click **Next**. The **Custom Setup** dialog box appears.



The GoldMine Premium Edition and GoldMine Plus! options are selected for installation by default.

**NOTE:** If you select the Microsoft Excel option and plan on having others use it, besides the current installing user, you must make changes manually to the registry key. See ["Modifying the Registration Key" on page 36](#).

There are three options under the GoldMine Plus! option:

- **For Microsoft Word**
- **For Microsoft Excel**
- **For Microsoft Outlook**

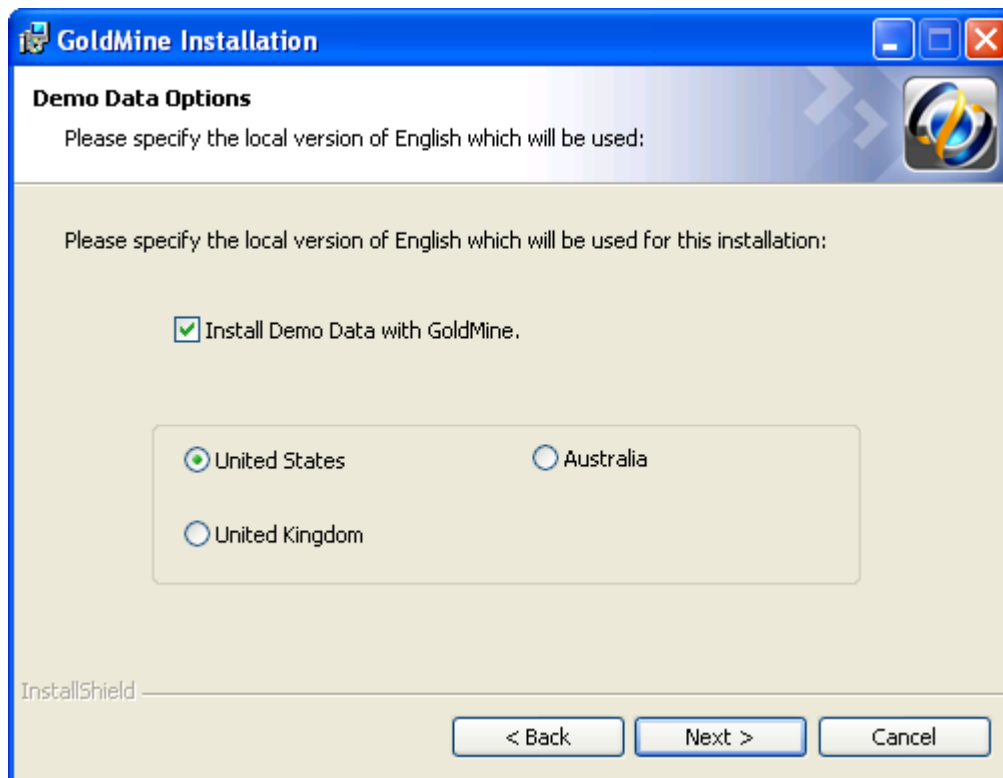
If you do not want to install the GoldMine Plus! components, click the GoldMine Plus! icon, select **This feature will not be available** from the drop-down menu, and then click **Next**. Alternately, can select individual GoldMine Plus! components for exclusion during installation.

These components can be install at a later date using the Add **or Remove Programs** control panel in Windows, and then selecting Change for the **GoldMine** entry on the list.

11. To install the selected GoldMine features, click **Next**.

**NOTE:** Microsoft Office must be installed prior to installing GoldMine Plus! components.

12. The **Demo Data Options** dialog box appears.



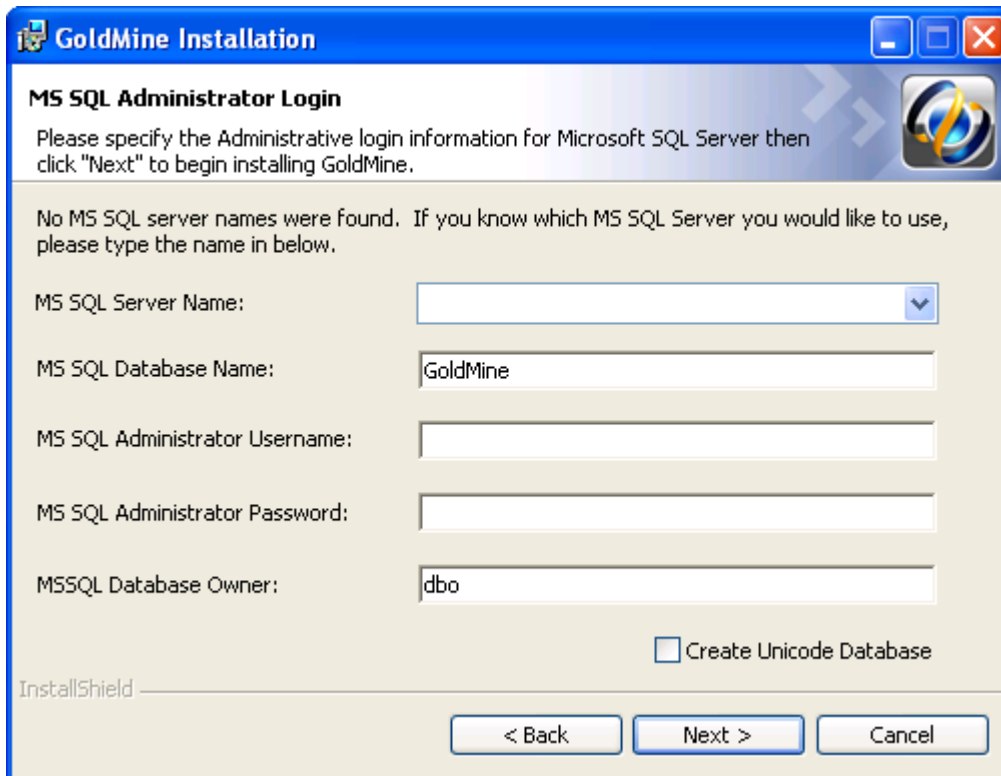
13. Select the local version of English for your installation.

14. To add the demonstration data to the database, check the **Install Demo Data with GoldMine** box.

**NOTE:** When upgrading, this dialog box does not appear

15. Click **Next**. The **MS SQL Administrator Login** dialog box appears.





**GoldMine Installation**

**MS SQL Administrator Login**

Please specify the Administrative login information for Microsoft SQL Server then click "Next" to begin installing GoldMine.

No MS SQL server names were found. If you know which MS SQL Server you would like to use, please type the name in below.

MS SQL Server Name:

MS SQL Database Name:

MS SQL Administrator Username:

MS SQL Administrator Password:

MSSQL Database Owner:

☐ Create Unicode Database

InstallShield

< Back    Next >    Cancel

- **MS SQL Server Name:** Type or select the name of the computer on your network where SQL Server is installed. When using named instances (such as default on MS SQL express Editions installations) type the name of the MS SQL Server; example: MACHI NENAME\SQLEXPRESS.
- **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 is sa. If your SQL Server user name is different, your SQL administrator must provide the information.
- **MS SQL Administrative Password:** Enter the SQL Server administrator password.
- **MS SQL Database Owner:** The default name of the SQL Server database owner is **dbo**. There is no need to change this value.
- **Create Unicode Database:** Check this option to create a Unicode Database. Checking this option will greatly increase the size of your database.

**NOTE:** If you click **Next** without typing a user name and password, the **Insufficient Input** dialog box appears. Click **Back**. If you type incorrect information and click **Next**, the **MS SQL Login Failed** dialog box appears. Review the troubleshooting tips, then click **Back**.

16. Click **Next** to continue.

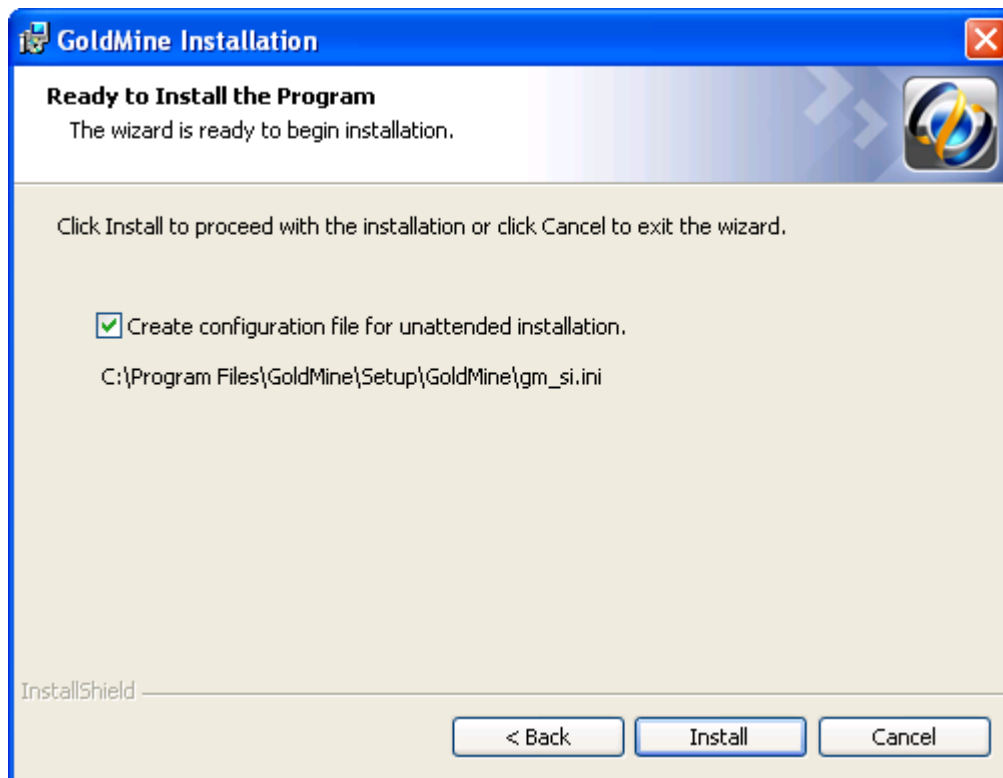


**IMPORTANT:** A minimum of Microsoft SQL 2005/2008 Express with Advanced Services is required for the GoldMine database. SQL Express editions have a maximum database size:

- SQL Express 2005 = 4GB
- SQL Express 2008 = 10 GB

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





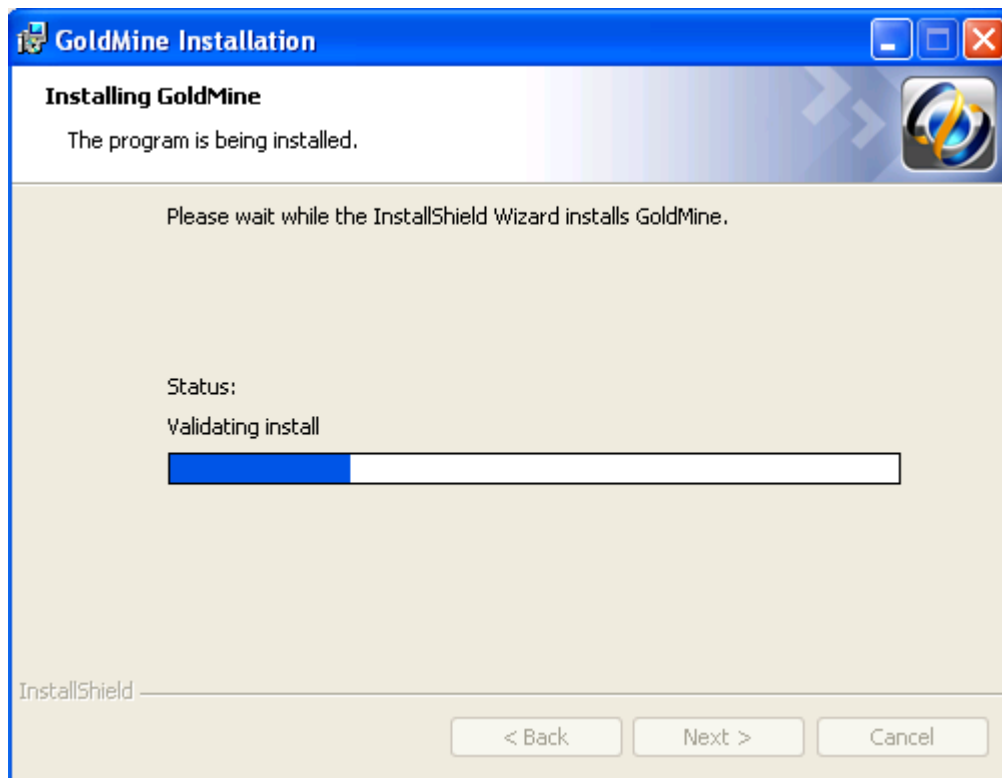
If you are planning on installing GoldMine on other computers, you can check the **Create a configuration file for unattended installation** box to create a configuration file with these settings.

If you choose not to use this option, you can manually create the unattended installation script (see ["To Create an Unattended Installation Script" on page 35](#)).

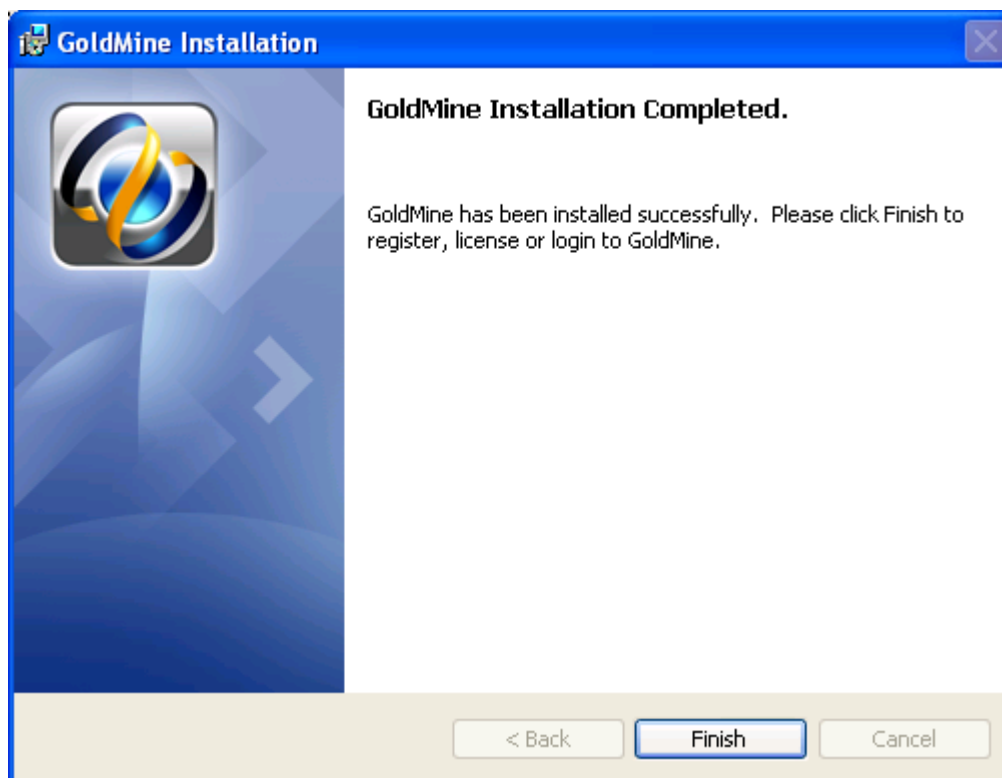
18. If you selected any of the GoldMine Plus! options, a **Question** box appears.



19. Click **Yes** to install the Microsoft Office add-ins, or click **No** to skip installation of these add-ins and only install GoldMine.
20. The **Installing GoldMine** dialog box appears.



21. When finished, the **Installation Completed** dialog box appears.



22. Click **Finish**.

The **Welcome to GoldMine** dialog box appears to begin the licensing process. See ["Licensing and Registration" on page 37](#).

# Unattended Installation

Another installation option is the **Unattended Installation** (also known as Silent Install). This option allows installation without user interaction. Installing GoldMine using the unattended installation mode recreates the same steps as a workstation install, using user responses stored in a configuration file.

For example, you perform a full GoldMine installation on a clean computer (a computer with no previously installed versions of GoldMine) using the **connect to existing database** option. Then you run the GoldMine installer in unattended mode on the other computers. GoldMine will be installed into the same directory with **connect to existing database** option.

**TIP:** A GoldMine administrator can create unattended installation scripts for various installation scenarios.

The Unattended Installer uses a special configuration file named `gm_si.ini`. For detailed instructions on how to create this file, see ["To Create Configuration File for Unattended Installation" on page 27](#).

**NOTE:** The generated `gm_si.ini` is meant to be deployed to a machine with a similar condition. If you create a `gm_si.ini` file from a machine that has been upgraded, the same `gm_si.ini` can not be deployed as a new installation in another machine.

## To Create Configuration File for Unattended Installation

1. Run GoldMine installer as usual.

For more information on installing, see ["Installation on a Server" on page 19](#).

2. Proceed to **Install Welcome** dialog.
3. Select the **Create a configuration file for unattended installation** checkbox.
4. The file will be created in the:

`C:\Program Files\GoldMine\Setup\GoldMine\gm_si.ini`

**NOTE:** If installing to Windows 7, Windows Vista, or Windows Server 2008, a *split-path* installation is used, which places the `gm_si.ini` file in the `\ProgramData\GoldMine\setup` folder. For more information, see ["Changes to System Files for Microsoft Windows 7, Vista, and Server 2008" on page 18](#).

5. Click **Install**.

The configuration file and bat file (`gmsetup_si.bat`) will be created.

**TIP:** You can also create an unattended installation script after installation. For more information, see ["Creating an Unattended Installation Script" on page 34](#).

**NOTE:** If the installer in unattended mode cannot repeat exactly the user mode steps, then the installer will switch to an interactive mode and the user can manually continue with the installation.

## To Manually Run the Unattended Installation

Manually run the unattended install using `gmsetup_si.bat` file.

**NOTE:** GM installer files `gmsetup.exe`, `gm_si.ini`, and `gmsetup_si.bat` should be placed into the same directory.

In some cases the unattended installer cannot repeat the exact steps as a normal install. For example, the unattended installer cannot perform a full installation (without previously installed GoldMine) on the computer with GoldMine already installed with the same version because the installer is running in maintenance mode.

# Automatic Upgrade

Use the following procedure to upgrade networked workstations.

## *To Upgrade Unattended Installation*

1. Create the configuration file.  
For instructions, see ["To Create Configuration File for Unattended Installation" on page 27](#).
2. Select **GoldMine > Tools > Configure > System Settings > Auto-Upgrade**.
3. Set the paths and filenames of the GoldMine installer and configuration file created in step 1.

**NOTE:** This must be a UNC path to a sharable directory.

After completing this procedure, any local installs of GoldMine will automatically prompt users to upgrade GoldMine whenever the local GoldMine version is less than the server GoldMine version.

---

## Installation on a Networked Workstation

A Networked Workstation setup installs GoldMine on the workstation and enables a workstation user to connect to the Server copy of the GoldMine database from their individual computer.

Share the GoldMine data folder on the server, then map the same drive on each workstation to the shared GoldMine folder on the server using a UNC path to a sharable directory (not recommended if using softPhone or Management Intelligence).

## Sharing the GoldMine Folder on the Server

To run the shared folder installation, after installing the Server setup, share the GoldMine root directory so the Networked Workstation function properly. All GoldMine users must have rights to read, write, modify, and delete files for GoldMine to function on the Networked Workstation.

**NOTE:** Sharing can expose other applications. **Do Not** install GoldMine as a root folder of the drive, rather, install to [C:\Program Files\GoldMine](#) on the Server.

Your procedure might vary depending on the operating system where the Server database is located. Refer the documentation that can with your operating system for detailed instructions.

## *To Share the GoldMine Folder on Server 2003*

To share the GoldMine folder on Server 2003 you must perform two steps: share the folder and configure the permissions. Follow the procedures listed below to share the GoldMine folder.

### Share the GoldMine Folder

1. Log on to the computer as Administrator or as a member of the Administrators group.
2. Open the **Start** menu and select **All Programs > Accessories > Windows Explorer**.
3. Expand **My Computer** and locate the [\GoldMine](#) folder.
4. Right-click the folder and select **Sharing and Security** from the context menu.
5. On the GoldMine Properties dialog box, click **Share this folder**.

## Configure The Share Permissions

1. On the **Sharing** tab, click **Permissions** and then click **Add**.
2. In the Select Users or Groups dialog box, double-click the desire user account or group that you want to give permission to this folder.
3. After you select the users and groups you want, click **OK**.
4. The groups/users that you added (and the Everyone group) appear in the **Group or user names list**.
5. Select each user or group in the list and assign permissions.
6. After setting permissions, click the **Everyone** group and then click **Remove**.
7. Click **OK**.

## *To Share the GoldMine Folder on Server 2008*

To share the GoldMine folder on Server 2008 you must perform two steps: share the folder and configure the permissions. Follow the procedures listed below to share the GoldMine folder.

### Share the GoldMine Folder

1. Open the Windows **Start** menu and select **Programs > Administrative Tools > Computer Management**.
2. In the console tree, expand **System Tools > Shared Folders** and right-click on **Shares**.
3. On the **Action** menu and select **New Share**.
4. Follow the steps in the **Create a Shared Folder Wizard**, and then click **Finish**.

**NOTE:** If you are planning to use a workstation where the Connect to Existing Database Install will be used, share the `\ProgramData\GoldMine` data folder.

## Configure The Share Permissions

1. Log on to the computer as **Administrator** or as a member of the **Administrators** group.
2. Open the Windows **Start** menu and select **Programs > Administrative Tools > Computer Management**.
3. In the console tree, expand **System Tools > Shared Folders** and click on **Shares**.
4. In the details pane, right click the shared folder and then click **Properties**.
5. On the **Share Permissions** tab, select the **Group** or **User Name**.
6. To set individual permissions for the Group or User Name, select either **Allow** or **Deny**.

**NOTE:** Read permission is typically established for the shared: `\Program Files\Goldmine` folder. Full permission is typically established for the shared: `\ProgramData\Goldmine` folder.

## Configuring the GoldMine 2008 Server to Emulate a Network Workstation

When the server is going to be used as a GoldMine workstation, the following shared folder should be mapped: `ProgramData\Goldmine` folder

1. Start Windows Explorer and select **Tools > Map Network Drive**.
2. From the **Drive** list box, select the designated drive letter for mapping to the GoldMine folder on the server.
3. From the **Folder** list box, browse to the shared **GoldMine** folder
4. Select the **Reconnect at Logon** check box.
5. Click **OK**.
6. Click **Finish**.

# Mapping a Drive on the Networked Workstations

All networked workstations accessing the shared GoldMine folder must be mapped to the same network drive letter (for example, **G:**) to facilitate GoldMine administration and operations related to linked documents and synchronization.

## When the Server is Windows 2003

The SysDir entry in `\Program Files\GoldMine\gm.ini` must be changed so that it points to the mapped folder containing the `LicenseGM.bin` file.

For example, if GoldMine was installed to **C:** and `\Program Files\GoldMine` was mapped to **G:**, the SysDir entry in `C:\Program Files\GoldMine\gm.ini` would be changed to: **SysDir=g:\**

On each workstation where the Connect to Existing Database Install option will be used, the following shared folder should be mapped:

`\Program Files\Goldmine` folder

## When the Server is Windows 2008

The SysDir entry in `\ProgramData\GoldMine\gm.ini` must be changed so that it points to the mapped folder containing the `LicenseGM.bin` file.

For example, if GoldMine was installed to **C:** and `\ProgramData\GoldMine` was mapped to **G:**, the SysDir entry in `C:\ProgramData\GoldMine\gm.ini` would be changed to: **SysDir=g:\**

The RealIni entry in `Program Files\GoldMine\gm.ini` must be changed so that it points to the `gm.ini` file in the mapped `ProgramData\GoldMine` folder.

For example, if GoldMine was installed to **C:** and `\ProgramData\GoldMine` was mapped to **G:**, the RealIni entry in `C:\Program Files\GoldMine\gm.ini` would be changed to: **RealIni=g:\gm.ini**

On each workstation where the Connect to Existing Database Install option will be used, the following shared folder should be mapped:

`\ProgramData\Goldmine` folder

## *To Map a Drive in Windows XP*

1. Start Windows Explorer and select **Tools > Map Network Drive**.
2. From the **Drive** list box, select the designated drive letter for mapping to the GoldMine folder on the server.
3. From the **Folder** list box, browse to the shared GoldMine folder
4. Select the **Reconnect at Logon** check box.
5. Click **OK**, and then click **Finish**.
6. Repeat this procedure on each client workstation computer.

## *To Map a Drive in Windows Vista*

1. Open the Windows **Start** menu and select **Programs > Accessories**.
2. Right click on the **Command Prompt** shortcut and choose **Run as Administrator**.
3. Type "net use <drive> <UNC path to the shared drive> /p:y"  
For example: **net use G: \\server name\goldmine /p:y**
4. Start Windows Explorer and select **Tools > Map Network Drive**.
5. From the **Drive** list box, select the designated drive letter for mapping to the GoldMine folder on the server.
6. From the **Folder** list box, browse to the shared GoldMine folder
7. Select the **Reconnect at Logon** check box.
8. Click **OK** and then click **Finish**.
9. Repeat this procedure on each client workstation computer.

After the GoldMine installation is complete, restart GoldMine. This will facilitate the use of GoldMine with the GoldMine Plus add-ins.

## To Map a Drive in Windows 7

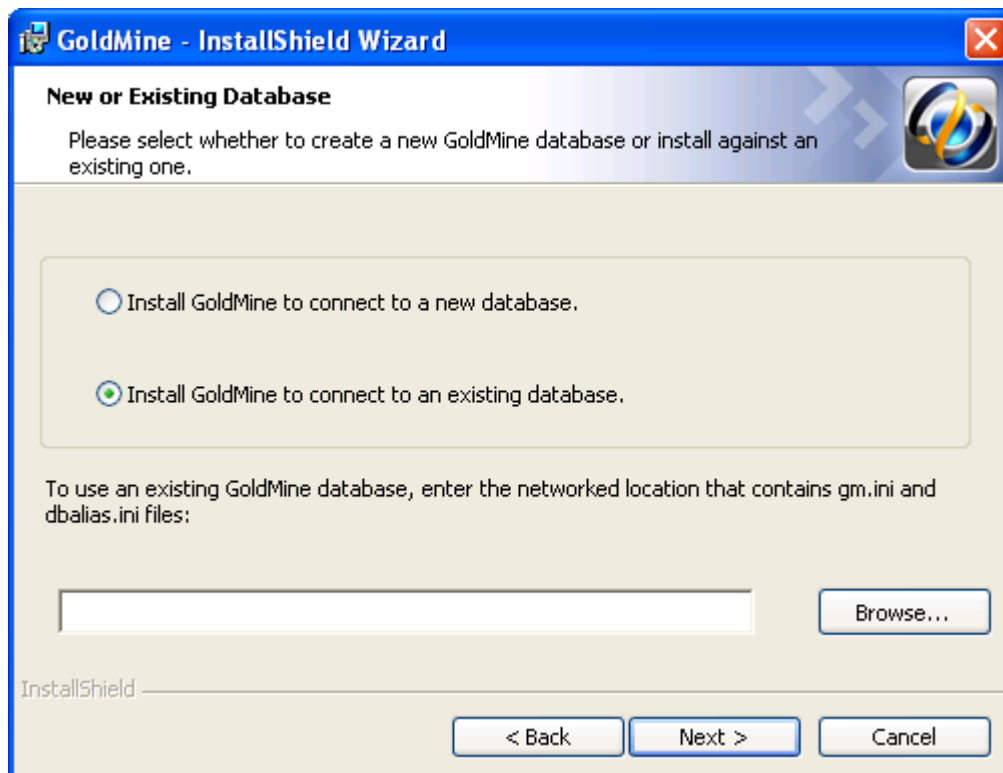
1. Open the Windows Start menu and select All Programs > Accessories
2. Right click on Command Prompt shortcut and choose Run as Administrator.
3. Type “net use <drive:> <UNC path to the shared drive> /p:y”  
For example: **net use g: \\server name\goldmine /p:y**
4. Click the Windows **Start** button, then select **Computer** and select Map network drive
5. From the **Drive** list box, select the designated drive letter for mapping to the GoldMine folder on the server.
6. From the **Folder** list box, browse to the shared GoldMine folder
7. Select the **Reconnect at Logon** check box.
8. Click **OK** and then click **Finish**.
9. Repeat this procedure on each client workstation computer.

After the GoldMine installation is complete, restart GoldMine. This will facilitate the use of GoldMine with the GoldMine Plus add-ins.

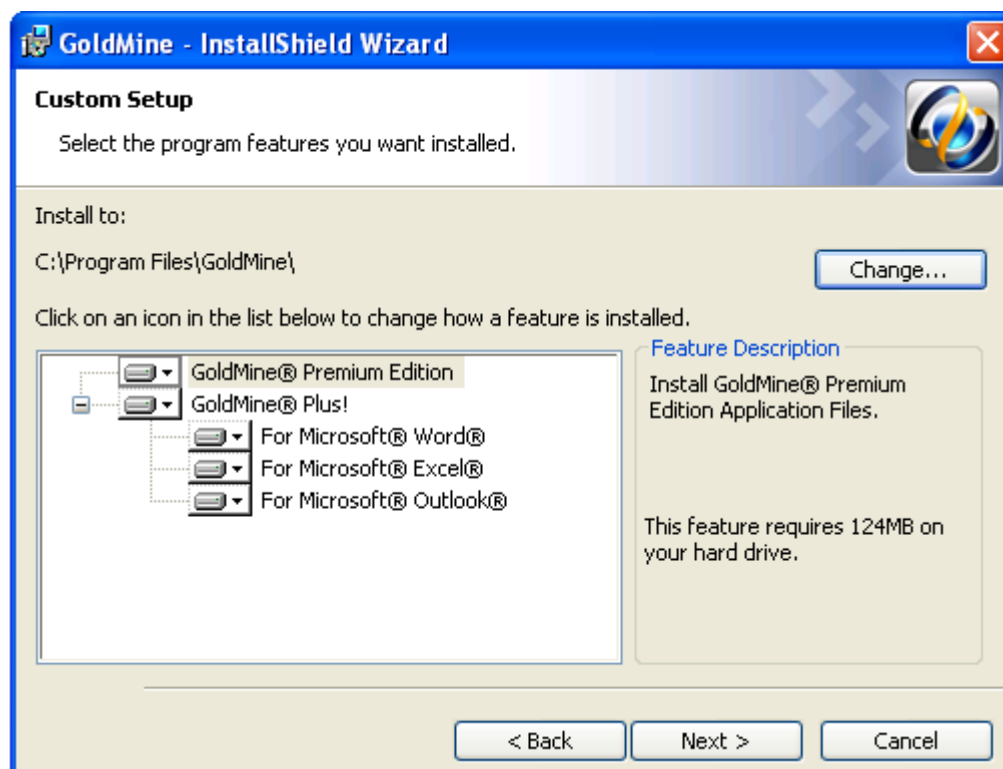
## Installing on a Networked Workstation

The Workstation step installs GoldMine on the workstation and enables the workstation user to connect to a shared copy of the GoldMine database.

1. From the workstation computer, locate the **gmsetup.exe** file. Double-click to run the executable. The **Welcome to the GoldMine Installation Wizard** dialog box appears.
2. Click **Next**. The **Readme** dialog box after reviewing the most recent information about this version of GoldMine to proceed with the installation.
3. Click **Next**. The **License Agreement** dialog box appears.
4. Review the licensing information carefully; 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.  
**NOTE:** 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 **New or Existing Database** dialog box appears.



7. Choose the **Install GoldMine to connect to an existing database** option, and then click the **Browse** button to navigate to the GoldMine shared path on the application server.
8. Click **Next**. The **Custom Setup** dialog box appears.



The default installation location is [C:\Program Files\GoldMine](#).

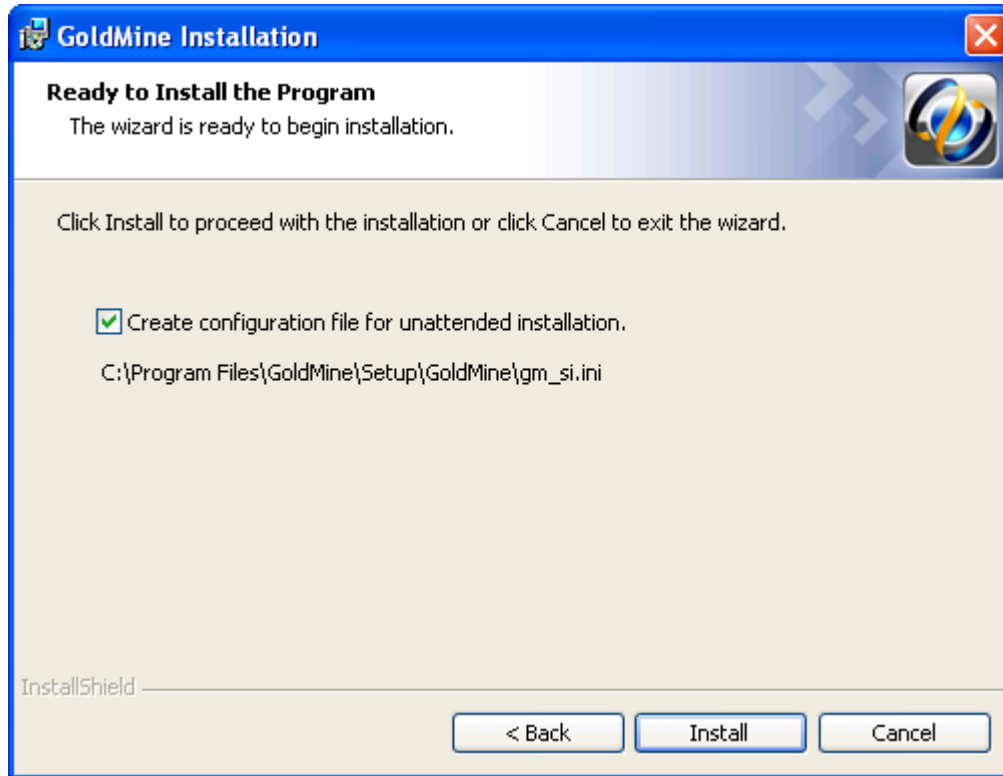


**NOTE:** If you select the Microsoft Excel option and plan on having others use it, besides the current installing user, you must make changes manually to the registry key. See ["Modifying the Registration Key" on page 36](#).



**IMPORTANT:** Choosing a location outside of the `\Program Files` directory when installing on Vista and Windows 7 can cause a loss of certain functionality, such as macro recording. This is due to security requirements within Vista and Windows 7, which connects certain privileged functions with the locations from which their associated executables are launched.

9. Click **OK**. The **Ready to Install** dialog box appears.



**NOTE:** The **Create configuration file for unattended installation** option allows you to create the `gm_si.ini` file. This file can be used to establish settings for future Workstation installation based on the settings of *this* Workstation.

A GoldMine administrator can also create unattended installation scripts for various installation scenarios (see ["To Create an Unattended Installation Script" on page 35](#)).

10. Click **Install**. The network shortcuts are installed on your workstation computer.  
11. If you selected any of the GoldMine Plus! options, a **Question** box appears.



12. Click **Yes** to install the Microsoft Office add-ins, or click **No** to skip installation of these add-ins and only install GoldMine.

13. When finished, the **Installation Completed** dialog box appears.

14. Repeat this process for each workstation accessing GoldMine.

**NOTE:** When installing GoldMine and its add-in components on **Microsoft Windows Vista**, ensure that GoldMine is at the same elevation level as the programs it interacts with. For instance, if GoldMine is installed at: **C:\Program Files\GoldMine**, then Microsoft Office should be installed at: **C:\Program Files\Microsoft Office**. Vista will block any interaction between applications that are not at the same elevation level. This applies to any third party applications integrating with GoldMine.

---

## Installation on an Undocked Computer

An Undocked setup is the same as a full setup, with the only difference being the license number. For detailed installation instruction, see ["Installation on a Server" on page 19](#).

If the undocked computer you are upgrading or installing works remotely, see ["Upgrading GoldMine" on page 49](#).

Read the following points before running an undocked computer installation:

- If 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.
- An Undocked installation is performed for users that frequently work remotely and are not connected to the office network via a faster connection. The user works on a local database on their computer. Data is exchanged between the user's local database and the office database during synchronization. For more information, see the online help for instructions on setting up **GoldSync**.
- Instead of using the following procedure, you can run the installation by using an installation file for One-Button Synchronization. For further information, refer to the "Synchronization" chapter of the *GoldMine Administrator Guide* (or the "Synchronization" topic in the online help).

---

## Creating an Unattended Installation Script

During installation, you have the option to **Create a configuration file for unattended installation** (see ["Installation on a Server" on page 19](#)). If you are planning on installing or upgrading GoldMine on other computers, you can, use this file or create a new one

By creating a customized installation script, you can choose precisely the script parameter information you want to proliferate to the other computers on your network. This script can then be used for your unattended installations.

### Use Case Scenarios

- **New Installation**

Create installation file that enables GoldMine to be installed (with data and license) on an undocked machine in an unattended mode. Repeat this process for 20 undocked machines

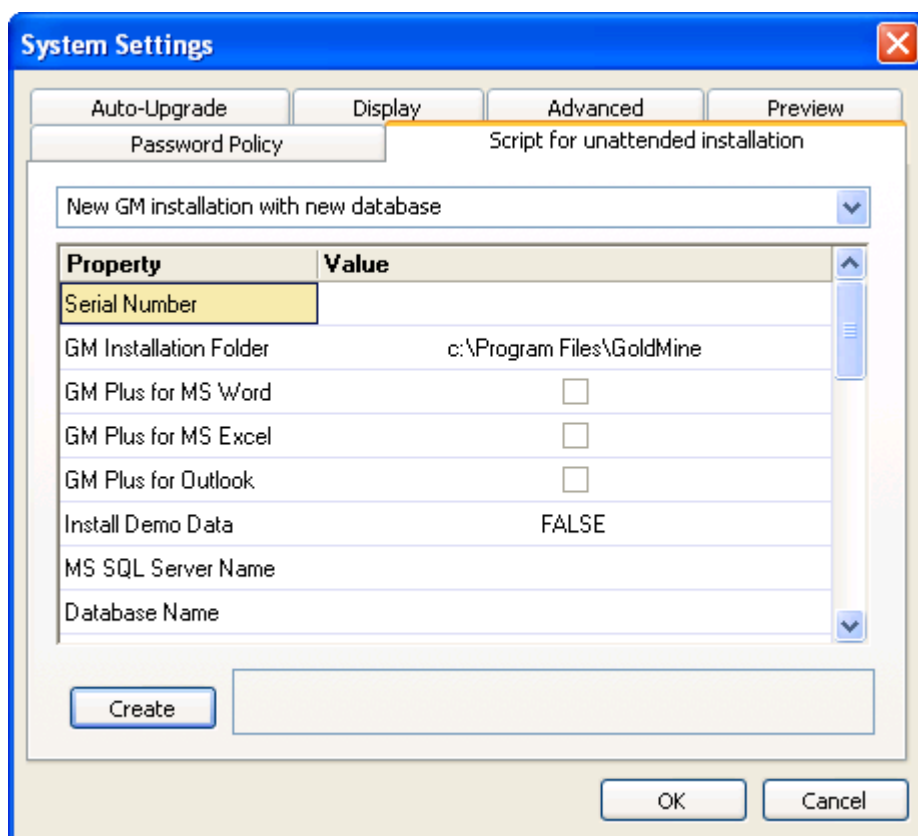
- **New Installation Connecting to Existing Database**

Create installation file that enables GoldMine to be installed (with data and license) on an networked machine in an unattended mode that connects to an existing database. The process is similar to a New Installation above.

- **Upgrade Installation**

Upgrade an undocked machine with a new license. This process should not require that the administrator have physical access to the machine. Repeat this process for any additional undocked machines.

## To Create an Unattended Installation Script



1. Start GoldMine and login as an administrator.
2. Open the **Tools** menu and select **Configure > System Settings**.
3. Click the **Script for unattended installation** tab.
4. Open the drop-down menu and select the installation type:
  - **GM Upgrade from previous versions**
  - **New GM installation with connect to existing database**
  - **New GM installation with new database**
5. Select or modify any **Value** for each **Property** as needed.
6. Click the **Create** button to generate the script.
7. Click **OK** to close the **System Settings** dialog box.

The new script is saved to the `\GoldMine\Setup\` directory.

Below is an example of the two files created:

- `NewGm-NewDb-X-000390-EVALNR-00000-00000-00000.ini`
- `NewGm-NewDb-X-000390-EVALNR-00000-00000-00000.bat`

## To Run an Unattended Installation Script

1. Create an Unattended Installation Script (see "To Create an Unattended Installation Script" on page 35).
2. Place a copy of the `.INI` and `.BAT` file in the same location as the GoldMine installation file.

For example, the following files would need to be in the same directory to run the script:

- `<scriptname>.ini`
- `<scriptname>.bat`
- `gmsetup.exe`

3. Run the `<scriptname>.bat` file to start the installation.

---

## Modifying the Registration Key

If you install GoldMine Plus!, it is only active for the current user. If you want other users of the same system to have access to Microsoft integration features, you must make changes manually to the system registry for each additional user. This change is only required for Excel. To make these changes, follow the steps listed below.

### *To Modify the System Registry for Additional GoldMine Plus! Users*



**WARNING:** You should create a backup of your Windows Registry before making any changes.

1. Login as different user account.
2. Open the Windows **Start** menu and select **Run**.
3. Type `regedit` in the textbox and click **OK**.
4. Expand the tree to:  
`HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\<YOUR VERSION>\Excel`  
The **<YOUR VERSION>** Office folders are as follows:
  - For Office2003 = **11.0**
  - For Office 2007 = **12.0**
5. Expand the **Excel** folder.
6. Right-click on **Options** and select **New > String Value** from the context menu
7. Name the new string **OPEN**.
8. Right-click the **OPEN** string and select **Modify**.
9. Enter the following string in the **Value data** textbox:  
`/A "GMPI usOffi ce2007. UserDefi nedFuncti ons"`
10. Click **OK** to save the changes.

# Licensing and Registration

---

## Overview

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

---

## General Licensing Information

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

Most organizations generally buy one license—a **Master License** with x number of seats. These seats can then be 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

- **Master License:** This is the primary license. It determines what database types are supported by the master site as well as its synchronization capabilities. It is a precursor to executing any sub-licenses which stem from it.

**NOTE:** GoldSync and Outlook Integration licenses are included in E licenses.

**TIP:** For information about licensing serial number schema, see "[License Serial Number](#)" on page 38.

- **Sub-licenses:** To issue, install GoldMine with a Master License on your organization's primary network. This ensures all sub-licenses maintain security and are authenticated properly during synchronization.

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

- **Increases:** Previous increases for Premium Edition, Corporate Edition, and GoldSync (J, R, and N), are now facilitated by obtaining a new E license.

## Master License

<b>E</b>	Edition License	Supports SQL databases and includes GoldSync
<b>G</b>	GoldSync License	GoldSync seat purchased separately and can be added to E-Licenses.
<b>M</b>	GoldMine Mobile License	Support for GoldMine Mobile users.

## Sub-licenses

<b>U</b>	Undocked License	Single sub-license for a remote GoldMine user
<b>S</b>	Site License	Multiple-user sub-license for a remote office
<b>Y</b>	GoldSync License	GoldSync sub-license for a remote office

## License Serial Number

The schema for the serial number has changed. Because of the new licensing schema, the GoldMine installer will not upgrade your license. This example illustrates what a GoldMine license serial number looks like:

License type                      HDA number

**E-002590-123456-1A2B3C4D5E6F7G8-9H12J3K4L5M6NF7**

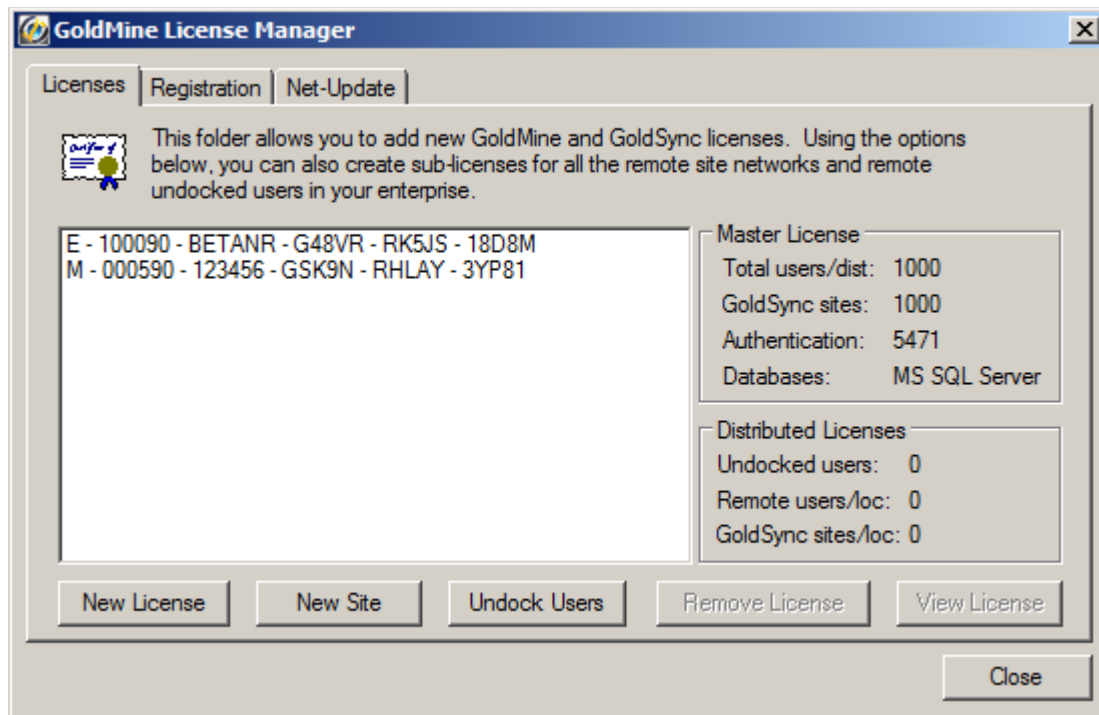
Number of users    Version                      Serial number                      Key code

- **License type:** Alpha-prefix denotes the type of Master license.
- **Number of users:** First 4 numbers indicate 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.
- **Version:** A 2-digit version number.
- **HDA number:** A unique 6-digit customer account number, also referred to as the Help Desk Authorization (HDA) Account.
- **Serial number:** 15-character (alphanumeric) serial number uniquely identifying the license for an organization. It is used for registration and support and identifies all sub-licenses as part of the same organization. Collected in 3 groups of 5 characters during licensing.
- **Key code:** 15-character (alphanumeric) key code is a computer-generated check used by GoldMine to verify the license's validity. Collected in 3 groups of 5 characters during licensing.

**NOTE:** The license is required for the product to run. Keep the license number and key code in a safe place in the event it becomes necessary to reinstall the software.

# License Manager

Initial licensing information is collected during installation. Subsequent changes and related management functions are handled through the **License Manager**.



To open the License Manager, launch GoldMine, open the **Tools** menu and select **Configure > License Manager**.

The central text box lists all installed licenses and any sub-licenses created from this location. Status is displayed along the right side. Buttons along the bottom allow you to add a **New License**, add a **New Site**, add an **Undocked User**, **Remove License**, or **View 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.

**NOTE:** Licensing information is stored in the license file, [LicenseGM.bin](#), created at the time you register. This file must exist only in the GoldMine root directory of each GoldMine installation.

**TIP:** Additional License Manager information is provided in the Online Help.

## LicenseGM.bin File Locations

The [LicenseGM.bin](#) file is location in the following directories per operating system:

Windows 2008 Server Windows Vista Windows 7	<a href="#">\ProgramData\GoldMine</a>
Windows 2003 Server Windows XP	<a href="#">\Program Files\GoldMine</a>

## Licensing with a Master License

A GoldMine Edition Master License begins with the alpha-prefix E.

For Example: **E-002590-123456-...**

The E-license is usually a multi-user license for a Server installation of GoldMine, but can be a single-user license for a Undocked Workstation computer.

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

Remote site sub-licenses (S- and Y-licenses) and Undocked sub-licenses (U-licenses) are created from the E-license.

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

**NOTE:** If you type an E-license serial number into the text boxes, the GoldSync text box area remains unavailable because GoldSync is included.

---

## Licensing Following Installation

1. After the installation completes, click **Finish**. The **licensing wizard** launches.

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

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

**Enter GoldMine Serial Number**

Please enter your GoldMine Serial Number and Key Code below:

GoldMine Serial Number:  
 -  -  -  -  -

Key Code:  
 -  -

☐ Evaluation version

If you have a GoldSync® Serial Number and Key Code, please enter it below to activate GoldMine's automated, remote synchronization server GoldSync®:

GoldSync Serial Number:

Key Code

< Back   Next >   Cancel

2. Type your GoldMine serial number and key code. Options appearing in this dialog box depend on type of license purchased.
3. Click **Next**. The **Enter License Information** 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 with your registration information below:

Organization:  Contact Name:

E-mail address:  Phone:  Fax:

Address 1:  Address 2:

City:  State(Prov):  ZIP/Postal Code:  Country:

☒ This checked box indicates your consent for FrontRange Solutions to use this information to send product, services and promotional information from time to time.

Your privacy is important to us. To review our privacy policy, please visit:  
<http://www.frontrange.com/privacy.html>

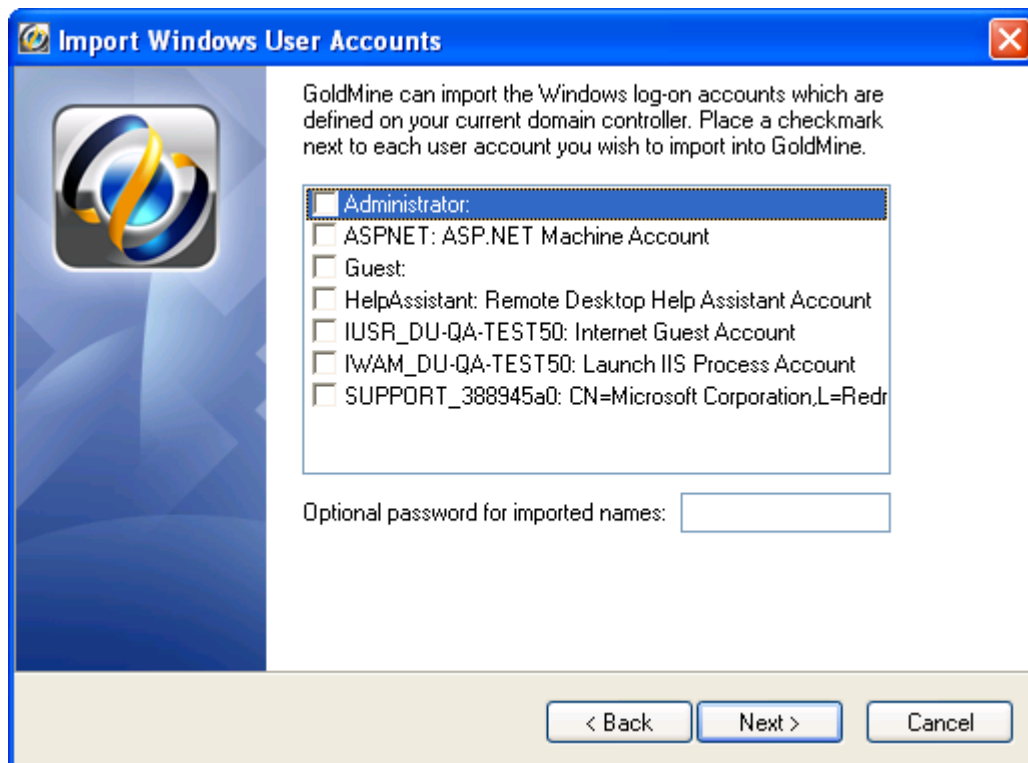
< Back   Next >   Cancel

**NOTE:** The following fields are used in GoldMine when using address information for the VCard (.vcf file):

- Mailing Address = Address1 (street address) + Address2 (suite/room number)
- Home Street Address = Address1

This information can also be accessed from the **Registration** tab in the GoldMine License Manager (**Tools > Configure > License Manager**). For more information, refer to the GoldMine Online Help.

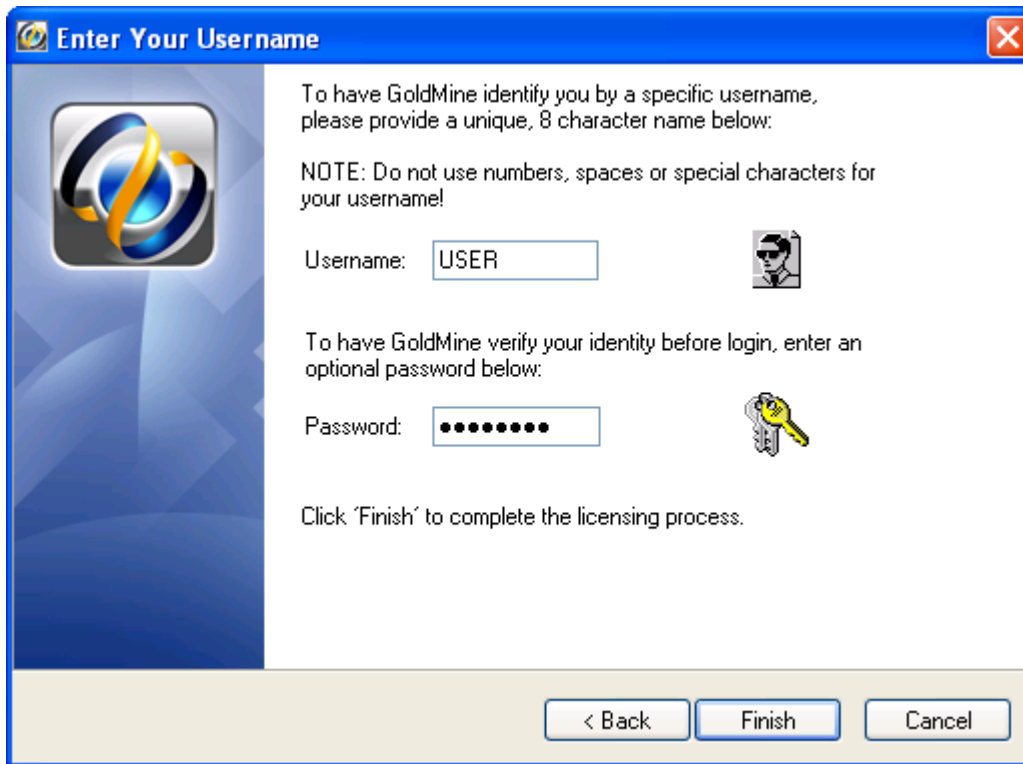
4. Enter your contact information in the designated text boxes to continue. All fields are **required**.  
Click the checkbox if you want to receive future product information.
5. Click **Next**. The **Import Windows User Accounts** dialog box appears.



6. Select each user account you want to import into GoldMine. If appropriate, type an optional password for imported names.

**NOTE:** Imported users do not have “master” rights.

- Click **Next**. The **Enter Your Username** dialog box appears.



The **Enter Your Username** dialog box has a blue title bar with a close button. On the left is a vertical blue bar with a GoldMine logo. The main area contains the following text: "To have GoldMine identify you by a specific username, please provide a unique, 8 character name below:", "NOTE: Do not use numbers, spaces or special characters for your username!", "Username: USER" (with a text input field), a user icon, "To have GoldMine verify your identity before login, enter an optional password below:", "Password: " (with a masked text input field), a key icon, and "Click 'Finish' to complete the licensing process." At the bottom are three buttons: "< Back", "Finish", and "Cancel".

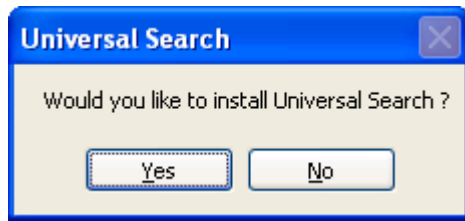
- Type a user name (eight characters or fewer). The password is optional. GoldMine requests these at log in. This user has Master Rights in GoldMine.
- Click **Finish**. The **GoldMine Logon** dialog box appears.



The **GoldMine** dialog box has a blue title bar with a close button. It features a large GoldMine logo and the text "GoldMine Premium Edition Version 9.0.2.14 March 2011". Below this, it states "This product is licensed to: tesat", "Serial Number: E-100090-BETANR-G48VR-RK5JS-18D8M", and "Customer ID: NOT REGISTERED". At the bottom, it says "Copyright © 1989 - 2011 FrontRange Solutions Inc. All rights reserved." and includes the FrontRange Solutions logo. At the very bottom are input fields for "Username: USER" and "Password: " (masked), followed by "OK" and "Cancel" buttons.

- Type the user name and password and click **OK** to launch GoldMine.

11. After logging in, the **Universal Search** dialog box appears.



**IMPORTANT:** Full Text Search must be installed and configured prior installing GoldMine Universal Search.

12. Click **Yes** to proceed with Universal Search or **No** to ignore the option.

If you click **No**, Universal Search can still be installed at a later time. For more information, see "About Universal Search" in the *GoldMine User Guide* or Online Help.

---

## 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.



**IMPORTANT:** Plan before creating sub-licenses, keeping in mind each sub-license transfers seat availability which affects how many users can log in on the network system. For example, on the Licenses 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

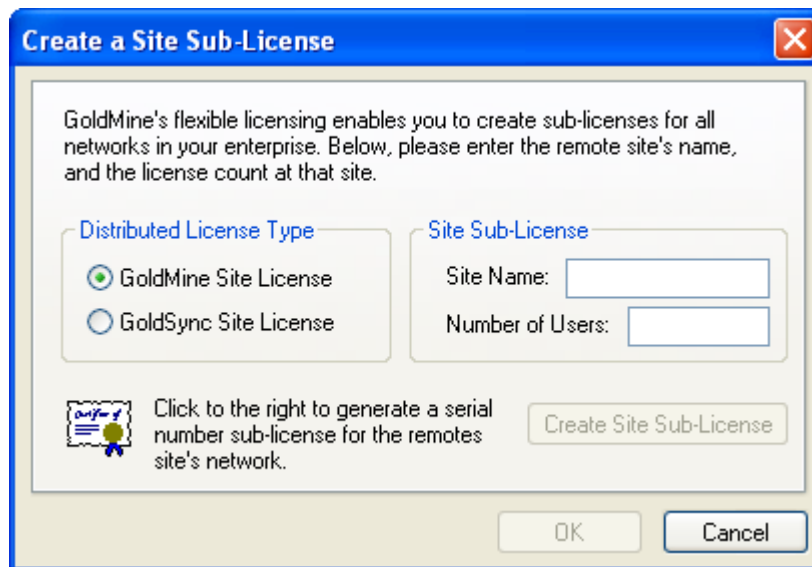
From a Master License, you can create sub-licenses for remote offices. Remote office sub-licenses can be a **Site License (S-license)** and/or a **GoldSync License (Y-license)**.

Each "S" 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 5 seats to make GoldMine available to 4 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.

### *To Create a Sub-license for a Remote Office*

1. From the **GoldMine** menu, select **Tools > Configure > License Manager**. The **License Manager** appears.
2. Click the **Licenses** tab.
3. Click **New Site**. The **Create a Site Sub-License** dialog box appears.



4. In the **Distributed License Type** area, select the site license you want to create; **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.

**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 who can type the license number during the GoldMine installation.

5. In the **Site Sub-License** area, type the site name and number of users.
6. Click **Create Site Sub-License**. The **Site-License for Remote Site** dialog box appears.
7. Review the information about the sub-license and click **I Agree**. The sub-license number for the site appears in the **Sub-license for Remote Site [Name of Site]** dialog box.
8. If you created a Site license, repeat the above process to create the necessary GoldSync license and select GoldSync Site License.

**NOTE:** GoldMine 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. Consider:

- 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 5-user GoldMine system, 5 Undocked licenses can be created. This is in contrast to creating an "S" sub-license which requires one seat to 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 5-user GoldMine system with 3 undocked users, 3 undocked users plus 2 other users can log on to GoldMine.

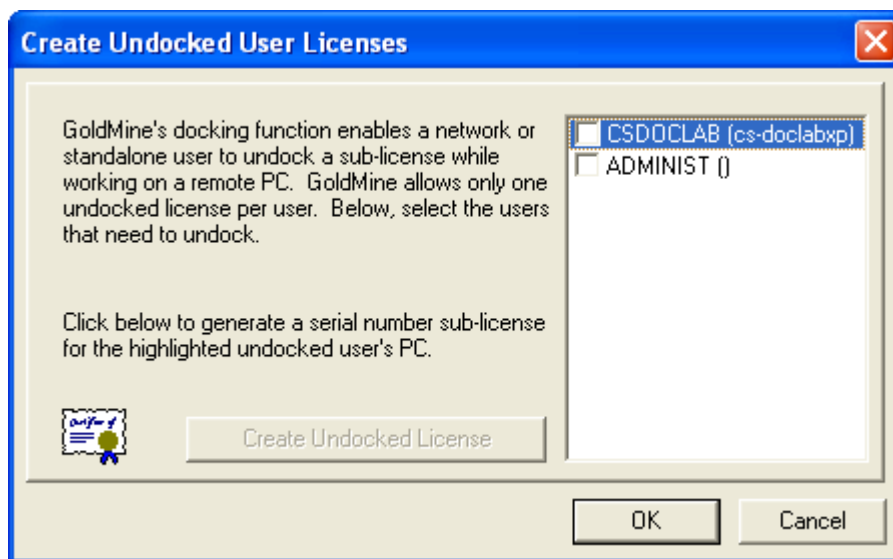


**WARNING:** If you undock all users, only those users will be able to log in. If you have not assigned master rights to any of those undocked users, GoldMine administration cannot take place.

- 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, users must have an Undocked license on their laptop. Create an Undocked license from the Master License or a Site license.

### *To Create a Sub-license for an Undocked User*

1. From the **GoldMine** main menu, select **Tools > Configure > License Manager**. The License Manager appears.
2. Click the **Licenses** tab and **Undock Users**. The **Create Undocked User Licenses** dialog box appears.



3. Select the check box next to the user you want to create a sub-license for, and click **Create Undocked License**. The **Sub-Licenses** dialog box appears.
4. Review the information and 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.

**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 who can type the license number during the GoldMine installation.

---

# Licensing with Sub-licenses

## Site License

A Site License is a multiple-user sub-license for a remote office and is designated with the alpha-prefix “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.

**NOTE:** Y licenses are not entered in the Enter GoldMine Serial Number dialog box. Only S licenses are entered during registration (the GoldSync Section remains disabled). Clicking **Next** displays an **ALERT: Suggested Action(s)!** if you try 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.

1. To configure applicable sub-license sites, select **Tools > Configure > License Manager** to enter your Y-type license.
2. 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.
3. In the **GoldSync Serial Number** text boxes, type the **Y-license**, **Key Code**, and **Site Code** you created in the License Manager.

---

## Undocked License

Undocked licenses are sub-licenses created from a Master License or a Site license and are designated by the letter “U.” This license type is created for users who work with GoldMine at another location, on a laptop, or on a workstation disconnected from the server copy of GoldMine.

Type the **U-license**, **Key Code**, and **Site Code** created in the License Manager.

---

## Evaluation License

The Evaluation license allows you to evaluate GoldMine Premium Edition for 30 days. During or after this time you can purchase a production GoldMine license and apply it to your database.

You will receive a warning of the approaching expiration of the evaluation license. If you do not apply a production license within 30 days, product performance will degrade to make GoldMine unusable for practical use, but will permit an administrator to access the application to add a license or take another look at the user interface.





# Upgrading GoldMine

---

## Overview

The upgrade process is intended to be used with GoldMine 8.5.2 or higher. There is no need to uninstall the existing version, or remove folders and databases before proceeding. If you are upgrading a prior version, you must upgrade to 8.5.2 before upgrading to 9.0.2. Contact Customer Care at 800.776.7889 for information about upgrading from versions prior to 8.5.2.

**NOTE:** Back up your existing GoldMine database and system before beginning the upgrade.

- In addition to the 110MB of disk space required for installation (plus 45MB more if adding GoldMine Plus!), ensure you have at least 2½ times the size of your largest table in additional free space on your hard disk.  
For 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 might be required when upgrading from earlier versions of GoldMine. This conversion occurs automatically when GoldMine is installed into the path of the existing **gmw.exe**.



**IMPORTANT:** If you are upgrading a *large Microsoft SQL Server database* (5GB of data or more), note that certain computers (limited computing power) require manual steps to upgrade the database successfully.

---

- Undocked users must be on the same version and build of GoldMine as the site with which they sync. If you are upgrading the server but are not upgrading Undocked Workstations 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 and build of GoldMine as the server.
- If you have a previous version of the GoldMine Link to Word or GoldMine Plus Microsoft Office, uninstall this version prior to upgrading. The upgrade installs the new GoldMine Plus Microsoft Office installer file that is compatible with GoldMine 9.0.
- If you have a previous version of GoldMine Integration Services for Microsoft Outlook (GISMO), uninstall this version prior to upgrading.

**NOTE:** If your company policy requires that you uninstall the previous version of GoldMine to run a “clean” installation, you might have entries left in the Windows Registry which will cause GoldMine to assume you are upgrading. These entries must be removed to allow you to install GoldMine. Consult with your System Administrator before you attempt to remove any entries from your Windows Registry.

---

# Upgrading Existing GoldMine Running SQL Server

The following procedure demonstrates upgrading from a SQL Server 2005/2008 Standard Edition database. This procedure is for customers that have the following:

- GoldMine 8.5.2 or newer
- SQL Server/SQL Server Express GoldMine database

If you are upgrading from a previous version of GoldMine and have a large Microsoft SQL Server database (5GB of data or more), refer to "[Migrating Large Databases](#)" on page 95.

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**IMPORTANT:** Before upgrading GoldMine, we recommend backing up your existing database.

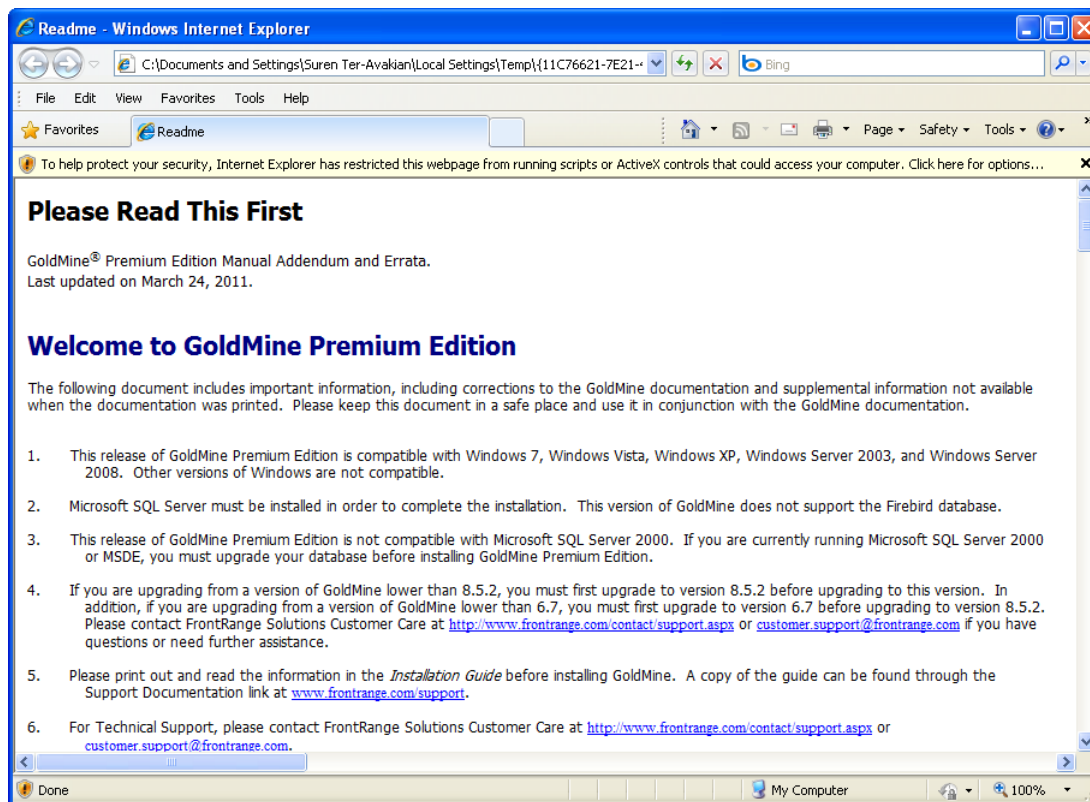
---

## *To Upgrade GoldMine Running SQL Server*

1. The **Welcome to the GoldMine Installation Wizard** dialog box appears.

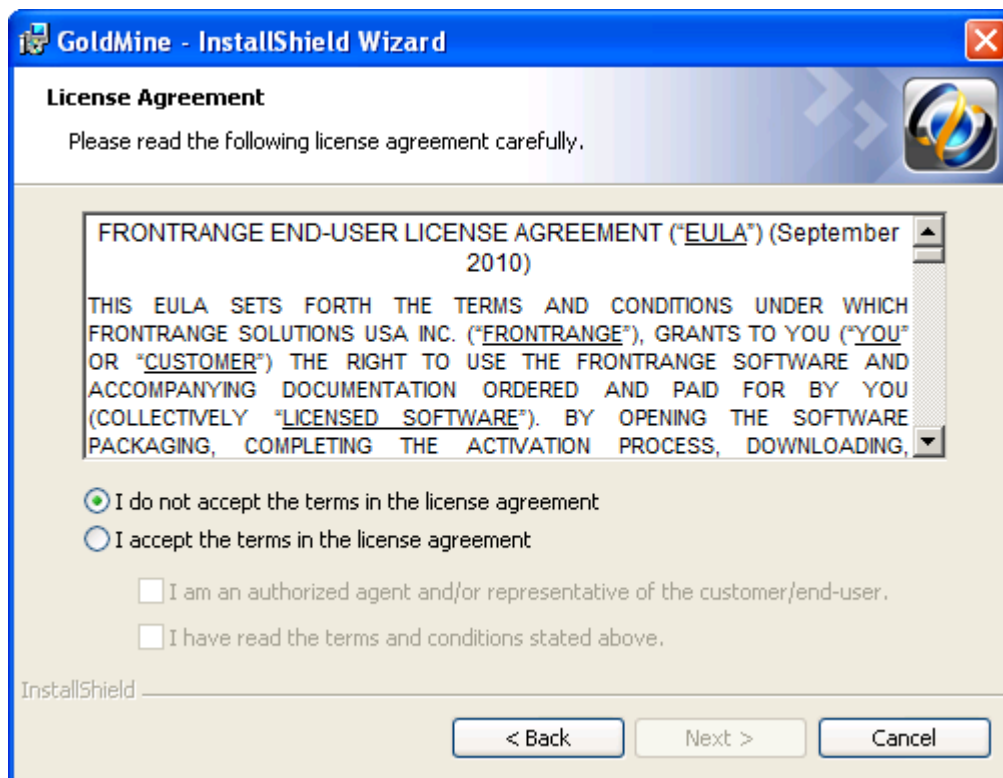


2. Click **Next**. The **Readme** dialog box appears.



This file contains the most recent information about this version.

3. Close this dialog box after reviewing the most recent information about this version of GoldMine to proceed with the installation.
4. The **License Agreement** dialog box appears.



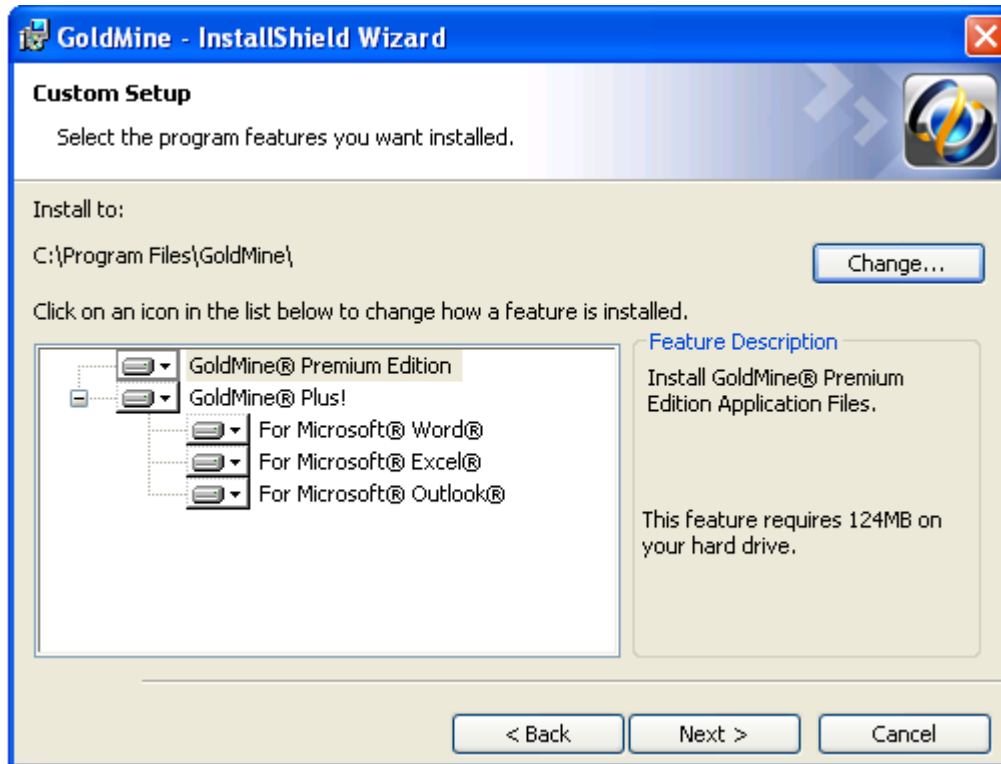
5. Review the licensing information carefully; if you agree to the terms, select **I accept the terms in the license agreement**.

**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.

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

**NOTE:** 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.

7. Click **Next**. The **Custom Setup** dialog box appears.



The GoldMine Premium Edition and GoldMine Plus! options are selected for installation by default. There are three options under the GoldMine Plus! option:

- ☐ **For Microsoft Word**
- ☐ **For Microsoft Excel**
- ☐ **For Microsoft Outlook**

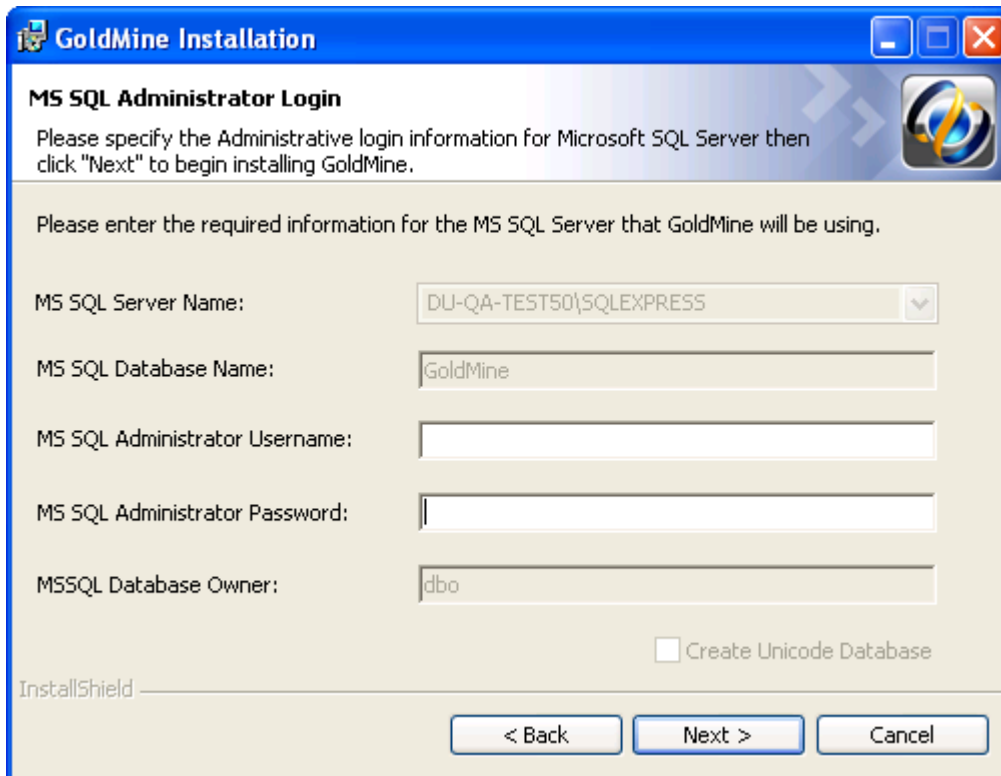
If you do not want to install the GoldMine Plus! components, click the GoldMine Plus! icon, select **This feature will not be available** from the drop-down menu, and then click **Next**. Alternately, can select individual GoldMine Plus! components for exclusion during installation.

These components can be install at a later date using the **Add or Remove Programs** control panel in Windows, and then selecting **Change** for the **GoldMine** entry on the list.

8. To install the selected GoldMine features, click **Next**.

**NOTE:** Microsoft Office must be installed prior to installing GoldMine Plus! components.

9. Click **Next**. The **MS SQL Administrator Login** dialog box appears.



**GoldMine Installation**

**MS SQL Administrator Login**

Please specify the Administrative login information for Microsoft SQL Server then click "Next" to begin installing GoldMine.

Please enter the required information for the MS SQL Server that GoldMine will be using.

MS SQL Server Name: DU-QA-TEST50\SQLEXPRESS

MS SQL Database Name: GoldMine

MS SQL Administrator Username:

MS SQL Administrator Password:

MSSQL Database Owner: dbo

☐ Create Unicode Database

InstallShield

< Back   Next >   Cancel

The Server Name, Database Name, and Database Owner fields are retained from the previous installation and not required during the upgrade. The only fields required in this dialog box are:

- **MS SQL Administrative Username:** The default login is **sa**. If your SQL Server user name is different, your SQL administrator must provide the information.
- **MS SQL Administrative Password:** Enter the SQL Server administrator password.

**NOTE:** If you click **Next** without typing a user name and password, the **Insufficient Input** dialog box appears. Click **Back**. If you type incorrect information and click **Next**, the **MS SQL Login Failed** dialog box appears. Review the troubleshooting tips, then click **Back**.

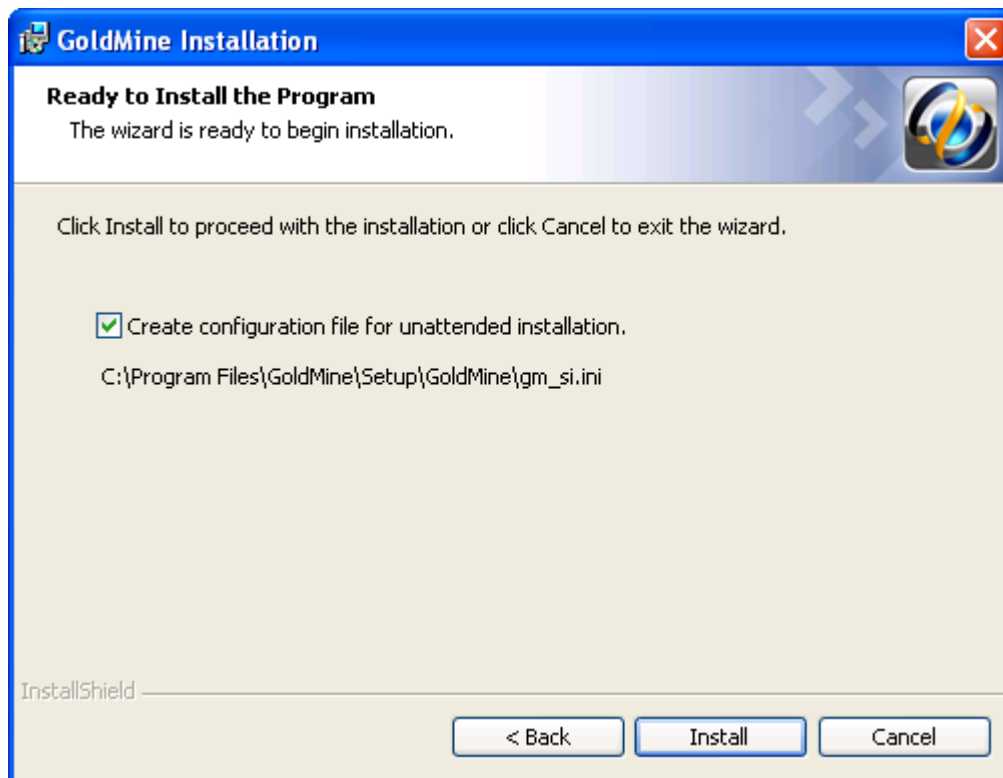
10. Click **Next** to continue.



**IMPORTANT:** A minimum of Microsoft SQL 2005/2008 Express with Advanced Services is required for the GoldMine database. SQL Express editions have a maximum database size:

- SQL Express 2005 = 4GB
- SQL Express 2008 = 10 GB

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



If you will be installing GoldMine on other computers sharing these same configuration settings, you can check the **Create a configuration file for unattended installation** box to create a configuration file with these settings.

A GoldMine administrator can also create unattended installation scripts for various installation scenarios (see ["To Create an Unattended Installation Script" on page 35](#)).

12. Click the **Install** button.
13. If you selected any of the GoldMine Plus! options, a **Question** box appears.



14. Click **Yes** to install the Microsoft Office add-ins, or click **No** to skip installation of these add-ins and only install GoldMine.
15. The **Installing GoldMine** dialog box appears.
16. When finished, the **Installation Completed** dialog box appears.



17. Click **Finish** to start GoldMine.

18. Enter your login information. GoldMine updates your database and starts the program.

**NOTE:** If you are upgrading from a previous version of GoldMine that supported Dashboards, a message box displays asking if you want to overwrite the existing predefined Dashboards. Click **Yes** to overwrite or **No** to keep your existing predefined Dashboards.

---

## Upgrading Existing GoldMine Running Firebird

GoldMine 9.0 no longer supports Firebird database. However, the installation process now contains a database migration step to migrate your data from the Firebird database into a SQL database.

During the migration process, the Firebird database is not modified. There is no need to create a backup before upgrading GoldMine.

This procedure is for customers that have the following:

- GoldMine 8.5.2 or newer
- Firebird GoldMine database

If you are currently using a SQL database, refer to ["Upgrading Existing GoldMine Running SQL Server" on page 50](#).

**NOTE:** Before upgrading GoldMine from a Firebird database to a SQL database, you must have previously installed and setup the SQL Server 2005/2008 Standard, Workgroup, or Express edition before running the wizard. For more information about installing SQL Server, refer to the documentation that came with your software.

### *To Upgrade GoldMine Running Firebird*

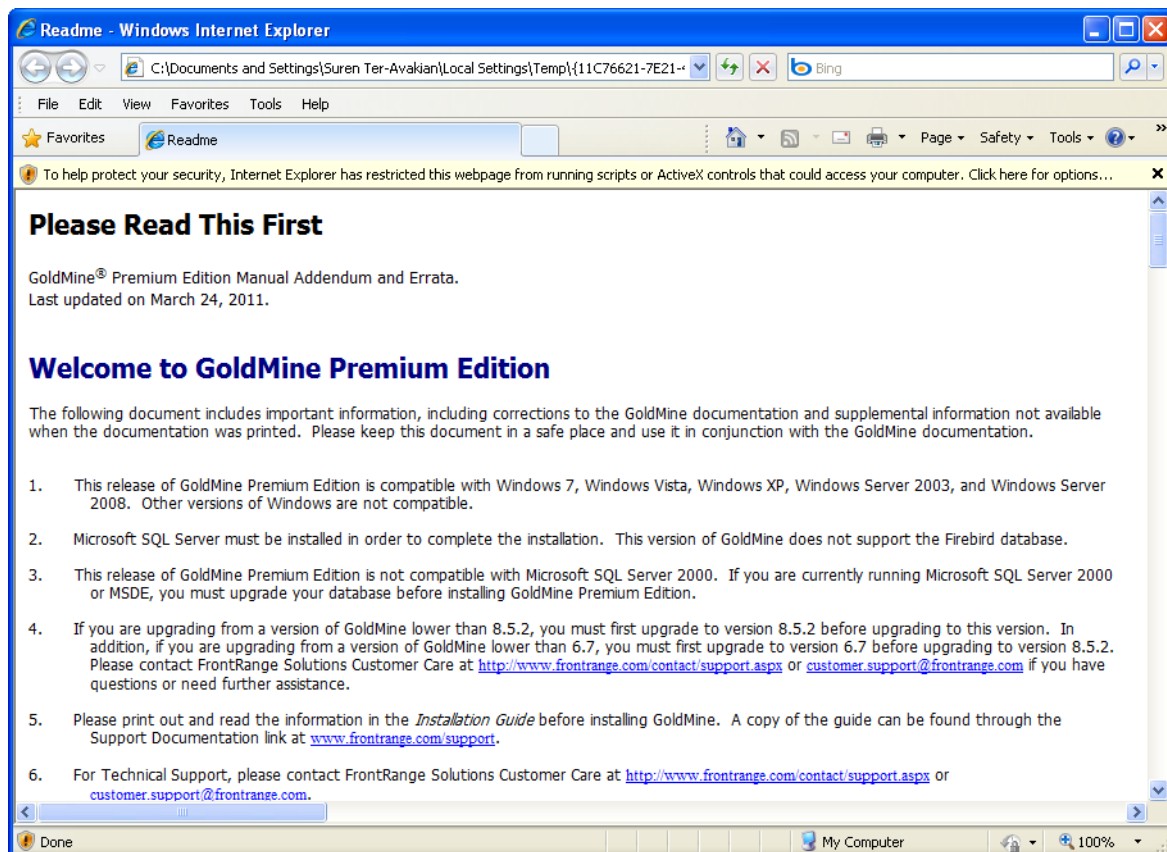
1. Log directly into the machine as a local administrator.
2. The installation CD is set up to autorun when inserted into your CD-ROM drive or run the [gmsetup.exe](#) downloaded to your server installation of GoldMine during the Net-Update process.

The **Welcome to the GoldMine Installation Wizard** dialog box appears.





3. Click **Next**. The **Readme** dialog box appears.



4. Close this dialog box after reviewing the most recent information about this version of GoldMine to proceed with the installation.



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



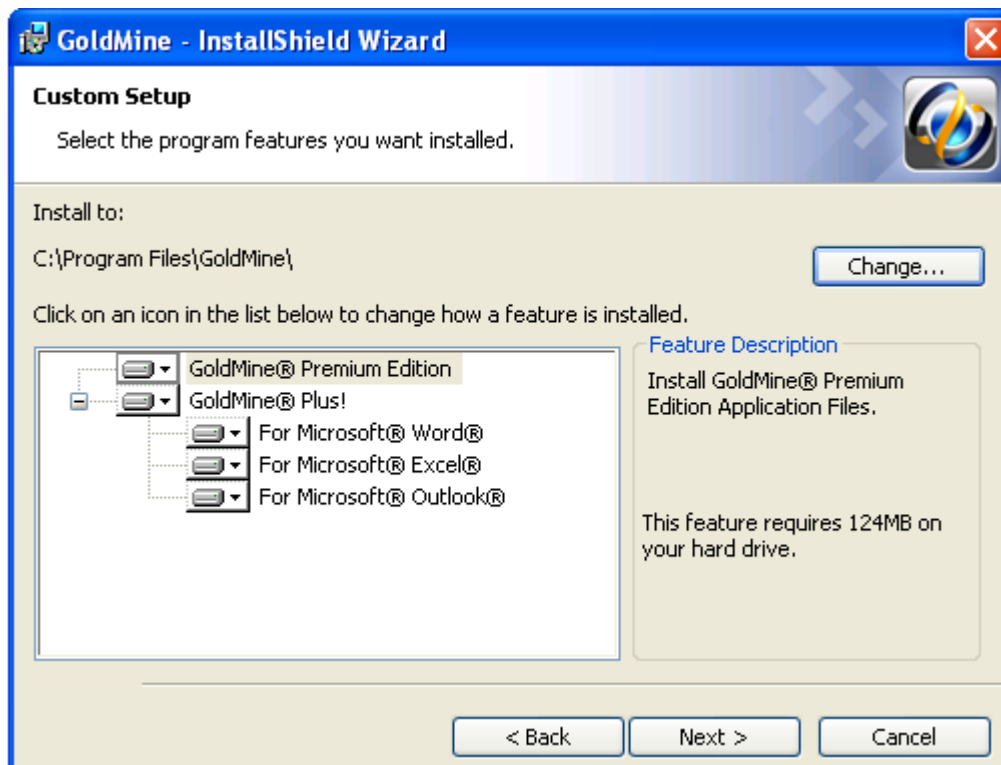
6. Review the licensing information carefully; if you agree to the terms, select **I accept the terms in the license agreement**.

**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.

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

**NOTE:** 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.

8. Click **Next**. The **Custom Setup** dialog box appears.



The GoldMine Premium Edition and GoldMine Plus! options are selected for installation by default. There are three options under the GoldMine Plus! option:

- **For Microsoft Word**
- **For Microsoft Excel**
- **For Microsoft Outlook**

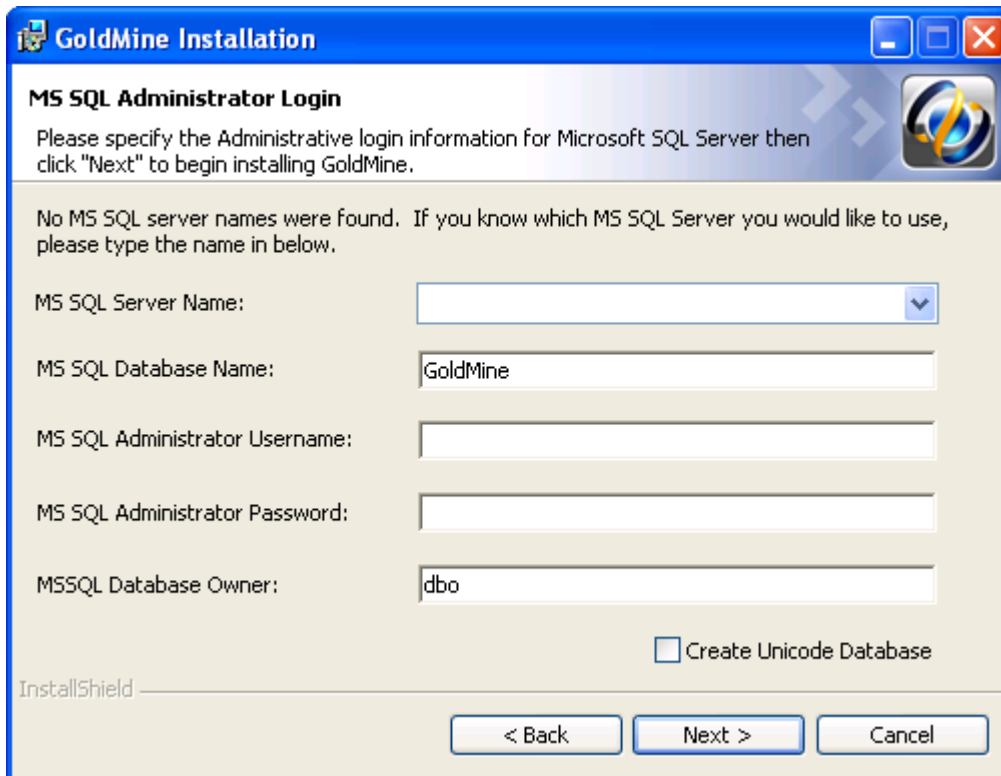
If you do not want to install the GoldMine Plus! components, click the GoldMine Plus! icon, select **This feature will not be available** from the drop-down menu, and then click Next. Alternately, can select individual GoldMine Plus! components for exclusion during installation.

These components can be install at a later date using the **Add or Remove Programs** control panel in Windows, and then selecting **Change** for the **GoldMine** entry on the list.

9. To install the selected GoldMine features, click **Next**.

**NOTE:** Microsoft Office must be installed prior to installing GoldMine Plus! components.

10. Click **Next**. The **MS SQL Administrator Login** dialog box appears.



**GoldMine Installation**

**MS SQL Administrator Login**

Please specify the Administrative login information for Microsoft SQL Server then click "Next" to begin installing GoldMine.

No MS SQL server names were found. If you know which MS SQL Server you would like to use, please type the name in below.

MS SQL Server Name:

MS SQL Database Name:

MS SQL Administrator Username:

MS SQL Administrator Password:

MSSQL Database Owner:

☐ Create Unicode Database

InstallShield

< Back   Next >   Cancel

- **MS SQL Server Name:** Type or select the computer name 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 is sa. If your SQL Server user name is different, your SQL administrator must provide the information.
- **MS SQL Administrative Password:** Enter the SQL Server administrator password.
- **MS SQL Database Owner:** Enter the name of the SQL Server database owner.
- **Create Unicode Database:** Check this option to create a Unicode Database.

**NOTE:** If you click **Next** without typing a user name and password, the **Insufficient Input** dialog box appears. Click **Back**. If you type incorrect information and click **Next**, the **MS SQL Login Failed** dialog box appears. Review the troubleshooting tips, then click **Back**.

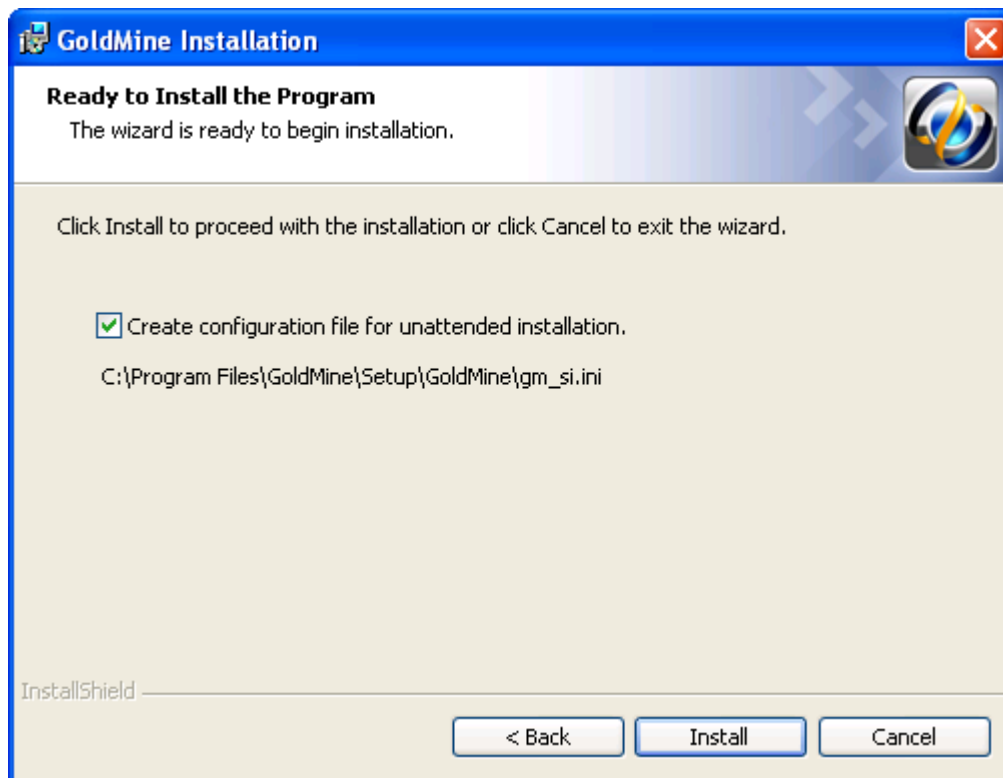
11. Click **Next** to continue.



**IMPORTANT:** A minimum of Microsoft SQL 2005/2008 Express with Advanced Services is required for the GoldMine database. SQL Express editions have a maximum database size:

- SQL Express 2005 = 4GB
- SQL Express 2008 = 10 GB

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



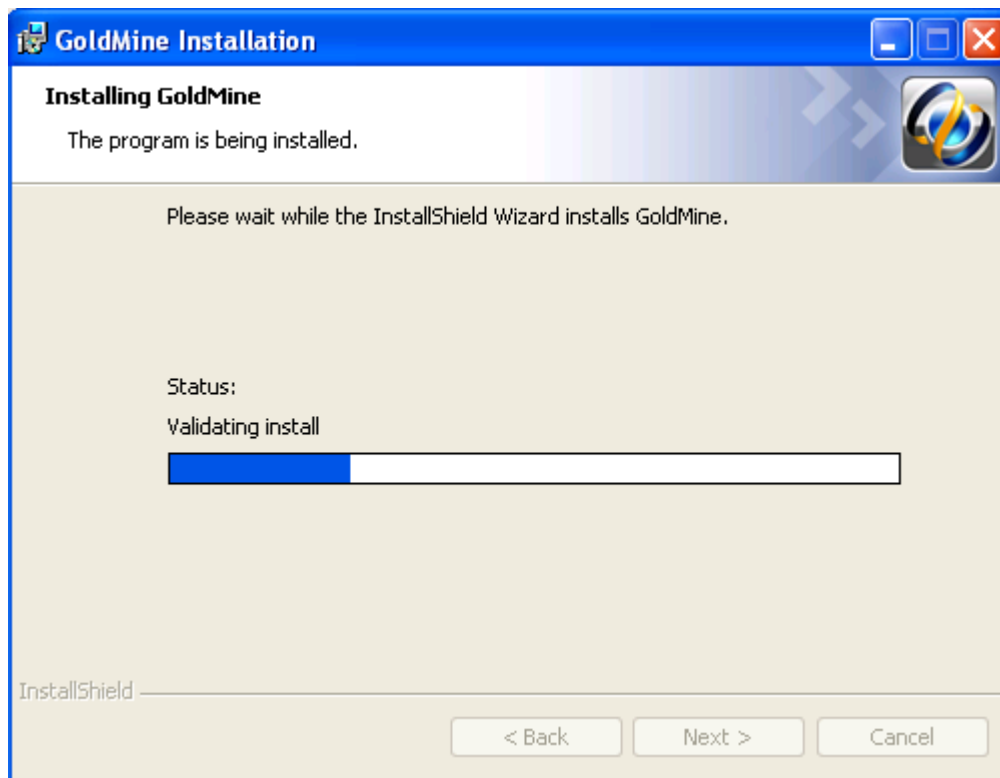
If you will be installing GoldMine on other computers sharing these same configuration settings, you can check the **Create a configuration file for unattended installation** box to create a configuration file with these settings.

A GoldMine administrator can also create unattended installation scripts for various installation scenarios (see ["To Create an Unattended Installation Script" on page 35](#)).

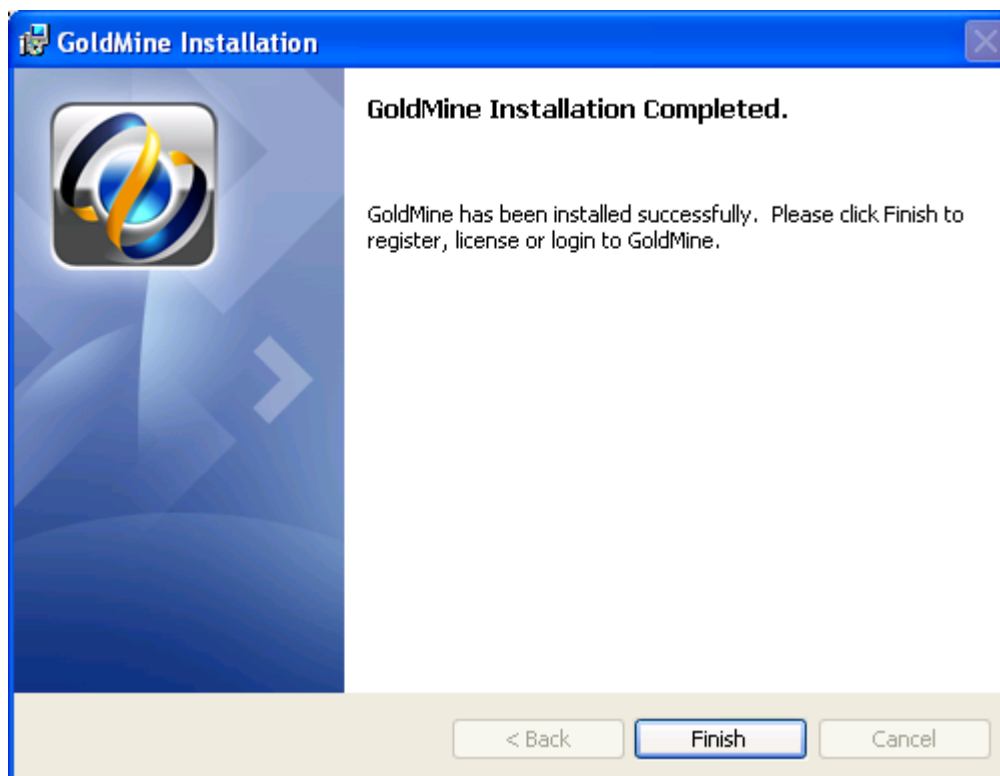
13. Click **Install** to begin the file installation.
14. If you selected any of the GoldMine Plus! options, a **Question** box appears.



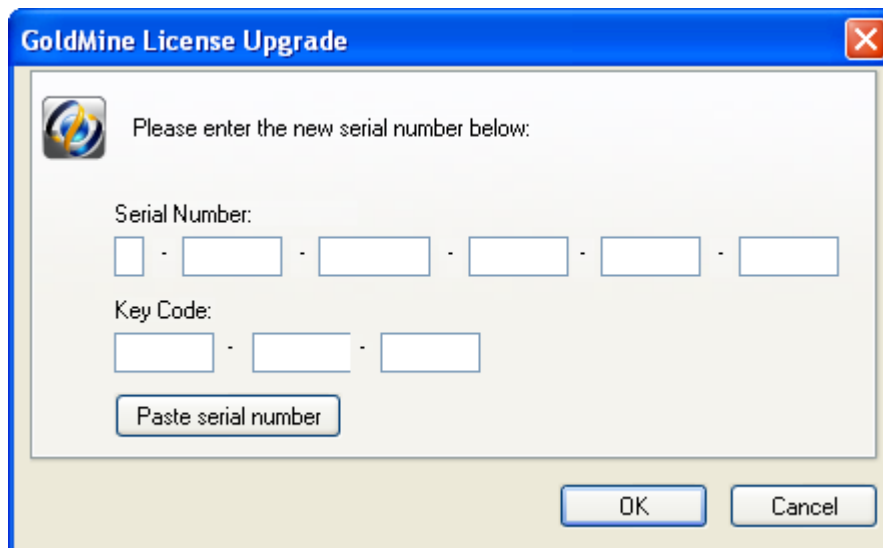
15. Click **Yes** to install the Microsoft Office add-ins, or click **No** to skip installation of these add-ins and only install GoldMine.
16. The **Installing GoldMine** dialog box appears.



17. When finished, the **Installation Completed** dialog box appears.



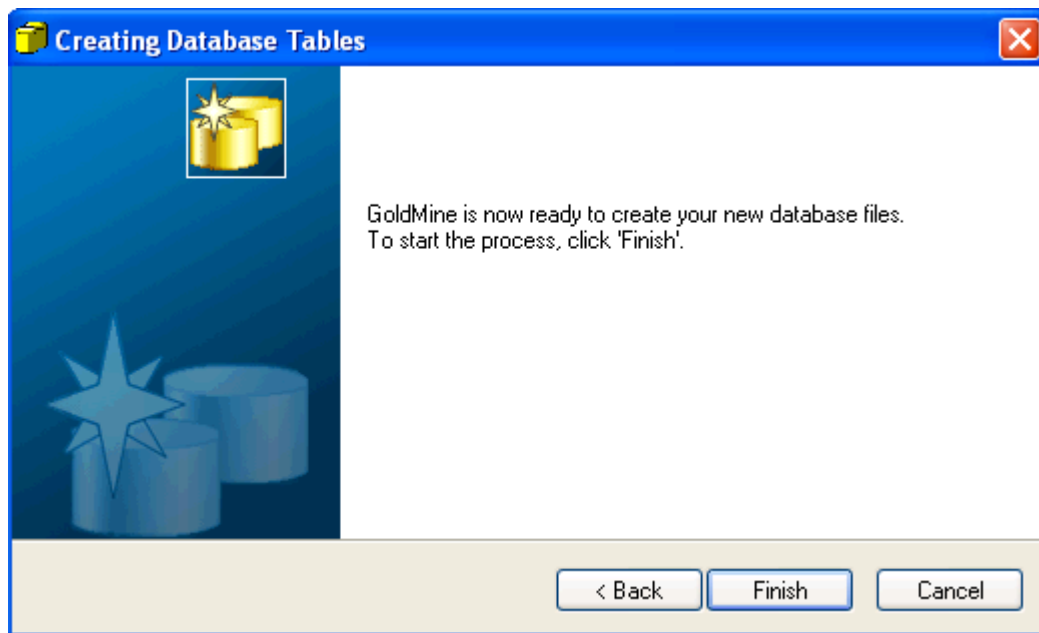
18. Click **Finish**. The GoldMine License Upgrade dialog box appear.



19. Enter the new **Serial Number** and **Key Code** and then click **OK**.
20. The GoldMine login screen appears.



21. Enter your login information and click **OK**. The **Creating Database Tables** dialog box appears.

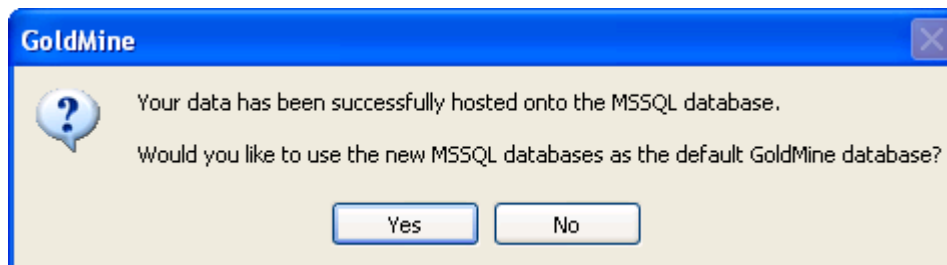


22. Click **Finish**. GoldMine launches and starts to create the database table for the SQL database.



**NOTE:** If a message box appears with a question to overwrite existing Contact Set files, click **Yes** to overwrite the files.

23. A message box appear with a question to use the new MSSQL database as the default database.



24. Click **Yes** to use the new database.

**NOTE:** You might be required to log in again to GoldMine.

---

## Upgrading Remote Systems

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

- If you are upgrading a Site, the Master installation provides the site administrator with the [gmsetup.exe](#). For more information, see "[Installation on a Server](#)" on page 19.
- If updating an undocked computer, the Master installation provides the undocked computer user with the [gmsetup.exe](#). For more information, see "[Installation on an Undocked Computer](#)" on page 34.
- 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 a Remote System*

1. Upgrade the Master GoldMine site.
2. Upgrade remote computers by sending them a [gmsetup.exe](#) installation file using one of these methods:
  - CD-ROM
  - FTP site
  - E-mail
  - Accessible network drive

**NOTE:** Database upgrade and universal search installation are automatic when the user selects the Yes option. If the user selects not to install Universal Search, it can be installed later by running GoldMine with a special parameter: [GMW /us:install](#) (see "[Installation of Universal Search](#)" on page 16).

3. Remote users must run the installation CD or the [gmsetup.exe](#) on their computer following these upgrade instructions. After remote users upgrade to the same version of GoldMine as the server, they can begin synchronizing again.



# Configuring

---

## Overview

After installation, system administrators must configure GoldMine to meet the needs of the organization. Some preliminary setup is presented in this chapter. Additional configuration steps are presented in the online Help.

---

## Configuration Considerations

In developing a GoldMine deployment strategy, the GoldMine administrator must carefully plan how the GoldMine database should run and determine who is going to use it.

- Creating users, user groups, security rights, and preferences including menu rights
- Changing field labels
- Creating user-defined fields and tabs
- Setting up expanded details
- Generating and modifying F2 Lookup lists

### *To Enhance GoldMine, Configure Other Areas:*

- Automated Processes
- Reports

### *To Import Existing Databases Into GoldMine, Plan the Migration by Asking Yourself:*

- Is it essential to keep all existing data?
- How out of date is the data?
- Are all fields in the existing database required in GoldMine?

TIP: For details on these procedures, see the Administration topics in the GoldMine online help Table of Contents, accessed by selecting **Help > Help Topics** on the GoldMine menu bar.

---

## Placing a Custom Image in the Logon Window

To display your organization's logo or other graphic on GoldMine's logon screen correctly, the file must be a bitmap within a size limit of 150 x 250 pixels.

**NOTE:** [GM.ini](#) is a special initialization file that stores settings that apply globally to all users running the same installation of GoldMine.

Place the bitmap file in the root GoldMine directory. Using a text editor such as Windows Notepad, open [GM.ini](#). Under the **[GoldMine]** section, add this line:

```
UserLogo=<path\<filename>
```

For example, if you place the graphics file [MyLogo.bmp](#) in your GoldMine directory, type this statement:

```
UserLogo=C: \Gol dMi ne\MyLogo. bmp
```

Save [GM.ini](#), then exit the text editor. Open GoldMine to display the changed login screen.

# Installing Management Intelligence

---

## Overview

Whether you work in support, sales, or marketing, Manager's Console and Answer Wizard take all the information collected from front line contacts—including call histories, open support tickets, and forecasts—and deliver that information to the rest of the organization. These tools track and disseminate information, they actually transform the information in your company into an asset.

- **Manager's Console:** Manager's Console provides at-a-glance summaries of the overall status of a Support Center or sales department. It allows managers to proactively review and manage critical business issues and facilitate future responses to recurring problems.
- **Answer Wizard:** Answer Wizard is a management-reporting tool for a supervisor or manager. Answer Wizard not only provides immediate answers to the questions managers are asking, but also coaches them to understand the additional questions they should ask.

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## Installing Management Intelligence

The **CD Browser** initiates the installation process, allowing you to install, browse the CD, view Documentation, or exit.

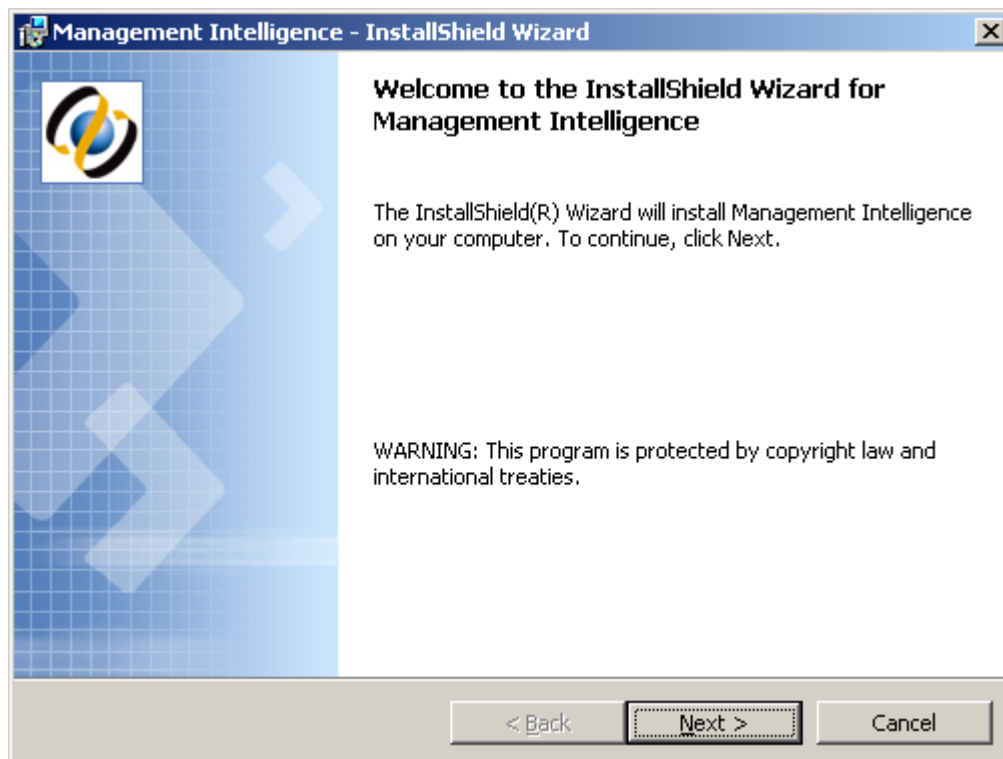
Available from the **Documentation** browser are the ReadMe and a PDF copy of this Installation Guide. Documentation is also available from the Help menu in most modules.

The **Installation Wizard** walks you through the installation process step by step. Windows and dialog boxes outline important information, features, and directions. To navigate through the Installation Wizard, follow the directions in the windows and dialog boxes. To cancel the installation and exit the wizard at any time, click **Cancel**.

### *To Install Management Intelligence*

1. Insert the Installation CD into your CD-ROM drive. The **CD Browser** opens.
2. Select **Install Management Intelligence**.

The **Management Intelligence Installation Wizard** opens.



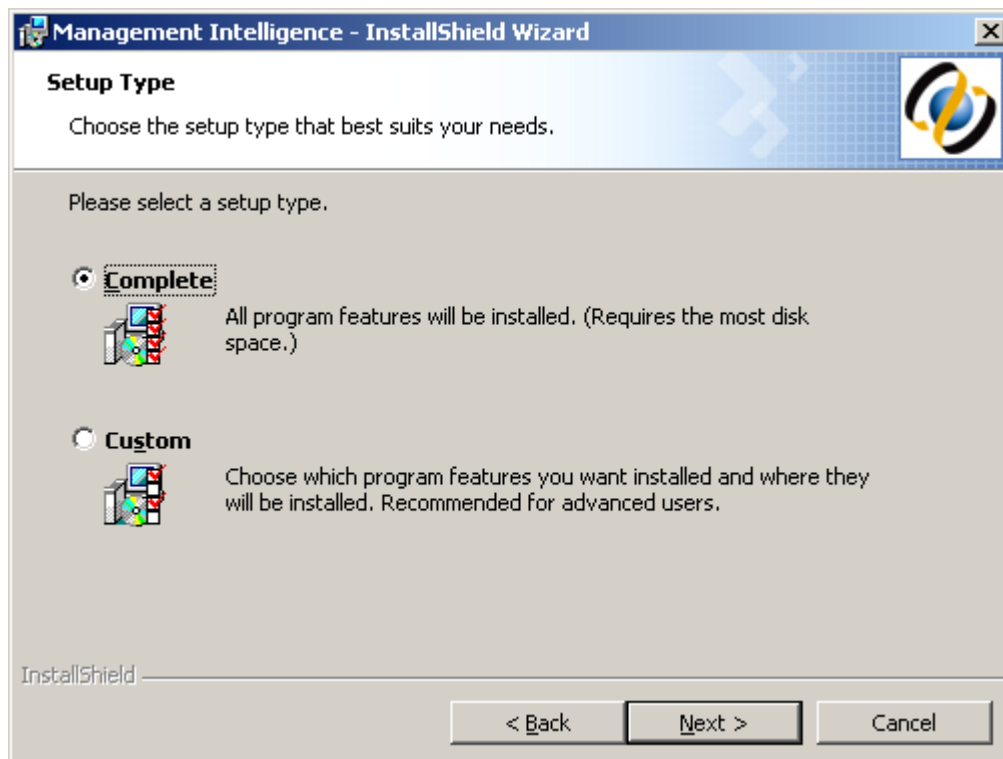
3. Click **Next**. The **Readme** dialog box opens.
4. Click **Next**. The **License Agreement** dialog box opens.
5. Review the licensing information carefully; if you agree to the terms, select **I accept the terms in the license agreement**.

**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.

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

**NOTE:** 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.

7. Click **Next**. The **Setup Type** dialog box opens.



8. Select **Complete**.
9. Click **Next**. The **Ready to Install the Program** dialog box opens.
10. Click **Install**. The **Installing Management Intelligence** dialog box opens. When finished, the **Installation Completed** dialog box opens.
11. Click **Finish**.

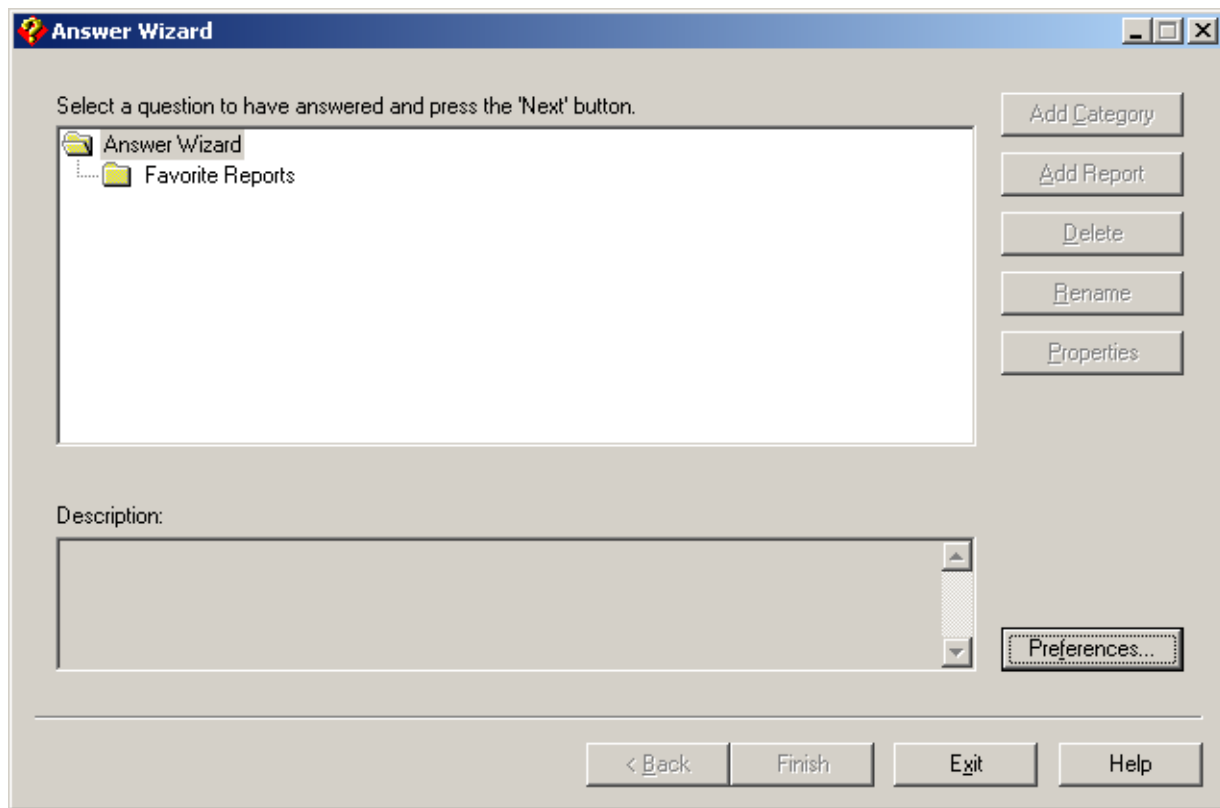
---

## Initial Setup

Manager's Console and Answer Wizard are installed. Next, launch the Answer Wizard to configure the data sources and load the reports.

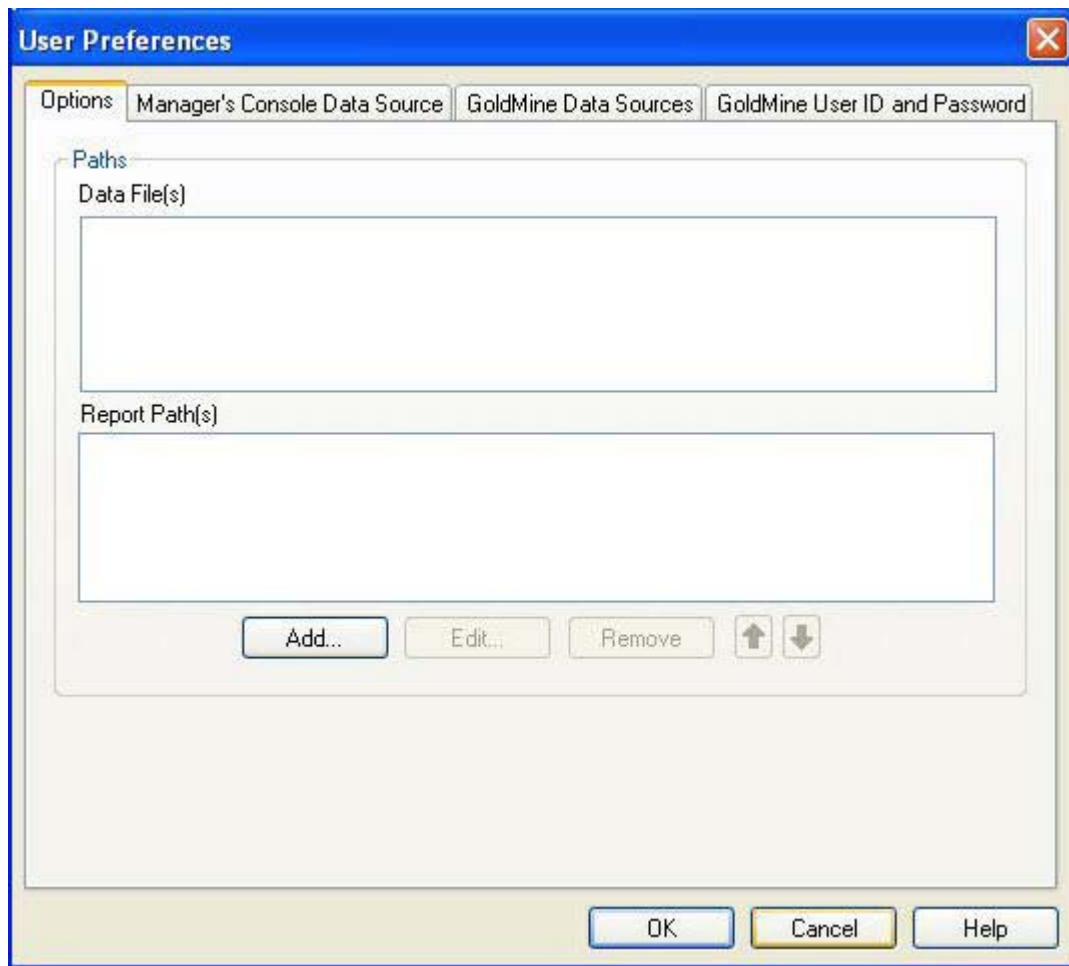
## Establishing the ODBC

1. From the Windows **Start** menu, select **Programs > GoldMine > Answer Wizard**.  
The **Answer Wizard** main window opens.

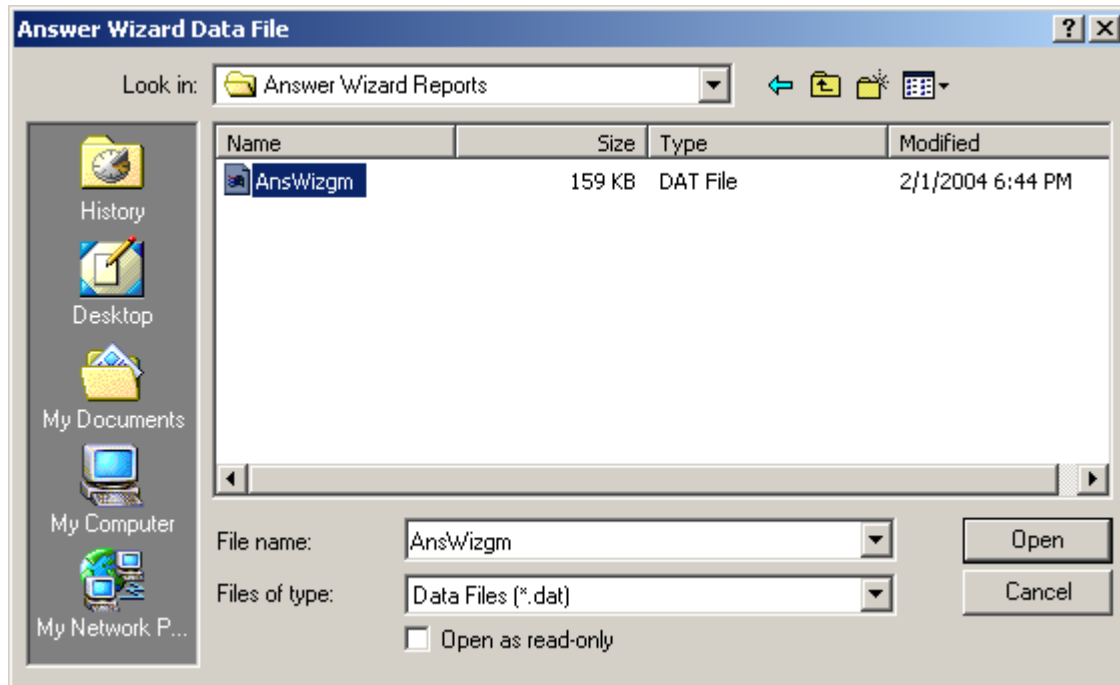


2. Click **Preferences**.

The **User Preferences** dialog box opens.

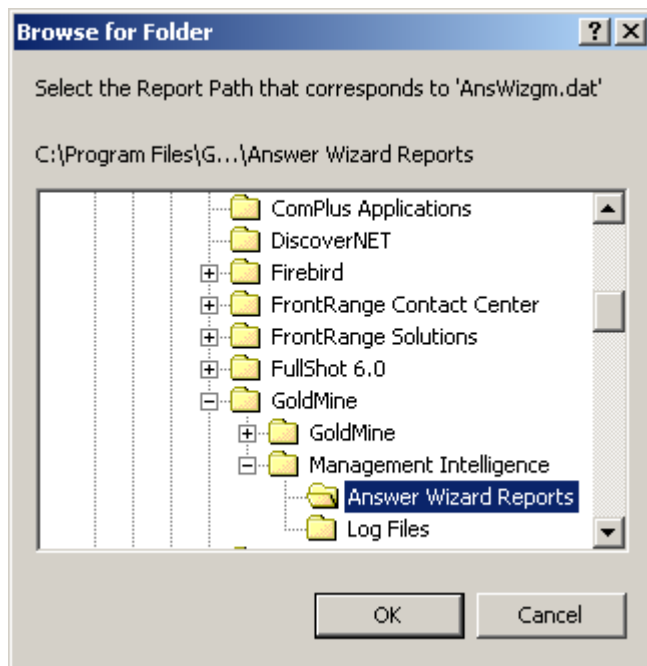


3. Use the **Options** tab to set the paths to the data file and reports. Click **Add**. The **Answer Wizard Data File** dialog box opens.

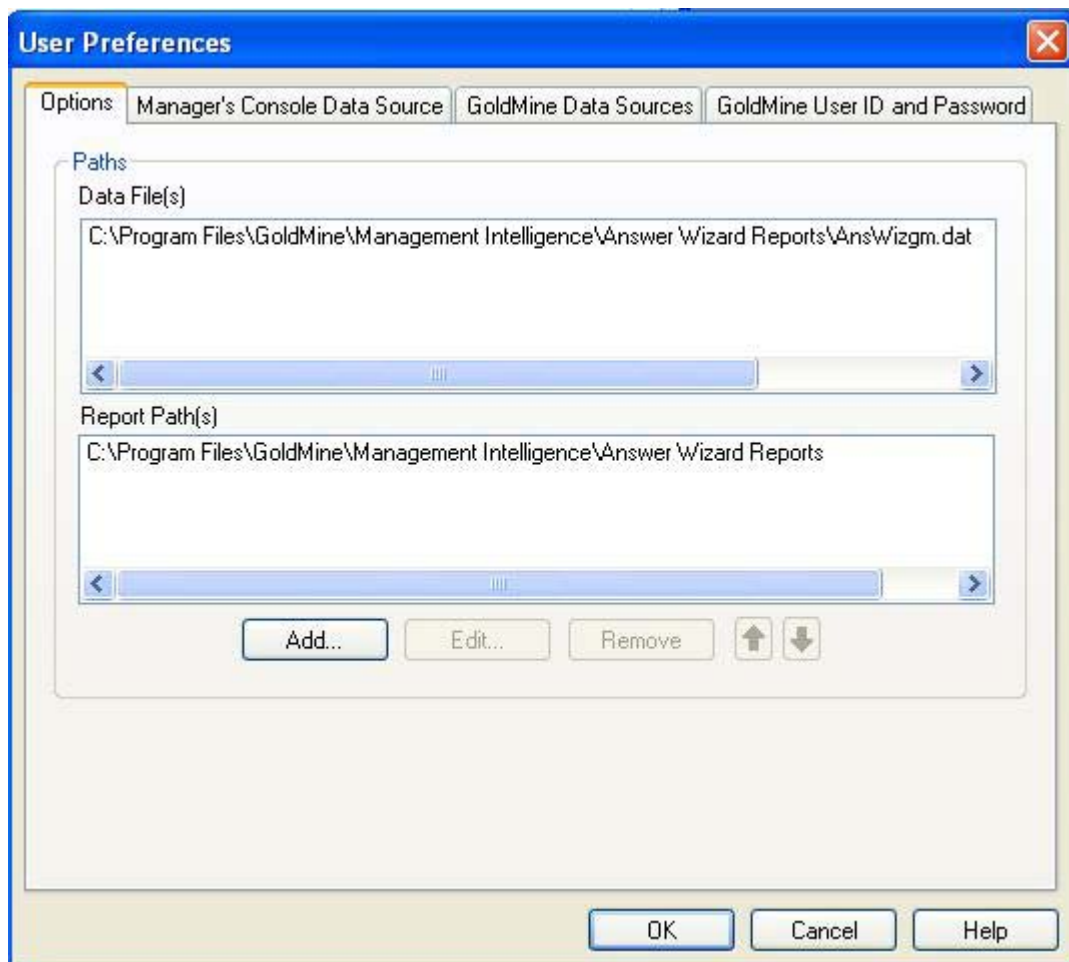


4. Navigate to the **AnsWizgm.dat** file, located in the **\GoldMine\Management Intelligence\Answer Wizard Reports** folder.

5. Click **Open**. The **Browse for Folder** dialog box opens.

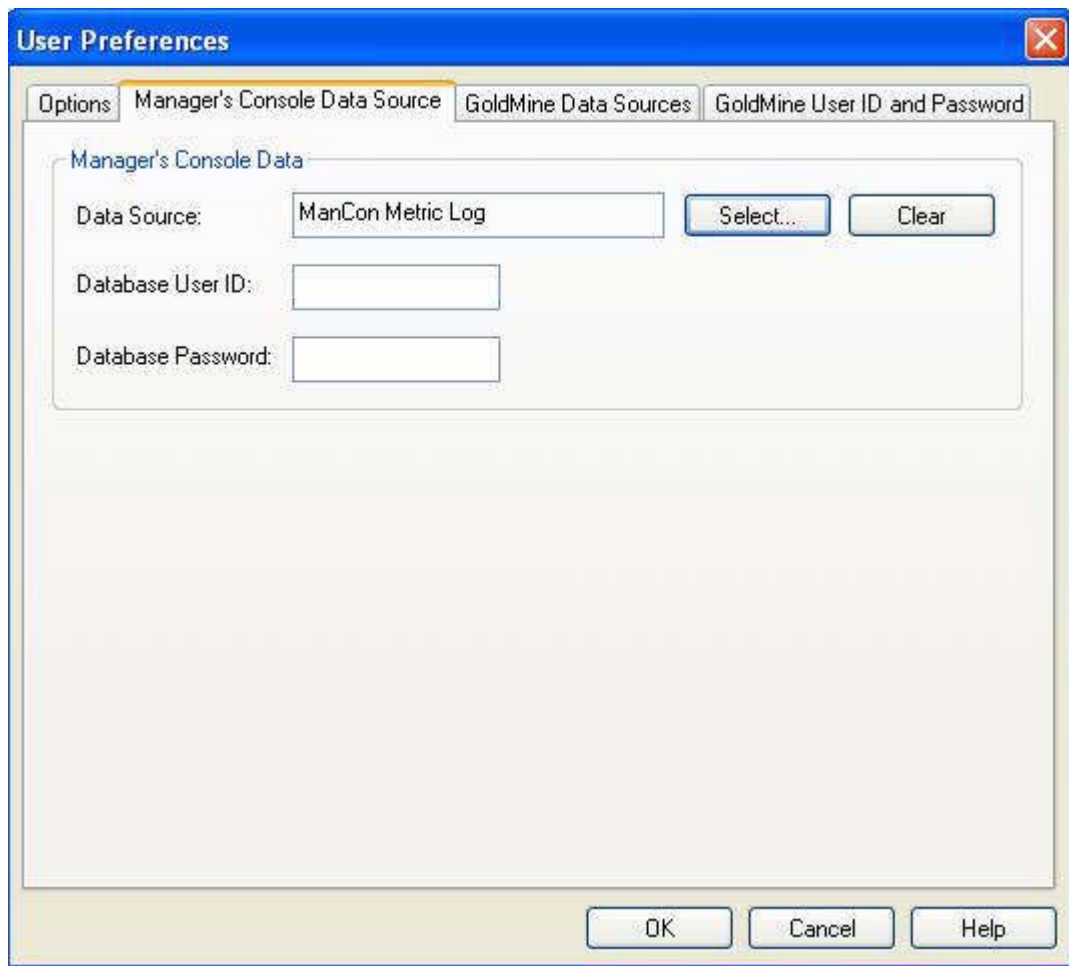


6. Verify the path is correct and click **OK**. The **User Preferences** dialog box reopens with paths defined.



7. Click the **Manager's Console Data Source** tab.





8. Click **Select**. The **Select Manager's Console Data Source** dialog box opens.

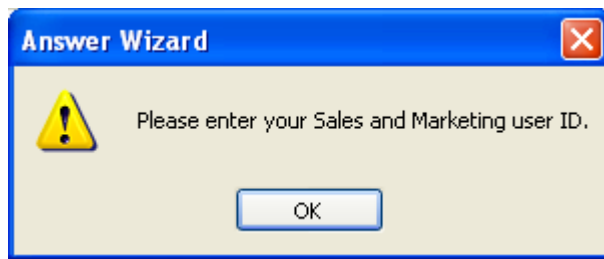


9. In the drop-down list, select **GMSales\_Mktg**.
10. Click **OK**. The **SQL Server Login** dialog box opens.

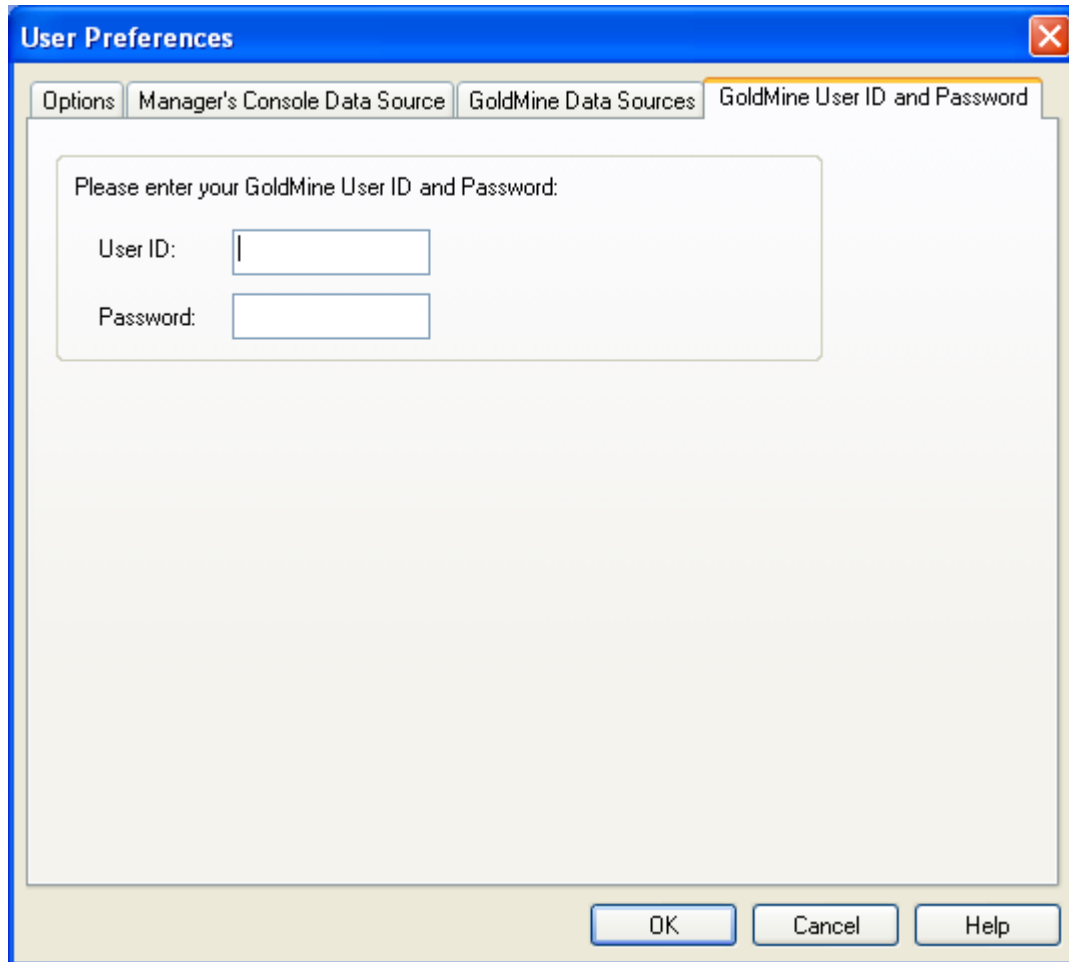


11. Type the **Login ID** and **Password** for SQL Server. Click **OK**.

12. A dialog box opens.

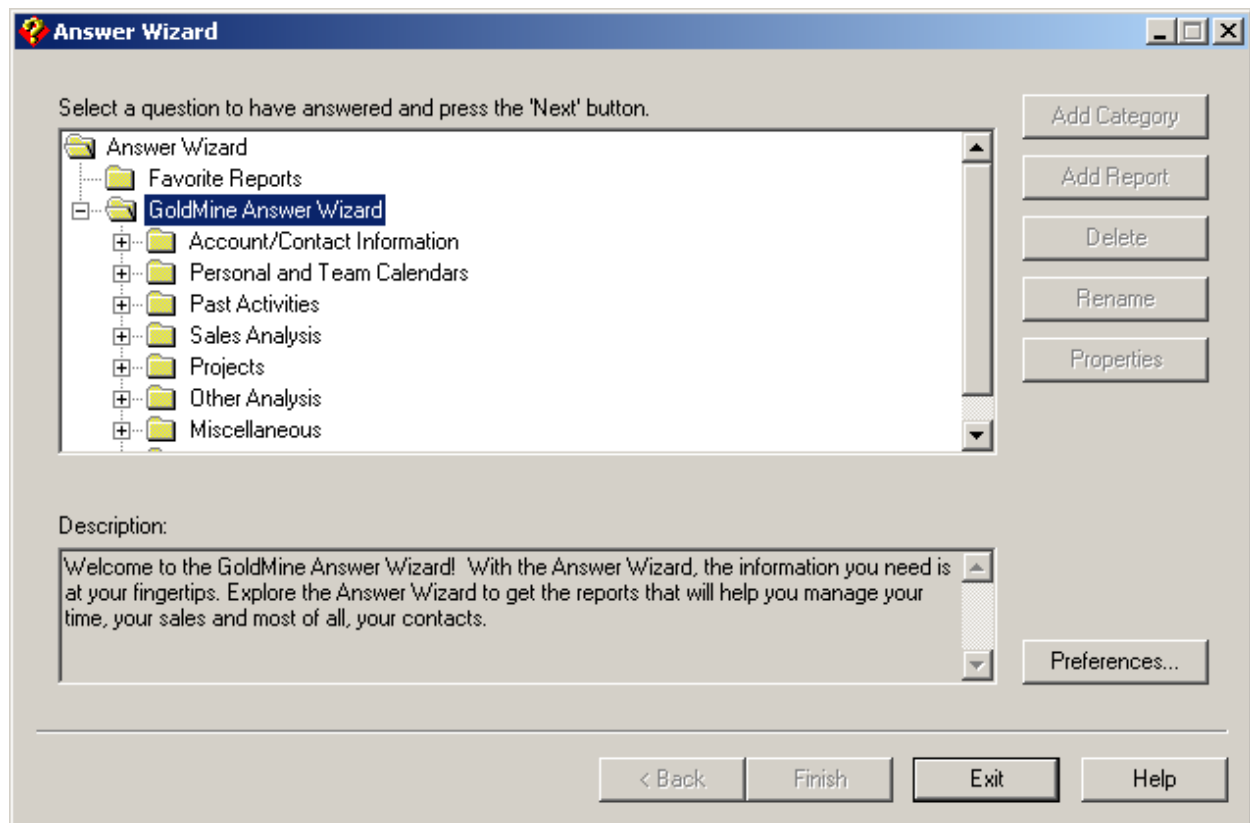


13. Click **OK**. The User Preferences window reopens with the **GoldMine User ID and Password** tab selected.

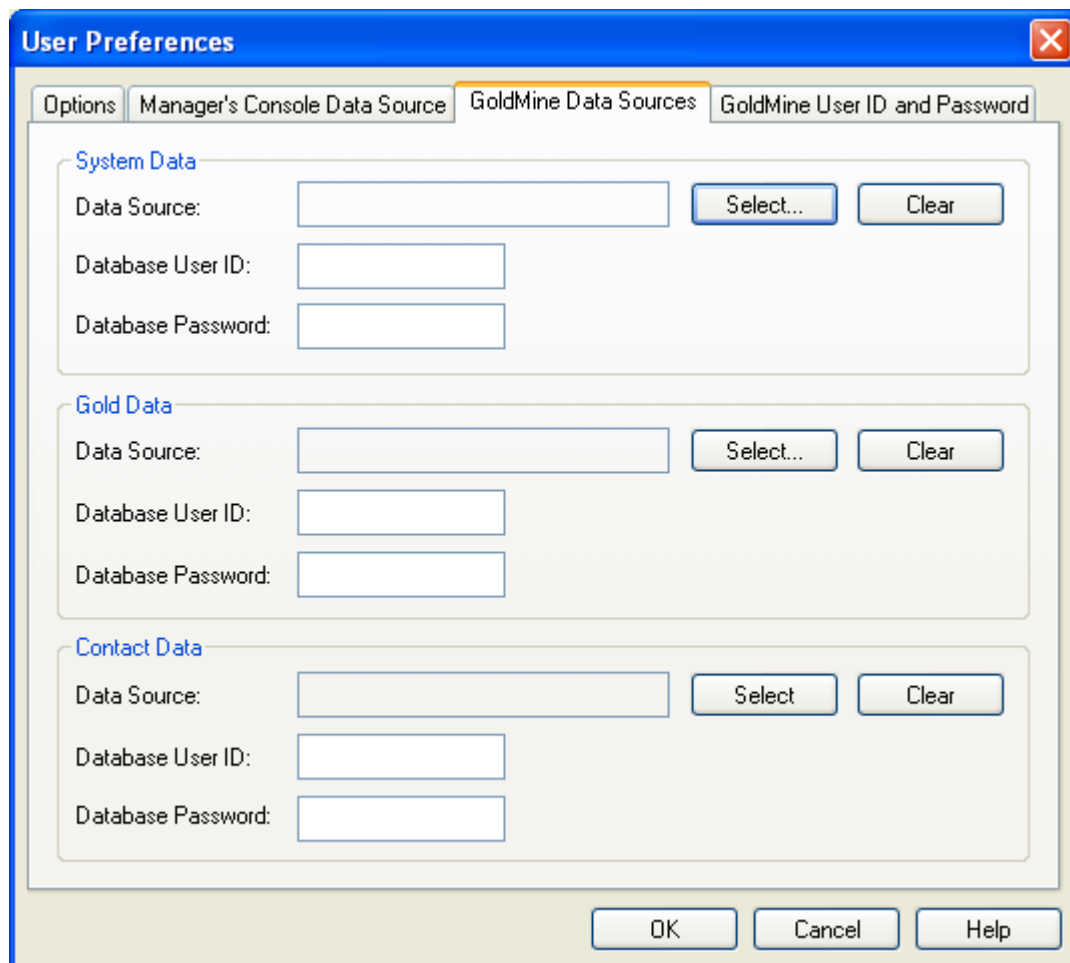


14. Enter your GoldMine user ID and password.

15. Click **OK**. The **Answer Wizard** main window reopens. Notice the GoldMine reports now appear in the tree.



16. To define custom data sources for your GoldMine data, click **Preferences**, then select the **GoldMine Data Sources** tab.



17. Use the fields on the GoldMine Data Sources tab to define custom data sources:

- **System Data:** Specifies the data source you want to use for core GoldMine system information.
- **Gold Data:** Specifies the data source you want to use for GoldMine calendar information.
- **Contact Data:** Specifies the data source you want to use for GoldMine contact information.

Click the **Select** button in each section, then select your data source from the drop-down menu. Enter your User ID and password for each database selected. Click the **Clear** button to reset all fields for each section. When finished, click **OK**.

The Answer Wizard main window reopens.

18. Click **Exit** to close the Answer Wizard.

## Displaying the ProgramData Folder

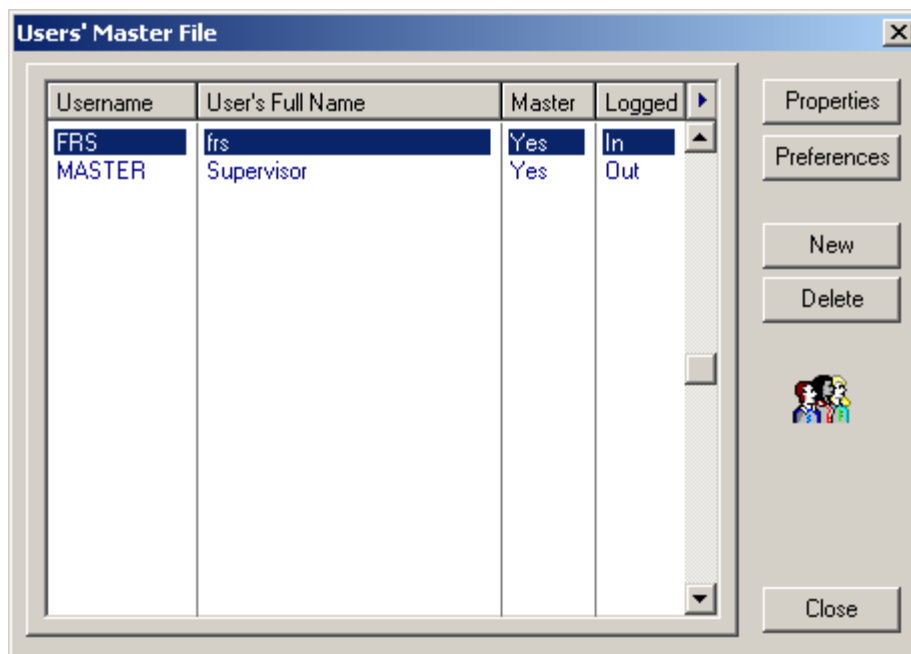
Answer Wizard initialization requires browsing to the location of the DAT and report files; however, the ProgramData folder is a hidden folder and may be unavailable to a user using the default Windows Explorer Folder Options' settings.

### To show hidden files and folders:

Select this Explorer menu action: **Tools > Folder options > View** tab. Then, at the **Browse To** dialog box, make selection to expose folders.

## Verifying the SQL Login

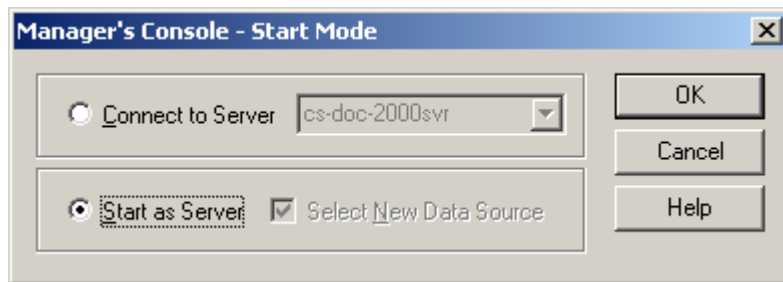
1. From the Windows **Start** menu, select **Programs > GoldMine > GoldMine**. The GoldMine Login opens.
2. Log into GoldMine as the User with **Master Rights**.
3. From the main menu, select **Tools > User's Settings**. The **User's Master File** dialog box opens.



4. Select the local user with **Master Rights**.
5. Click **Properties**. The **Properties** dialog box opens.
6. Click the **Access** tab.
7. Ensure the **SQL Logon name** and **SQL Password** are correct (such as, **sa** and **sa**).
8. Click **OK**. The **User's Master File** dialog box reopens.
9. Click **Close**.

## Starting Manager's Console

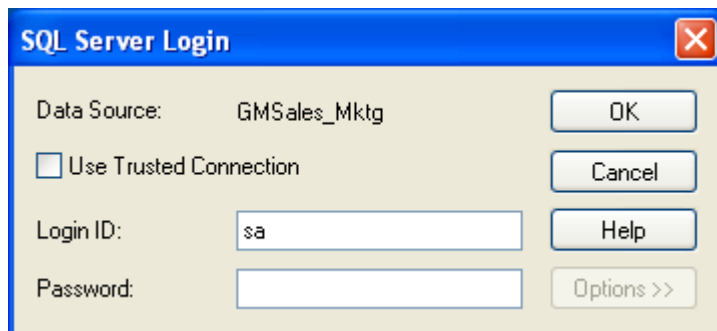
1. From Windows **Start** menu, select **Programs > GoldMine > Manager's Console**. The **Manager's Console - Start Mode** dialog box opens.



2. Select **Start as Server**.
3. Click **OK**. The **Select Manager's Console Data Source** dialog box opens.



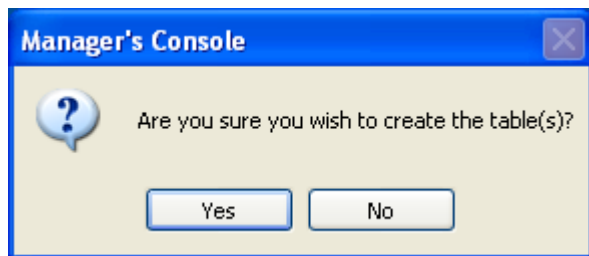
4. In the drop-down list, select **GMSales\_Mktg**.
5. Click **OK**. The **SQL Server Login** dialog opens.



6. Enter your SQL database **Login ID** and **Password**.
7. Click **OK**. A dialog box opens.



8. Click **Yes** to create a new table. A dialog box opens.



9. Click **Yes** to create the table. The Manager's Console Login screen opens



10. Enter your **User ID** and **Password**.
11. Click **OK**. The Manager's Console Login screen reopens.

The Manager's Console is now ready for use.

To exit the Manager's Console, click **Cancel**. To set up a metric using the Metric Indicator Wizard, click **OK**. The Metric Indicator Wizard opens.

**TIP:** Refer the Online Help of either the GoldMine or Management Intelligence applications for information about using the Metric Indicator and other features of the Manager's Console.

# Installing Microsoft SQL Server

---

## Overview

The Server setup requires that you install Microsoft SQL Server before installing GoldMine. GoldMine supports Microsoft SQL Server 2005 SP2 and later, but Microsoft SQL 2008 is recommended and used as the example in this section. For information about installing earlier versions, refer the documentation that came with your version.

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

**TIP:** The Microsoft SQL Server 2008 CD included with your GoldMine Premium Edition package provides complete installation instructions in the Microsoft online help.

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## Installing Microsoft SQL Server 2008

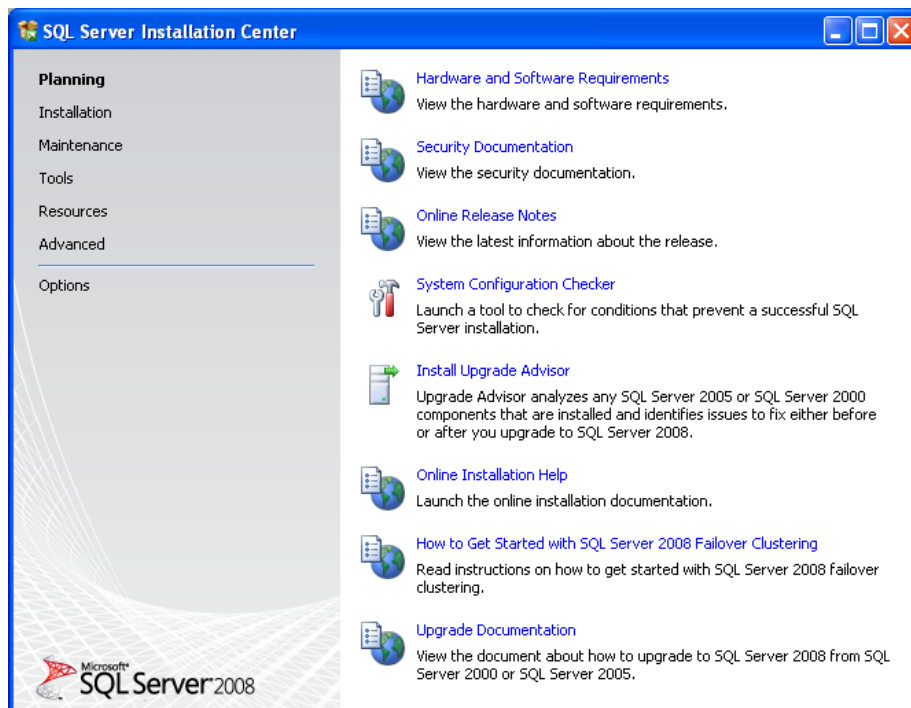
The server on which you are installing Microsoft SQL Server 2008 *must* have one of the following operating systems: Windows XP with SP2 or later; Windows Vista; Windows Server 2003 Enterprise, Standard, or Data Center Edition with SP2 or later; Windows Server 2008 Enterprise, Standard, or Data Center Edition; Windows Small Business Server 2008.

**NOTE:** For detailed hardware and software requirements for installing SQL Server 2008, refer to <http://msdn.microsoft.com/en-us/library/ms143506.aspx>.

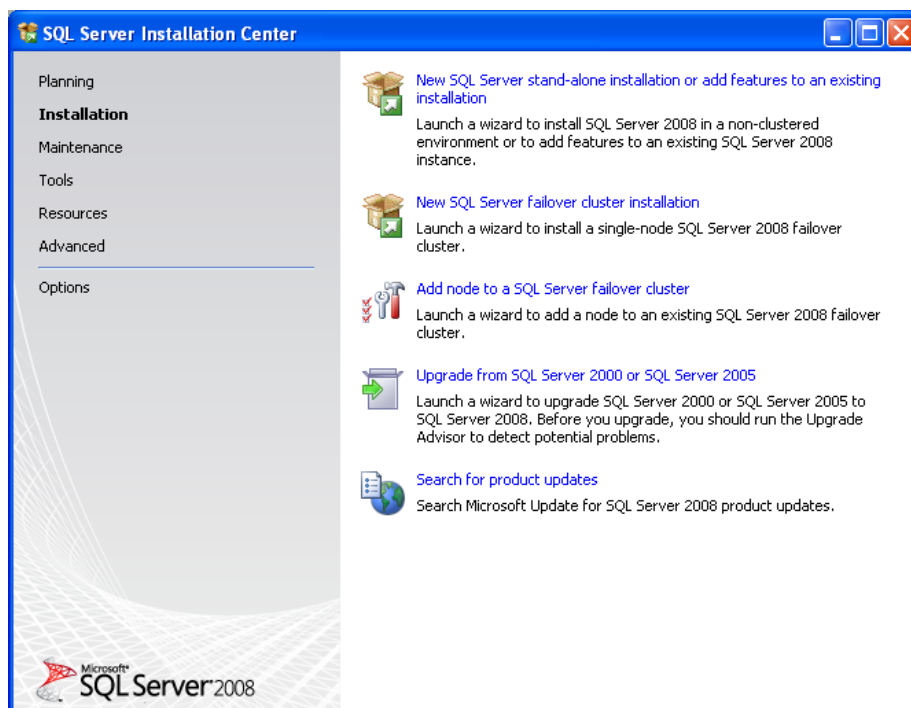
1. Insert the Microsoft SQL Server 2008 Installation CD into the CD/DVD drive of the computer on which you are installing SQL Server.

**NOTE:** The SQL Server 2008 Installation CD is set up to autorun when inserted into your CD/DVD drive. If autorun is not enabled, select **Run** from the Windows **Start** menu on the Windows taskbar, and then type `x: \setup.exe` (where **x** is the letter of the CD/DVD drive)

The **SQL Server Installation Center** opens.

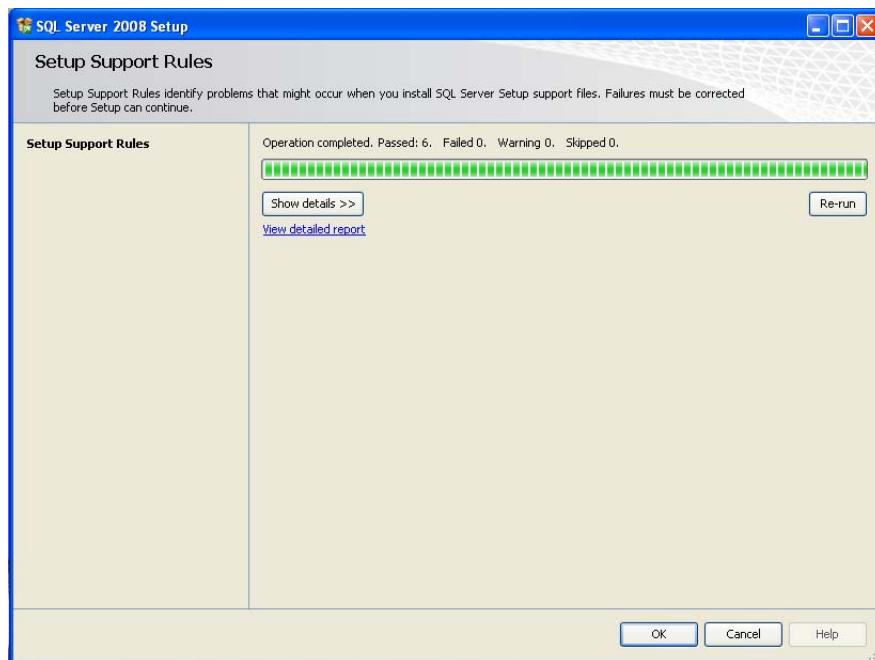


2. From the menu list on the left, select **Installation**. The screen changes to display the installation options.

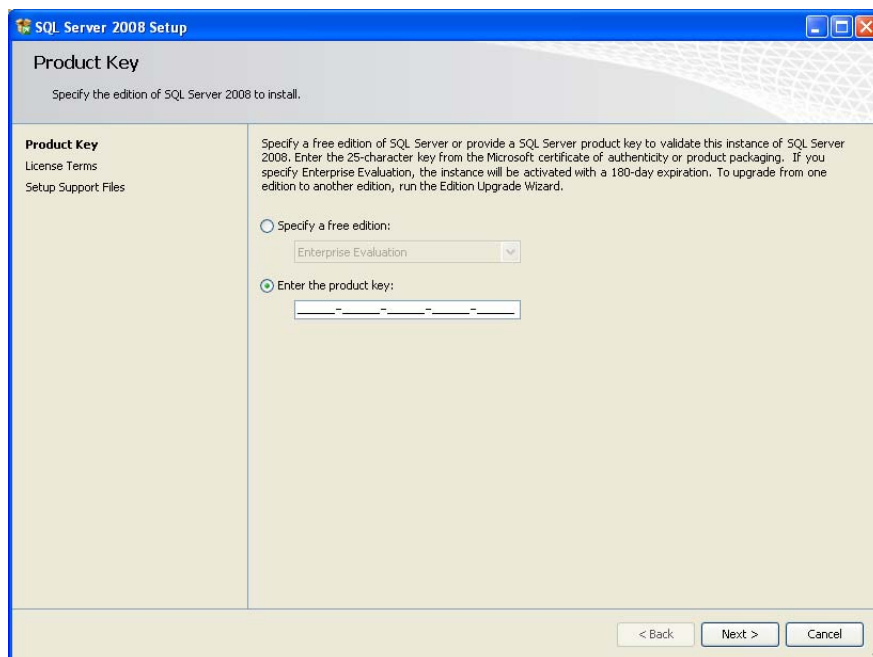


3. From the list of installation options on the right, select **New SQL Server stand-alone installation**. The **SQL server 2008 Setup** dialog box opens.



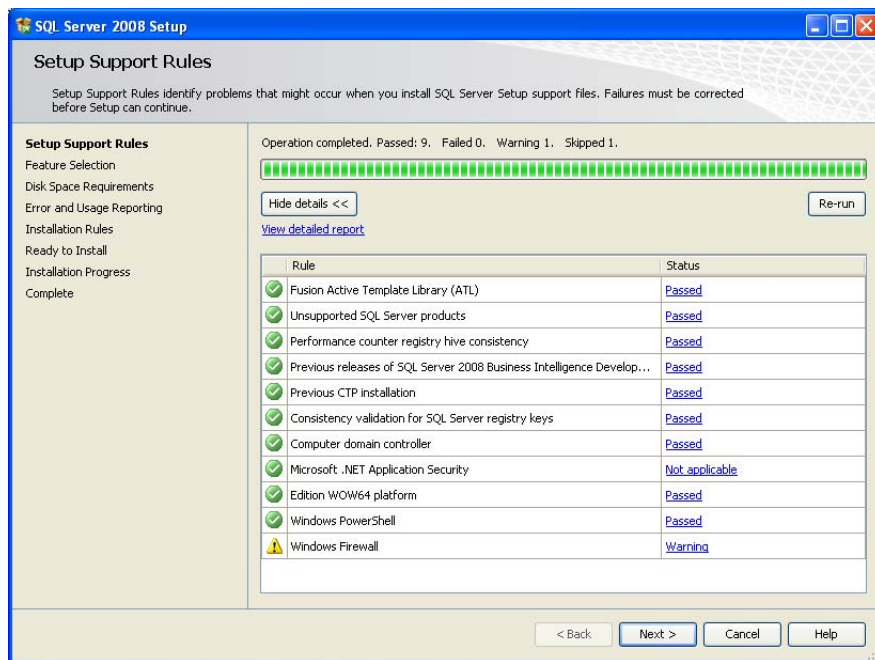


4. Prior to installing SQL Server Support files, the wizard runs an operation to identify problems that might occur when installing the support files. If problems are indicated, they must be resolved before the installation process can continue. If no problems are identified, click **OK** to continue. The **Product Key** dialog box opens.

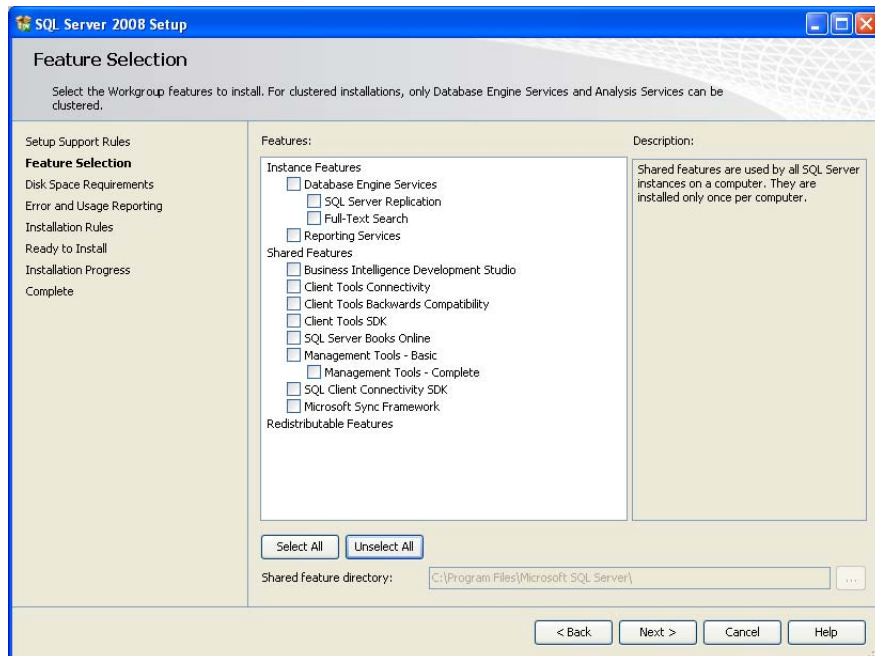


5. The product key information should be auto-populated. Click **Next**. The **License Terms** dialog box opens.



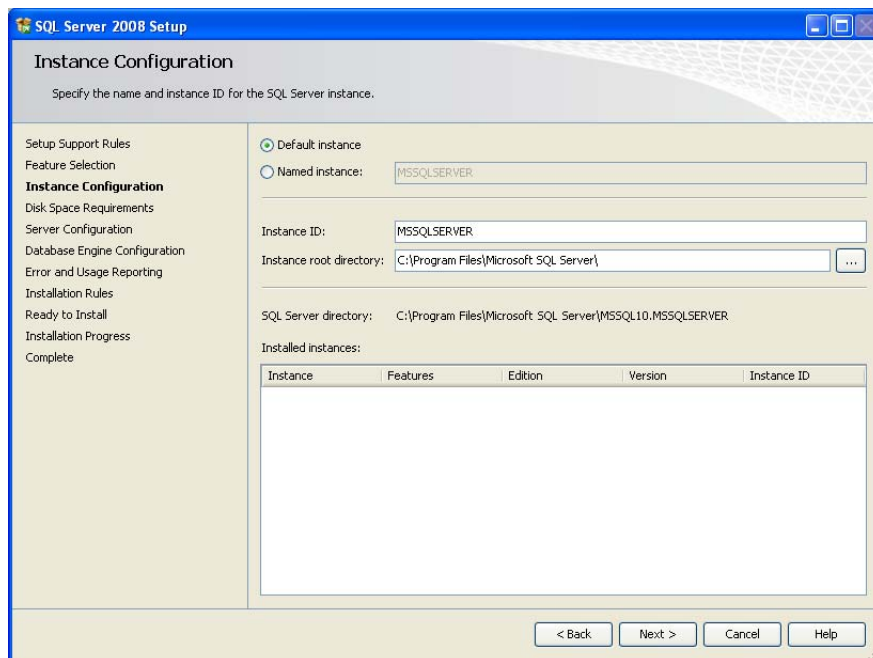


8. When complete, click **Next**. The **Feature Selection** dialog box opens.

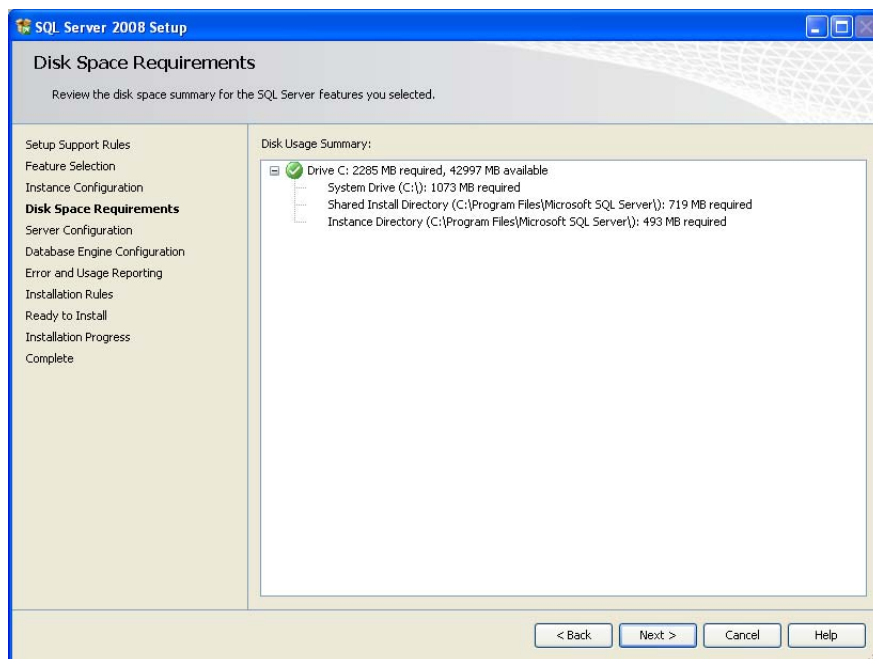


9. Select the **Instance Features: Database Engine Services, Full-Text Search, Client Tools Connectivity**, and also the **Management Tools** option (either **Basic** or **Complete**). Click **Next**. The **Instance Configuration** dialog box opens.

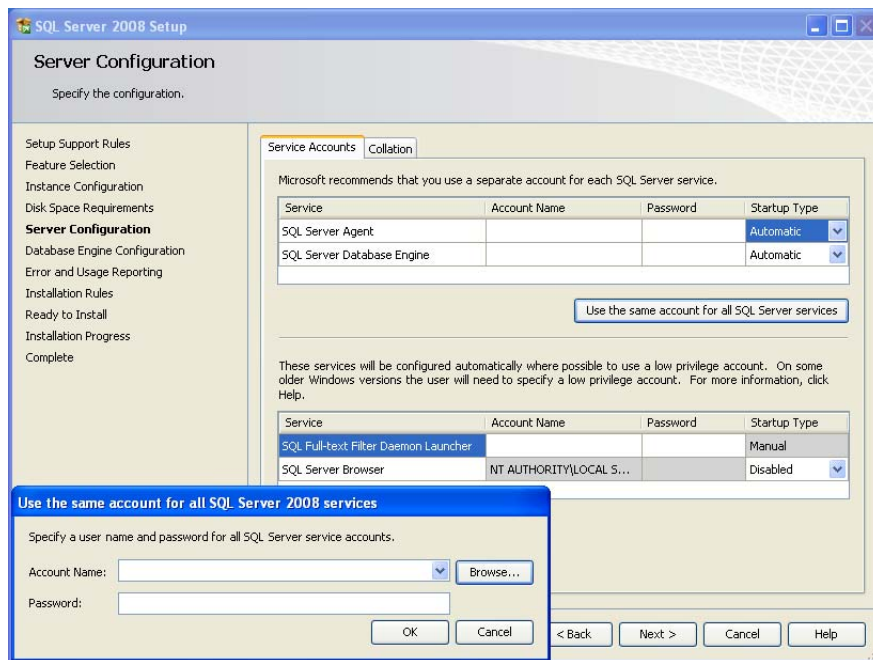
**NOTE:** If you plan on using Reporting Services with GoldMine, Reporting service must also be installed.



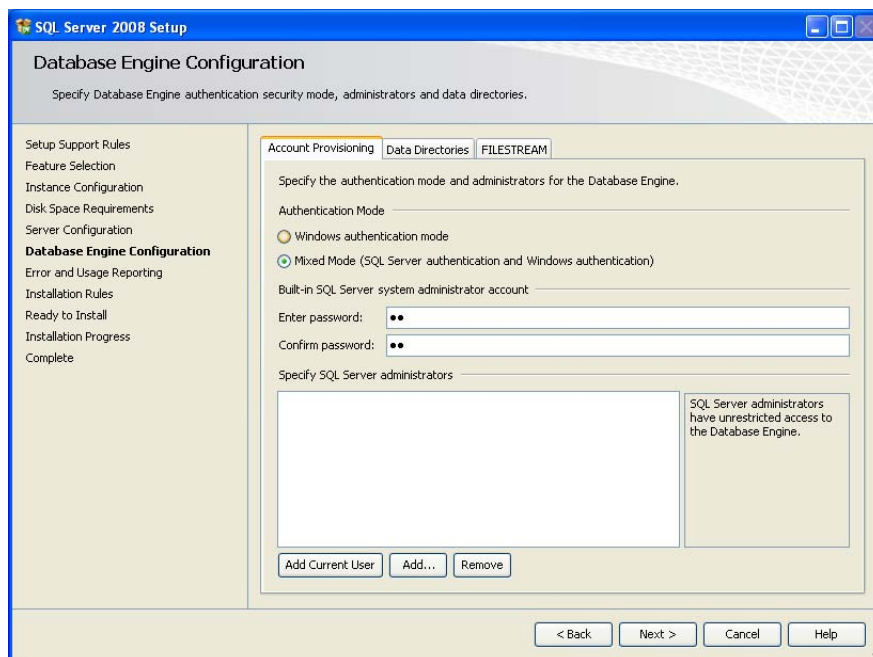
10. Select the **Default instance** option and click **Next**. The **Disk Space Requirements** dialog box opens.



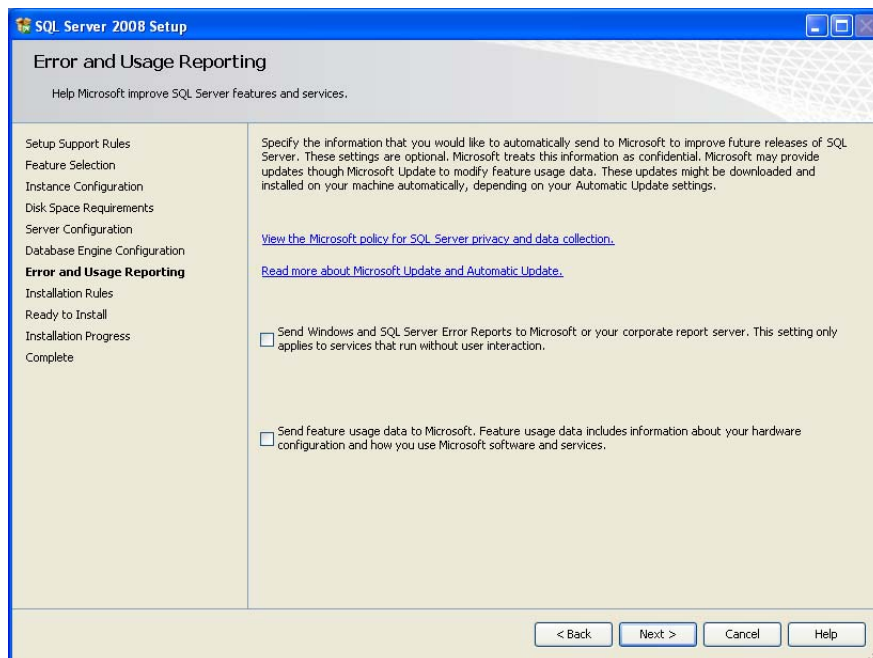
11. Click **Next**. The **Server Configuration** dialog box opens.



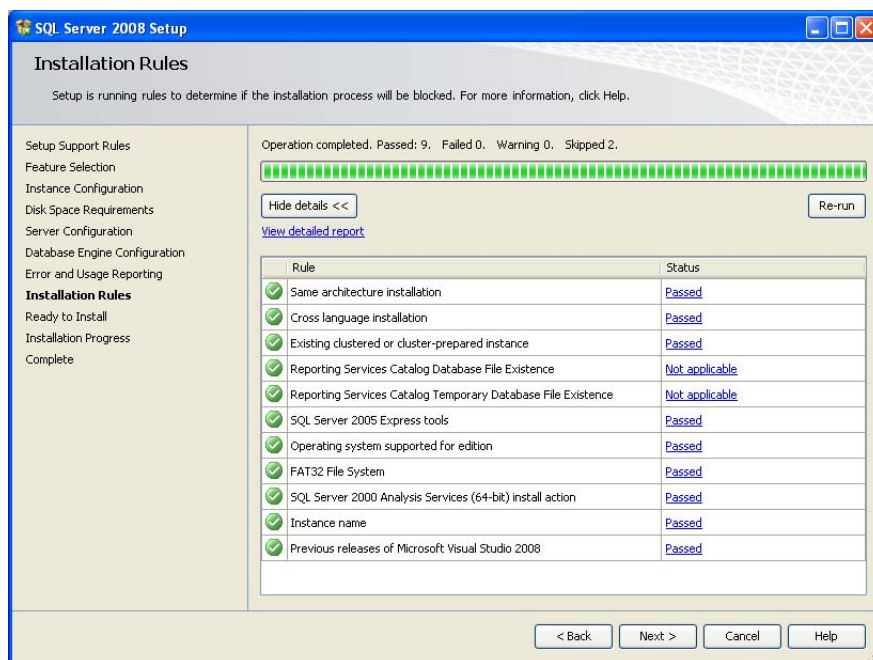
12. Change the **SQL Server Agent Startup Type** to **Automatic**, then click the **Use the same account for all SQL Server services** button. A dialog box opens for you to select the **Account Name**: select **NT AUTHORITY/SYSTEM**. Click **OK**.
13. Click **Next**. The **Database Engine Configuration** dialog box opens.



14. Select the **Mixed Mode** option, then enter and confirm the password. You must also specify a SQL Server Administrator; you can click the **Add Current User** button to do so.
15. Click **Next**. The **Error and Usage Reporting** dialog box opens.

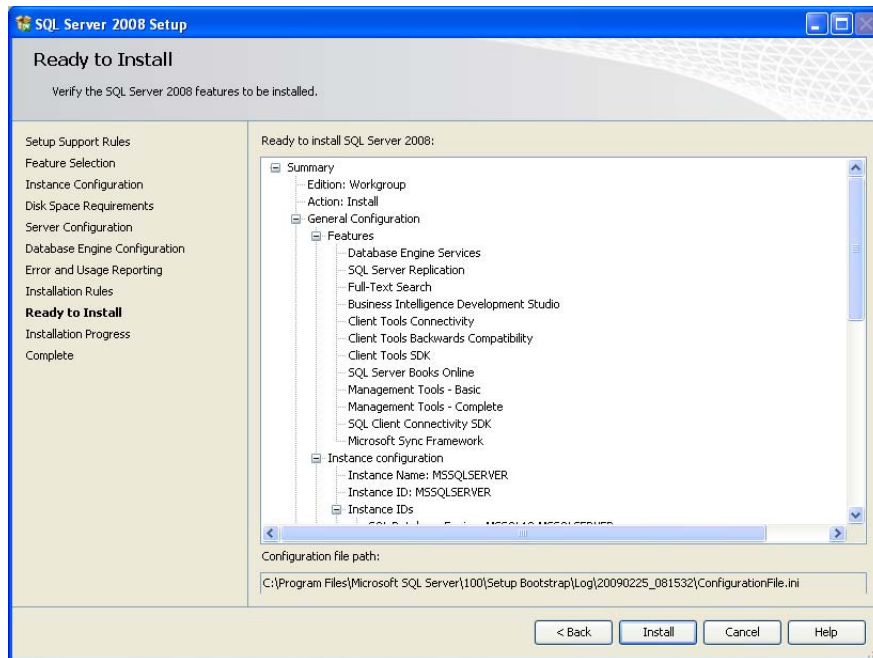


16. If you want MSSQL Server 2008 to automatically send your error messages and usage reports to Microsoft, check the appropriate box. Click **Next**. The **Installation Rules** dialog box opens.



17. Click **Next**. The **Ready to Install** dialog box opens.





18. Review the installation summary, then click **Install**. The **Installation Progress** dialog box opens.
19. When installation is complete, click **Next**. The **Complete** dialog box displays, advising you to restart your computer.
20. Click **Close**, then restart your computer.
21. Exit the **SQL Server Configuration Manager**.
22. In Windows, go to **Start > Settings > Control Panel > Administrative Tools > Computer Management**.
23. Expand **Services and Applications** and select **Services**.
24. Stop and restart the service **SQL Server (MSSQLSERVER)**.

## Post-Installation Configurations

Subsequent to installing SQL Server 2008 and GoldMine, you will need to open Microsoft Server SQL Management Studio to confirm (or modify) the configuration of some database settings:

1. Open the Windows **Start** menu and select **Programs > Microsoft SQL Server 2008 > SQL Server Management Studio**.
2. In the left panel, click **Databases** to open the folder, then right-click your database, and select **Properties**.
3. In the **Select a page** panel, click **Options**.
4. Confirm the **Recovery model** field is set to **Full**.

**NOTE:** This might greatly increase the database size and transaction logs. Transaction logs should be regularly backed up and truncated to save space.

5. Confirm the **Compatibility level** field is set to the highest level.
6. In the **Automatic** section, confirm the **Auto Create Statistics** is set to **True**.
7. In the **Automatic** section, confirm the **Auto Update Statistics** is set to **True**.
8. Click **OK**.

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# Installing Microsoft SQL Server 2005

If you choose to install Microsoft SQL Server 2005, use the following procedure.

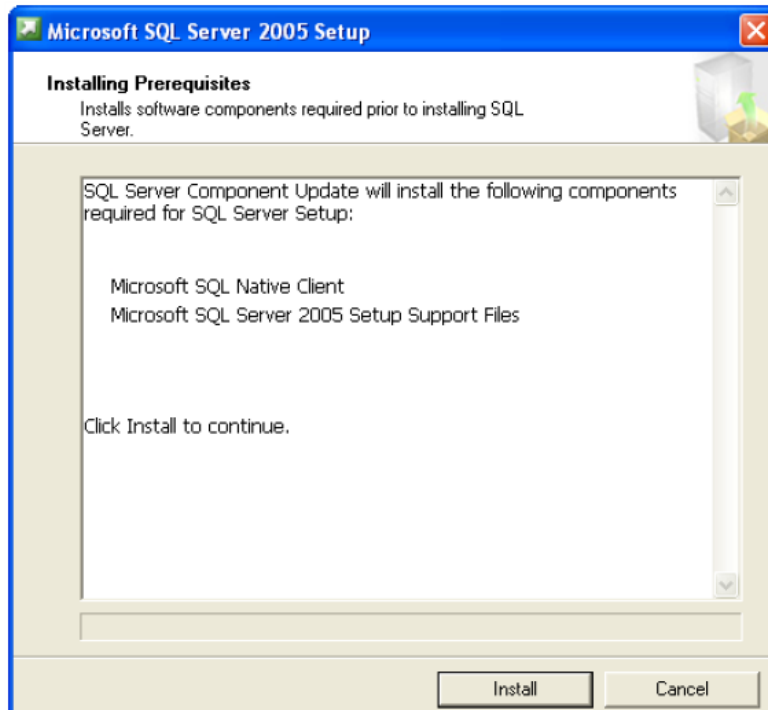
1. Insert the Microsoft SQL Server 2005 Installation CD into the CD/DVD drive of the computer on which you are installing SQL.

**NOTE:** The SQL Server 2005 is **not** included with GoldMine 9.0.

The main window opens.



2. Select **Server components, tools, Books Online, and samples**. The **End User License Agreement** window appears. To install SQL Server 2005, you must accept the terms of the End User License Agreement.
3. When you have reviewed and accepted the terms, click **Next**. The **Installing Prerequisites** window opens.

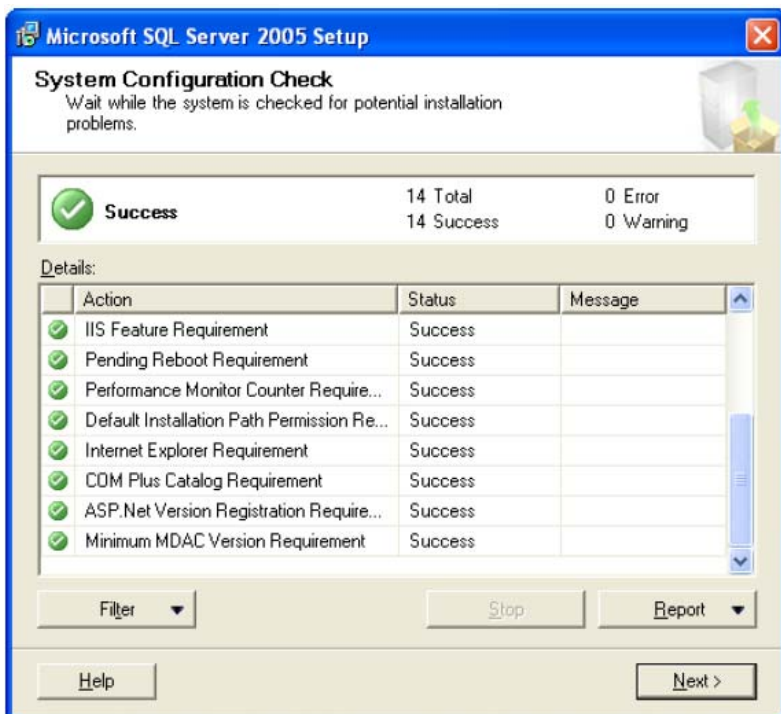


4. Click **Install**. After the software prerequisites are installed, click **Next**. The **Welcome** window opens.

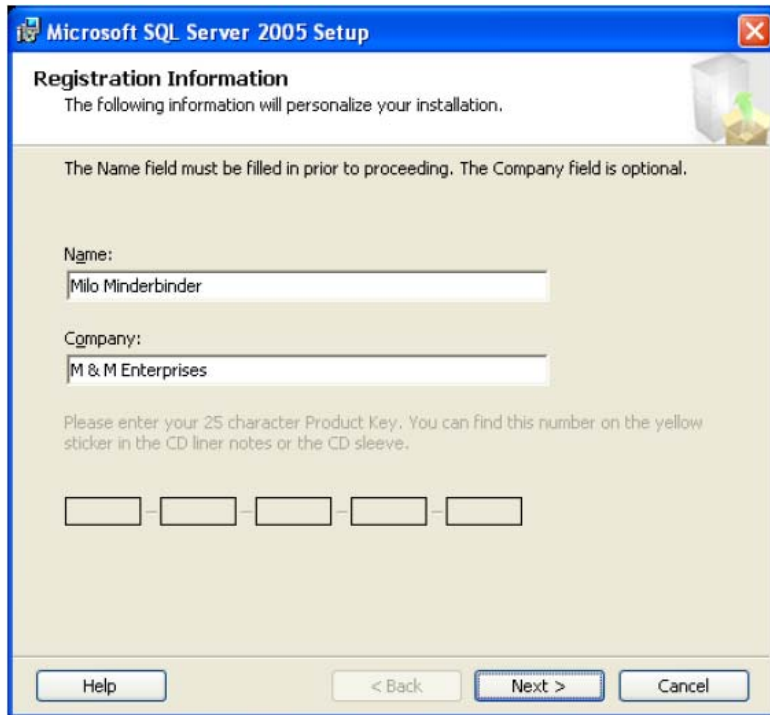




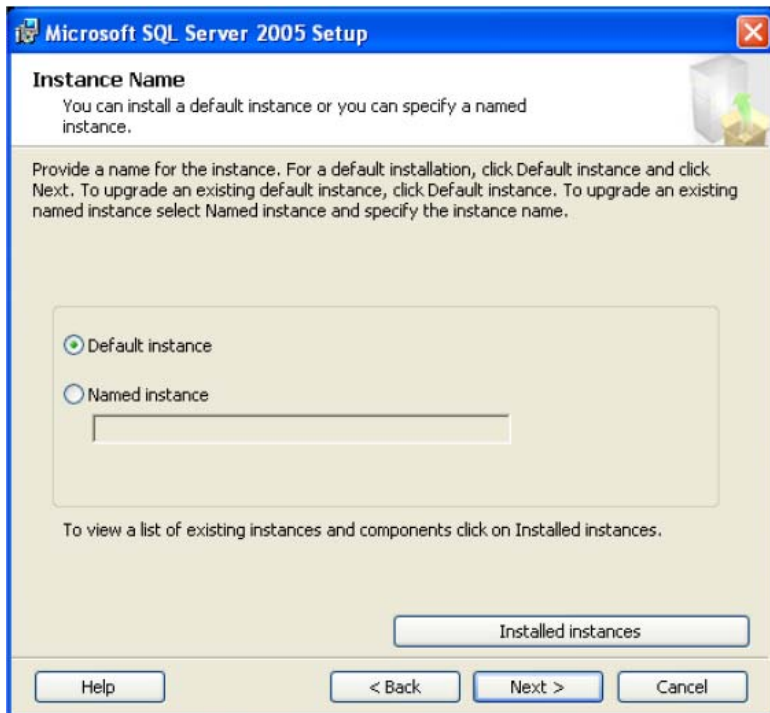
5. Click **Next**. The **System Configuration Check** window opens.



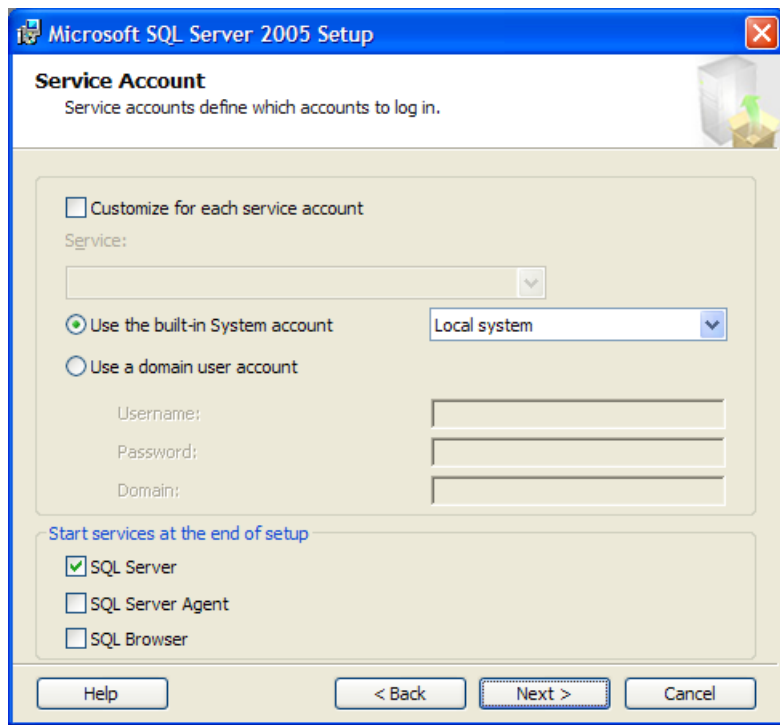
6. When the system configuration check is complete, click **Next**. The **Registration Information** window opens.



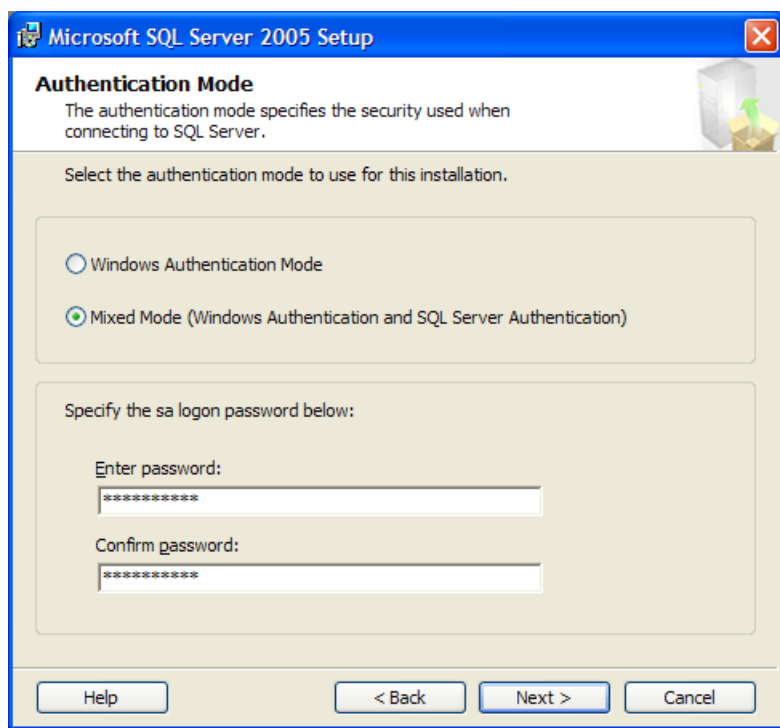
7. Click **Next**. The **Feature Selection** window opens.
8. In the **Feature Selection** window, select **SQL Server Database Services** and **Workstation** components, **Books Online and development tools**, then click **Next**. The **Instance Name** window opens.



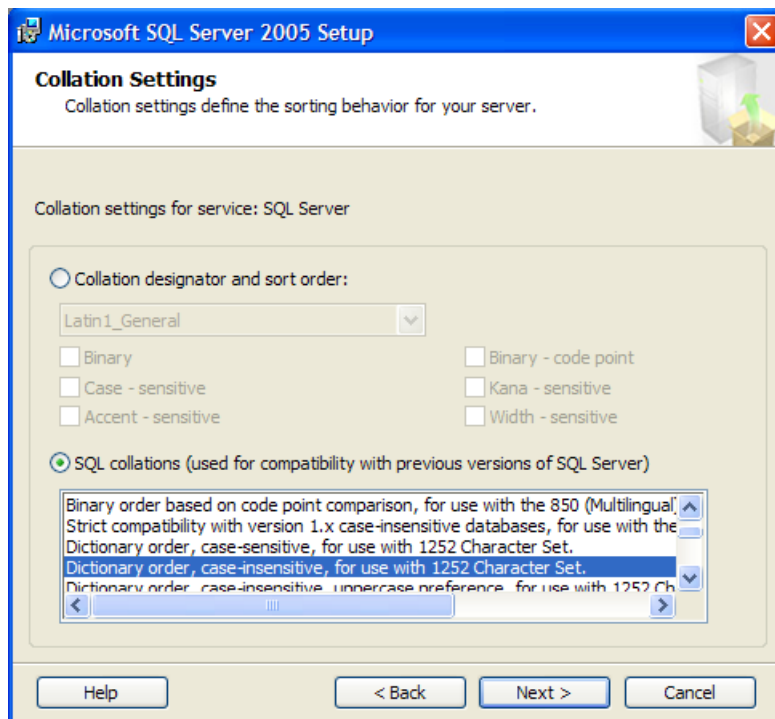
9. Leave **Default** selected. Click **Next**. The **Service Account** dialog box opens.



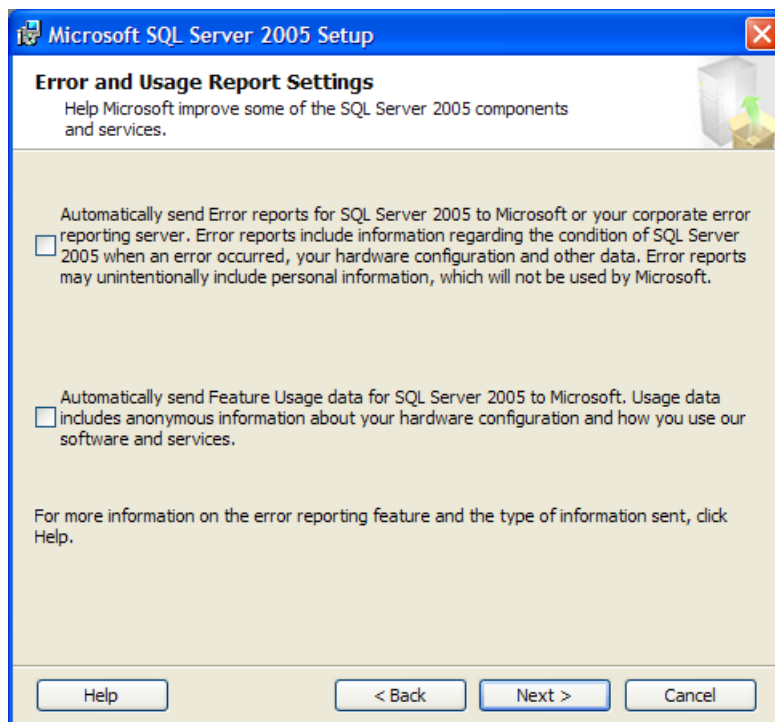
10. Select **Use the built-in system account > Local System**. Under **Start services at the end of setup**, check **SQL Server**.
11. Click **Next**. The **Authentication Mode** dialog box opens.



12. Select **Mixed Mode** and enter an sa logon password. Click **Next**. The **Collation Settings** window opens.

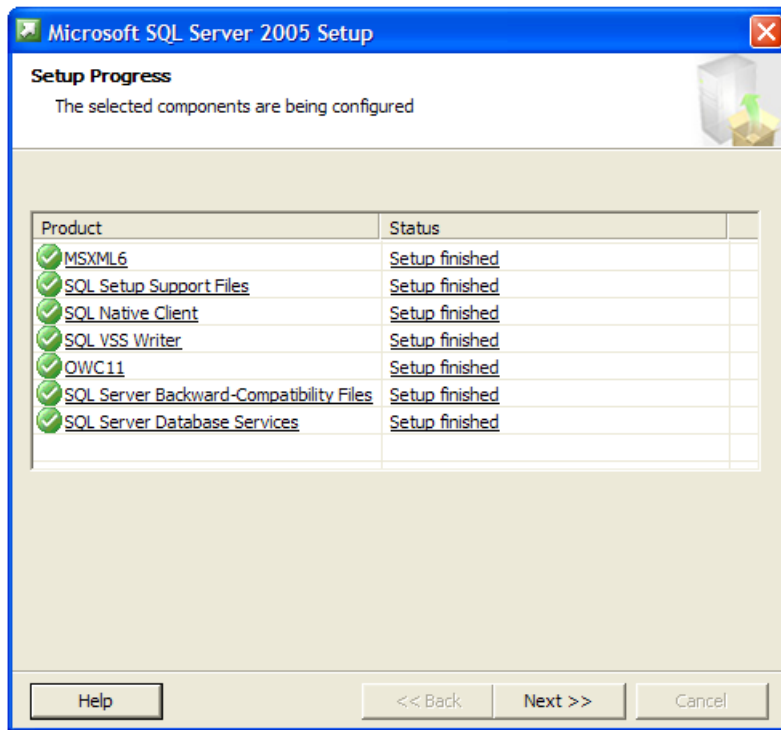


13. From the SQL collations, choose the default. The **Error and Usage Report Settings** window opens.

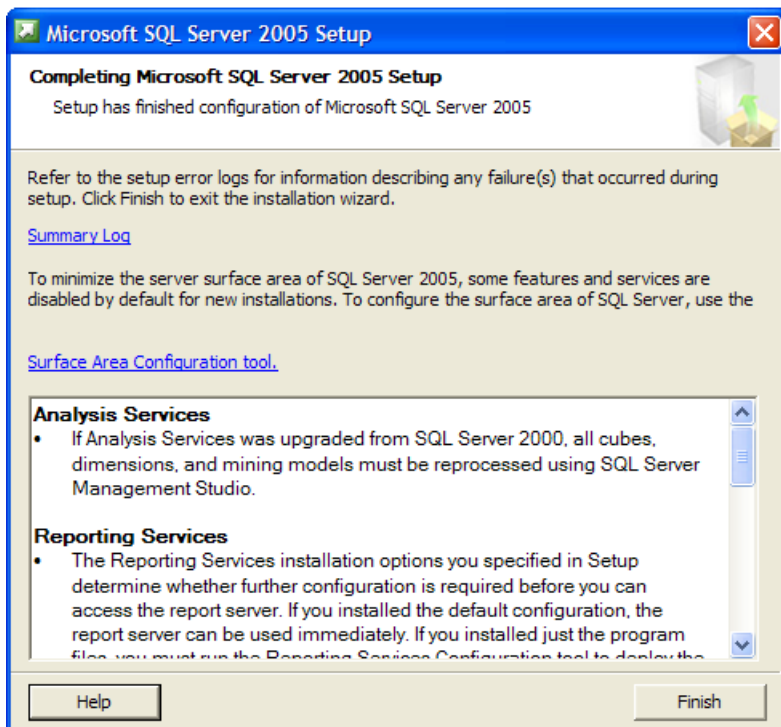


14. If you want MSSQL Server 2005 to automatically send your error messages and usage reports to Microsoft, check the appropriate box. Click **Next**. The **Ready to Install** window opens.

15. Click **Install** to proceed with the installation. The **Setup Progress** window opens.



16. When the installer completes the setup process, click **Next**. The **Completing Microsoft SQL Server 2005 Setup** window opens.



17. Click **Finish** to exit the installation wizard.
18. Exit the **SQL Server Configuration Manager**.
19. Open the Windows **Start** menu and select **Settings > Control Panel > Administrative Tools > Computer Management**.
20. Expand **Services and Applications** and select **Services**.
21. Stop and restart the service **SQL Server (MSSQLSERVER)**.

---

# Troubleshooting

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 the password 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.

# Migrating Large Databases

---

## Overview

If you are upgrading from a previous version of GoldMine to version 9.0 and have a large Microsoft SQL Server database (5GB of data or more), we recommend you consider the following steps before proceeding with the upgrade. Certain computers (limited computing power) require manual steps to upgrade the database successfully.

**NOTE:** These steps do not apply to Firebird databases.

---

## Database Preparation

### Back Up Your Database

This is especially important prior to migration. Also, a power failure or any unpredicted interruption may corrupt data. Invaluable data can be restored from the backup.

### Truncate the Transaction Log

#### *For SQL 2005*

1. From **Start**, select **Microsoft SQL Server > SQL Server Management Studio**.
2. After logging on to SQL Server, click the **New Query** toolbar button (or select **File > New > Query with Current Connection**).
3. Run:  

```
backup log database_name with truncate_only  
dbcc SHRINKDATABASE(database_name, TRUNCATEONLY)
```

## For SQL 2008

1. From **Start**, select **Microsoft SQL Server > SQL Server Management Studio**.
2. After logging on to SQL Server, click the **New Query** toolbar button (or select **File > New > Query with Current Connection**).
3. Run:  
**Alter Database dbname Set Recovery Simple**  
**Alter Database dbname Set Recovery Full**
4. Purge the **syslog** table from your current GoldMine version. Ensure you have backed up your database prior to purging.
  - To purge logs, select **Tools > Logs > GoldMine Logs**. The System Logs dialog box appears. Select either **Process Monitor Logs**, **Maintenance Logs**, or **Error Logs**. Right-click and select **Purge Logs**.
  - Select the check boxes for **Process Monitor**, **Maintenance**, and **Error** logs. Accept the default date (1 month) or adjust to extend. If you require more logs, revise according to the GoldMine Online Help or the *GoldMine Administrator Guide*.



# Converting dBASE Databases to MSSQL

---

## Overview

To convert your dBASE database to MSSQL for use with GoldMine:

- Install GoldMine normally and create a new database. Do not install demo data.
- Use the Databases Wizard in GoldMine to import your dBASE database.

TIP: Refer to the topic “Using the Databases Wizard” in GoldMine Online Help for details on using the wizard.

Assuming your data contains English language records only, with no special characters, such as Euro symbols, accented characters, or Cyrillic letters, there will be no encoding conversion issues when importing your database into GoldMine.

If your database does contain special characters, as noted above, you will need to determine what type of coding is used in your DBF files in order to correctly convert all characters and symbols. The coding will be one of the following:

**OEM:** Legacy encoding used by Microsoft DOS

**ANSI:** Encoding used by Microsoft Windows

The process of determining which type of encoding was used in your original DBF file may require a trial and error approach. Be sure that you have created complete back-ups, both for safety, and to allow you to *roll back* to a pre-import version of the database in order to verify that all special characters and symbols are properly converted.



# Resources

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## Additional Documentation

In addition to this guide, the following resources are available to provide you with information about GoldMine:

- **Online Help** - Accessed by clicking the Help menu option in GoldMine, online help provides topic overviews and step-by-step instructions to walk you through basic tasks, in addition to a comprehensive table of contents, index, and search function.

**NOTE:** Guides are available in PDF format from the Installation kit for maintenance customers at <http://www.frontrange.com/support>.

- **Training Courses** - Information regarding training courses for FrontRange Solutions family of products can be found at: <http://frontrange.learn.com>
- 

## Contact Us

### Support Site

FrontRange Solutions can answer your technical support questions about HEAT, FRS Foundation, GoldMine, and other FrontRange product families. Visit:

<http://www.frontrange.com/support>

### Contact Information

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5675 Gibraltar Drive

Pleasanton, CA 94588 USA

TEL: 800.776.7889 and +1 925.398.1800

If calling from Canada, dial: 1.888.603.3270

Offices are also located in Latin America, Asia Pacific, Europe, South Africa, and the Middle East. For international contact information, go to the FrontRange Solutions Web site, click the **Contact** link at the top of the page, then select your region.



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