

# GoldMine Premium Edition Installation Guide

Version 8.5.1

Copyright © 2009 FrontRange Solutions USA Inc. All Rights Reserved.

Microsoft(R) SQL Server(tm) is (c) Copyright 2008, Microsoft Corporation. All rights reserved.

This software includes software developed by the Apache Software Foundation (**<http://www.apache.org/>**).

This program includes Firebird SQL Database Engine v1.5. Firebird SQL Database Engine v1.5 was developed by Inprise Corporation, now called Borland Software Corporation Copyright © 2001-2005. All Rights Reserved.

For FBExport see **<http://fbexport.sf.net>**.

The Sentry Spelling-Checker Engine Copyright © 1999 Wintertree Software Inc.

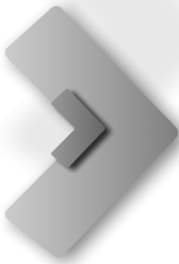
Portions Copyright © 1998-2008 The OpenSSL Project. All rights reserved.

USE OF THIS SOFTWARE AND ITS RELATED USER DOCUMENTATION IS SUBJECT TO THE TERMS AND CONDITIONS OF THE APPLICABLE END-USER LICENSE AGREEMENT (EULA), A COPY OF WHICH IS FOUND IN THE USER DOCUMENTATION. YOU MUST AGREE TO THE TERMS AND CONDITIONS OF THE EULA IN ORDER TO USE THIS SOFTWARE. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THE EULA, PROMPTLY RETURN THE UNUSED SOFTWARE IN ITS UNOPENED CD PACKAGE TO THE PLACE FROM WHICH YOU OBTAINED IT FOR A REFUND.

WARNING: The software described in this manual and its related user documentation are protected by copyright law. In no event, shall any part of the related user documentation be copied, reproduced, distributed, transmitted, stored in a retrieval system, or translated into any language, without the express written permission of FrontRange Solutions USA Inc.

Contact FrontRange Solutions USA Inc. at our Web site: **[www.frontrange.com](http://www.frontrange.com)**

(June. 2009)



# Table of Contents

## Introduction

Welcome to GoldMine .....	vii
About this Guide .....	vii
Audience and Expertise .....	vii

## System Requirements

Overview .....	1-1
Environments .....	1-2
Host Requirements .....	1-2
Server Requirements .....	1-2
Workstation System Requirements .....	1-4
Undocked/Single-user Requirements .....	1-4
Software Requirements .....	1-5
Additional Requirements .....	1-6
GoldSync Requirements .....	1-7

## Installing Premium Edition

Overview .....	2-1
Planning for Installation Checklist .....	2-2
Installing GoldMine on Windows XP .....	2-3
Installing GoldMine on Windows Vista .....	2-3
Installing Universal Search .....	2-4
Installing Universal Search from Within GoldMine .....	2-4
Installing Universal Search from a Command Prompt .....	2-4
Searching Emails in Vista .....	2-5

Changes to System Files .....	2-6
Changes to System Files for Microsoft Windows Vista .....	2-6
Installation Checklists .....	2-7
Server Installation Checklist .....	2-8
Shared Workstation Installation Checklist .....	2-9
Undocked Computer Installation Checklist .....	2-9
Installing on a Server (SQL Database) .....	2-10
Unattended Installation .....	2-18
Running a Shared Workstation Installation .....	2-20
Sharing the GoldMine Folder on the Server .....	2-21
Mapping a Drive on the Workstations .....	2-22
Installing on a Workstation .....	2-22
Running an Undocked Computer Installation .....	2-26
Upgrade Considerations .....	2-33
Upgrading a Server (SQL Database) .....	2-34
Upgrading Remote Systems .....	2-35
Upgrading Licenses .....	2-36

## Licensing and Registration

Overview .....	3-1
General Licensing Information .....	3-1
License Types .....	3-2
License Serial Number .....	3-3
License Manager .....	3-4
Licensing with a Master License .....	3-5
Licensing Following Installation .....	3-5
Creating Sub-licenses .....	3-9
Creating Sub-licenses for Remote Offices .....	3-9
Creating Sub-licenses for Undocked Users .....	3-11
Licensing with Sub-licenses .....	3-13
Site License .....	3-13
Undocked License .....	3-13
Evaluation License .....	3-14

## Configuring

Overview .....	4-1
Configuration Considerations .....	4-2
Placing a Custom Image in the Logon Window .....	4-3

## Firebird Information

Overview .....	5-1
Using Firebird With The Windows XP SP2 Firewall .....	5-1

## Installing Microsoft SQL Server

Overview .....	6-1
Installing Microsoft SQL Server 2008 .....	6-2
Post-Installation Configurations .....	6-15
Installing Microsoft SQL Server 2005 .....	6-16
Troubleshooting .....	6-27

## Installing Management Intelligence

Overview .....	A-1
Installing Management Intelligence .....	A-2
Initial Setup .....	A-5
Establishing the ODBC .....	A-5
Verifying the SQL Login .....	A-12
Starting Manager's Console .....	A-13

## Migrating Large Databases

Overview .....	B-1
Database Preparation .....	B-2
Failure During Upgrade .....	B-3

## Converting dBASE Databases to MSSQL

Overview .....	C-1
Upgrading European Special Characters .....	C-2

## Resources

Additional Documentation .....	D-1
Contact Us .....	D-2

## TradeMarks and Licensing Agreement

Trademark Notices .....	E-2
-------------------------	-----

## Index



# Introduction

---

## Welcome to GoldMine

GoldMine 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.

## About this Guide

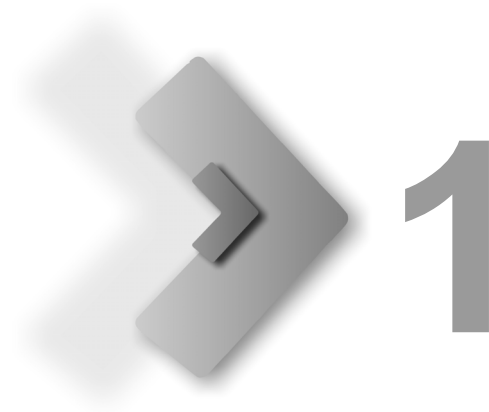
The *GoldMine Installation Guide* describes the basic components and steps for installing GoldMine on your server, client workstations, and undocked computers, and helps you integrate GoldMine smoothly with your other technology tools.

## 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

---

## Overview

This chapter provides the system requirement information you need before you begin a network server, client workstation, or undocked/single-user GoldMine installation.

Only users with local Administrator rights, or users who belong to the Administrator group, can install GoldMine.

---

**IMPORTANT:** 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.

---

---

**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)**.

---

## 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 Server, or select a regular computer to host a server installation. Environment is influenced by database size and capabilities, performance considerations, number of shared/undocked users, etc.

GoldMine uses either the Microsoft SQL Server or Firebird database.

## Host Requirements

Requirements are listed for the following:

- Server
- Shared Workstation
- Undocked/Single-user

If using GoldMine with Microsoft SQL Server, use **Recommended** instead of **Minimum** requirements.

## Server Requirements

### Network Operating Systems

FrontRange Solutions supports these network operating systems:

- Microsoft Windows Server 2003 SP2 (supported).
- Microsoft Windows Server 2003 R2 (supported).
- Microsoft Windows Server 2003 R2 SP2 (recommended).
- Microsoft Windows Server 2008 (recommended).

---

**Note:** The 64-bit version of Windows is supported.

---

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)

## 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

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

## Performance Considerations

Server RAM and CPU requirements vary, depending upon your database 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.

## 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.

### Operating Systems

FrontRange Solutions supports these workstation operating systems:

- Microsoft Windows Vista SP1 (recommended)
- Microsoft Windows XP SP2 (supported)
- Microsoft Windows XP SP3 (recommended)

---

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

---

## Undocked/Single-user 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 GoldMine server.

---

**CAUTION:** If you are running Windows XP you must have Admin or Power User rights in order to install GoldMine.

---

## Operating Systems

FrontRange Solutions supports:

- Microsoft Windows Vista SP1 (recommended)
- Microsoft Windows XP SP2 (supported)
- Microsoft Windows XP SP3 (recommended)

---

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

---

## Performance Considerations

Your RAM and CPU requirements vary depending upon your database and these factors:

- Number of items in the database:
  - Contact Records (1K each)
  - Detail Records (2K each)
  - History Records (1K each)
  - User-defined field
- Number of simultaneous users on the network
- Database size

## Software Requirements

Use Microsoft Internet Explorer 7.0 with GoldMine.

Microsoft Windows Installer 4.5 or later (For SQL 2008 - may require server restart).

## Additional Requirements

- **Microsoft SQL Server 2005 (SP2 - supported or SP3 - recommended) or Microsoft SQL Server 2008 (recommended)** must be installed and configured if you are using a SQL database.
- **Microsoft SQL Server 2005/2008 Reporting Services** must be installed and configured to use the Scheduled Reports feature.
- **Microsoft SQL Server 2005/2008 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 .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 .NET Framework 3.5 SP1** must be installed for SQL 2008. (requires server restart).
- When installing SQL 2008, the Windows Installer creates temporary files on the system. Make sure you have at least **2.0 GB** of available space on your system drive. This requirement applies even if you have installed SQL server components to a non-default drive.
- **Microsoft Visual Studio 2003 .NET** must be installed and configured to create reports for the Scheduled Reports feature. End users do not require this application.
- When you select a Firebird database during installation of GoldMine, a working copy of **Firebird 1.5** is installed. To change the default password, Firebird comes with an ISQL command line tool.

There are also free tools to help you administer Firebird, such as those available from **FlameRobin**, **FeniSQL**, and **IBExpert**. The **Firebird 1.5 Quick Start Guide** provides essential details and is available online at [www.firebirdsql.org/index.php?op=doc](http://www.firebirdsql.org/index.php?op=doc). To take advantage of other Firebird features, see [www.ibphoenix.com](http://www.ibphoenix.com) and [www.firebirdsql.org](http://www.firebirdsql.org) for additional information.

---

**Note:** FrontRange Solutions does not provide support for these third-party tools.

---

## 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.



---

For details on GoldSync implementation and functionality, see the "Synchronization: About GoldSync" online help topic.

---

### GoldSync System Requirements

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





# Installing Premium Edition

---

## 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.

## Planning for Installation Checklist

When planning a GoldMine installation consider:

1. **Who will be the designated GoldMine administrator?** The GoldMine administrator should have access to network and office resources and be able to address the business-related implementation issues regarding configuration and customization.
2. **Do you have the proper license and registration information for the version of GoldMine you are installing?** For detailed information on licensing, see Chapter 3, "Licensing and Registration."



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.

---

3. **Are you going to import data?** Verify that you can import the source data into GoldMine.
4. **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.
5. **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 on the Web site at **[support.frontrange.com](http://support.frontrange.com)**.
6. **Have you reviewed the network structure?**
  - Are there multiple domains? Do the users have the correct 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.
7. **What type of database are you using?** Decide whether to use a Microsoft SQL Server database or a Firebird database. Ask your Sales representative for information.

## Installing GoldMine on Windows XP

Windows XP is not a supported platform for a server.

- Some users may encounter issues with the auto-run installation.
- For users of GoldMine 5.0-5.7 who back up GoldMine by copying the GoldMine folder at C:\Program Files, this means they are not copying their data files and must browse to Documents and Settings\All Users\Application Data\GoldMine to find their data folders.
- Customers using a Windows XP system as a server may have problems with the client workstations accessing the data on the network due to the “split.” Users may encounter license errors when performing NetUpdates.

---

**Note:** Microsoft SQL Tools must already be installed, before doing a complete installation of GoldMine on XP. For more information, visit [www.microsoft.com](http://www.microsoft.com).

---

## Installing GoldMine on Windows Vista

- Although the install process for Vista is very similar to Windows XP, it is not supported as a GoldMine server environment. You may install and run GoldMine on Vista, but you may not share your installation with other workstations over a network.
- You may 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.
- The installer will offer customized path settings for GoldMine's program files and program data. 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.

## Installing Universal Search

Universal Search can be installed using one of the following procedures:

---

**Note:** You can also install Universal Search by selecting **Yes** at the end of the Licensing Wizard (see "Licensing Following Installation" on page 3-5).

---

### Installing Universal Search from Within GoldMine

1. Start GoldMine
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.

### Installing 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:install** 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 Emails in Vista

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

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:**

"2008-09-12 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.

2008-09-12 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 problem, perform the following procedure.

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 Microsoft SQL Server
4. Restart the Microsoft Fulltext service  
Or at least restart the computer.
5. Re-install the Universal Search.

After installing Universal Search you might see the following message:

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

## Changes to System Files

Located in the GoldMine folder, these store user and licensing information. System files typically take a BIN or XML format, whether you use Firebird or SQL as your database system.

- **DataDict.xml:** Includes database and field definitions and is required for creation of required databases and maintenance operations.
- **Flags.bin:** Controls the number of users logged on to GoldMine.
- **License.bin:** The system's license control table that stores License Manager information and validates incoming sync connections.
- **Users:** Formerly **Users.dbf**, this is now a table. It is rehosted to the SQL Server starting with version 7.0. It 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.
- **GoldMine.fdb:** Default database name when Firebird is selected during installation.
- **Firebird ODBC driver:** Made up of the **lscDbc.dll**, **OdbcJdbc.dll**, and **OdbcJdbcSetup.dll** files.

## Changes to System Files for Microsoft Windows Vista

When installing GoldMine onto a Microsoft Windows Vista system, a *split-path* installation is used. This is due to security changes in Vista'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**.

## Installation Checklists

If you are:	Then run:
<b>Shared 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:</b> An individual who often works remotely on a computer with an Undocked sublicense, who synchronizes with a GoldMine 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>Gold Sync Server</b>	Full Setup, connected to an existing database
<b>Shared 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 client workstations 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 GoldMine server or on another computer on your network. See "Additional Requirements" on page 1-6.
- ☐ **Install GoldMine:** Install on the computer serving as your GoldMine server. Select the Server Setup installation and follow the directions in this manual.
- ☐ **License the server copy of GoldMine:** Licensing registers the shared server copy of GoldMine with the appropriate license. See Chapter 3, "Licensing and Registration."
- ☐ **Verify you can launch GoldMine:** Ensure the server installation is functioning properly before installing any workstations.
- ☐ **Share the GoldMine folder:** In order for the client workstations to connect to the shared copy of GoldMine, you must first share the folder in which GoldMine is installed.

## Shared 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 2-21.
- ☐ **Install GoldMine on the Client Workstation:** See "Running a Shared Workstation Installation" on page 2-20.
- ☐ **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 Chapter 3, "Licensing and Registration."
- ☐ **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 "Running an Undocked Computer Installation" on page 2-26.
- ☐ **License GoldMine:** Use the appropriate U-license information. See Chapter 3, "Licensing and Registration."
- ☐ **Verify you can launch GoldMine:** Ensure the undocked installation is functioning properly.

## Installing on a Server (SQL Database)

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 running a Shared Workstation installation).

---

**IMPORTANT:** The following steps are for a **New Install**. If you have had a previous version installed, remove the existing version, folders, and databases before proceeding. If upgrading, use the steps in "Upgrading a Server (SQL Database)" on page 2-34.

---

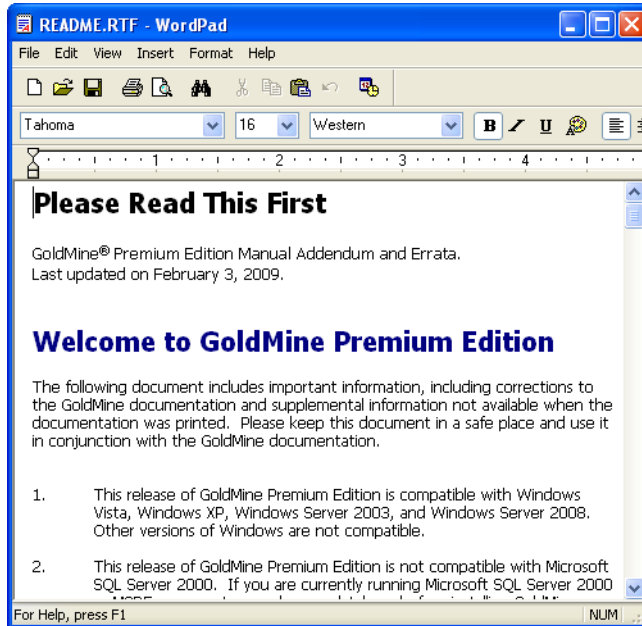
### To install on a server

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.

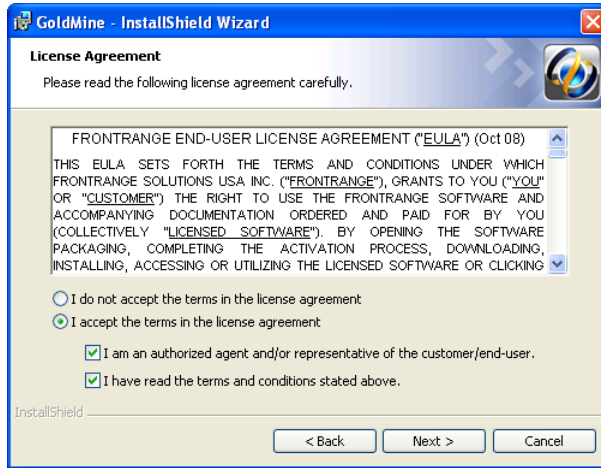


---

**Note:** The README.RTF file contains the most recent information about this version of GoldMine.

---

4. Close this dialog box 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.

---

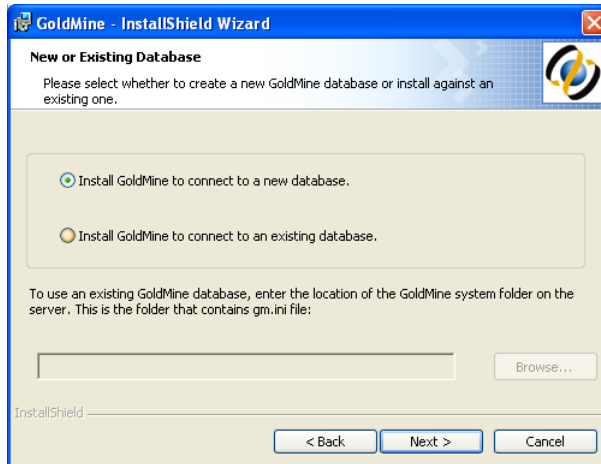
7. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

---

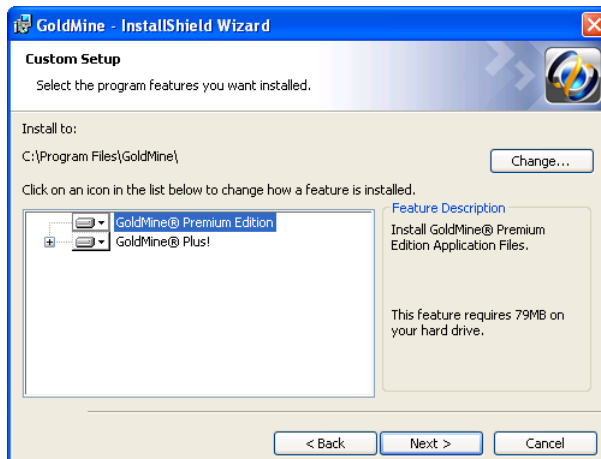
**IMPORTANT:** Select **I am an authorized agent and/or representative of the customer/end-user** and **I have read the terms and conditions stated above** to continue.

---

8. Click **Next**. The **New or Existing Database** dialog box appears. Choose the desired option to connect to a new or existing database. If you are connecting to an existing database, use the **Browse** button to navigate to its location.



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



10. To install GoldMine Premium Edition application files and GoldMine Plus! Microsoft add-in components, click **Next**.

---

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

---

There are three options under the GoldMine Plus! option:

- **For Microsoft Word**

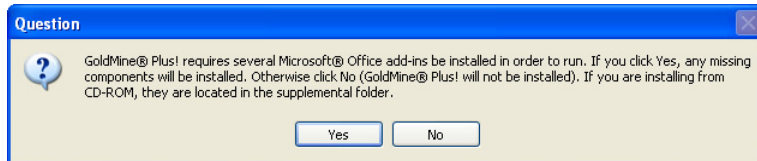
- For Microsoft Excel
- For Microsoft Outlook

---

**Note:** To install only the GoldMine application without GoldMine Plus! components, click the GoldMine Plus! icon, and select “**This feature will not be available**” from the drop-down menu. Click **Next**. GoldMine Plus! will not be installed at this time. You may install these components at a later date using the **Add or Remove Programs** control panel in Windows, then selecting **GoldMine** from the list. Choose **Change** from dialog window options to access the GoldMine Plus! installer.

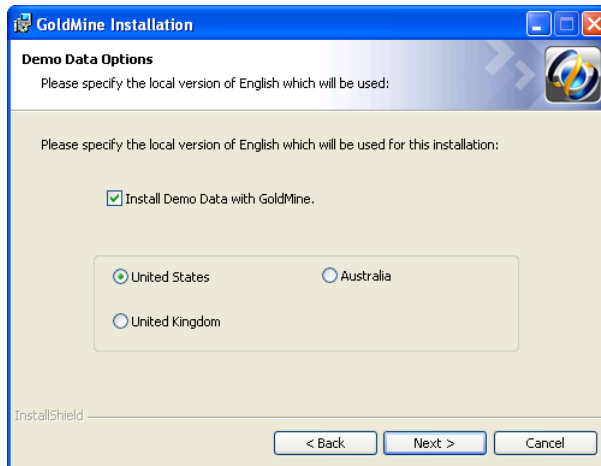
---

11. A **Question** box appears.



12. To install all add-in components, click **Yes**. To install only GoldMine applications, click **No**.

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



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

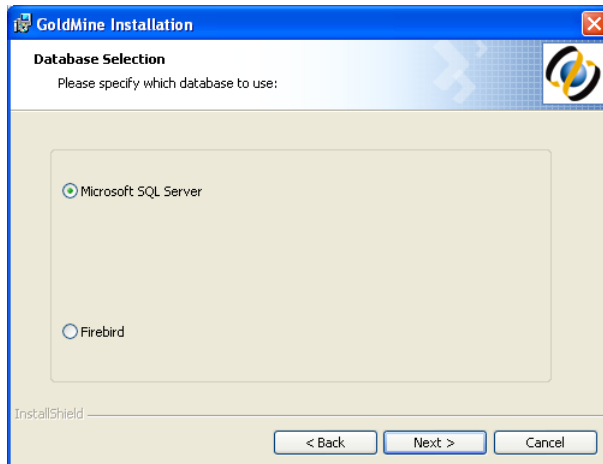
15. To add the demonstration data to the database, check the **Install Demo Data with GoldMine** box.

---

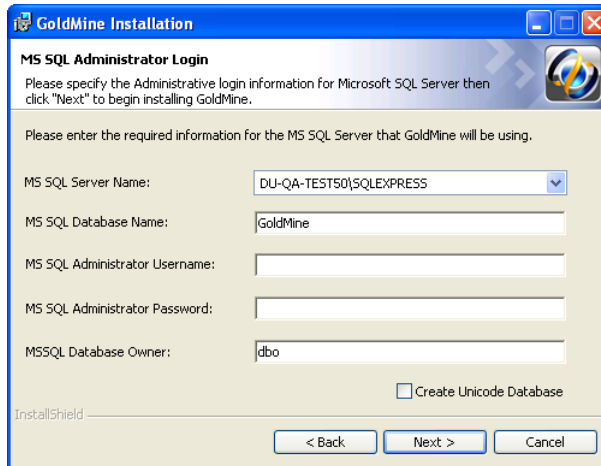
**Note:** When upgrading, this dialog box does not appear.

---

16. Click **Next**. The **Database Selection** dialog box appears.



17. Select **Microsoft SQL Server**.
18. 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

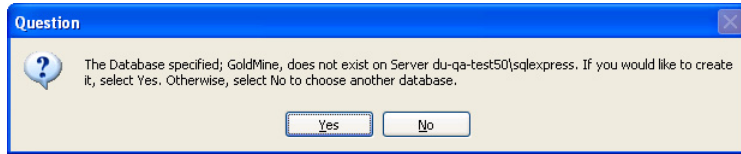
- **MS SQL Server Name:** Type or select the name of the computer on your network where SQL Server is installed.
- **MS SQL Database Name:** GoldMine creates and installs the demo data in a SQL database called GoldMine. If you want your database to have a different name, type it in the text box.
- **MS 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**.

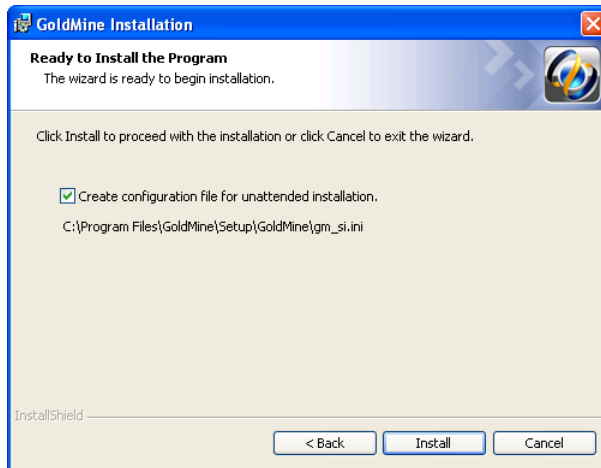
---

19. When creating a new database, a Question dialog box appears.



Click **Yes** to create the GoldMine database on the server, or click **No** and chose another.

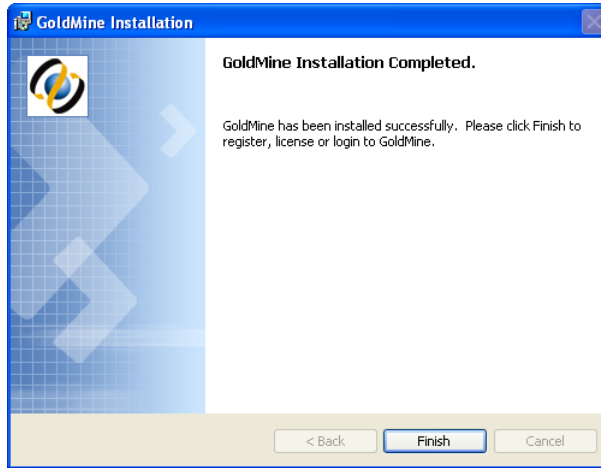
20. Click **Next**. The **Ready to Install the Program** dialog box appears.



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.

21. Click **Install** to begin installing GoldMine.  
22. The **Installing GoldMine** dialog box appears.

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



23. Click **Finish**.

---

**IMPORTANT:** The Welcome to GoldMine dialog box appears to begin the licensing process. See "Licensing and Registration" on page 3-1.

---

## Unattended Installation

Another installation option is the **Unattended Installation**. 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.

The Unattended Installer uses special a configuration file named (**gm\_si.ini**). The following procedure shows you how to create this file.

---

**Note:** When running an unattended installation on an undocked machine, you will need to modify the serial number in the configuration file each time you run it, so that the appropriate serial number is used. You might also have to change the Host name to match the local machine.

---

### To create configuration file for Unattended Installation

1. Run GM installer as usual.

For more information on installing, see "Installing on a Server (SQL Database)" on page 2-10.

2. Proceed to **Install Welcome** dialog (it's the last dialog).
3. Select the **Create configuration file for silent installation** checkbox and choose a location for this file
4. Click **Install**.

The configuration file and bat file (**gmsetup\_si.bat**) will be created.

---

**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

1. 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 server local installations.

### To upgrade Unattended Installation

1. Create the configuration file.

For instructions, see "To create configuration file for Unattended Installation" on page 2-19.

2. Select **GoldMine >> Tools >> Configure >> System Settings >> Upgrade.**
3. Set the paths and filenames of the GoldMine installer and configuration file created in step 1.

---

**Note:** This should 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.

## Running a Shared Workstation Installation

A shared workstation setup installs GoldMine on the workstation and enables a workstation user to connect to the shared 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 (not recommended if using softPhone, Management Intelligence, or a Firebird database).

## Sharing the GoldMine Folder on the Server

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

---

**IMPORTANT:** Sharing may expose other applications. Do **not** install GoldMine as a root folder of the drive, rather, install to **C:\apps\GoldMine** (on Windows Server 2003, Windows Server 2008, and Windows XP Professional) and install the server copy of GoldMine to this folder.

---

1. Navigate to and select the **GoldMine** folder on the server. For example:  
**C:\apps\GoldMine**
2. Right-click for a menu and select **Sharing and Security**. The **GoldMine Properties** dialog box appears.
3. Click the **Sharing** tab.
4. Select the **Share this folder** option.
5. Name the shared folder **GoldMine**.
6. Set the **User Limit** to **Maximum Allowed**.
7. Click **Permissions**. The **Permissions for GoldMine** dialog box appears.
8. From the **Group or User Names** list, select the workstation's user.
9. In the **Permissions for** area, select the **Full Control** check box.
10. Click **OK**. The **GoldMine Properties** dialog box reappears.
11. Click **OK**.

---

**Note:** If you are using a different Windows operating system, your steps may vary.

---

## Mapping a Drive on the Workstations

To enable sharing the GoldMine folder on the server, we recommend all workstations accessing the shared GoldMine folder be mapped to the same network drive letter (for example, **G:**) to facilitate GoldMine administration and operations related to linked documents and synchronization.

---

**Note:** The synchronization process will NOT include linked files referenced by mapped drive designations. If linked files were added using mapped drive paths, you can use Linked Document Mover (**Tools>Data Management>Move Linked Docs and Attachments**) to replace a path using a mapped drive with a UNC path before synchronizing.

---

1. On the workstation computer, 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, for example, **\\GoldMine Server\GoldMine**.
4. Select the **Reconnect at Logon** check box.
5. Click **OK**.
6. Click **Finish**.
7. Repeat this procedure on each client workstation computer.

## Installing on a 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 appears. Close this dialog box 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.

---

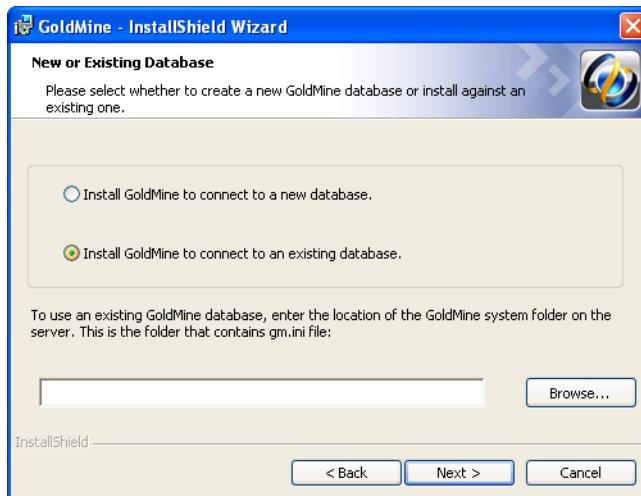
5. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

---

**IMPORTANT:** 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.

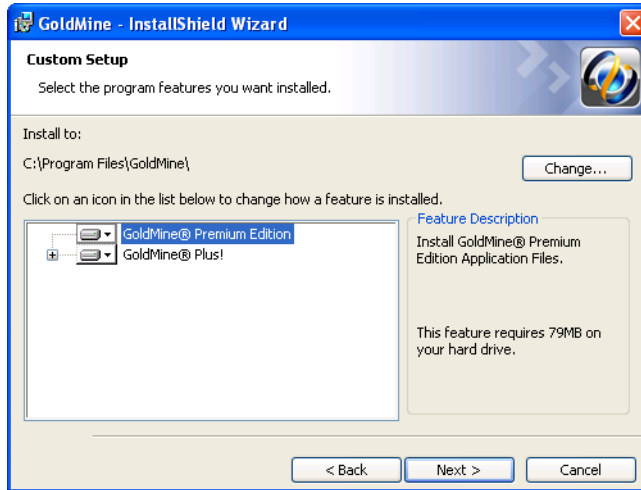
---

6. Click **Next**. The **New or Existing Database** dialog box appears.



Choose the **Install GoldMine to connect to an existing database** option, and then click the **Browse** button to navigate to the system folder on the server.

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



The default installation location is **C:\Program Files\GoldMine**.

8. If the default path is not the location you want for the local workstation, click the **Change** button.

---

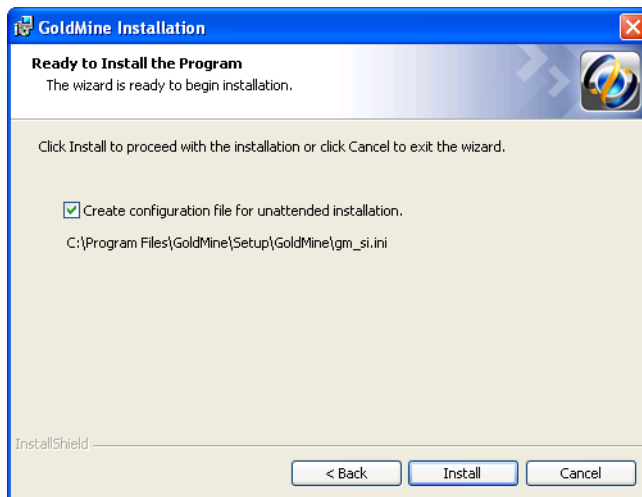
**Note:** Choosing a location outside of the **\Program Files** directory when installing on Vista can cause a loss of certain functionality, such as macro recording. This is due to security requirements within Vista, which connects certain privileged functions with the locations from which their associated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

---

9. On the **Change Ini Files Location Folder** dialog box, you can change to the destination folder for the installation files. In the **Folder name:** textbox, enter a valid folder on the local computer where you want to install these files, or browse to the desired location on the local workstation for the installation.



10. 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.

---

11. Click **Install**. The network shortcuts are installed on your workstation computer.
  12. When finished, the **Installation Completed** dialog box appears.
- Repeat steps 1-12 for each workstation accessing GoldMine.

---

**IMPORTANT:** 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.

---

### Performance Considerations

Named Pipes should be enabled and should be the top of the enabled protocols list for clients. For more information, see step 18 in "Installing Microsoft SQL Server 2008" on page 6-2.

## Running an Undocked Computer Installation

An Undocked setup is the same as a full setup, with the only difference being the license number.



---

If the undocked computer you are upgrading or installing works remotely, see "Upgrade Considerations" on page 2-33.

---

### Installation Notes

- 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).

## To Run an Undocked Computer Installation

The following procedure explains how to run the installation.

1. On the undocked computer, navigate to 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 appears. Close the dialog box 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.

---

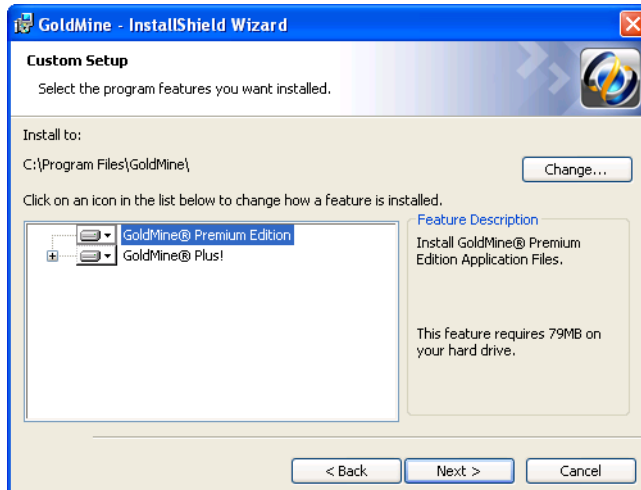
5. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

---

**IMPORTANT:** 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. Choose the desired option to connect to a new or existing database.
7. Click **Next**. The **Custom Setup** dialog box appears.



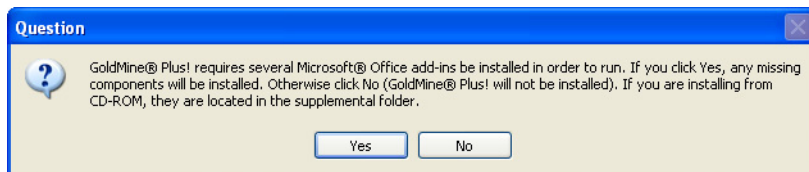
8. To install GoldMine Premium Edition application files and GoldMine Plus! Microsoft add-in components, click **Next**.

---

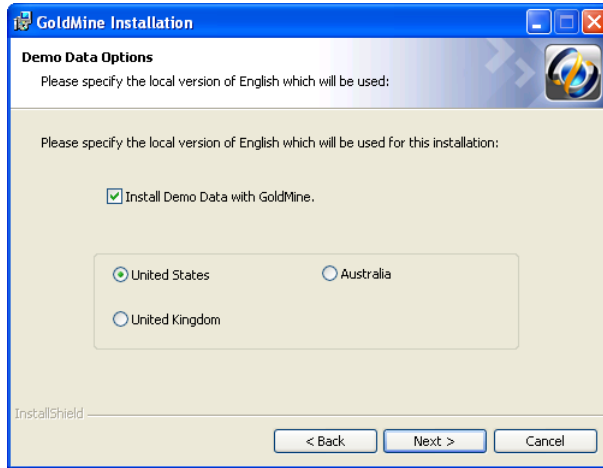
**Note:** To install only the GoldMine application without GoldMine Plus! components, click the GoldMine Plus! icon, and select “**This feature will not be available**” from the drop-down menu. Click **Next**. GoldMine Plus! will not be installed at this time. You may install these components at a later date using the **Add or Remove Programs** control panel in Windows, then selecting **GoldMine** from the list. Choose **Change** from dialog window options to access the GoldMine Plus! installer.

---

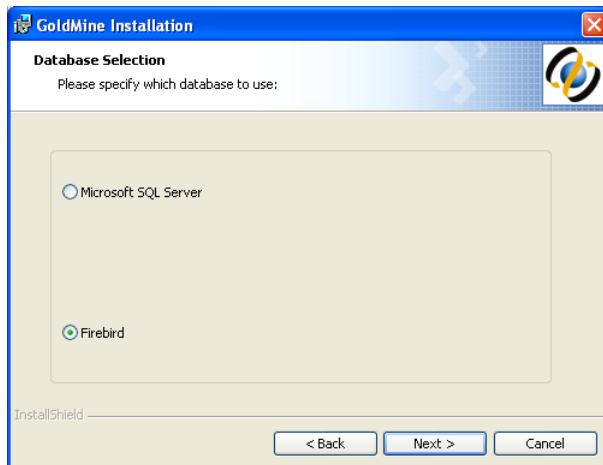
9. A **Question** dialog box appears.



10. To install all add-in components, click **Yes**. To install only GoldMine applications, click **No**.
11. The **Demo Data Options** dialog box appears.



12. Select the local version of English for your installation.
13. Click **Next**. The **Database Selection** dialog box appears.

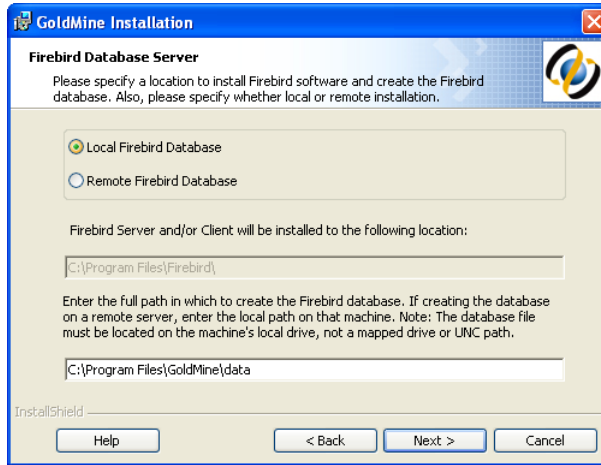


14. Select **Firebird**.

**Note:** Installation on an undocked computer can use the Firebird database or the Microsoft SQL Server database. The Firebird database is packaged

with the GoldMine installer. Microsoft SQL Server or Microsoft SQL Server Express can be used if installed separately, prior to installing GoldMine.

15. Click **Next**. The **Firebird Database Server** dialog box appears.



16. Select **Local Firebird Database**.
17. The **Firebird Server/Client** are installed to the drive where the OS is installed (in Program Files\Firebird\firebird\_1\_5 folder).
18. The **Firebird database** is installed locally on the Firebird server to **Program Files\ GoldMine\GoldMine\Data**. Accept the default or type an valid alternative path (such as <Firebird server> C:\Apps\GoldMine).
19. Click **Next**. The **Firebird Administrator** dialog box appears.

20. Accept the default or specify the appropriate information:

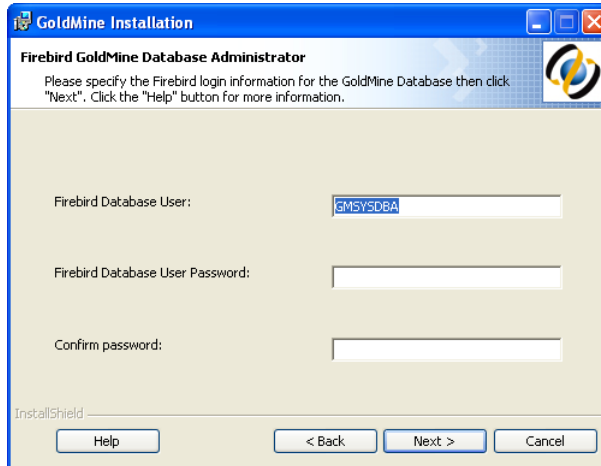
- **Firebird Server Name:** Name of remote server.
- **Firebird Database Name:** Name of new Firebird database (with FDB extension).
- **Firebird Administrator Username:** username.
- **Firebird Administrator Password:** password.

---

**Note:** For a local database these are pre-set initial values. For a remote database, enter the username and password to that database. To maintain security, you must change the user name and password after the installation is complete. See online Help for instructions.

---

21. Click **Next**. The **Firebird GoldMine Database Administrator** dialog box appears.



22. Accept the default or specify new database login for owner:
  - **Firebird Database User:** The default user **GMSYSDBA** is created.
  - **Firebird Database User Password:** Options are a) accept the default user and type a new password (write it down during setup), or b) type an existing user name. If you specify an existing user as owner, you must type that user's corresponding password before the installation proceeds (if authentication fails, the message "Unable to connect...." appears). Field has 8-character recognition limit.
  - **Confirm Password:** Retype password to confirm.
23. Click **Next**. The **Ready to Install the Program** dialog box appears.
24. Click **Install**. The **Installing GoldMine** dialog box appears. When finished, the **Installation Completed** dialog box appears.
25. Click **Finish**.

---

**Note:** The Welcome to GoldMine dialog box appears to begin the licensing process. See "Licensing and Registration" on page 3-1.

---

## Upgrade Considerations

This upgrade process is intended to be used with GoldMine 6.7 or higher. If you are upgrading a prior version, you must upgrade to 6.7 before upgrading to 8.5. Contact Customer Care at 800.776.7889 for information about upgrading from versions prior to 6.7.

---

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

---

- In addition to the 65 MB of disk space required for installation, 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 ( $2\frac{1}{2} \times 100$  MB).

- A database conversion may be required when upgrading from earlier versions of GoldMine. This conversion occurs automatically when GoldMine is installed into the path of the existing gmw5.exe or gmw6.exe.

---

**CAUTION:** 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 should be on the same version of GoldMine as the site with which they sync. If you are upgrading the server but are not upgrading undocked computers 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 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 8.5.
- If you have a previous version of GoldMine Integration Services for Microsoft Outlook, uninstall this version prior to upgrading.

## Upgrading a Server (SQL Database)

Be sure to review the "Installing on a Server (SQL Database)" on page 2-10.

---

**CAUTION:** If you are upgrading from a previous version of GoldMine, back up your existing GoldMine database and system before beginning the upgrade.

---

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. Close the dialog box to proceed with the installation.
4. Click **Next**. 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.

---

**IMPORTANT:** 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.
8. Select the program features you would like to install. Click **Next**.
9. Click **Next** to continue. The **MS SQL Administrator Login** dialog box appears.

10. Enter the Administrative login information for the Database Server.

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.

11. Click **Next**. The **Ready to Install the Program** dialog appears.

12. Click **Install** to start the installation.

## Upgrading Remote Systems

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

If you are upgrading a Site, the Master installation provides the site administrator with the **gmsetup.exe**.




---

See "Installing on a Server (SQL Database)" on page 2-10.

---

If updating an undocked computer, the Master installation provides the undocked computer user with the **gmsetup.exe**.




---

See "Running an Undocked Computer Installation" on page 2-26.

---



---

**IMPORTANT:** 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.

---

1. Upgrade the Master GoldMine site.
2. After upgrading the Master site, you can upgrade remote computers by sending them a **gmsetup.exe** installation file using one of these methods:
  - One-button Synchronization
  - 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 "Installing Universal Search" on page 2-4).

---

3. Remote users should run the installation CD or the **gmsetup.exe** on their computer following these upgrade instructions.
4. After remote users upgrade to the same version of GoldMine as the server, they can begin synchronizing again.

## Upgrading Licenses

Licenses can be upgraded using GoldMine's License Manager. Follow the steps below upgrade your license. For more information, see "Licensing and Registration" on page 3-1.

1. Login to GoldMine.
2. Open the **Tools** menu and select **Configure>License Manager**.
3. Click the **New License** button. The Enter GoldMine Serial Number dialog box appears.
4. Enter your GoldMine Serial Number and Key Code in the appropriate boxes and then click Next.
5. Check the boxes next to the Windows log-on accounts to import.
6. Click **Next**. The **Enter Your Username** dialog box.
7. If you want Goldmine to identify you by a specific username, enter a Username and Password in the appropriate text boxes.
8. Click **Finish**.



# 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.

GoldSync and Outlook Integration licenses are included in E licenses.

---

**Note:** For information about licensing serial number schema, see "License Serial Number" on page 3-3.

---

- **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.

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, Standard Edition, and GoldSync (J, R, and N), are now facilitated by obtaining a new E or G license (which account for the increase and the Master license count).

Master License		
<b>E</b>	<b>Edition License</b>	Supports SQL databases and includes GoldSync
<b>G</b>	<b>GoldSync Master License</b>	GoldSync seats purchased separately and can be added to E-Licenses
<b>O</b>	<b>GoldMine Outlook Integration Services License</b>	Outlook integration purchased separately to increase number of users with E-License
Sub-licenses		
<b>U</b>	<b>Undocked License</b>	Single sub-license for a remote GoldMine user
<b>S</b>	<b>Site License</b>	Multiple-user sub-license for a remote office
<b>Y</b>	<b>GoldSync License</b>	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	002570	1	23456	1	A2B3C4D5E6F7G8	9	H12J3K4L5M6NF7											
	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:** Your 6-digit HDA number.
- **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.

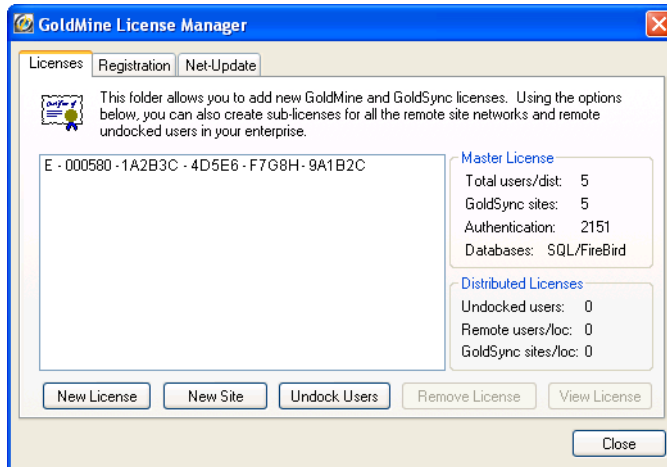
---

**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.

---

**IMPORTANT:** Licensing information is stored in the license file, **License.bin**, created at the time you register. This file must exist only in the GoldMine root directory of each GoldMine installation.

---



Additional License Manager information is provided in the online Help.

---

## Licensing with a Master License

A GoldMine Edition Master License begins with the alpha-prefix E (*Example:* E-005070-111111...).

The E-license is usually a multi-user license for a server installation of GoldMine but may be a single-user license for a stand-alone 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.

---

**IMPORTANT:** 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.

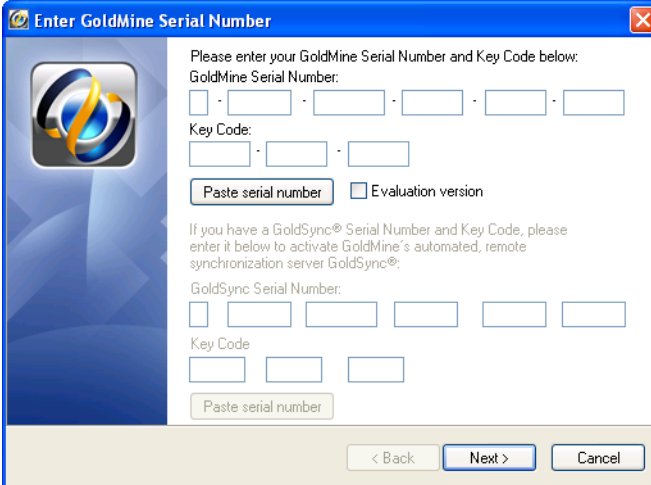
---

**IMPORTANT:** 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.

### 3-6 Licensing and Registration



**Enter GoldMine Serial Number**

Please enter your GoldMine Serial Number and Key Code below:

GoldMine Serial Number:  
 -  -  -  -  -

Key Code:  
 -  -

☐ Evaluation version

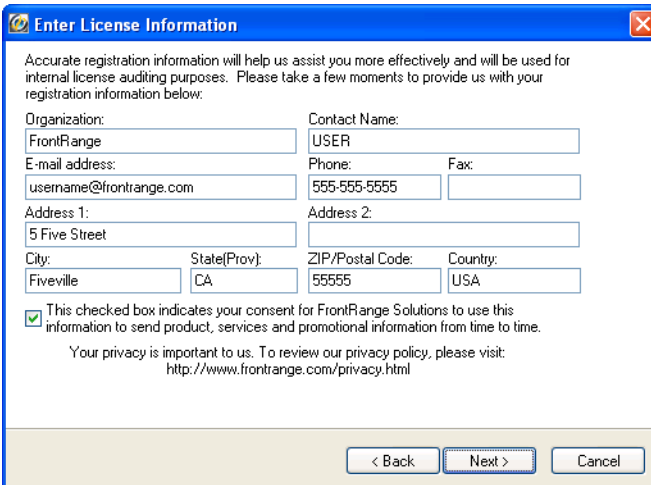
If you have a GoldSync® Serial Number and Key Code, please enter it below to activate GoldMine's automated, remote synchronization server GoldSync®:

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: <input type="text" value="FrontRange"/>	Contact Name: <input type="text" value="USER"/>		
E-mail address: <input type="text" value="username@frontrange.com"/>	Phone: <input type="text" value="555-555-5555"/>	Fax: <input type="text"/>	
Address 1: <input type="text" value="5 Five Street"/>	Address 2: <input type="text"/>		
City: <input type="text" value="Fiveville"/>	State(Prov): <input type="text" value="CA"/>	ZIP/Postal Code: <input type="text" value="55555"/>	Country: <input type="text" value="USA"/>

☒ 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

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.

---

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

---

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

### 3-8 Licensing and Registration

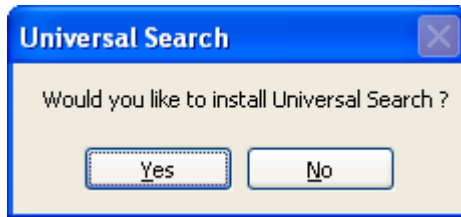


8. Type a user name (eight characters or fewer). The password is optional. GoldMine requests these at log in. This user has Master Rights in GoldMine.
9. Click **Finish**. The **GoldMine Logon** dialog box appears.



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

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



For more information about Universal Search, see "About Universal Search" in the *GoldMine User Guide* or online help.

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

## 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.

---

**CAUTION:** 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)**.

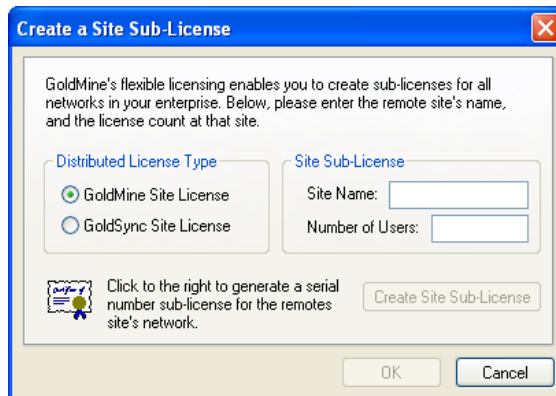
Each "S" and/or "Y" sub-license transfers seat availability from non-remote users. A minimum of one seat must remain available to non-remote users. For example, you must have at least 5 seats to make GoldMine available to 4 remote offices. Headquarters retains the fifth seat.

---

**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. The information only displays in its entirety during the creation process.

---

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.

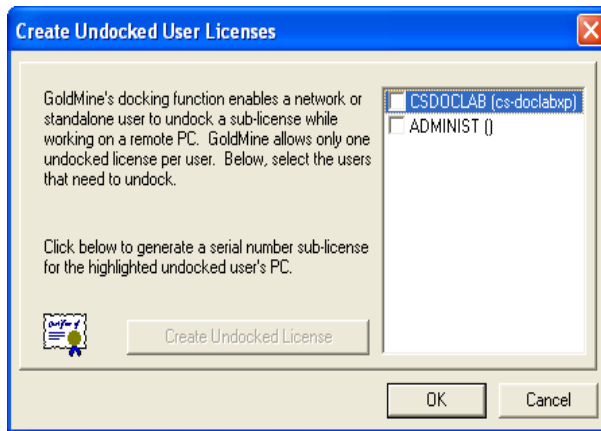
---

**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.
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 8.5 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.



# 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?



---

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:\GoldMine\MyLogo.bmp**

Save GM.ini, then exit the text editor. Open GoldMine to display the changed login screen.






# Firebird Information

---

## Overview

Firebird is an open-source SQL solution. When you select a Firebird database during installation of GoldMine 8.5, a working copy of Firebird 1.5 is installed.


---

 Obtain the source code and documentation for Firebird from the downloads page at <http://www.ibphoenix.com>. Obtain the FlameRobin database administration tool for Firebird DBMS from the downloads page at <http://www.flamerobin.org/>.

---

After GoldMine installation, the license files can be found in the **Program Files\Firebird\Firebird\_1\_5** folder.

---

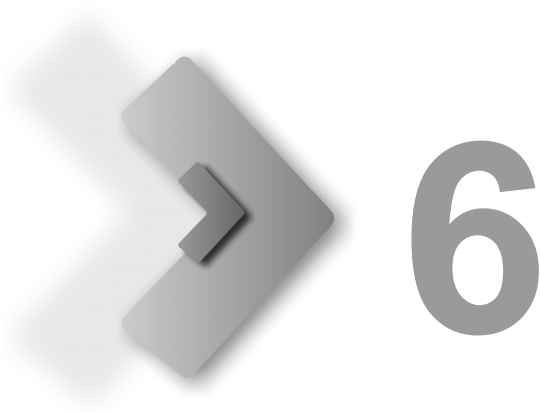
 Obtain a copy of this source code license from the Firebird Project Web site at: <http://www.firebirdsql.org/index.php?op=doc&id=idpl>.

---

## Using Firebird With The Windows XP SP2 Firewall

The firewall included with Windows XP SP2 blocks port 3050, which the Firebird databases use. If you use a Firebird database and cannot access GoldMine from a workstation, either disable the Windows firewall or adjust your security settings to enable port 3050. You can adjust your Windows Firewall settings from the Security Center on the Control Panel.





# Installing Microsoft SQL Server


---

## Overview

The GoldMine Server Setup requires you to install Microsoft SQL 2008 before installing GoldMine.

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.

---

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

---

## 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 Small Business Server 2008.

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

---

**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 **Start** button 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.



6. Read the licensing agreement and select the **I accept the license terms** check box to indicate agreement. Click **Next**. The **Setup Support Files** dialog box opens.



7. Click **Install**. The operations runs to install the Setup Support Files. This may take several minutes.



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.



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. After your computer has rebooted, select **Start>>Programs>>Microsoft SQL Server 2008>>Configuration Tools>>SQL Server Configuration Manager**. The SQL Server Configuration Manager launches.
22. On the left pane, expand the **SQL Server Network Configuration** section, and select **Protocols for MSSQLSERVER**.
23. On the right pane, locate and select the protocol name **Named Pipes**.
24. Right-click on **Named Pipes** and select **Enable**. The following warning message appears:  
  
*Any changes made will be saved, they will not take effect until the service is stopped and restarted.*  
  
Select **OK**.
25. Exit the **SQL Server Configuration Manager**.
26. In Windows, go to **Start>>Settings>>Control Panel>>Administrative Tools>>Computer Management**.
27. Expand **Services and Applications** and select **Services**.
28. 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. Select **Start>>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**.
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**.

## Installing Microsoft SQL Server 2005

If you opt 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 8.5.

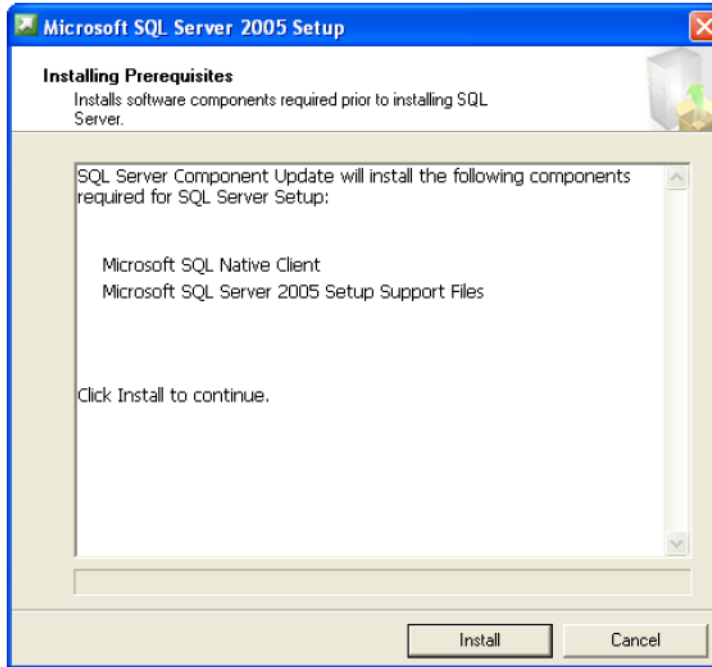
---

The main window opens.



2. Select **SQL Server 2005 Components**. The **End User License Agreement** window opens. To install SQL Server 2005, you must accept the terms of the End User License Agreement.

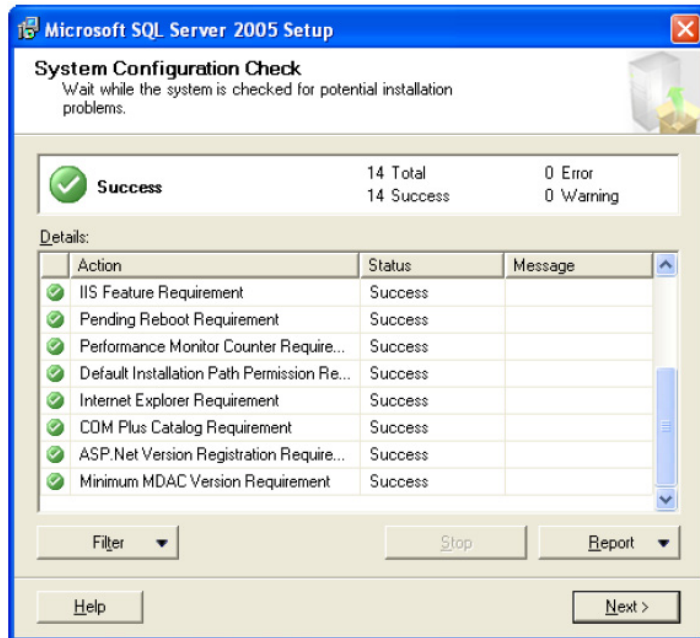
3. When you have reviewed and accepted the terms, click **Next**. The **Installing Prerequisites** window opens.



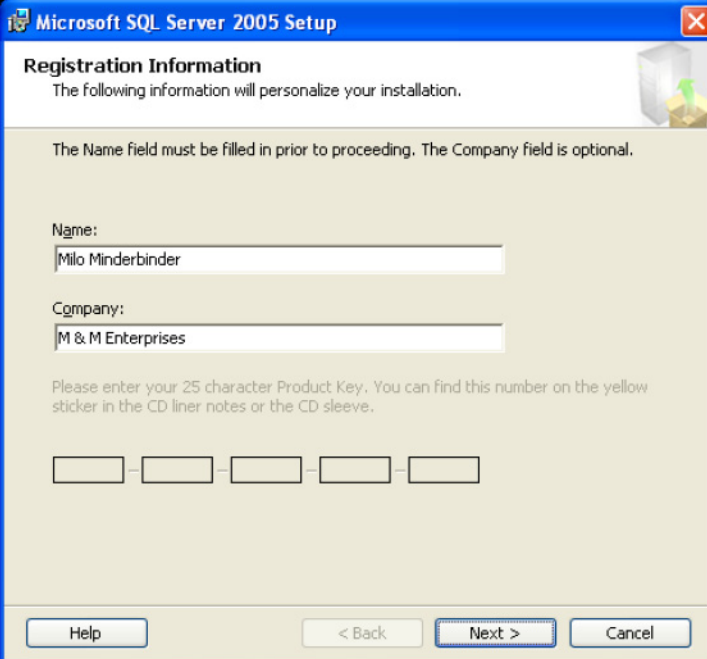
4. Click **Install**. After the software prerequisites are installed, click **Next**. The **Welcome** window opens.



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



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



The screenshot shows the 'Microsoft SQL Server 2005 Setup' window with the 'Registration Information' tab selected. The window has a blue title bar and a standard Windows XP-style interface. The main content area is light beige. At the top, it says 'Registration Information' followed by 'The following information will personalize your installation.' Below this, a note states: 'The Name field must be filled in prior to proceeding. The Company field is optional.' There are two text input fields: 'Name:' with the text 'Milo Minderbinder' and 'Company:' with the text 'M & M Enterprises'. Below these fields, a message says: 'Please enter your 25 character Product Key. You can find this number on the yellow sticker in the CD liner notes or the CD sleeve.' Underneath this message are five empty text boxes separated by hyphens. At the bottom of the window, there are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a blue border.

**Microsoft SQL Server 2005 Setup**

**Registration Information**  
The following information will personalize your installation.

The Name field must be filled in prior to proceeding. The Company field is optional.

Name:  
Milo Minderbinder

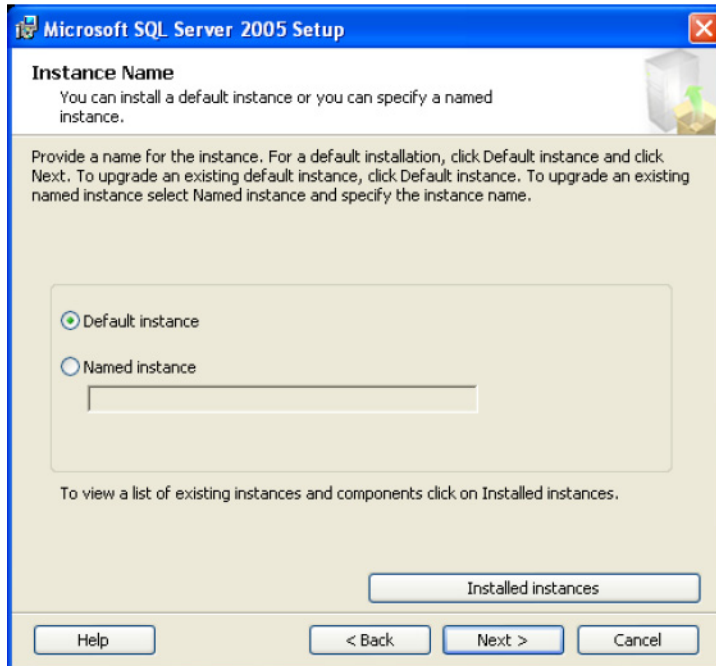
Company:  
M & M Enterprises

Please enter your 25 character Product Key. You can find this number on the yellow sticker in the CD liner notes or the CD sleeve.

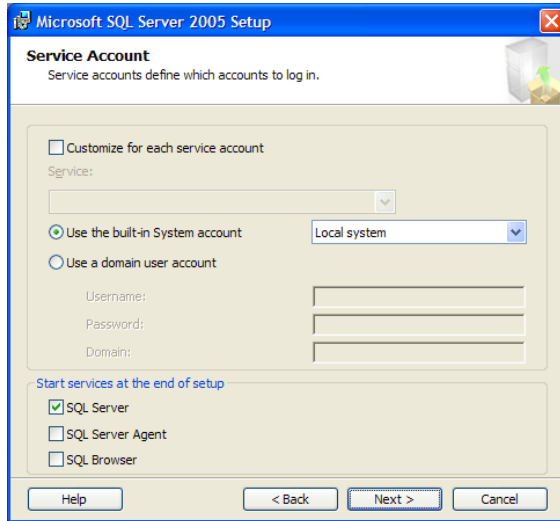
— — — — —

Help < Back Next > Cancel

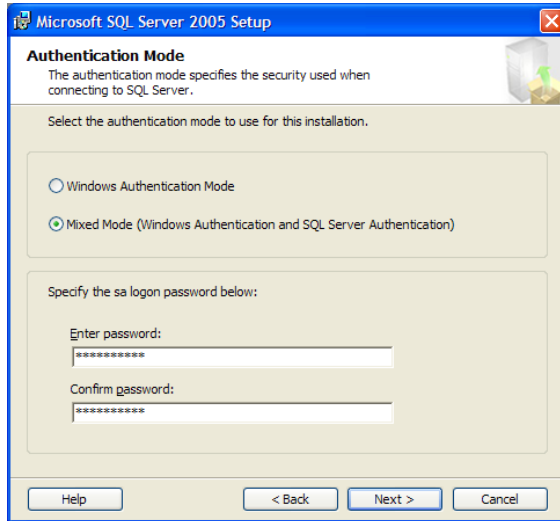
7. Click **Next**. The **Feature Selection** window opens.
8. In the **Feature Selection** window, select **SQL Server Database Services** and **Workstation components, Books Online and development tools**, then click **Next**. The **Instance Name** window opens.



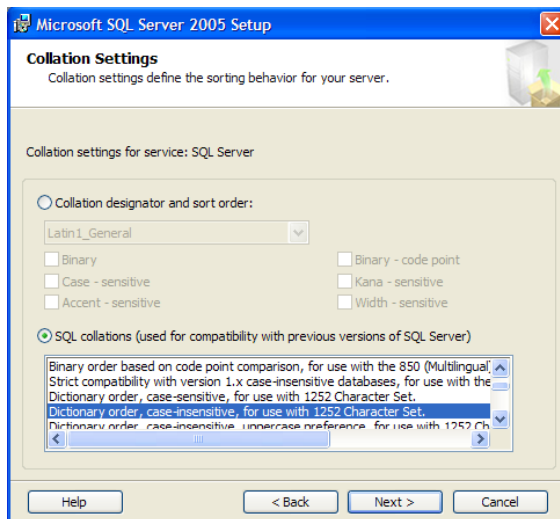
9. Leave **Default** selected. Click **Next**. The **Service Account** dialog box opens.



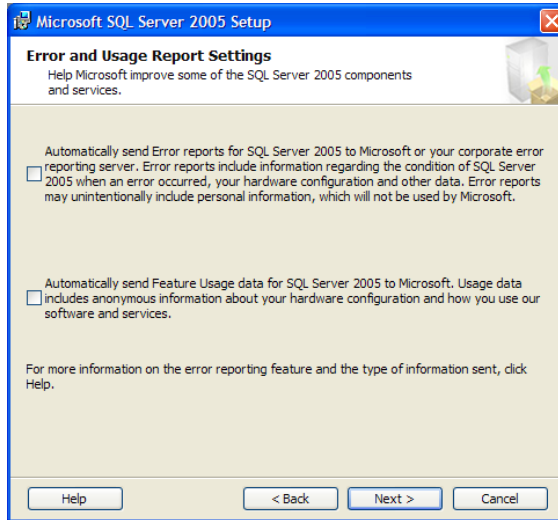
10. Select **Use the built-in system account >> Local System**. Under **Start services at the end of setup**, check **SQL Server**.
11. Click **Next**. The **Authentication Mode** dialog box opens.



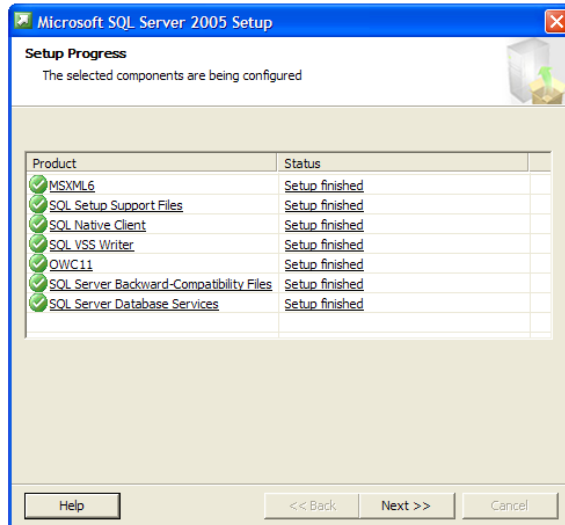
12. Select **Mixed Mode** and enter an sa logon password. Click **Next**. The **Collation Settings** window opens.



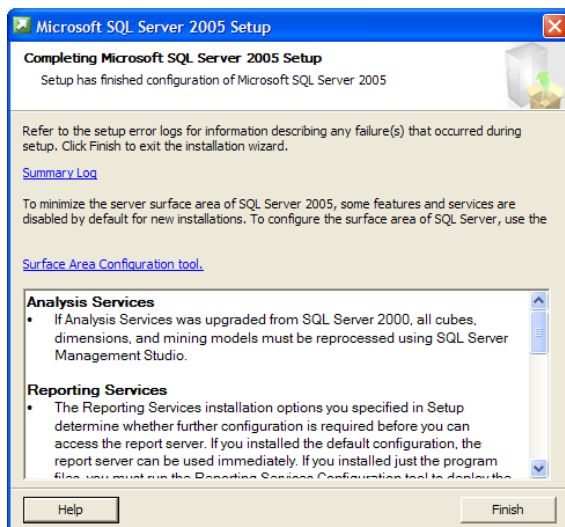
13. From the SQL collations, choose the default. The **Error and Usage Report Settings** window opens.



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. Select **Start>>Programs>> Microsoft SQL Server 2005>>Configuration Tools>>SQL Server Configuration Manager**. The SQL Server Configuration Manager launches.
19. On the left pane, expand the **SQL Server 2005 Network Configuration** section, and select **Protocols for MSSQLSERVER**.
20. On the right pane, locate and select the protocol name **Named Pipes**.
21. Right-click on **Named Pipes** and select **Enable**. The following warning message appears:  
*Any changes made will be saved, they will not take effect until the service is stopped and restarted.*  
Select **OK**.
22. Exit the **SQL Server Configuration Manager**.
23. In Windows, go to **Start>>Settings>>Control Panel>>Administrative Tools>>Computer Management**.
24. Expand **Services and Applications** and select **Services**.
25. 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.





# 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.

---

**IMPORTANT:** Management Intelligence may only be installed once GoldMine and a SQL database have been previously installed.

---

## Installing Management Intelligence

Management Intelligence can only be installed from the Installation CD. This CD is set up to autorun when inserted into your CD-ROM drive.

---

**Note:** If autorun is not enabled, select Run from the Start button on the Windows taskbar, and type: x\:\setup.exe (where “x” is the letter of your CD-ROM drive).

---

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**.

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.

---

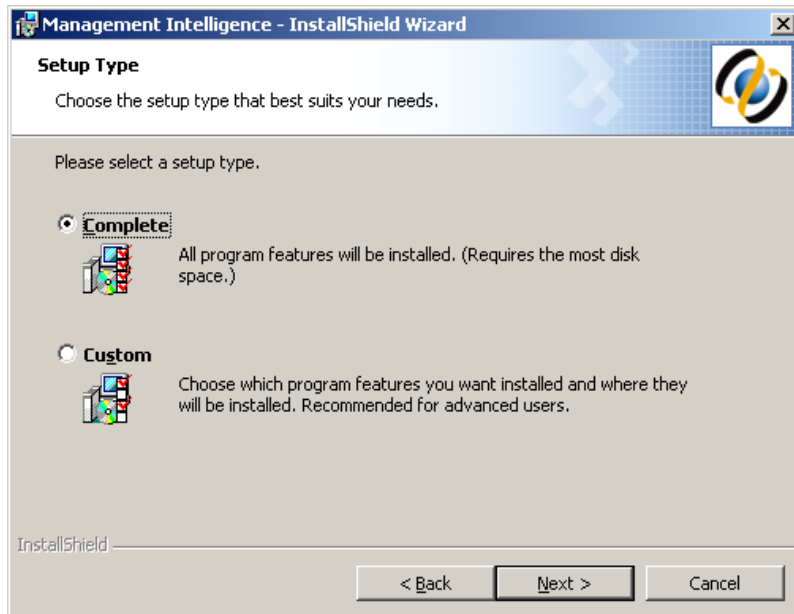
6. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

---

**IMPORTANT:** 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.



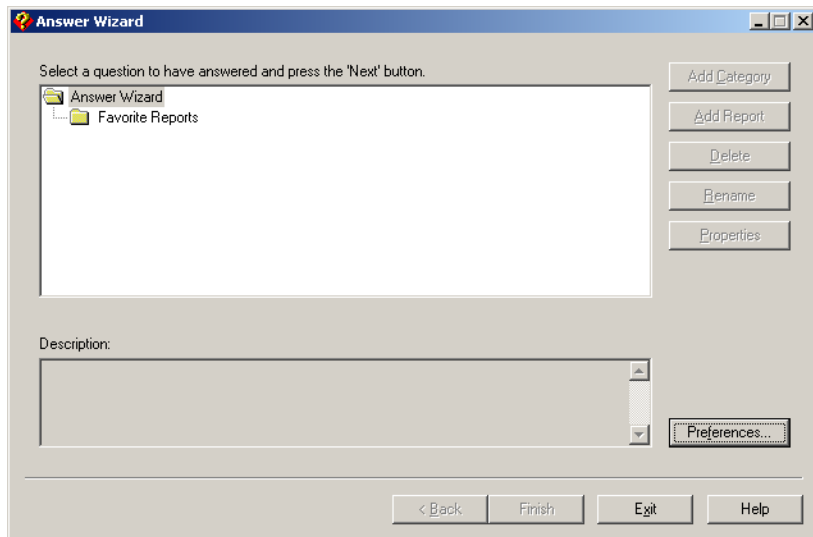
8. Select **Complete**.
9. Click **Next**. The **Ready to Install the Program** dialog box opens.
10. Click **Install**. The **Installing Management Intelligence** dialog box opens. When finished, the **Installation Completed** dialog box opens.
11. Click **Finish**.

## Initial Setup

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

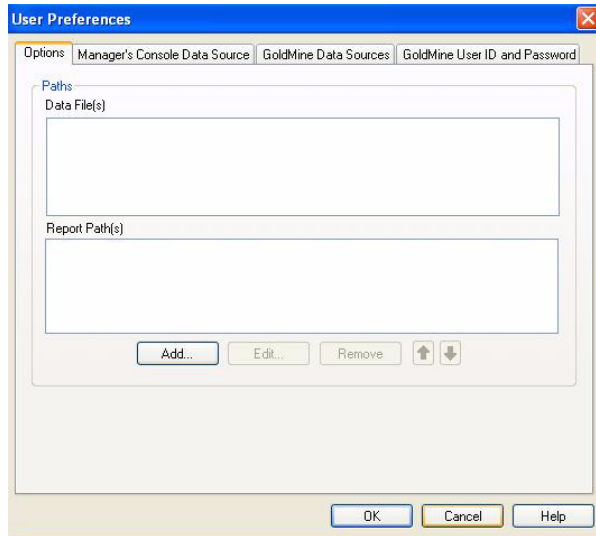
### Establishing the ODBC

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

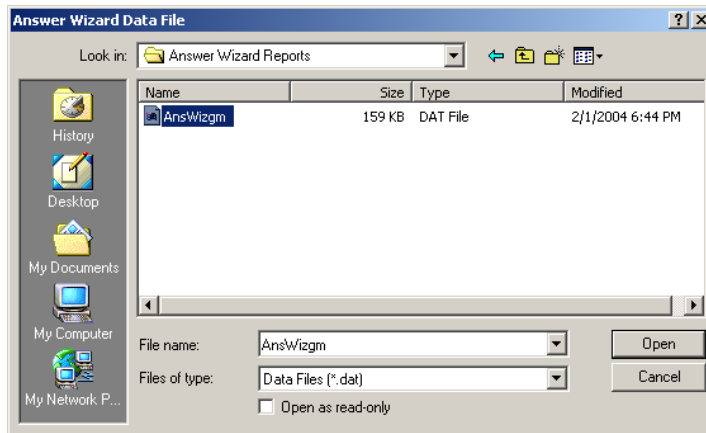


2. Click **Preferences**.

The **User Preferences** dialog box opens.

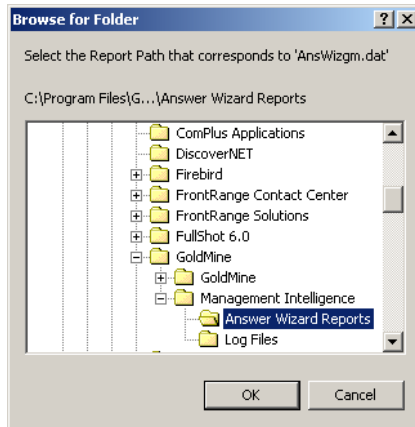


3. Use the **Options** tab to set the paths to the data file and reports. Click **Add**. The **Answer Wizard Data File** dialog box opens.

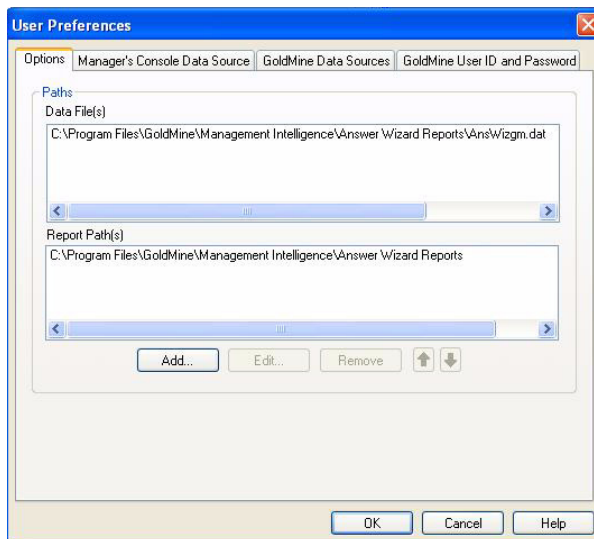


4. Navigate to the **AnsWizgm.dat** file, located in the **GoldMine\Management Intelligence\Answer Wizard Reports** folder.

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

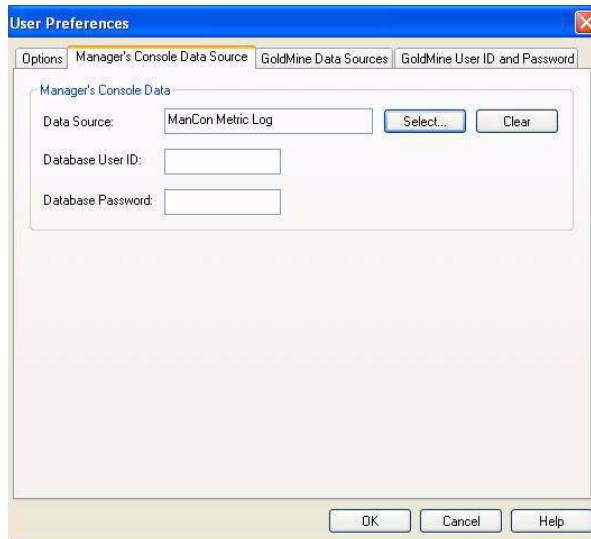


6. Verify the path is correct and click **OK**. The **User Preferences** dialog box reopens with paths defined.



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

## A-8 Installing Management Intelligence



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

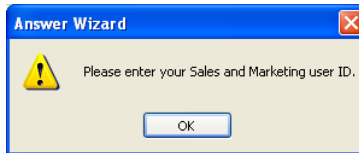


9. In the drop-down list, select **GMSales\_Mktg**.
10. Click **OK**. The **SQL Server Login** dialog box opens.

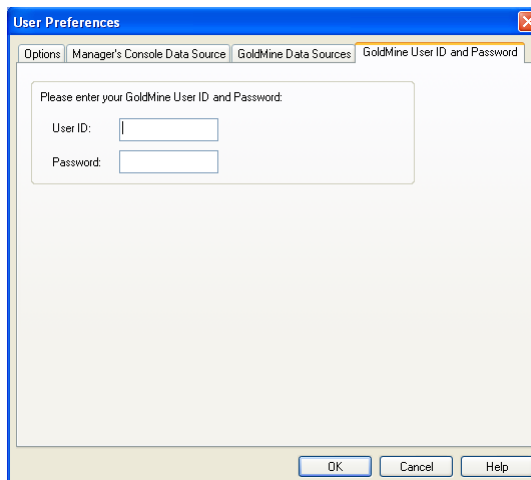


11. Type the **Login ID** and **Password** for SQL Server. Click **OK**.

12. A dialog box opens.

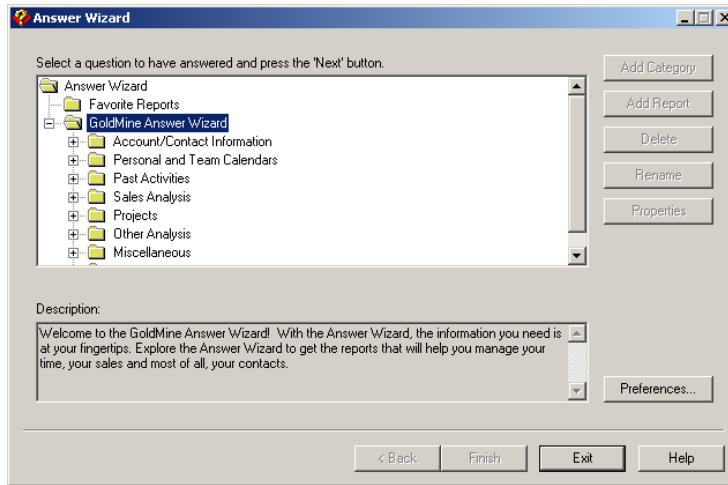


13. Click **OK**. The User Preferences window reopens with the **GoldMine User ID and Password** tab selected.

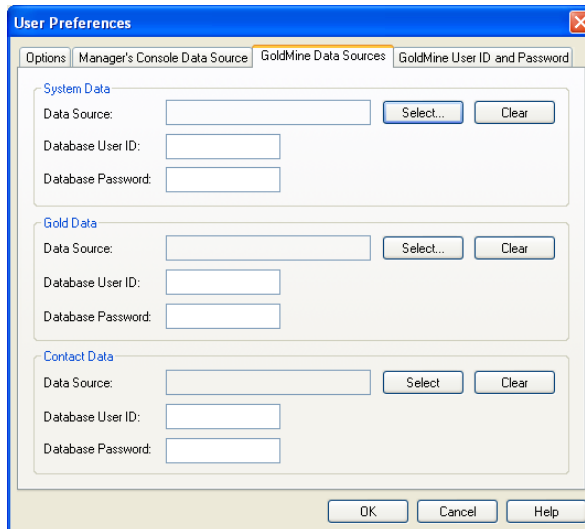


14. Enter your GoldMine user ID and password.

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

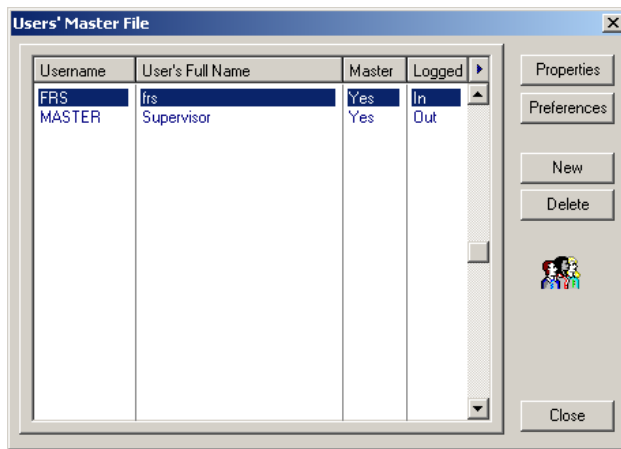
Answer Wizard initialization requires browsing to the location of the DAT and report files; however, the ProgramData folder is a hidden folder and may be unavailable to a user using the default Windows Explorer Folder Options' settings.

To show hidden files and folders:

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

## Verifying the SQL Login

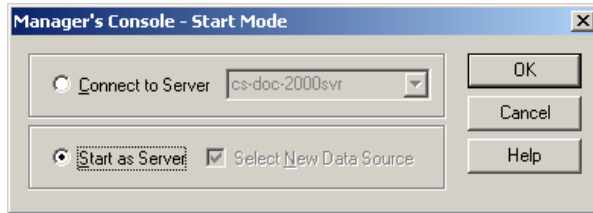
1. From **Start**, select **Programs>>GoldMine>>GoldMine**. The GoldMine Login opens.
2. Log into GoldMine as the User with **Master Rights**.
3. From the main menu, select **Tools>>User's Settings**. The **User's Master File** dialog box opens.



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

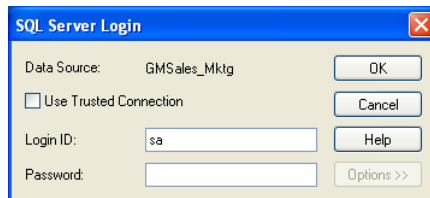
1. From **Start**, select **Programs>>GoldMine>>Manager's Console**. The **Manager's Console - Start Mode** dialog box opens.



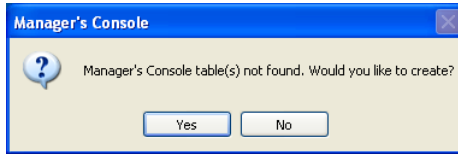
2. Select **Start as Server**.
3. Click **OK**. The **Select Manager's Console Data Source** dialog box opens.



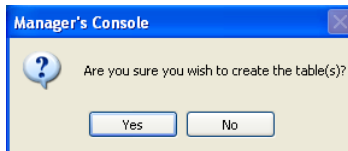
4. In the drop-down list, select **GMSales\_Mktg**.
5. Click **OK**. The SQL Server Login dialog opens.



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.
10. The Manager's Console Login screen opens




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

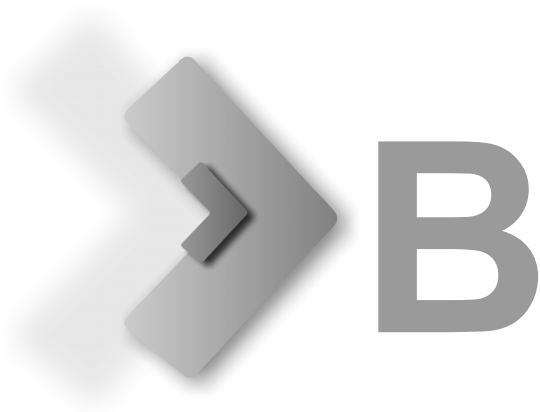
The Manager's Console is now ready for use.

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.

---

 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.

---



# Migrating Large Databases

---

## Overview

If you are upgrading from a previous version of GoldMine to version 8.5 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.

---

---

**IMPORTANT:** If your upgrade has already failed, see "Failure During Upgrade" on page B-3.

---

## Database Preparation

1. **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.
2. Truncate the transaction log.
  - For SQL 2005:
    - From **Start**, select **Microsoft SQL Server>>SQL Server Management Studio**.
    - After logging on to SQL Server, click the **New Query** toolbar button (or select **File>>New>>Query with Current Connection**).
    - Run:
 

```
backup log database_name with truncate_only
dbcc SHRINKDATABASE(database_name, TRUNCATEONLY)
```
  - For SQL 2008:
    - From **Start**, select **Microsoft SQL Server>>SQL Server Management Studio**.
    - After logging on to SQL Server, click the **New Query** toolbar button (or select **File>>New>>Query with Current Connection**).
    - Run:
 

```
Alter Database dbname Set Recovery Simple
Alter Database dbname Set Recovery Full
```
1. 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 Administrator Guide.

## Failure During Upgrade

Take the following steps if, during migration, you received an error such as:

- Unit Conversion in CONTHIST
- Unit Conversion in CAL
- Unit Conversion in CONTSUPP

---

**Note:** This error may prevent you from logging in to GoldMine or immediately after logging into the application, the GoldMine application disappears.

---

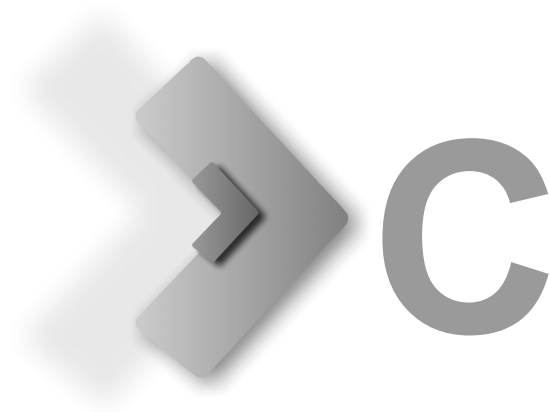
1. In your Web browser, open: **<http://support.frontrange.com>**
2. Select **Maintenance Customer Support>>Online Support**.
3. Log into the support site.
4. Select **Drivers and Downloads**.
5. From the drop-down list, select GoldMine Premium Edition.
6. Locate and download “**Unit Conversion Error During GoldMine 8.5 Upgrade.**”
7. Execute the patch in the DOS prompt by passing the right parameters:  
GM85Update SERVER\_NAME DATABASE\_NAME USERID PASSWORD
8. Log into GoldMine 8.5 application

---

**Note:** Contact FrontRange Solutions Customer Support for more information.

---





# Converting dBASE Databases to MSSQL

---

## Overview

If you are installing GoldMine for use with an existing dBASE database, it is recommended that you install GoldMine with blank data and use the Databases Wizard to import your dBASE data, rather than allowing GoldMine to convert your data to MSSQL during installation.

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.



---

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.

### Upgrading European Special Characters

To upgrade European special characters (including currency symbols, accented characters, and other region-specific characters) stored in Notes from a GoldMine 6.7 system, you must apply a temporary registry change to be in place during the upgrade process.

---

**IMPORTANT:** Registry settings can affect the stability of your system. Incorrect data in the registry can prevent your machine from running and may require you to reinstall the operating system. See [support.microsoft.com](http://support.microsoft.com) for information about backing up and modifying the registry. **FrontRange Solutions does not support registry changes or issues that arise from editing the registry.**

---

#### To upgrade European special characters

1. Back up your GoldMine database.
2. Back up the registry.
3. Write down the current value of the **HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Jet\4.0\Engines\Xbase\BDE** registry key.

Then change this key to **2**.

4. Upgrade your GoldMine database.
5. Back up the registry again.
6. Change the **HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Jet\4.0\Engines\Xbase\BDE** registry key back to its original setting.



# Resources

---

## 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 or from **[support.frontrange.com](http://support.frontrange.com)** for maintenance customers.

---

- **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://support.frontrange.com>

### Contact Information

#### **FrontRange Solutions Worldwide Headquarters**

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.



# TradeMarks and Licensing Agreement

---

## Trademark Notices

### FrontRange Trademark Information

The following are trademarks of FrontRange Solutions USA Inc. and/or its affiliates in the United States and/or other countries:

FrontRange Solutions®, FrontRange™, GoldMine®, GoldSync®, GoldMine® Answer Wizard™, GoldMine® Management Intelligence™, GoldMine® Manager's Console™, iGoldMine™, HEAT®, HEAT® Service & Support™, HEAT® PowerDesk™, iHEAT™, HEAT® Self Service™, HEAT® Manager's Console™, HEAT® Answer Wizard™, HEAT® Quick Start Wizard™, InfoCenter®, Automated Processes™, First Level Support®, GoldMine® CustomerIQ®, HEAT® CustomerIQ®, CustomerIQ®, entec®, Centennial™, DeviceWall®, Centennial Discovery®, Discovery Dashboard®, MicroAudit®, SAM™, and other FrontRange products and brands.

### Other Trademark Information

The following are trademarks of their respective owners or companies:

TRADEMARK OR REGISTERED TRADEMARK	COMPANY
ACT!®	CRM Division of Best Software Inc.
Adobe®, Acrobat® and Reader®	Adobe Systems Inc.
Apple®, Mac® OS, and Macintosh®	Apple Computer, Inc.
Avaya®	Avaya, Inc.
Beyond Gold™	Computerese
Blackberry®	Research In Motion Limited
Borland® Interbase®	Borland International Inc.
Calyx®	Calyx Software
Cisco®	Cisco Technology, Inc.
Citrix®	Citrix Systems, Inc.
Corel®	Corel Corporation
Crystal Reports®	Business Objects S.A.
dBASE®	dBASE Inc.
dbCams+™	Financial Computer Support, Inc.
Ethereal®	Ethereal, Inc.
Fast™, Folio®, NXT®, LivePublish®, GetSmart™	Fast Search and Transfer SAS
Firebird®	FirebirdSQL Foundation Incorporated (Australia)
Genesys®	Genesys Telecommunications Laboratories, Inc.
Genesis 2000®	Genesis 2000, Inc.
GlobalCall®	IDT Corporation
GoldBox©	copyright of Redstone Softbase Company
GraphOn® and GO-Global®	GraphOn Corporation
Great Plains®	Great Plains Software Inc.
Hewlett Packard®	Hewlett Packard Company

GoldMine

TRADEMARK OR REGISTERED TRADEMARK	COMPANY
IBM®, Lotus®, and Lotus Organizer®	IBM Corporation
InaPlex™ and Inaport™	Inaplex Limited
Intel®, Pentium® and Dialogic®	Intel Corporation
Intuit®, QuickBooks®, and QuickBooks Pro®	Intuit Inc.
ITIL®	The Office of Government Commerce
KNOWLIX™	Peregrine Systems Inc.
LANDesk®	LANDesk Group Ltd.
Linux®	Linus Torvalds
Maximizer Enterprise™	Multiactive Software
Microsoft®, Active Directory®, Microsoft® SQL Server™, ActiveX®, Outlook®, Windows®, Windows NT®, .Net™, Visual FoxPro®, Outlook®, Windows®, Windows NT®, Microsoft Exchange Server®, and Windows Vista®	Microsoft Corporation
Netcensus®	Tally Systems Corporation
Netilla®	Netilla Networks, Inc.
Netscape® and Netscape Navigator®	Netscape Communications Corp.
NextPage®, Folio®, Folio Views®, Folio Publisher®, Folio Builder®, Folio Integrator®, NXT™, NextPage Triad™, NextPage Contenta™, NextPage Solo™, Rapidapps™, Matrix™, and Live-Publish™	NextPage, Inc.
Novell®, Netware®, and GroupWise®	Novell, Inc.
OmniRush™ (formerly FaxRush®)	Z-Firm LLC
Oracle®	Oracle Corporation
Palm®, MyPalm™, Palm Powered™, Palm.Net®, PalmOS®, and PalmPak®	Palm, Inc.
Pink Elephant™	Pink Elephant Inc.
Red Hat®	Red Hat, Inc.
RightFax®	Captaris, Inc.
Rolodex®	Rolodex Corp.
Sage Line™	The Sage Group plc
SaleMaker®	SaleMaker Corp.
Scansoft® and SpeechPearl®	Scansoft, Inc.
SPARC®	SPARC International Inc.
Sun®, Java™, and Solaris®	Sun Microsystems, Inc.
Sybase®	Sybase, Inc.
Symantec®, pcAnywhere®, and WinFax®	Symantec Corporation
UNIX®	UNIX System Laboratories, Inc.
Visor®	Handspring, Inc.
VNC™	AT&T Laboratories Cambridge
Voxpoint®	Cayo Communications, Inc.
Zetafax®	Equisys PLC Company

Other products and brands are registered trademarks or trademarks of their respective owners/companies.

### FRONTRANGE END-USER LICENSE AGREEMENT (“EULA”) (May 09)

THIS EULA SETS FORTH THE TERMS AND CONDITIONS UNDER WHICH FRONTRANGE SOLUTIONS USA INC. (“FRONTRANGE”), GRANTS TO YOU (“YOU” OR “CUSTOMER”) THE RIGHT TO USE THE FRONTRANGE SOFTWARE AND ACCOMPANYING DOCUMENTATION ORDERED AND PAID FOR BY YOU (COLLECTIVELY “LICENSED SOFTWARE”). BY OPENING THE SOFTWARE PACKAGING, COMPLETING THE ACTIVATION PROCESS, DOWNLOADING, INSTALLING, ACCESSING OR UTILIZING THE LICENSED SOFTWARE OR CLICKING THE “I ACCEPT” BUTTON, YOU AGREE TO BE BOUND BY THE TERMS OF THIS EULA. IF YOU DO NOT AGREE WITH THE TERMS OF THIS EULA, PROMPTLY RETURN THE UNUSED LICENSED SOFTWARE TO THE PLACE FROM WHICH YOU OBTAINED IT FOR A REFUND.

**1. License Grant.** Subject to the terms and conditions of this EULA, FrontRange hereby grants to Customer, and Customer fully accepts upon delivery, a nonexclusive, non-transferable and perpetual (unless terminated or limited as provided below) right to use only the executable version (not source code) of the Licensed Software for Customer's internal business purposes.

**2. Scope of Authorized Use.** You may use the Licensed Software only as expressly permitted under this EULA and in accordance with the technical and other user manuals and read me files shipped with the Licensed Software (collectively, “Documentation”). FrontRange expressly reserves any rights not expressly granted to Customer. Your right to use the Licensed Software is limited to the number of server(s), user(s), assets, modules, databases etc... (collectively, “License Limits”) that You have ordered and paid for. All Licensed Software updates, upgrades, or new releases (collectively, “Updates”) are provided to You on a license exchange basis. By using an Update You voluntarily terminate Your right to use any previous version of the Licensed Software; provided, however, that You may continue to use previous versions solely to assist You in transitioning to the Update. All Updates are part of the Licensed Software. Should You exceed any of Your License Limits, You agree to pay the then applicable full list price for the excess usage, as well as the related maintenance and support fees. You agree to allow FrontRange to audit Your use of the Licensed Software to verify Your compliance with Your License Limits. Audit rights shall be subject to Your reasonable securities policies as applied to all of Your vendors, and may only be performed once every twelve (12) months.

**3. Restrictions.**

a. **Proprietary Rights.** This is a license only and no title passes to You. With the exception of the license granted under this EULA, FrontRange and any Third Party Licensor retain all right title and interest to the Licensed Software and all related intellectual property and proprietary rights. You will not remove or obscure any copyright notices, logos, or other proprietary rights notices or legends in the Licensed Software. The Licensed Software contains information deemed confidential or otherwise proprietary to FrontRange and any Third Party Licensor, and You will handle the Licensed Software with at least the same degree of care employed with respect to Your own confidential or proprietary information.

b. **Territory Restrictions.** The server(s) on which the Licensed Software and any related database(s) are stored must be located and remain in the specific geographic region where You have ordered the Licensed Software. The relevant geographic regions are: (1) the European Union, (2) North America, (3) South America, (4) Australia and New Zealand, (5) Africa, and (6) for all other geographic regions, the specific country where You have ordered the Licensed Software.

- c. Derivative Works, Reverse Engineering. You may not create any derivative works to the Licensed Software except to facilitate Your authorized use of the Licensed Software, provided that Your use of such limited derivative works is subject to this EULA. You may not modify, decompile, translate, disassemble or reverse engineer the Licensed Software except if the laws of Your jurisdiction proscribe the enforcement of such prohibitions but then only to the extent actually permitted, and for the limited purposes specifically contemplated, by applicable law.
- d. Commercial Exploitation. You may not distribute, rent, lease or transfer the Licensed Software or any portion thereof. You may not use the Licensed Software, or any portion thereof, in a commercial hosting, application service provider or service bureau environment.
- e. Non Production Copies: Temporary Licenses. You may make one copy of the Licensed Software for safe-keeping purposes and as permitted in the Documentation. The original copy of the Licensed Software and all copies that You may make may not leave Your control. If the Licensed Software is provided for testing or other nonproduction purposes, You may not use it in a production or live environment and Your right to use the Licensed Software is limited in accordance with the terms under which You received it. In addition, if the Licensed Software is provided on a trial, evaluation, pilot or other temporary basis, then notwithstanding anything to the contrary in Sections 1, 6 or elsewhere in this EULA, it may only be used for the time period specified by FrontRange (and if none specified, then no more than 30 days), is provided on an AS-IS basis without warranty and Your right to use it may be terminated for convenience by FrontRange. Upon termination of any temporary license You agree to return or destroy all copies of the Licensed Software.
- f. Subscription. If You licensed the Licensed Software on a 'subscription' (or limited time) basis ("Subscription Product"), then notwithstanding anything to the contrary in Section 1 or elsewhere in this EULA, you may only use the Subscription Product during the time period that you have contracted and paid for ("Subscription Term"). You agree that upon expiration of the Subscription Term, the Subscription Product may automatically cease to function and irrespective of any auto-disablement, You will return all copies of the Subscription Product (unless otherwise instructed by FrontRange). All other non-conflicting terms herein shall apply.
- g. Third Party Software. To the extent the Licensed Software includes software owned by third parties (collectively "Third Party Licensors") You may only use such third party software with the Licensed Software and at all times subject to this EULA. The Third Party Licensors are intended third party beneficiaries of this EULA. Notwithstanding the foregoing, to the extent that the Documentation provides a separate license agreement for such third party software, then You agree that such separate agreement shall govern.
- 4. Term/Termination.** This EULA will remain in effect until terminated pursuant to this Section 4. You may terminate this EULA at any time by destroying all of Your copies of the Licensed Software. FrontRange may terminate this EULA if You breach this EULA and fail to remedy such breach after a thirty (30) days notice and opportunity to cure period. Notwithstanding the preceding, FrontRange may immediately terminate this EULA if You breach Section 2, 3 or 9. Upon any termination, You agree to cease all use of the Licensed Software, remove all copies from Your computers, destroy all copies of the Licensed Software, and, upon request from FrontRange, certify in writing Your compliance herewith.
- 5. Payments.** All licenses and rights granted under this EULA by FrontRange are subject to timely receipt by FrontRange of payment. All payments for fees, taxes and expenses must be made within thirty (30) days of invoice, unless otherwise agreed in writing by an authorized FrontRange officer. You are responsible for any and all federal, state, dominion, provincial or local sales, use, personal property, excise, or other taxes, fees or duties arising from or related to this Agreement (other than taxes based on FrontRange's net income).

## E-6 End-User Licensing Agreement (EULA)

**6. Warranty.** FrontRange warrants that the Licensed Software will perform substantially in accordance with its Documentation for a period of ninety (90) days following delivery of the Licensed Software. This limited warranty is void if failure of the Licensed Software results from accident, abuse, modification, or misuse. FrontRange does not warrant that the Licensed Software will meet Your requirements, that the operation of the Licensed Software will be uninterrupted or error free, or that all defects will be corrected. The warranty and remedy set forth in this EULA are exclusive and in lieu of all other warranties and remedies, oral or written, expressed or implied.

Except as provided above, FRONTRANGE AND ANY THIRD PARTY LICENSOR DISCLAIM ALL WARRANTIES, EITHER EXPRESSED OR IMPLIED, WITH RESPECT TO THE LICENSED SOFTWARE, ITS QUALITY, PERFORMANCE, NON-INFRINGEMENT, MERCHANTABILITY, OR FITNESS FOR A PARTICULAR PURPOSE.

If You believe the Licensed Software does not meet this Limited Warranty, You must notify FrontRange in writing within the warranty period. FrontRange' entire liability and Your exclusive remedy with regard to the Limited Warranty, will be, at FrontRange' sole discretion, either repair or replacement of the Licensed Software or a refund of the amount paid to FrontRange for the Licensed Software (provided in that case that You also return the Licensed Software).

**7. Indemnification.** FrontRange will, at its expense, defend and pay any settlement amounts or damages awarded by a court of final jurisdiction arising out of any third party claim against You that the Licensed Software infringes any copyright, patent, trademark or trade secret owned or controlled by the third party ("Infringement Claims"); provided, however, that (i) FrontRange will be notified promptly in writing by You of any such claim; (ii) FrontRange will have sole control of the defense of any action on such claim and all negotiations for its settlement or compromise; and (iii) You will cooperate with FrontRange, at FrontRange' expense, in a reasonable way to facilitate the settlement or defense of such claim; except that such indemnification obligation does not apply with respect to a claim of infringement if and to the extent such claim arises out of (A) Your modifications not authorized by FrontRange, (B) the combination or use of the Licensed Software with products not provided or recommended by FrontRange if the infringement would have been avoided but for such combination or use, (C) use of the Licensed Software after written notice of the claimed infringement has been received by You, (D) Your failure to use an Update if the infringement would have been avoided by the use of the Update, or (E) actions by Customer in breach of this EULA. Should the Licensed Software become, or in FrontRange' opinion likely to become, subject to an Infringement Claim, then You will permit FrontRange, at FrontRange' option and expense, either (a) to procure for Customer the right to continue using the Licensed Software, or (b) to replace or modify the Licensed Software so that it becomes non-infringing and performs in a substantially similar manner to the original product, or (c) upon failure of (a) or (b), despite the reasonable efforts of FrontRange, to terminate this EULA and return the license fee You paid for the Licensed Software pro-rated over a four (4) year life span. THIS SECTION SETS FORTH YOUR EXCLUSIVE REMEDY AND FRONTRANGE'S SOLE LIABILITY WITH RESPECT TO INFRINGEMENT CLAIMS.

**8. Liability Limits.** THE LICENSED SOFTWARE IS NOT DESIGNED OR INTENDED FOR USE IN ANY MEDICAL OR NUCLEAR SYSTEMS, OR FOR ANY OTHER MISSION CRITICAL APPLICATION IN WHICH THE FAILURE OF THE LICENSED SOFTWARE COULD CAUSE SUBSTANTIAL PROPERTY DAMAGE, PERSONAL INJURY OR DEATH. FRONTRANGE DISCLAIMS ANY LIABILITY FOR USE OF THE LICENSED SOFTWARE IN ANY SUCH APPLICATION(S).

TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, AND EXCEPT FOR LIABILITY ARISING UNDER THE INDEMNIFICATION PROVIDED IN SECTION 7 ABOVE, FRONTRANGE' AND ITS THIRD PARTY LICENSORS' ENTIRE LIABILITY UNDER THIS EULA WILL BE LIMITED TO THE AMOUNT PAID BY YOU TO FRONTRANGE FOR THE LICENSED SOFTWARE. IN NO EVENT WILL FRONTRANGE OR ITS THIRD PARTY LICENSORS BE LIABLE FOR INDIRECT, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OR INABILITY TO USE THE LICENSED SOFTWARE, including without limitations damages for lost profits, loss or corruption of data, costs of procurement of substitute technology or services, even if advised of the possibility of such damages. The parties agree that the limitations and exclusions of liability and disclaimers specified in this EULA will survive and apply even if the limited remedies are found to have failed of their essential purpose.

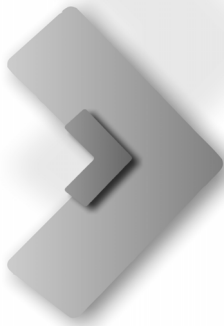
**9. Legal Compliance.** You must comply with all applicable laws and regulations in Your use of the Licensed Software including without limitations any United States or foreign Export Control laws or regulations, and all applicable data protection, SPAM, privacy laws and regulations. As part of the registration process You may provide user information. Any personal information collected (1) will be used solely for registration and license limit auditing purposes and to provide You with important information about the Licensed Software, (2) will be stored in computer servers with limited access that are located in controlled facilities, (3) may be stored and processed in the United States or other country and by using the Licensed Software, You consent to any such transfer of information outside of Your country, (4) may be stored for as long as the EULA is in effect, (5) will not be shared with any government agency, private organization, or the public, except that Customer's corporate name may be used as a reference company in the context of sales presentations and marketing activities.

**10. United States Government Restricted Rights.** THIS SECTION APPLIES ONLY TO LICENSING OR USE BY THE FEDERAL GOVERNMENT OF THE UNITED STATES. The Licensed Software is provided with RESTRICTED RIGHTS. Use, duplication, or disclosure by the federal government is subject to restricted rights as set forth in subparagraph (c) of The Rights in Technical Data and Computer Software clause at 252.227-7014 for DOD contracts and at FAR (48 CFR 52.227-19) for civilian agency contracts or other comparable agency clauses.

**11. Severability.** If any provision of this EULA is unenforceable or invalid, such provision(s) shall be amended to achieve as nearly as possible the same economic effect as the original provision(s) and the remainder of the EULA shall remain in full force and effect.

**12. Miscellaneous.** This EULA constitutes the entire agreement between You and FrontRange relating to the license rights for the Licensed Software (and any subsequent orders of additional License Limits or new FrontRange products), and any additions to, or modifications of, this EULA will be binding upon the parties only if in a writing duly executed by You and an authorized officer of FrontRange. THE TERMS AND CONDITIONS OF ANY CUSTOMER PURCHASE ORDER ARE ONLY BINDING ON FRONTRANGE IF THEY ARE AGREED TO IN WRITING BY AN AUTHORIZED FRONTRANGE OFFICER AND IN A DOCUMENT OTHER THAN THE PURCHASE ORDER FORM. You may not transfer the Licensed Software or assign this EULA without FrontRange' prior written consent and any attempt by You to do so will be void and without effect; except that, You may assign Your rights and obligations hereunder in connection with a merger, acquisition or sale of all or substantially all of Your assets subject to compliance with FrontRange's administrative requirements for such assignments. If the Licensed Software is acquired through a Reseller, You agree that (i) this EULA constitutes the entire agreement between You and FrontRange regarding the Licensed Software (and the terms and conditions of any purchase order or any other agreement between You and the Reseller are not binding on FrontRange); and (ii) the Reseller is not FrontRange' agent and is not authorized to alter, amend or modify the terms of this EULA. FrontRange makes no representation or warranty with regard to any services provided by any Reseller. The waiver or failure of either party to exercise in any respect any right provided for in this EULA will not be deemed a waiver of any further or future right under this EULA.





# Index

## A

- Additional system requirements, 1-6
- Audience and Expertise, -vii

## C

- Changing
  - ownership in Windows XP, 2-1
- Checklist
  - installation, 2-7
  - server, 2-8
  - undocked, 2-9
  - workstation, 2-9
- Configuring GoldMine, 4-1
  - custom image, 4-3
- Converting dBase databases to SQL, C-1
- Creating
  - sub-licenses
    - for remote offices, 3-9
    - for undocked users, 3-11

## D

- Database
  - backing up your, 2-33, 2-34
  - conversion, 2-33
  - Firebird, 1-6

- migrating, B-1
- selecting, 2-2

- Database preparation, B-2
- DataDict.xml, 2-6
- DBAlias.ini, 2-6
- Demo data, 2-15, 2-16

## E

- E-License, 3-2, 3-5
- End-User License Agreement
  - about, 2-11, 2-22, 2-27, 2-34
- Error
  - Unit Conversion in CAL, B-3
  - Unit Conversion in CONTHIST, B-3
  - Unit Conversion in CONTSUPP, B-3

## F

- FDB file, 2-6
- Firebird, 1-6, 5-1
  - .fdb, 2-6
  - administrator, 2-30
  - database, 2-30
- Firebird, using with XP firewall, 5-1
- Flags.bin, 2-6

**G**

G-License, 3-2  
 GM.ini, 2-6  
 gmsetup.exe, 2-10, 2-22, 2-27, 2-34, 2-35  
 GoldMine  
   .fdb, 2-6  
   configuring, 4-1  
   GISMO, 2-33  
   licensing, 3-5  
   Link to Word, 2-33  
   Outlook, 2-33  
   Plus Microsoft Office, 2-33  
   v5.x, 2-3  
 GoldMine logon window  
   custom image, 4-3  
 Goldsync, 1-7  
 GoldSync License (Y-License)  
   about, 3-9  
   creating, 3-9

**H**

HDA number, 3-3  
 Host system requirements, 1-2

**I**

Import Windows User Accounts, 3-7  
 Increases, 3-2  
 Install  
   MSSQL Server, 6-1  
 Installation  
   checklist for shared server, 2-8  
   checklist for shared workstation, 2-9  
   checklist for single-user, 2-9  
   types, 2-7  
   wizard, 2-7  
 Installing  
   Firebird, 5-1  
   on a client workstation, 2-3

on a server (SQL database), 2-10  
 on a single-user license computer, 2-26  
 on a workstation, 2-20  
 on an undocked computer, 2-26  
 on Windows XP, 2-3  
 planning for, 2-2

Insufficient input, 2-16

**K**

Key code, 3-3, 3-10, 3-13

**L**

License file, 3-4  
 License Manager, 3-1, 3-9, 3-10  
   about, 3-4  
 License types  
   about, 3-2  
   increases, 3-2  
   master license, 3-2  
   sub-licenses, 3-2  
 License.bin, 2-6, 3-4  
 Licenses  
   about, 3-2  
   creating, 3-4  
   GoldSync (Y), 3-2  
   license types, 3-2  
   managing, 3-4  
   Master license, 3-1, 3-2  
   master license, 3-5  
   Site (S), 3-2  
   sub-licenses, 3-1, 3-2  
   types of, 3-2  
   Undocked (U), 3-2, 3-13  
 Licensing  
   after installing, 2-18, 2-32  
   GoldMine, 3-5  
   serial number, 3-3  
   with a Master License, 3-5  
   with a Site license, 3-13

- with an Undocked license, 3-13
- wizard, 3-5

Local administrator, 2-10, 2-34

## M

Management Intelligence

- End-User License Agreement, A-2
- installing, A-2

Mapping a drive, 2-22

Master

- license, 3-2
  - about, 3-1
  - licensing with, 3-5
- rights, 3-7, 3-8
- site, 2-35

Memory requirements

- server, 1-3

Microsoft

- Windows XP
  - changing ownership, 2-1

Microsoft Windows Server, 1-2

Migrating large databases, B-1

MS SQL login failed, 2-16

## O

O-License, 3-2

Operating system requirements

- service packs, 2-2

Operating systems

- server, 1-2
- single user, 1-5
- undocked, 1-5
- workstation, 1-4

Ownership

- changing in XP, 2-1

## R

Registration

- GoldMine, 3-5

Remote offices

- creating sub-licenses for, 3-9

Remote systems

- upgrading, 2-35

## S

Schema

- licensing, 3-3

Security, 1-2

Serial number, 3-5

Server requirements

- security, 1-2

Server system requirements, 1-2

- memory, 1-3
- network protocols, 1-3
- operating systems, 1-2
- performance considerations, 1-3

Shared

- server installations checklist, 2-8
- workstation installations
  - checklist, 2-9
  - running, 2-22

Single user system requirements

- operating systems, 1-5
- performance considerations, 1-5

Single-user installations

- checklist, 2-9
- running, 2-26

Single-user requirements

- about, 1-4
- CPU, 1-4
- memory, 1-4
- performance considerations, 1-4

Site

- master, 2-35

Site License (S-License)

- about, 3-9
- creating, 3-9
- licensing with, 3-13

S-License, 3-2, 3-9, 3-13

- Software requirements, 1-5
- Split-Path Installation, 2-6
- SQL Server installation, 6-1
- Sub, 3-2
- Sub-license, 3-2, 3-5
  - creating, 3-9, 3-10
    - for remote offices, 3-9
    - for undocked users, 3-11
- System files, 2-6
- System requirements, 1-1
  - environments, 1-2
  - Goldsync, 1-7
  - host, 1-2
  - server, 1-2
  - single user, 1-4
  - software, 1-5
  - undocked user, 1-4
  - workstation, 1-4
- U**
- U-License, 3-11
- Unattended Installation, 2-18
- Undocked, 2-35
  - installation, 2-26
  - users
    - creating sub-licenses for, 3-11
    - licenses, 3-11
    - warning, 3-11
- Undocked License (U-License)
  - about, 3-11
  - creating, 3-11
  - licensing with, 3-13
- Undocked system requirements
  - operating systems, 1-5
  - performance considerations, 1-5
- Upgrading
  - considerations, 2-3
  - large SQL Server databases, 2-33
  - licensing schema, 3-3
  - remote systems, 2-35

- Upgrading European Special Characters, C-2
- User accounts, 3-7
- User\_info.bin, 2-6
- Users
  - table, 2-6
  - users.dbf, 2-6

## **V**

- Vista
  - Add-in installations, 2-26
  - Installation, 2-6
  - Installation Considerations, 2-3

## **W**

- Windows
  - security, 1-2
- Workstation
  - installing option 1, 2-20
  - installing option 2, 2-20, 2-22
  - mapping a drive, 2-22
- Workstation system requirements, 1-4
  - operating systems, 1-4

## **Y**

- Y-License, 3-2, 3-9, 3-13