

GoldMine®

Business Contact Manager

CORPORATE EDITION VERSION 6.0

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FrontRange Solutions Software Product: GoldMine®

(Rev. Dec. 2002)

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INTRODUCTION



Introduction

Welcome to GoldMine

Welcome to GoldMine® 6.0 (Corporate Edition)! GoldMine is a business contact management tool with sales force and marketing automation functionality for individuals and teams.

About this Guide

This guide describes the basic components and steps for installing GoldMine 6.0 (Corporate Edition) on your server, client workstations, and undocked computers.

Audience and Expertise

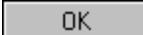
The information in this manual is written for system administrators and GoldMine users performing installations. The manual describes the system requirements, step-by-step installation instructions, and tips for Server Setup, Workstation Setup, and Undocked user installations.

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

Document Conventions

This document uses the following terms and syntax when explaining steps and procedures:

- Menu bar commands and the corresponding menu item are presented as **File>>Print**. This means you should select the word **File** on the menu bar, and then click **Print** in the drop-down menu.
- Dialog box, window, menu, and menu bar names begin with uppercase letters and are referenced in bold text when they are the result of an action. For example: “Click **OK**. The **Select a Data Source** dialog box appears.” Bold text may also be used if needed for emphasis on the first mention of that item.
- Command buttons you click on-screen are referenced in bold text or pictured as they actually appear.

Example: **OK** or 

- **Tips** are presented in the margins to provide users with alternative procedures or with suggestions for using the feature.
- **Notes** are presented with a line above and below the paragraph; the word “Note” always appears in bold text. Notes provide information supplementing or emphasizing information in the text.

- **General Notes** are presented in the margins. General Notes contain additional information that can be pulled out of the text flow without affecting the actual content.
- **Important Notes** are presented with a line above and below the paragraph; the word “IMPORTANT” is always capitalized and appears in bold text. Important notes provide information essential to the text.
- **Cautions** are presented with an Exclamation icon  and contain bold text. Cautions alert users that failure to read and use information provided may result in data loss.
- **Warnings** are presented with an Exclamation icon  and contain bold text. Warnings alert users that failure to read and use information provided may result in functionality and/or data loss.
- **Cross-references** are presented with a book icon . Cross-references inform users that related or additional information is available in another topic or manual.

Other GoldMine Resources

GoldMine Manuals

GoldMine offers the following manuals to help you find the information you need:

- **What's New in GoldMine:** This guide Provides an overview of the new features of each release.
- **Using GoldMine:** This manual provides an introduction to the main tools and features of GoldMine.
- **Administrating GoldMine:** This manual provides an introduction to the main concepts and features of GoldMine system administration.

IMPORTANT: These manuals are available for download in PDF format on our Web site at support.frontrange.com.

Online Help

GoldMine provides an extensive online Help system. This convenient feature allows you to access step-by-step instructions, overviews, checklists, tips, notes, definitions, dialog box descriptions, and reference information without having to look past your computer screen.

The following Help is available:

- **General Help:** This Help describes how to use GoldMine. Step-by-step instructions walk you through basic tasks while overviews, checklists, tutorials, and definitions explain general concepts and ideas.
- **Context-Sensitive Help:** This Help describes the feature currently being accessed.

To Access General Help

Choose commands from the **Help** menu located in the module's main menu bar.

To Access Context-Sensitive Help

Click the **Help** button located in the active dialog box or press **F1**.

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- Southern Europe (Italy, Spain, Portugal, Greece, Cyprus)
- South Africa

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System Requirements
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Installation Types
Installation Checklists

CHAPTER ONE

Installation Basics

Overview

Before you install GoldMine® 6.0 (Corporate Edition) on a network server, client workstation, or undocked computer, it is important to understand the basic components of the installation.

System Requirements

This section lists the baseline system requirements for successful installation and operation of GoldMine 6.0 (Corporate Edition). Requirements are listed for the following:

- Servers
- Workstations
- Undocked User Systems

Server Requirements

The following recommendations are made for GoldMine servers.

Network Operating Systems

FrontRange Solutions supports the following network operating systems:

- Microsoft® Windows® 2000 Server/Advanced Server
- Novell® NetWare® 5.0 and 6.0 (only with Microsoft Client for Netware, *not* Novell® intraNetWare® Client/Client 32)



Note: For more information on Novell NetWare, see Appendix D: "Installing on a Novell NetWare Network."

Network Protocols

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

Server System Requirements

- Microsoft Windows 2000 Server/Advanced Server
- SCSI or Ultra DMA Enhanced IDE hard drives: RAID Array or mirrored (recommended)
- 100 MBps network connection (recommended)

Server Memory Requirements

Database Size	Minimum RAM Allocation
50 MB	128 MB
100 MB	256 MB
500 MB < 2 GB	512 MB
2 -5 GB	1 GB
5-12 GB	2 GB
12+ GB	3 GB

Server CPU Requirements

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

Performance Considerations

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

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

Shared Workstation Requirements

The following recommendations are made for client workstations connected to the GoldMine server.

System	Minimum	Recommended
CPU	Pentium 166 MHz	Pentium II/III +
HDD	65 MB	125 MB +
RAM	32 MB	64 MB +

Operating Systems

FrontRange Solutions supports the following Microsoft operating systems:

- Microsoft Windows 98/98 SE
- Microsoft Windows ME
- Microsoft Windows 2000 Professional/Server/Advanced Server
- Microsoft Windows XP® (Home/Professional)

Note: FrontRange Solutions Technical Support neither supports nor recommends using Windows emulators, such as Macintosh®, Linux®, or other operating systems.

Undocked User Requirements

The following recommendations are made for computers working disconnected from a GoldMine server but synchronize with the GoldMine server to update information.

System	Minimum	Recommended
CPU	Pentium 166 MHz	Pentium II/III +
HDD	65 MB	125 MB +
RAM	32 MB	64 MB +

Operating Systems

FrontRange Solutions supports the following Microsoft operating systems:

- Microsoft Windows 98/98 SE
- Microsoft Windows ME
- Microsoft Windows 2000 Professional/Server/Advanced Server
- Microsoft Windows XP (Home/Professional)

Note: FrontRange Solutions Technical Support neither supports nor recommends using Windows emulators, such as Macintosh®, Linux®, or other operating systems.

Performance Considerations

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

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

Software Requirements

- Microsoft Internet Explorer 6.0
- If Borland® Database Engine (BDE) is installed on your target system, a minimum of BDE 5.01 is required. If no BDE is present on the target system, the GoldMine installs it automatically.

GoldMine Link for Outlook Requirements

To install the GoldMine Link for Outlook, you must have Outlook 2000 SR-1 (9.0.0.3821) or higher installed on your computer.

Installation Wizard

The GoldMine Installation Wizard takes you step-by-step through the installation processes. Windows and dialog boxes clearly outline important information, features, and directions.

To navigate through the GoldMine Installation Wizard, simply follow the directions in the windows and dialog boxes. To cancel the installation and exit the wizard at any time, click **Cancel**.

IMPORTANT: After GoldMine is installed, you can go back and use the Installation Wizard to modify, repair, or remove the GoldMine program files. The wizard launches automatically when you access the Add/Remove Program feature on your computer.

Installation Types

Two installation types are available on the GoldMine 6.0 (Corporate Edition) CD. They are:

If you are:	Then run:
A company who needs to support multiple GoldMine users using a shared copy of GoldMine.	Server Setup
An individual who often works remotely on an undocked computer; who synchronizes with a GoldMine server to update information.	Undocked Setup

- **Server Setup:** This installs a shared copy of GoldMine to a common location, usually a shared network drive. Users can then connect to the server copy from their local client workstations using shortcuts installed by running a Workstation installation using the WSsetup.exe in the server installation.

Recommendation: Run shared Server Setup on the primary GoldMine server and remote sites serving two or more users.

- **Undocked Setup:** This installs a full copy of GoldMine, with a dBASE database, on a computer working disconnected from a network.

Recommendation: Run undocked installations on computers that work disconnected from a GoldMine server, but synchronize with the GoldMine server to update information.

Installation Checklists

Review the following checklists before installing GoldMine. These checklists outline the basic steps for efficiently installing and running GoldMine.

Server Setup Installation Checklist

1. **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.
2. **Confirm all GoldMine users are logged out of the system (upgrading customers only).**
3. **Exit all programs running on your system.** This frees memory and alleviates potential conflicts between the installer and other software on your computer, including third-party utilities that integrate with GoldMine and other GoldMine add-on products. You should also exit the Microsoft Office Shortcut bar and stop all services.
4. **Install Microsoft® SQL Server™.** You can install SQL Server on the computer serving as the GoldMine server or on another computer on your network. See “Appendix E, Installing Microsoft SQL Server 2000.”
5. **Install GoldMine on the computer serving as your GoldMine server.** Choose the Server Setup installation and follow the steps in the “Installing GoldMine 6.0 (Corporate Edition)” chapter.

IMPORTANT: GoldMine should *not* be installed as a root folder of the drive (for example, C:\GoldMine).

6. **License the server copy of GoldMine.** Licensing registers the shared server copy of GoldMine with the appropriate license. Step-by-step instructions for licensing are covered in the “Licensing and Registration” chapter.



Note: For detailed information on GoldMine Licensing, see the *Adminstrating GoldMine* manual or GoldMine online Help.

7. **Verify that you can launch GoldMine on your GoldMine server.** This ensures the installation is functioning properly before you install any workstations.
8. **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 (or will be installed), giving users full control. For detailed steps on sharing the GoldMine folder, see the “Installing GoldMine 6.0 (Corporate Edition)” chapter.

Shared Workstation Installation Checklist

1. **Exit all programs running on your system.** This frees memory and alleviates potential conflicts between the installer and other software on your computer. You should exit any third-party utilities integrating with GoldMine and other GoldMine add-on products. You should also exit the Microsoft Office Shortcut bar and stop all services.
2. **Create a mapped drive to the shared GoldMine folder on the server.** This allows workstations to navigate and connect to the shared copy of GoldMine on server. For detailed steps on mapping a drive, see the “Installing GoldMine 6.0 (Corporate Edition)” chapter.
3. **Install GoldMine on the Client Workstation.** Browse across your network to WSsetup.exe and follow the steps in the “Installing GoldMine 6.0 (Corporate Edition)” chapter.
4. **Verify that you can launch GoldMine from the workstation.** This ensures the installation is functioning properly.

Undocked User Installation Checklist

1. **Create an Undocked license (U-license) on the server (for undocked license users only).** This license type is created for users who work with GoldMine primarily at a remote location, on a laptop or workstation. To create an Undocked license, follow the steps in the “Licensing and Registration” chapter.



Note: For detailed information on GoldMine Licensing, see the *Administering GoldMine* manual or GoldMine online Help.

2. **Exit all programs running on your system.** This frees memory and alleviates potential conflicts between the installer and other software on your computer. You should exit any third-party utilities integrating with GoldMine and other GoldMine add-on products. You should also exit the Microsoft Office Shortcut bar and stop all services.
3. **Disconnect the laptop from the network.** Ensures GoldMine configures the laptop to connect only with the database on the local computer, and not with the network.
4. **Install GoldMine to the undocked laptop or home office computer.** Choose Undocked Setup and follow the directions in the “Installing GoldMine 6.0 (Corporate Edition)” chapter.
5. **License GoldMine.** License GoldMine with the appropriate U-license information.
6. **Verify that you can launch GoldMine.** This ensures the installation is functioning properly.

in this chapter...

Running a Server Setup Installation
Installing the Custom Configuration
Running a Workstation Installation
Running an Undocked User
Installation

CHAPTER TWO

2

Installing GoldMine 6.0 (Corporate Edition)

Overview

This chapter contains step-by-step instructions for running:

- Server Setup installations
- Custom Configuration
- Workstation installations
- Undocked Setup installations

IMPORTANT: The instructions in this chapter use the Server Setup installation as a standard while illustrating the individual differences between the installation types.

Running a Server Setup Installation

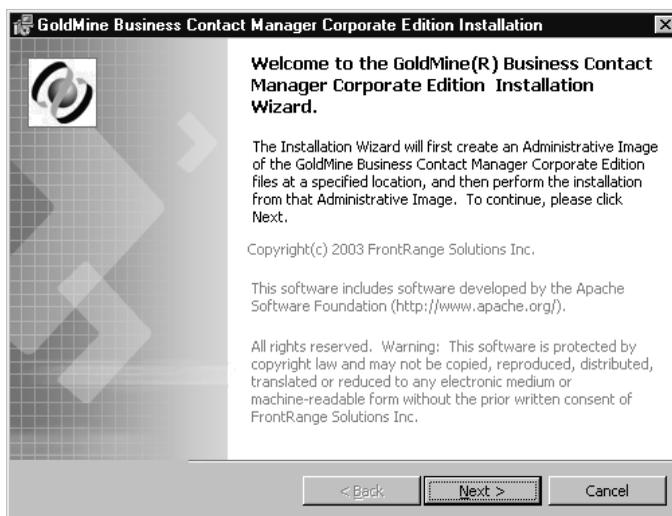
A shared Server Setup installs a full copy of GoldMine® to a common location, usually a shared network drive. Workstation-based users can then connect to the server copy from their local computers (after running a Shared Workstation installation).

To Run a Server Setup Installation

1. Insert the GoldMine 6.0 (Corporate Edition) CD into your CD-ROM drive. The Installation Wizard prepares to install GoldMine.

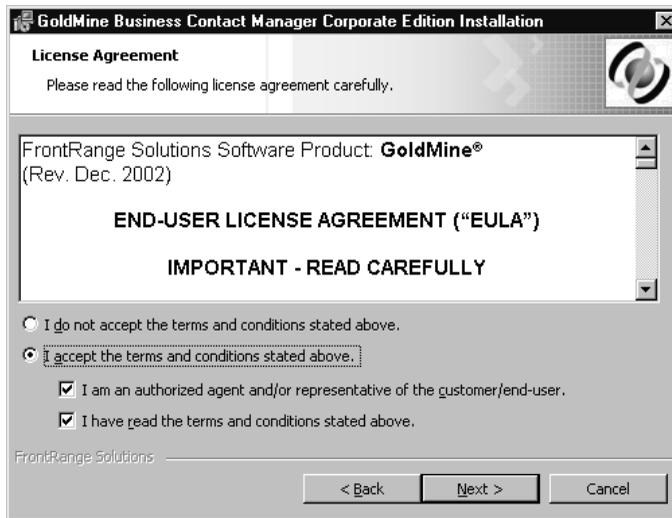
Note: The GoldMine CD is set up to autorun when inserted into your CD-ROM drive. If autorun is not enabled, select **Run** from the **Start** button on the **Windows** taskbar, and then type `x:\setup.exe` (where “x” is the letter of CD-ROM drive).

When the setup is ready, the **Welcome to the GoldMine Business Contact Manager Corporate Edition Installation Wizard** dialog box appears.



2. Click **Next**. The **Readme** dialog box appears providing you with important and useful information about GoldMine.
3. Click **Next**.

The **License Agreement** dialog box appears.



4. Review the end-user license agreement (EULA). If you agree to the terms, select **I accept the terms and conditions stated above**. You must also indicate your status by selecting **I am an authorized agent and/or representative of the customer/end-user**. When you have finished reading the agreement, select **I have read the terms and conditions stated above**. Click **Next**.

Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms and conditions stated above**. Click **Cancel** to exit the installation.

The **Setup Type** dialog box appears.

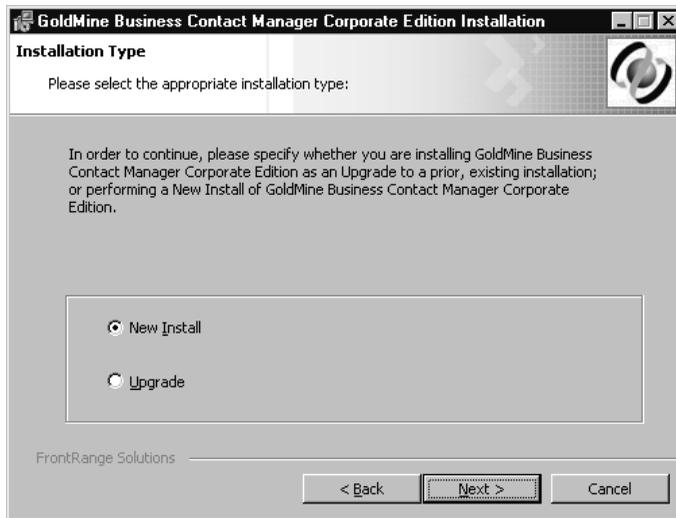


5. To install a shared server copy of GoldMine, select **GoldMine Business Contact Manager Corporate Edition Server Setup**.

Note: Undocked Setup installs GoldMine on an independent computer that does not access the server except through synchronization. The undocked user installation is discussed later in this chapter.

6. Click **Next**.

The **Installation Type** dialog box appears.



7. Select the kind of installation you want to run. You can select from the following options:
 - **New Install:** Select this option if GoldMine is not currently installed.
 - **Upgrade:** Select this option if you are upgrading from a previous version of GoldMine.

Note: The upgrade steps are addressed in Appendix A, "Upgrading GoldMine."

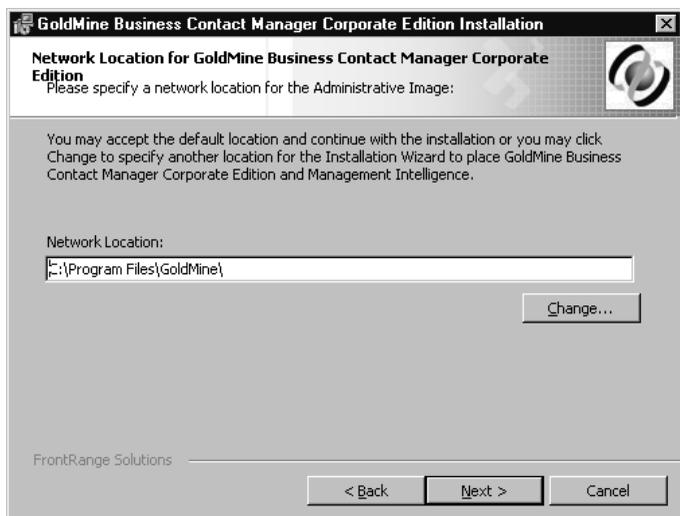
8. Click **Next**.

The **Language Type** dialog box appears.



9. Select the language version you are installing.
10. To install demonstration data, select **Install Demo Data**.
11. Click **Next**.

The **Network Location for GoldMine Business Contact Manager Corporate Edition** dialog box appears.



12. GoldMine is installed to the location indicated in the **Network Location** text box. If you want to install the application to another location, type the new path or click **Change** to navigate to the new location.
13. In the **Network Location** dialog box, click **Next**.

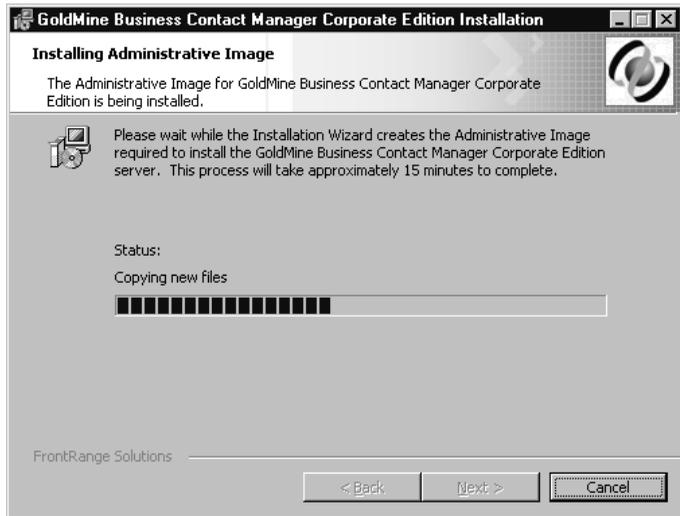
The **MS SQL Administrator Login** dialog box appears.

The screenshot shows a dialog box titled "GoldMine Business Contact Manager Corporate Edition Installation" with a sub-header "MS SQL Administrator Login". The main text reads: "Please specify the Administrative login information for MS SQL Server then click 'Next' to begin installing GoldMine Business Contact Manager Corporate Edition." Below this, a message states: "No MS SQL server names were found. If you know which MS SQL Server you would like to use, please type the name in below." There are four input fields: "MS SQL Server Name:" (a dropdown menu), "MS SQL Database Name:" (a text box containing "GoldMine"), "MS SQL Administrator Username:" (an empty text box), and "MS SQL Administrator Password:" (an empty text box). At the bottom, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted. The text "FrontRange Solutions" is visible in the bottom left corner.

14. Complete the following SQL Server text boxes:
 - **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 in SQL is **sa**. If your SQL user name is different, your SQL administrator must provide the information.
 - **MS SQL Administrative Password:** There is no default password in SQL. If your SQL password is different, your SQL administrator must provide the information.

15. Click **Next**. The installation process begins.

The **Installing Administrative Image** dialog box appears displaying the status of the installation process.



16. When the process is finished, the **Administrative Image Installation Completed** dialog box appears. Click **Finish**.

Note: The GoldMine administrative image is now installed on your computer. Please continue with the custom configuration to complete the setup.

Installing the Custom Configuration

GoldMine's custom setup options help you install the following:

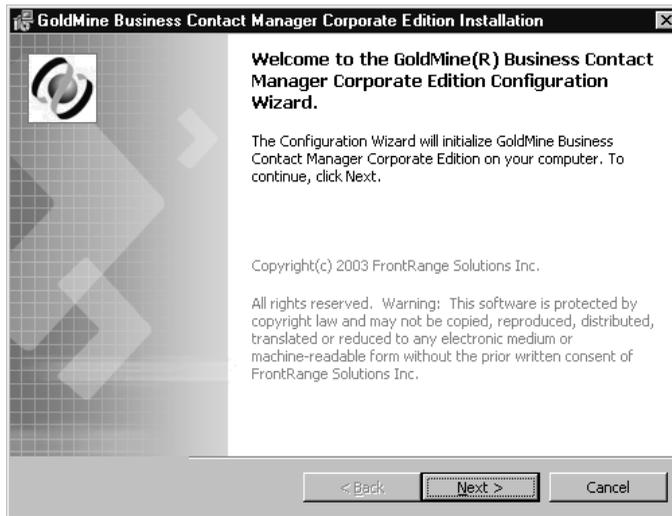
- **Answer Wizard:** Allows you to use predefined reports optimized to generate reports on GoldMine SQL databases.
- **Manager's Console:** Provides graphical monitoring of high level workflow or individual Contact Records.
- **BDE:** Configures the Borland Database Engine to GoldMine specifications.

If you choose to use Answer Wizard or Manager's Console, install them on the GoldMine server and then install them locally on each computer. You can choose the options to setup locally as part of the workstation installation.

To Install the Custom Configuration

1. The Configuration Wizard begins immediately after the administrative image is installed.

The **Welcome to the GoldMine Business Contact Manager Corporate Edition Configuration Wizard** appears.

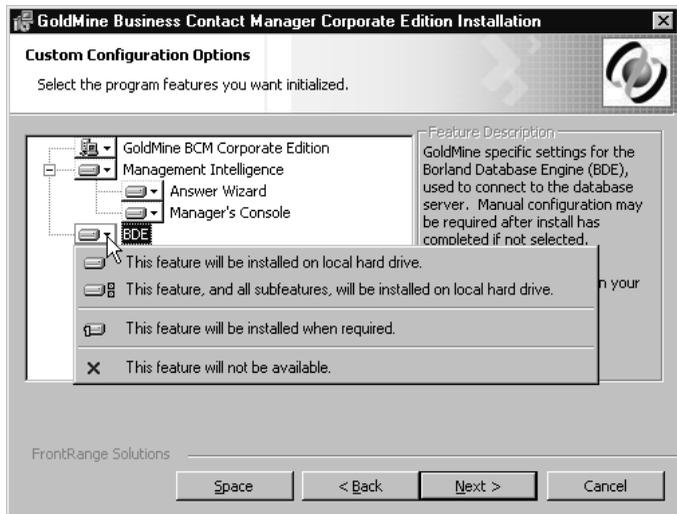


2. Click **Next**.

Tip

To view a description of each feature, select the feature and read the text in the Feature Description box. Items displayed with a hard drive symbol are already selected for configuration. Items displayed with a red X are not selected.

The **Custom Configuration Options** dialog box appears.



3. Click the arrow to the immediate left of **Management Intelligence** to install both Answer Wizard and Manager's Console. If you want to install just one of the options, click the arrow to the left of the specific feature. Select **This feature, and all subfeatures, will be installed on local hard drive** on the pop-up menu.
4. The BDE is automatically selected for configuration. If you do not want GoldMine to configure the BDE for optimal GoldMine use, select **This feature is not available** from the pop-up menu.
5. Click **Space** to check whether you have enough space on the drive. The **Disk Space Requirements** dialog box appears displaying the space required to install the features you selected. If there is not enough space on the drive, the volume is highlighted. Click **OK** to return to the Custom Configuration Options.
6. Click **Next**.

The **Ready to Configure the Program** dialog box appears.



7. Click **Install**. The **Configuring GoldMine Business Contact Manager Corporate Edition** status box appears.
8. When the process is finished, click **Next**.

The **SERVER Installation Completed** dialog box appears.



9. Click **Finish**.

CONGRATULATIONS! You have successfully installed all the components of GoldMine on your server. You now need to license the program. Detailed instructions for licensing and registration are located in the “Licensing and Registration” chapter in this manual.

Running a Workstation Installation

A shared workstation setup installs shortcuts on the workstation, enabling workstation users to connect to the shared server copy of GoldMine from their individual computers.

To install a shared version of GoldMine on a workstation, you must first:

- Share the GoldMine folder on the server.
- Map the same drive on each workstation to the shared GoldMine folder on the server.
- Run the workstation installation.

Sharing the GoldMine Folder on the Server

After GoldMine is installed on the server, you must share the GoldMine root directory in order for the workstations to function properly. All GoldMine users must have rights to read, write, modify, and delete files. If users do not have sufficient permissions to the GoldMine folder, GoldMine may not function on the workstations.

To Share the GoldMine Folder

1. Locate the GoldMine folder on the server (for example, C:\Program Files\GoldMine).
2. Right-click the folder, and then select **Sharing**. 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**. All GoldMine users must have full control.
8. Click **OK** to save settings.

Note: These steps were documented on a Windows 2000 operating system. If you are using a different operating system, your steps may vary.

Mapping a Drive on the Workstations

We recommend mapping the same network drive on all the workstations accessing the shared GoldMine folder. Using the same network drive letter on all the workstations facilitates GoldMine administration and operations related to linked documents and synchronization.

Note: Users at all workstations must specify the same **Drive** letter (for example, **G:**) on all workstations.

To Map a Drive:

1. On the workstation computer, start **Windows Explorer** and then select **Tools>>Map Network Drive**.
2. In the **Drive** text box, select the drive letter you are mapping to the GoldMine folder on the server. This drive letter should be the same on all workstations.
3. In the **Path** text box, type the path to the shared GoldMine folder in the **Shared Directories** text box or browse to the server name and shared folder. An example path: **\\GoldMine Server\GoldMine**.
4. Select **Reconnect at Logon**.
5. Click **OK**.
6. Repeat this procedure on each computer used as a client workstation.

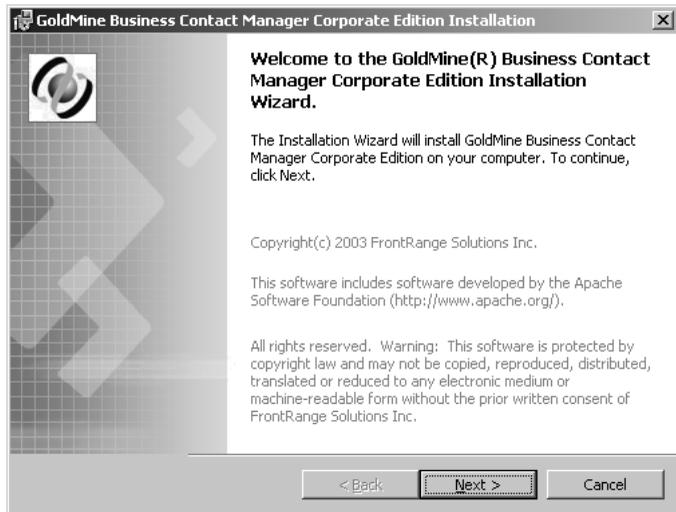
Running the Installation

Client workstations are installed across the network. The process creates a shortcut to the server copy of GoldMine.

To Run a Shared Workstation Installation

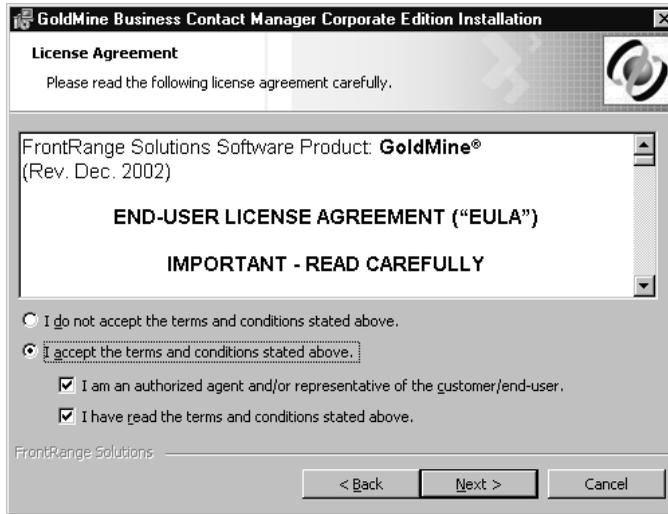
1. From the workstation, browse on the mapped drive to `WSsetup.exe`, located in the main GoldMine folder on the server.
2. Double-click **WSsetup.exe**.

The **Welcome to the GoldMine Business Contact Manager Corporate Edition Installation Wizard** dialog box appears.



3. Click **Next**.

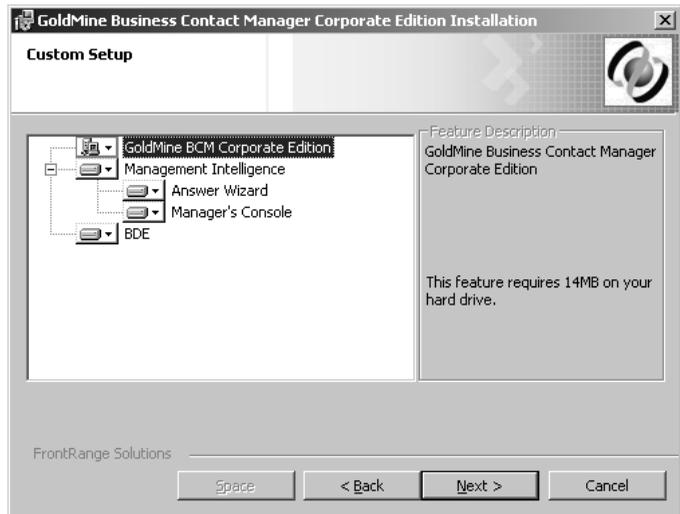
The **GoldMine License Agreement** dialog box appears.



4. Review the end-user license agreement (EULA). If you agree to the terms, select **I accept the terms and conditions stated above**. You must also indicate your status by selecting **I am an authorized agent and/or representative of the customer/end-user**. When you have finished reading the agreement, select **I have read the terms and conditions stated above**. Click **Next**.

Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms and conditions stated above**. Then click **Cancel** to exit the installation.

The **Custom Setup** dialog box appears.



5. Click the arrow to the immediate left of **Management Intelligence** to install both Answer Wizard and Manager's Console. If you want to install just one of the options, click the arrow to the left of the specific feature.
6. Select **This feature, and all subfeatures, will be installed on local hard drive** on the pop-up menu.
7. Click **Space** to check whether you have enough space on the drive. The **Disk Space Requirements** dialog box appears, displaying the space needed to install the features you selected. If there is not enough space on the drive, the volume is highlighted. Click **OK** to return to the **Custom Setup** dialog box.
8. Click **Next**. The **File Location** dialog box appears.
9. The GoldMine files are installed to the folder displayed in the **Location** text box. If you want to install the files to another location, type the new path or click **Change** to navigate to a new location.
10. When the location is correct, click **Next**. The **Ready to Configure Program** dialog box appears.

11. Click **Install** to begin the installation process.
12. The **Install GoldMine Business Contact Manager Corporate Edition** status box appears. When the process is completed, click **Next**.

The **WKSTN Installation Completed** dialog box appears.



13. Click **Finish** to exit the wizard.

CONGRATULATIONS! You have successfully installed the shortcuts to the server copy of GoldMine on your workstation. Repeat this procedure for each workstation accessing GoldMine.

Running an Undocked User Installation

An Undocked Setup installs a full copy of GoldMine with a dBASE database on a computer working disconnected from a network. This type of installation is for computers working disconnected from the GoldMine server but synchronizing with the GoldMine server to update information.

IMPORTANT: If you are 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.

To Run an Undocked User Installation

1. Follow steps 1-4 of the Server Setup installation.

The **Setup Type** dialog box appears.

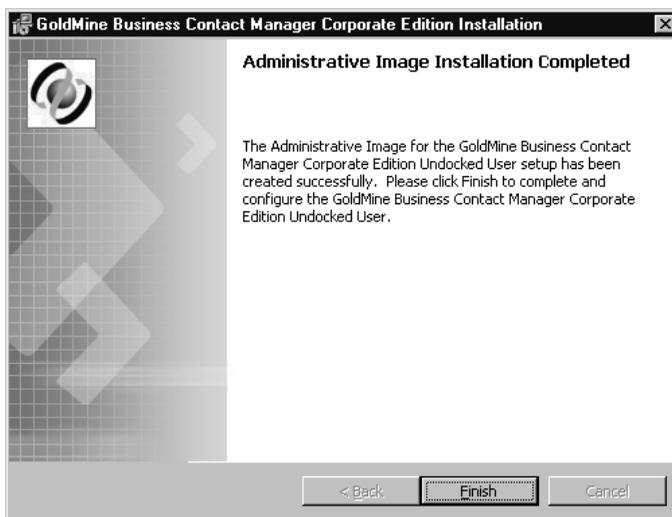


2. Select **GoldMine Business Contact Manager Corporate Edition Undocked Setup**.

3. Click **Next**. The **Installation Type** dialog box appears.
 4. Select the kind of installation you want to run. You can select from the following options:
 - **New Install:** Select this option if GoldMine was never installed.
 - **Upgrade:** Select this option if you are upgrading from a previous version of GoldMine.
-
- Note:** The Upgrade steps are addressed in Appendix A, "Upgrading GoldMine."
-
5. Click **Next**.
 6. The **Language Type** dialog box appears. Select the language version you are installing.
 7. To install demonstration data, select **Install Demo Data**. The undocked user installation installs only a dBASE database.
 8. Click **Next**. The **Location for GoldMine Business Contact Manager Corporate Edition** dialog box appears.
 9. GoldMine is installed to the location indicated in the **Location** text box. If you want to install the application to a different location, type the path or click **Change** to navigate to the new location.
 10. After returning to the **Location** dialog box, click **Next**. The **Installing Administrative Image** dialog box appears displaying the process status.

installing

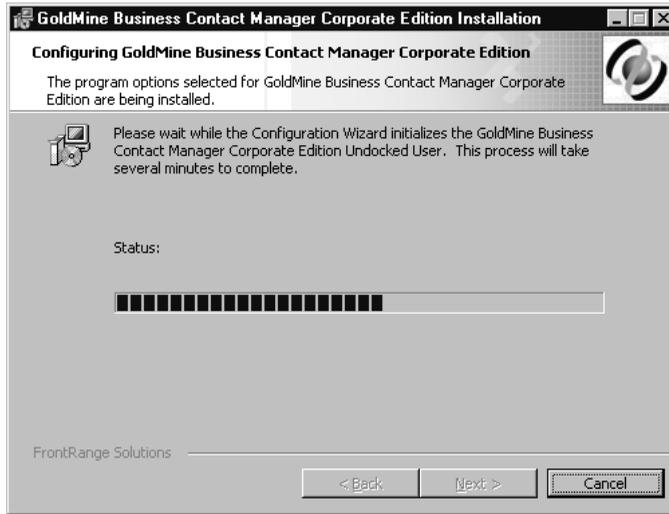
11. When the process is finished, the **Administrative Image Installation Completed** dialog box appears.



12. Click **Finish**. The **Welcome to the GoldMine Business Contact Manager Corporate Edition Configuration Wizard** dialog box appears.

13. Click **Next**.

The **Configuring GoldMine Business Contact Manager Corporate Edition** status dialog box appears.



14. When the process is finished, click **Next**.

15. The **UNDOCKED Installation Completed** dialog box appears. Click **Finish**. The License Wizard automatically launches. If you wish to continue, click **Next**; otherwise, click **Cancel**. If you cancel the licensing process, the wizard starts automatically the first time you launch GoldMine.

CONGRATULATIONS! You have successfully installed GoldMine on your computer. You now need to license the program. Detailed instructions for licensing and registration are located in the "Licensing and Registration" chapter.

in this chapter...

The GoldMine License
License Types
Managing and Creating
Licenses
Licensing with License
Types
Licensing GoldMine

CHAPTER THREE

Licensing and Registration

Overview

GoldMine® has a fully scalable licensing structure. Most organizations, regardless of their requirements, generally buy one license—a **Master License** with X number of seats.

An organization can then create Site sublicenses for each remote office and Undocked sublicenses for individual remote (mobile) users. As your business matures and GoldMine expands, your organization can change the licensing configurations. The single, distributed Master License serves as the authentication mechanism for easy and secure synchronization across the entire organization.



Note: For detailed information on GoldMine licensing, see the *Administrating GoldMine* manual and the GoldMine online Help.

The GoldMine License

The following example illustrates what a GoldMine license serial number looks like:



The first character denotes the license type. The first set of numbers indicates 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. The seats available may be increased by adding license counts in the License Manager.

The next set of numbers is an eight-digit serial number uniquely identifying the license for an organization. This eight-digit number is used for registration and support and identifies all sublicenses as part of the same organization.

When purchasing a license from GoldMine, you receive a keycode with it. The keycode is a computer-generated check used by GoldMine to verify the license's validity.

Note: The keycode is required during installation. Keep the license number and keycode in a safe place in the event it becomes necessary to reinstall the software.

License Types

A Master License must be installed *only* on the organization's primary network. A Master License is inherited by all sublicenses to ensure all the organization's sublicenses are authenticated properly during synchronization.

Properly creating and installing the sublicenses is important because they control security for synchronization throughout the organization.

Only the Master License can be increased, decreased, or sublicensed. Site sublicenses can be increased under specific circumstances.

Master Licenses		
E	Enterprise License	Supports SQL and dBASE databases, and includes GoldSync.
Sublicenses		
U	Undocked License	Single sublicense for a remote GoldMine user
S	Site License	Multiple-user sublicense for a remote office
Y	GoldSync License	GoldSync sublicense for a remote office
Increasing License Counts		
J	Enterprise License Increase	Increases the number of GoldMine seats and GoldSync sites on an E-License.
N	GoldSync License Increase	Increases the number of G-Licenses

Undocked licenses (technically sublicenses) are for remote users and can only be licensed for a single user. They can be sublicensed from the main GoldMine system or from a Site sublicense.



Note: For detailed information on License Types, see the *Adminstrating GoldMine* manual.

Note

The GoldMine (Corporate Edition) Master License is a Enterprise License and begins with the letter E.

Managing and Creating Licenses

All GoldMine licensing information and related functions are available within the **License Manager**.



The central window lists all installed licenses and any sublicenses created from this location.

The first letter of each license determines what type of license it is. Every GoldMine system begins with a Master License. This Master License determines what database types are supported by the master site as well as its synchronization capabilities. The database support of the Master License is inherited by the site sublicenses distributed throughout the organization. GoldSync Synchronization capabilities can be distributed separately to sublicenses.

Note: Licensing information is stored in the license file, **License.dbf**. This file must exist only in the GoldMine root directory of each GoldMine installation.

Creating Sublicenses for Remote Offices

From a Master License, you can create sublicenses for remote offices. Office sublicenses include **Site Licenses (S-licenses)** and **GoldSync Licenses (Y-licenses)**.

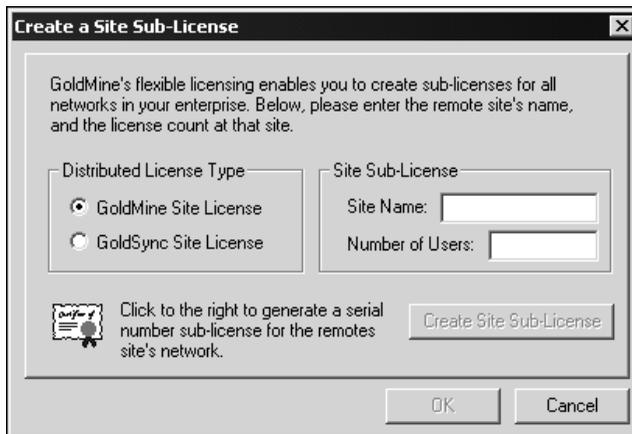
The available users on the Master License decrease by the number of users for whom the sublicense is created, reducing the maximum number of simultaneous users at that location.

Note: When creating any sublicense, note the entire license number created by GoldMine. The sublicense includes the keycode and additional information needed when licensing the remote computer. The information is only displayed in its entirety during the creation process.

To Create a Sublicense for a Remote Office

1. From the **GoldMine** main menu, select **File>>Configure>>License Manager**. The **License Manager** appears.
2. Click the **Licenses** tab, and then click **New Site**.

The **Create a Site Sub-License** dialog box appears.



3. In the **Distributed License Type** area, select the site license you want to create—either **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 sublicense number down or copy it to Windows Notepad. The sublicense number is needed for each remote computer installation. Send the remote site license number to the remote user. The remote user can then type the license number during the GoldMine installation.

4. In the **Site Sub-License** area, type the site name and the number of users.
5. Click **Create Site Sub-License**. The **Site-License for Remote Site** dialog box appears.
6. Review the information about the sublicense and then click **I Agree**. The sublicense number for the site appears in the **Sub-license for Remote Site [Name of Site]** dialog box.

Note: GoldMine automatically adds the sublicense to the Licenses tab under previously installed licenses.

Creating Sublicenses for Undocked Users

GoldMine has a sublicense for an individual user called an **Undocked License (U-License)**. This license type is created for users who work primarily with GoldMine at another location, on a laptop, notebook, or home office computer, but may also need to log on to the network occasionally. Creating an undocked user decreases the available users of the network site (Master License) by one; however, when an undocked user logs on to the site from which they were sublicensed, 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 five-user GoldMine system, five Undocked licenses can be created.

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 five-user GoldMine system with three undocked users, three undocked users plus two other users can log on to GoldMine.

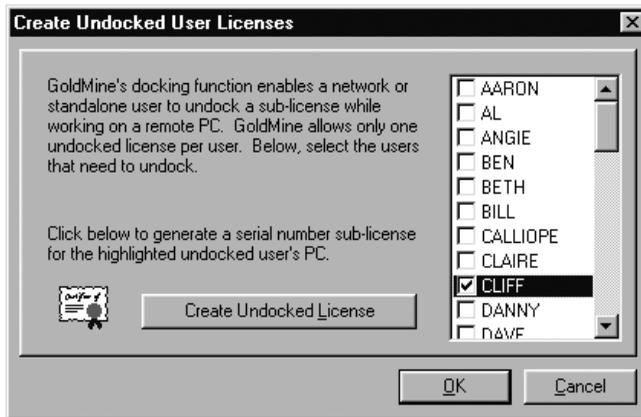
When used in combination with GoldSync, administrators can synchronize security settings to undocked users including new passwords, menu items, and preferences, in addition to data.

To work on an undocked basis, a user must have an Undocked license on his laptop. You can create an Undocked license from either the Master License or from a Site license.

To Create a Sublicense for an Undocked User

1. From the **GoldMine** main menu, select **File>>Configure>>License Manager**. The **License Manager** appears.
2. Click the **Licenses** tab, and then click **Undock Users**.

The **Create Undocked User Licenses** dialog box appears.



3. Select the check box next to the user for whom you want to create a sublicense, and then click **Create Undocked License**. The **Sub-Licenses** dialog box appears.
4. Review the information about the sublicense and then click **I Agree**. The sublicense 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 sublicense number down or copy it to Windows Notepad. The sublicense number is needed for each undocked computer installation. Send the Undocked sublicense number to the remote user. The remote user can then type the license number during the GoldMine installation.

Licensing with License Types

After GoldMine is installed, you must license it using the **License and Registration** wizard. The License and Registration wizard automatically launches the first time you open GoldMine if you did not complete the information during installation.

Licensing with a Master License

The GoldMine (Corporate Edition) Master License begins with the letter E (*Example:* E-0050-11111111). This is usually a multi-user license for a server installation of GoldMine. You need to provide the serial number and key code when licensing. An E-license for a specific number of GoldMine seats includes an equal number of GoldSync licenses.

Note: It is from the E-license that remote site sublicenses (S- and Y-licenses) and Undocked sublicenses (U-licenses) are created.

Enter GoldMine Serial Number

Please enter your GoldMine Serial Number and Key Code below.

GoldMine Serial Number: Key Code

E - [] - [] - [] [] [] [] []

If you have a GoldSync® Serial Number and Key Code, please enter it below to activate GoldMine's automated. If you have a GoldSync license, please enter the corresponding Serial Number and Key Code below.

GoldSync Serial Number: Key Code

[] - [] - [] - [] [] [] [] []

Automatically register

< Back Next > Cancel

To License GoldMine with a Master License

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

Licensing with a Site License

Again, Site licenses are sublicenses created from the Master License and begin with the letter S. You should have an **S**-license with the number of users. **Y**-licenses are required only if you are using an S-license and want to synchronize using GoldSync. You should have a Y-license for the number of GoldSync licenses required to synchronize.

Enter GoldMine Serial Number

Please enter your GoldMine Serial Number and Key Code below:

GoldMine Serial Number: Key Code Site Code
 S - [] - [] - [] - [] []

If you have a GoldSync® Serial Number and Key Code, please enter it below to activate GoldMine's automated. If you have a GoldSync license, please enter the corresponding Serial Number and Key Code below.

GoldSync Serial Number: Key Code Site Code
 Y - [] - [] - [] []

Automatically register

< Back Next > Cancel

To License GoldMine with a Site License

1. 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.
2. In the GoldSync Serial Number text boxes, type the **Y**-license, key code, and Site code you created in the License Manager.

Licensing with an Undocked License

As mentioned, Undocked licenses (technically sublicenses) are created from a Master License and begin with the letter U. This license type is created for users who work with GoldMine at another location, on a laptop or workstation but disconnected from the server copy of GoldMine.

Enter GoldMine Serial Number

Please enter your GoldMine Serial Number and Key Code below:

GoldMine Serial Number: Key Code Site Code
 U - [] - [] - [] - []

If you have a GoldSync® Serial Number and Key Code, please enter it below to activate GoldMine's automated. If you have a GoldSync license, please enter the corresponding Serial Number and Key Code below.

GoldSync Serial Number: Key Code
 [] - [] - [] - []

Automatically register

< Back Next > Cancel

To License GoldMine with an Undocked License

Type the **U**-license, key code, and site code created in the License Manager.



Note: For detailed information on GoldMine licensing, see the *Administrating GoldMine* manual and the GoldMine online Help.

Licensing GoldMine

After GoldMine is installed, you must register it using the License and Registration wizard. The License and Registration wizard automatically launches the first time you open GoldMine if you did not complete the license and registration information after installation.

To License and Registration GoldMine

1. Launch the **License and Registration Wizard**.

The **Welcome** dialog box appears.



2. Click **Next**.

The **Enter License Information-Contact** dialog box appears.



The screenshot shows a dialog box titled "Enter License Information" with a close button (X) in the top right corner. On the left side, there is a small icon of an open treasure chest. The main text reads: "To have GoldMine personalize your E-mails, letter and fax templates, please provide your personal contact data below:". Below this text are several input fields: "Organization:", "Contact Name:", "E-mail address:", "Phone/Fax:" (with a slash separator), "Address 1:", "Address 2:", "City/State(Prov):" (split into two boxes), and "ZIP/Country:" (split into two boxes). At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

3. Type your contact information in the designated text boxes. You must complete this information to continue. Click **Next**.

The **Enter License Information-Purchase** dialog box appears.



The screenshot shows the same "Enter License Information" dialog box, but with the "Purchase" tab selected. The main text reads: "So that we may better assist you, please take a moment to tell us about your GoldMine purchase below:". Below this text are several input fields: "Place of purchase:" (a dropdown menu), "Purchase Date" (a date field), "How did you learn about GoldMine?" (a dropdown menu), "Your current contact manager, if any?" (a dropdown menu), and "Your software dealer:" (a text field). At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

4. Complete the purchase information. Click **Next**.

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



5. Type your GoldMine serial number and key code. Depending on what kind of license you purchased or the kind of installation you are conducting, different options appear in this window. The options were discussed at the beginning of this chapter.
6. Click **Next**.

The **Import NT Server User Accounts** dialog box appears.



Note: The **Import NT Server User Accounts** dialog box only appears if the installation is performed on a Microsoft Windows 2000 system.

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

The **Enter Your Username** dialog box appears.



8. Type the user name. It should not be more than eight characters. The password is optional. This user has Master Rights in GoldMine. Click **Next**.

The **GoldMine Logon** window appears.



9. In the GoldMine window, type the user name and password. Click **OK** to launch GoldMine.

CONGRATULATIONS! GoldMine is licensed and the installation is now complete.

in this chapter...

- Installing GoldMine Link for Microsoft Outlook
- Configuring GoldMine Link for Microsoft Outlook
- Adding GoldMine Fields to Outlook
- Configuring the GoldMine (Corporate Edition) Address Book
- Displaying Information about the GoldMine Link

CHAPTER FOUR

Installing GoldMine Link for Microsoft Outlook 2000

Overview

GoldMine® Link for Microsoft® Outlook® allows you to launch the GoldMine Contact Record while working in Outlook, manually or automatically link Outlook messages to existing GoldMine contacts, and quickly create a new GoldMine contact and link an e-mail. It also allows Outlook users to access a GoldMine Address book of Users, Contacts, Additional Contacts, User Group Distribution Lists, and Contact Group Distribution Lists.

Installing GoldMine Link for Microsoft Outlook

You install the GoldMine Link for Microsoft Outlook on each computer running GoldMine (Corporate Edition), including each GoldMine client workstation, and where Outlook 2000 is installed locally.

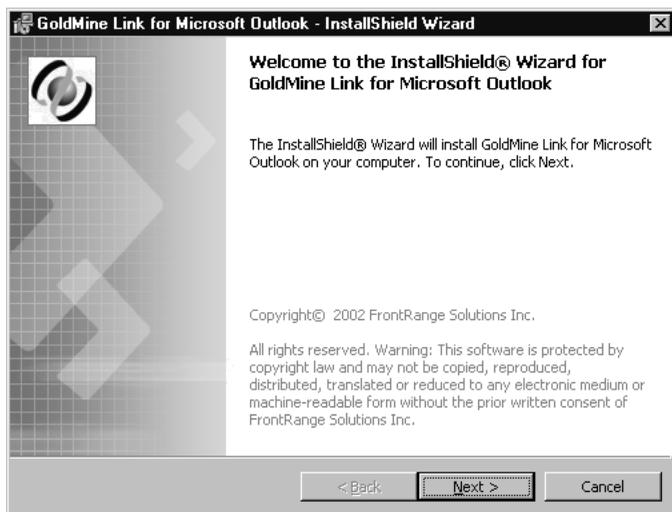
IMPORTANT: To install the GoldMine Link for Outlook, you must have Outlook 2000 SR-1 (9.0.0.3821) , or higher, installed on your computer.

Once the GoldMine Link for Outlook is installed and the initial configuration is finished, you can access the GoldMine Link for Outlook online Help for more information.

To Install GoldMine Link for Outlook

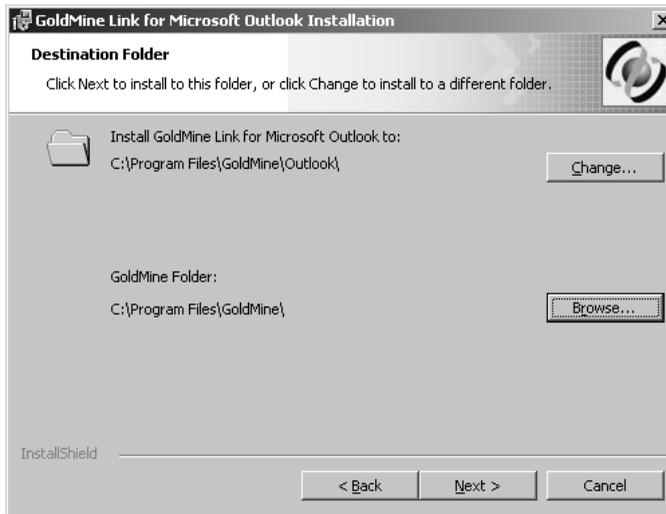
1. To manually launch the GoldMine Link for Outlook installation wizard, browse to the **GoldMineLinkFor Outlook** folder on the GoldMine 6.0 (Corporate Edition) CD. Double-click **GMLinkforOutlook.exe**.

The **Welcome to the InstallShield® Wizard for GoldMine Link for Microsoft Outlook** appears.



2. Click **Next**.

The **Destination Folder** dialog box appears.



3. The **Destination Folder** dialog box displays default paths and allows you to select alternative locations for the following:
 - **Install GoldMine Link for Microsoft Outlook to:** Installs the link to this location. To change the Outlook path, click **Change** and type or browse to the location where you want the GoldMine Link for Outlook installed.
 - **GoldMine Folder:** This should reflect the path where GoldMine is currently installed. To select a different path, click **Browse** and type or browse to the current installation of GoldMine you are using.

Note: If you are installing the GoldMine Link on a client workstation, browse to the network installation of GoldMine not the local GoldMine folder containing only Management Intelligence files.

4. Click **Next**.

The **GoldMine and SQL DataBase Login** dialog box appears.



5. In the **GoldMine Login Info** area, type your GoldMine user name and password. In the **SQL Login Info** area, type the SQL user name and password, or leave it blank if you are using integrated security. Click **Next**.

The **BDE Alias Setup** dialog box appears.



6. Select the contact database you are linking to your Outlook. Click **Next**.

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



7. Click **Install**.

The **InstallShield Wizard Completed** dialog box appears when the process is finished.



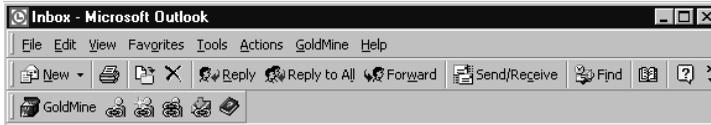
8. Click **Finish** to exit the wizard. Launch Outlook. You should see the following:

- A "Welcome to the GoldMine Link for Microsoft Outlook" e-mail message is sent to your Outlook account.
- A GoldMine menu
- A GoldMine toolbar

CONGRATULATIONS! You have successfully installed the GoldMine Link for Microsoft Outlook. You now need to configure the link to use the linking and addressing options.

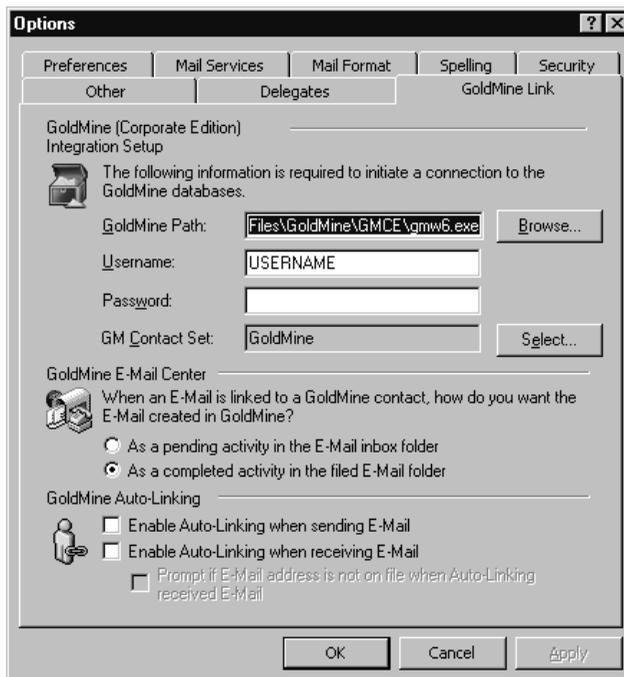
Configuring GoldMine Link for Microsoft Outlook

The GoldMine Link installs a GoldMine menu option and a GoldMine toolbar in Outlook. For the link to function correctly, you configure the GoldMine Link settings.



To Configure GoldMine Link for Outlook

1. On the Outlook menu, select **Tools>>Options**. Select the **GoldMine Link** tab.

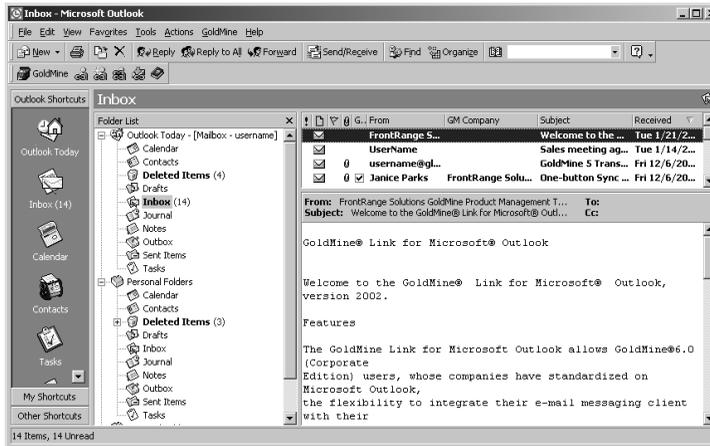


outlook link

2. In the **GoldMine (Corporate Edition) Integration Setup** area, you may need to change the GoldMine path to the correct GMW6.exe. Click **Browse** or type the correct path.
 3. If you need to change the GoldMine user name and password, type the correct information.
 4. To change the **GM Contact Set** linked to Outlook, click **Select**. In the **Contact Data** dialog box, select the correct database name.
 5. In the **GoldMine E-mail Center** area, you can choose to have linked e-mail messages created as one of the following:
 - **As a pending activity in the E-Mail inbox**
 - **As a completed activity in the filed E-Mail folder**
 6. To automatically link messages sent in Outlook to the GoldMine Contact Record, select **Enable Auto-Linking when Sending E-mail**.
 7. To automatically link retrieved messages to the GoldMine Contact Record, select **Enable Auto-Linking when Retrieving E-mail**. If you select this option, you can also select **Prompt if E-Mail is not on file**.
-
- Note:** This option automatically launches the **Attach E-mail to a Contact** dialog box when a matching contact is not located in the database.
-
8. Click **OK**. A dialog box appears informing you that the changes take effect the next time Outlook is run. Close and reopen Outlook to see the changes.

Adding GoldMine Fields to Outlook

You can configure the Outlook Inbox to display a check box when the e-mail is linked to a GoldMine contact, the GoldMine company name for the contact, and the GoldMine account number.

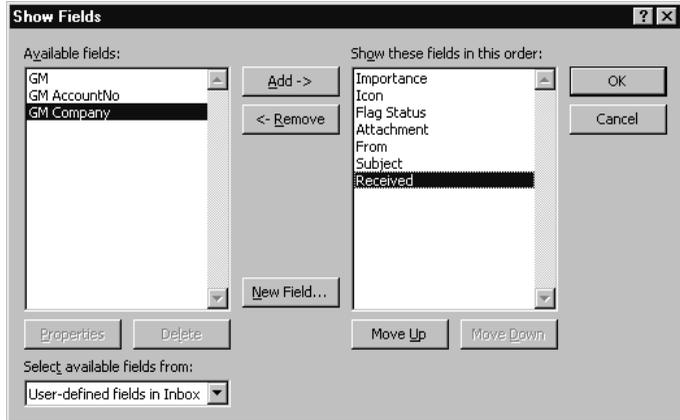


You can add the column views two ways. The first method uses the **Inbox** window's local menu. The second method uses the **View** menu.

Adding GoldMine Columns to the Inbox Display

1. In Outlook, open the **Inbox** window. You can add the fields to the display using either of the following methods:
 - To use the local menu option, right-click on the view header (**Importance**, **Icon**, **Flag Status**, **Attachment**, **From**, **Subject**, **Received**) to display the local menu.
 - To use the main menu option, select **View>>Current View**.
2. Select **Customize Current View**.
3. In the **View Summary** window, click the **Fields** button.

The **Show Fields** dialog box appears.



4. In the **Select available fields from** drop-down list, select **User-defined fields in Inbox**.
5. In the **Available fields** list, select a field and then click **Add**. The field options are:
 - **GM:** Displays a check box in the Outlook Inbox to indicate an existing GoldMine contact and the link status.
 - **GM AccountNo:** Displays the GoldMine system account number.
 - **GM Company:** Displays the linked contact's company name.
6. To reorder the displayed columns, highlight the field you wish to move and drag it to the desired location in the list.
7. Click **OK** when the display order is set to your specifications.
8. Click **OK** on the **View Summary** window to close.

Note: You must close and relaunch Outlook to see the changes.

Configuring the GoldMine (Corporate Edition) Address Book

You can configure the integration to allow Outlook users access to a GoldMine Address Book that includes Users, Contacts, Additional Contacts, User Group Distribution Lists, and Contact Group Distribution Lists.

Note: The GoldMine Address Book is not available if your Outlook 2000 is in "Internet Only" mode. You will not have the ability to add services. For more information on how to switch to "Corporate or Workgroup" mode, please consult your Microsoft Outlook Help files.

To Configure the GoldMine (Corporate Edition) Address Book

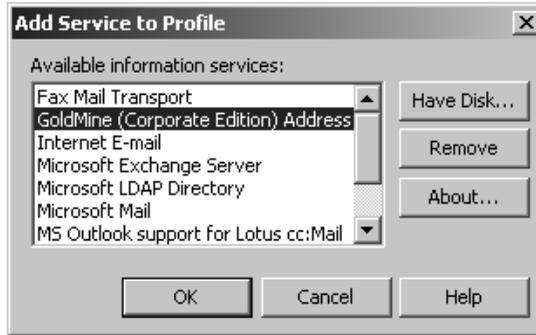
1. Close Outlook 2000 and GoldMine on your local computer.
2. On the Windows Desktop, right-click the **Outlook** icon, and then select **Properties** on the local menu.

The **MS Exchange Setting Properties** dialog box appears.



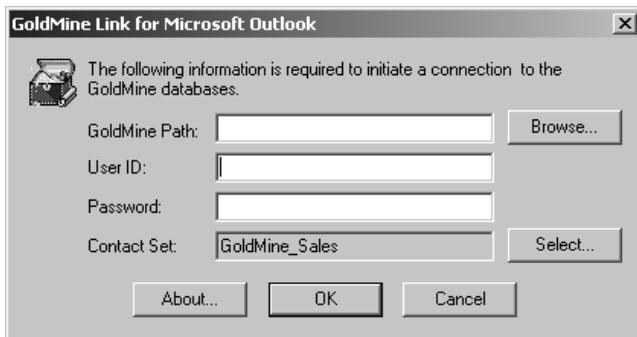
3. On the **Settings Properties** dialog box's **Services** tab, click **Add**.

The **Add Service to Profile** dialog box appears.



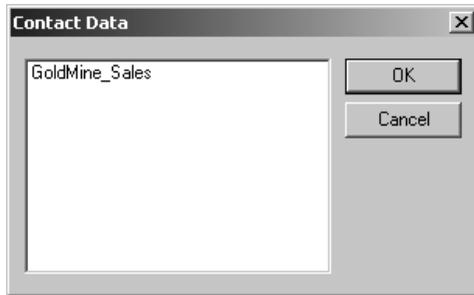
4. Select **GoldMine (Corporate Edition) Address Book** and click **OK**.

The **GoldMine Path** dialog box appears.



5. If the **GoldMine Path** text box is empty or incorrect, click **Browse** to locate the correct GMW6.exe file. In the **User ID** and **Password** text boxes, type your GoldMine user name and password.
6. To verify your Contact Set, click **Select**.

The **Contact Data** dialog box appears.



7. Select the correct Contact Set and click **OK**.

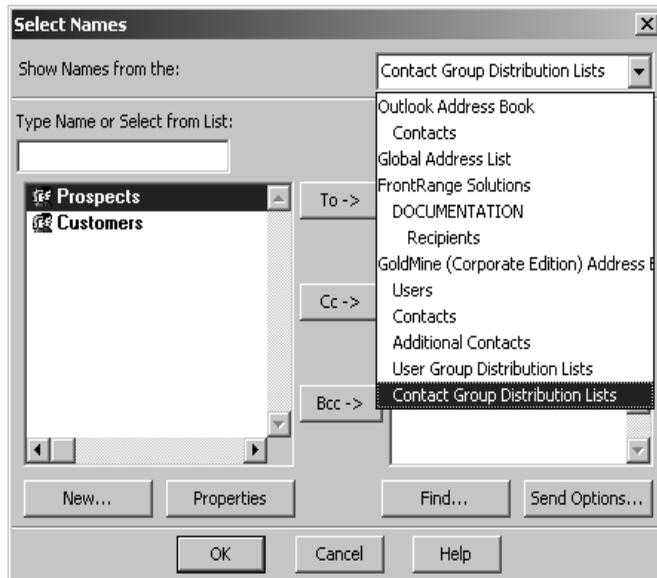
A warning dialog box appears.



8. You are notified of the need to close and reopen Outlook to apply the settings. Click **OK**.
9. You are now back on the dialog box where you specified the GoldMine Path. Click **OK**.
10. Click **OK** to exit the **Settings Properties** dialog box. To apply the changes, close and restart Outlook.

CONGRATULATIONS! You have configured the GoldMine Address Book. Outlook users sending e-mail can now select the GoldMine (Corporate Edition) Address Book, and choose from GoldMine Contacts, Additional Contacts, Contact Group Distribution Lists, Users, and User Group Distribution Lists.

Example of the GoldMine (Corporate Edition) Address Book in Outlook.



To Configure the GoldMine (Corporate Edition) Address Book in Outlook 2000 Office XP

1. Close Outlook 2000 and GoldMine on the local computer.
2. On the Windows Desktop, right-click the **Outlook** icon and select **Properties**.
3. On the **Mail Setup – Outlook** dialog box, click **E-mail Accounts**.
4. In the **Directory** area of the **E-Mail Accounts** dialog box, select **Add a new directory or address book**.
5. Click **Next**.
6. On the **Directory or Address Book Type** dialog box, select **Additional Address Books**, and then click **Next**.
7. On the **Other Address Book Types** dialog box, select the **GoldMine (Corporate Edition) Address Book**, and then click **Next**.

8. The GoldMine information dialog box appears. If the **GoldMine Path** text box is empty or incorrect, click **Browse** to locate the correct GMW6.exe file. Type your GoldMine User ID and Password.
9. Before continuing, click **Select** to locate the **Contact Set** even if it appears properly entered in the text box.
10. Highlight the correct Contact Set and click **OK**.
11. Click **OK** to verify that the changes are applied the next time Outlook is run.
12. Click **OK** to save your changes.
13. On the **Mail Setup – Outlook** dialog box, click **Close**.

CONGRATULATIONS! You have successfully configured the GoldMine (Corporate Edition) Address Book for Outlook 2000 on Windows XP.

outlook link

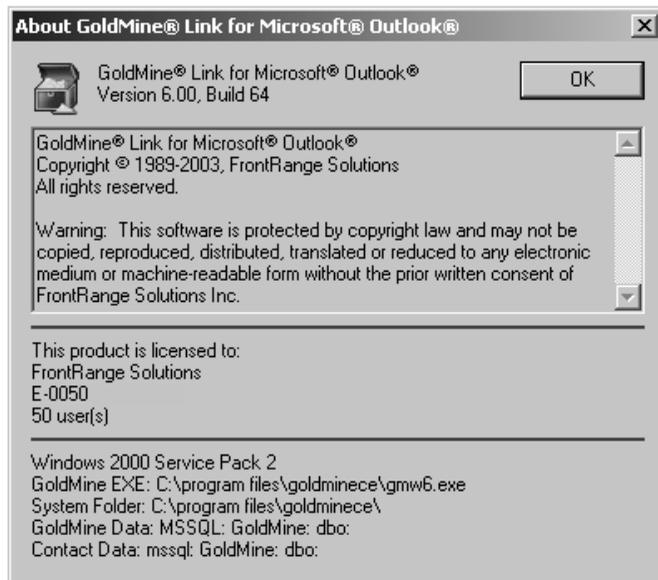
Displaying Information about the GoldMine Link

You can display the following details in Outlook about the GoldMine Link and GoldMine :

- GoldMine Link version and copyright
- GoldMine serial number and number of users
- Operating system
- GoldMine system and data folders linked to Outlook

To Display Information about the GoldMine Link

1. From Outlook's main menu, select **GoldMine>>About GoldMine Link for Microsoft Outlook**.



2. Click **OK** to close.

in this appendix...

Upgrading GoldMine on a Server

Upgrading GoldMine on a Client
Workstation

Upgrading GoldMine on Remote
Systems

APPENDIX A

Upgrading GoldMine

Overview

If you have a previous version of GoldMine® installed and are upgrading, the Installation Wizard proceeds through the upgrade step-by-step. The upgrade process follows the same basic steps as the new installation process without installing demo data.

Note: You can use this upgrade process with GoldMine 5.50.10424 or higher. If you are upgrading a prior version, you must upgrade to 5.50.10424 before upgrading to 6.0.

Upgrade Considerations

If you are upgrading from a previous version of GoldMine, you should make a backup of your existing GoldMine database and system before continuing. In addition to the 65 MB required for installation, please make sure you have at least two-and-a-half times the size of your largest table in additional free space on your hard disk.

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 is required when upgrading from earlier versions of GoldMine. This conversion should occur automatically when GoldMine is installed into the path of the existing gmw.exe, gmw32.exe, gmw4.exe, or gmw5.exe. Before upgrading, we recommend performing a backup and full database maintenance using your current version of GoldMine.

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.

Upgrading GoldMine on a Server



WARNING: Before upgrading, be sure to back up your database and the GoldMine directory. Also, be sure to close all applications running on your system, including all GoldMine add-on products.

To Upgrade GoldMine on a Server

1. Follow steps 1-4 of the Server installation.
2. When the **Installation Type** dialog box appears, select **Upgrade** and click **Next**.

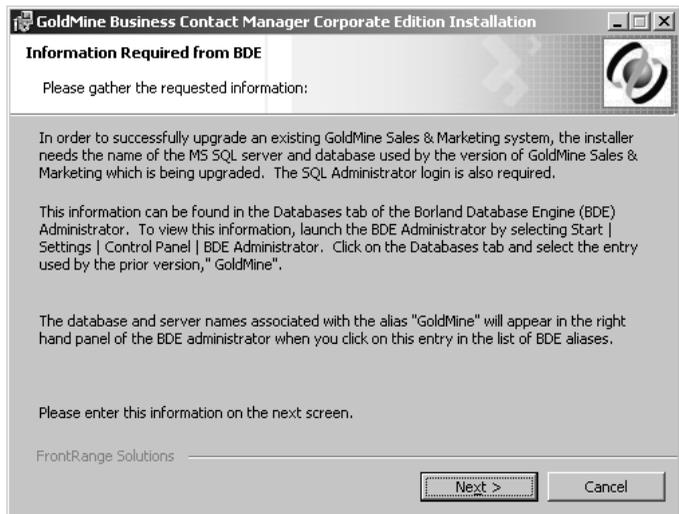
The **Existing GoldMine Location** dialog box appears.



3. If your current GoldMine files are not located in the displayed path, click **Change**. The **Change Current Destination Folder** dialog box appears allowing you to navigate to the current location of GoldMine. To return to the **Existing GoldMine Location** dialog box, click **OK**. Click **Next**.

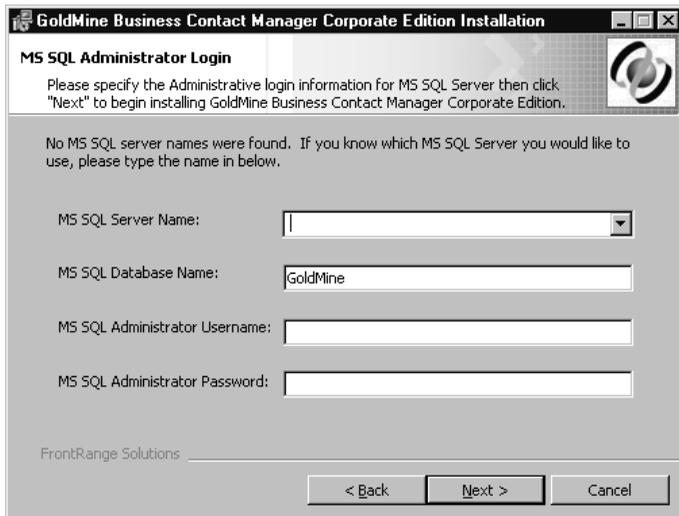
upgrading

The **Information Required from BDE** dialog box appears.



4. Click **Next**.

The **MS SQL Administrator Login** dialog box appears.



5. Complete the following SQL Server text boxes:
 - **MS SQL Server Name:** Type or select the name of the computer on your network where SQL Server is installed.
 - **MS SQL Database Name:** Type the name of your primary GoldMine SQL database.
 - **MS SQL Administrative Username:** The default login in SQL is **sa**. If your SQL user name is different, your SQL administrator must provide the information.
 - **MS SQL Administrative Password:** There is no default password in SQL. If your SQL password is different, your SQL administrator must provide the information.
6. Click **Next**. The **Installing Administrative Image** dialog box appears, displaying the status of the upgrade process.
7. When the installation process is finished, the **Administrative Image Installation Completed** dialog box appears. Click **Finish**.
8. The Configuration Wizard appears. Configuration steps are provided in the “Installing GoldMine 6.0 (Corporate Edition)” chapter.

Upgrading GoldMine on a Client Workstation

A client workstation is a computer running a server copy of GoldMine through a network connection. Because the computer is running the server copy of GoldMine, it automatically runs the upgraded version of GoldMine; however, the client workstations may have outdated versions of some necessary settings. We recommend uninstalling and reinstalling the workstations.

To Upgrade GoldMine on a Client Workstation

1. Uninstall the client workstation.
2. Follow the instructions for installing a shared workstation in the “Installing GoldMine 6.0 (Corporate Edition)” chapter.

Upgrading GoldMine on 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 from the CD, follow the instructions for the server upgrade in this chapter selecting Server Setup and then Upgrade. If you are updating an undocked computer, select Undocked Setup and then Upgrade.

If you are part of the Upgrade Protection Program (UPP) and are upgrading through NetUpdate, you can send the user the gm6setup.exe file created during NetUpdate.

IMPORTANT: If you are upgrading the server but are not upgrading an undocked user until a later date, disable the undocked user site in the GoldSync Administration Center until they are running the same version of GoldMine as the server.

To Upgrade GoldMine on an Undocked Computer

1. Upgrade the Master GoldMine site.
2. Once the Master site is upgraded, you can upgrade undocked users by sending them a GoldMine installation CD or, if you upgraded the server through NetUpdate, send them a copy of the gm6setup.exe by:
 - One-Button Synchronization
 - CD-ROM
 - FTP site
 - E-mail
 - Accessible network drive
3. The undocked user should run the installation CD or the gm6setup.exe on their computer following the upgrade instructions in this appendix.
4. After the undocked user upgrades to the same version of GoldMine as the server, they can begin synchronizing again.

in this appendix...

Finding the BDE in \Setup\
BDEShare

Specifying the Location of the
BDE with GM.INI

Working with the BDE
Administrator

Changing the dBASE Level
in the BDE

APPENDIX B

Working with the Borland Database Engine

Overview

GoldMine uses the Borland® Database Engine (BDE) to access the databases. For GoldMine to run properly, each computer must have access to the BDE. Other applications (such as Delphi) written by Borland or with Borland compilers can also use the BDE. Most of these applications require you to install the BDE on every computer using the application; however, client workstation installations of GoldMine can share the same BDE on the network. If you do not need the BDE on the local computer for other programs, you can use a shared installation allowing for easier management.

If the BDE is already installed on some of your computers, verify that GoldMine works with the installed version. We currently support only version 5.0 and higher.



Note: For more information on BDE, see Document #500, “The Borland Database Engine with GoldMine” available at support.frontrange.com.

Finding the BDE in \Setup\BDEShare

In a network environment, GoldMine does not require you to install the BDE to each workstation. Instead, all GoldMine users on a LAN can use a shared installation of the BDE. When GoldMine is installed on the server, the **\Setup\BDEShare** folder is automatically created in the GoldMine folder.

When launched on a workstation, GoldMine checks the registry for the location of the BDE. If the BDE path is found in the registry, then GoldMine loads the BDE from that location. If the BDE is *not* found in the registry, GoldMine checks its subdirectory **\Setup\BDEShare**. When the BDE is found, GoldMine loads it and then updates the registry to reference that location. If the BDE cannot be found, GoldMine displays a dialog box allowing you to browse to the correct location of the BDE and select the `Idapi32.dll` (for example **G:[*directory*]\Idapi32.dll**).

Specifying the Location of the BDE with GM.ini

If you do not need to install the BDE locally on your workstations for other programs, and you have many workstations to configure, you can “refer” the workstations to the shared IDAPI32.dll. Add the following lines to **GM.ini**, which is located in the GoldMine folder:

```
[GoldMine]
NetIdapi32dll=g:\apps\GoldMine\Setup\
BDEShared\Idapi32.dll
```

Substitute the path with the location of `idapi32.dll` you want the workstations to use.

By using this `.ini` entry, you can avoid having to manually select the directory for `Idapi32.dll` on each workstation.

Registry Settings

GoldMine uses different methods to initially locate the BDE during installation. When the application selects an installation of the BDE to use, the registry is updated with this location. When GoldMine is launched again, it loads the BDE from the path in the registry.

Working with the BDE Administrator

Some situations require changes to the BDE configuration files to enable GoldMine users to access all databases. For instance, you can add a new database or switch SQL to a new server. Both these actions require you to update the BDE.

The BDE consists of a list of database names, called aliases, to connect to SQL Server. GoldMine accesses the BDE alias to connect with the SQL database.

If all users access the BDE located on the server, they use the same configuration file and therefore have the same list of aliases and settings; however, users may install or use an existing version of BDE (v5.00 or higher) on their workstation to successfully access GoldMine.

Unless other constraints require using the BDE on the workstations, forcing the workstations to use the server's BDE configuration is the easiest to administer.

Copying the BDE Configuration to Workstations

You can make the configuration file of the server's BDE as the default configuration for the workstation. Using this method, the workstation can access the local BDE but use the server's configuration file.

To Copy the BDE Configuration to Workstations

1. Close GoldMine and any other applications using the BDE.
2. From the **Windows** task bar, select **Start>>Settings>>Control Panel**.
3. Double-click **BDE Administrator**. The **BDE Administrator** window appears.
4. Select **Object>>Open Configuration**. The **Open** dialog box appears.
5. Browse to the location of the `Idapi32.cfg` you want to use as the default configuration for this workstation.

Note: In most installations, `Idapi32.cfg` is located in the server's **GoldMine\Setup\BDEShare** folder. However, you should verify the path to the `Idapi32.cfg` on the server before proceeding.

6. Click **Open**. The BDE Administrator updates to the new configuration.
7. Click **X** on the title bar to close the BDE Administrator. A dialog box asks if you want to save this setting as your default configuration.
8. Click **Yes**.

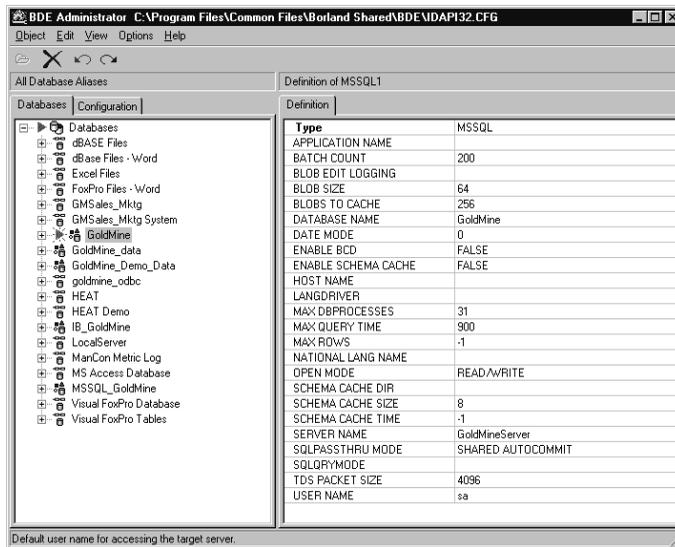
Note: The workstation will now use the new BDE configuration when launching GoldMine.

Changing the BDE Settings

You may be required to add or change the database alias settings. You can manually add a database BDE alias to the workstation's BDE or copy the configuration from the server to the workstation.

To Manually Add Aliases to a Workstation BDE

1. On the workstation Windows taskbar, select **Start>> Settings>>Control Panel**.
2. Double-click **BDE Administrator**.
3. Select the **Databases** tab. In the Database pane, right-click and select **New**.
4. In the **New Database Alias** dialog box, select **MSSQL** from the drop-down list. Click **OK**.
5. Type the alias name you want to use to connect to the SQL database. If you are configuring a workstation BDE to point to the main SQL database, use the same alias used in the BDE on the server. For example, **GoldMine**.



6. After the database alias is created in the left-hand pane, update the following lines in the **Definition** pane on the right:
 - **Blobs to cache:** 256
 - **Database Name:** The name of the GoldMine SQL database you are adding.
 - **Server Name:** The name of the server where SQL is installed.
 - **User Name:** The SQL user name on the SQL server. (The default is **sa**.)
7. From the **BDE Administrator** menu bar, select **Object>> Apply** to save the changes.
8. To test the connection, double-click the database alias you added. Type the SQL user name and password, and then click **OK**.
9. A green box appears around the icons beside the database alias. Verify that the definition labels are boldface type.

CONGRATULATIONS! You have successfully created a new BDE alias.

Changing the dBASE Level in the BDE

An incorrect dBASE level setting in the BDE Administrator can generate database errors. If your BDE is installed by another application, verify the dBASE level.

To Change the dBASE Level in the BDE:

1. Close GoldMine and any other application(s) using the BDE.
2. From the **Windows** task bar, select **Start>>Settings>>Control Panel**.
3. Double-click the **BDE Administrator** icon.
4. In the **BDE Administrator**, click the **Configuration** tab.
5. Expand **Configuration**, then **Drivers**, and then **Native**.
6. Select **DBASE**.
7. Ensure that **LEVEL** is **5**.

Note: If the LEVEL setting is not 5, stop this procedure, and perform the following:

- Back up all GoldMine files
 - Complete all the steps in this section
 - Rebuild all databases in GoldMine
-

8. Ensure the **MDX BLOCK** size is at least **1024**.
9. Expand **Configuration**, then **System**, and then **INIT**.
10. Ensure that **LOCAL SHARE** is **TRUE**.
11. Ensure **MAXFILEHANDLES** is at least **255**.
12. Select **Object>>Apply**.
13. Click **X** on the title bar to close the BDE Administrator.

in this appendix...

Changing GoldMine Ownership
in Windows XP

Granting Permission to Use
GoldMine in Windows XP

APPENDIX C

Granting Access Privileges in Windows XP

Overview

Microsoft® Windows XP® Professional® has enhanced system security restricting access to applications to all users except the installing user. Having a Windows XP logon does not grant access to an application. Access privileges must be granted to any additional users who want to use an application on the system.

To grant access to GoldMine® running on Microsoft Windows XP (Professional version), you must:

- Change GoldMine ownership.
- Grant permission to use GoldMine.

Note: If you are upgrading from GoldMine 5.7 (Business Contact Manager) installed on Windows XP Professional, consult your GoldMine 5.7 documentation regarding the “realini” setting in the GM.ini file.

Changing GoldMine Ownership in Windows XP

Windows XP (Professional version) enhances system security by granting access to installed applications only to the installing user. If GoldMine was installed on your system using a different Windows XP logon user name and password and you do not know the Windows XP logon that was used, you can change the permission settings with an administrator-level account.

To Change GoldMine Ownership in Windows XP

1. Log on as an administrator or as a user with equivalent rights.
2. Navigate through your system to **Program Files\GoldMine**. Right-click to display the local menu, then select **Properties**.
3. Click the **Security** tab.
4. Click the **Advanced** button.
5. Click the **Owner** tab.
6. In the **Change Owner To** area, select the user you want to make the owner.
7. Select **Replace owner on subcontainers and objects**.
8. Click **OK**.
9. On the **GoldMine Properties** dialog box, click **OK** to save and close.

Granting Permission to Use GoldMine in Windows XP

Windows XP's enhanced security requires the administrator to grant privileges to each additional user who wants to use an application on the system.

To Grant Permission to use GoldMine in Windows XP

1. Navigate through your system to **Program Files\GoldMine**. Right-click to display the local menu, then select **Properties**.
2. Click the **Sharing** tab.
3. Select **Share this folder**.
4. Click **Permissions**.
5. On the **Share Permissions** tab, select **Add**.
6. Select the user or user group to whom you want to grant access.
7. Click **OK** to return to the **Share Permissions** window.
8. Select the data access permissions that you want to allow or deny to the selected users or user groups. GoldMine users must have full control. Click **OK**.
9. Click the **Security** tab.
10. In the **Group or user names** area, select the users for whom you want to define access privileges.
11. Select the GoldMine application permissions that you want to allow or deny to the user or user group. GoldMine users must have full control.
12. Click **OK**.

granting access

in this appendix...

- Creating the GoldMine Group
- Configure the Workstation Drivers
- Setting Trustee Rights
- Setting the File Attributes

APPENDIX D

Installing on a Novell NetWare Network

Overview

To install GoldMine® on a Novell® NetWare® network system, you must modify the network configuration both on the file server and on the workstations that are to access GoldMine; therefore, to install GoldMine on the network, you should be familiar with using the NetWare command line utilities and have a supervisor-equivalent account.

Log on to the network with either the supervisor account or an account having security rights equivalent to a supervisor. On Novell NetWare 386 systems, you can use a group manager account if your system administrator has already set up a GoldMine group.

Creating the GoldMine Group

To add a new network group for GoldMine users, use the SYSCON System Configuration Utility.

IMPORTANT: Although you can select any name for this group, in this appendix the group is called *GoldMine*. Each GoldMine user on the network should be assigned to the GoldMine group.

Selecting the Installation Drive

In a network environment, physical disk volumes (such as SYS:) are redirected, or “mapped,” into a logical drive designator (such as F:). When GoldMine is installed, the logical drive designator containing the program files is recorded so that GoldMine can find these files when the program is running.

For this reason, install GoldMine on a logical drive that all GoldMine users can access. For example, if GoldMine is installed on volume SYS: using drive G:, then all GoldMine users need to map drive G: to volume SYS: on the network.

GoldMine can be executed from any drive designator that is mapped into the volume containing the GoldMine files; however, for GoldMine to operate correctly, you must map the drive designator selected during installation into the volume containing the program files. If the drive designator used during the installation process is mapped differently, GoldMine does not work properly.

Running GoldMine from a Root Directory

You cannot run GoldMine from a root directory or a “mapped root” directory. For example, if GoldMine is in the SYS: APPS\ GOLDMINE directory, you could map GoldMine by MAP ROOT G:=SYS: APPS (you would run GoldMine from G:\ GOLDMINE). You would not, however, MAP ROOT G: =SYS: APPS\ GOLDMINE because doing so would map GoldMine to the G:\ root directory.

After you select the drive designator to be used to install GoldMine, make sure users accessing GoldMine map that drive designator to the volume containing GoldMine files. You can map the drive designator by either of the following methods:

- **Method 1:** Modify the system logon script using the SYSCON system configuration utility. The following sample maps drive G: to the GoldMine directory on volume SYS: whenever a member of the GoldMine group logs on to the network:

```
IF MEMBER OF “GOLDMINE” THEN BEGIN
MAP G: =<fileserv>/SYS: GOLDMINE
END
```

You must modify some users’ private login scripts if another MAP command overrides the initial mapping of drive G: in the system login script. NetWare assigns the drive designator to the volume to which it was last mapped.

- **Method 2:** Modify the login script for each GoldMine user to contain a MAP command similar to the sample above. This method should be used only if access to the system login script is restricted.

Configuring the Workstation Drivers

You can use either Microsoft's drivers for Novell, or the existing ODI driver.

NETX or VLM Drivers

You cannot use NETX or VLM drivers. We do not recommend or support using Novell's Client32 or Intranetware drivers due to inconsistent behavior with GoldMine.

Note: Client32 drivers are not supported; if you must use Client32, please see Technical Document #348 available at [http:// support .frontrange.com](http://support.frontrange.com)

Contact your system administrator, network consultant, or Microsoft Technical Support for assistance in making these changes. FrontRange Solutions Technical Support cannot provide support in setting up or troubleshooting network settings.

Setting Trustee Rights

GoldMine's installation program copies the GoldMine program and data files to the appropriate directories. To maintain adequate security while allowing maximum flexibility, the following trustee rights should be granted in the \GoldMine\ directory to the GoldMine group using the SYSCON system configuration utility:

NetWare v2.x:

- Search for files in the folder(S)
- Open existing files (O)
- Read from files (R)
- Write to files (W)
- Create new files and folders(C)
- Modify (M)
- Delete (D)

NetWare 3.x and 4.x:

- Scan for files in the folder(F)
- Open and read existing files (R)
- Write to files (W)
- Create new files and folders(C)
- Erase existing files (E)
- Modify files and folders(M)

When contact databases are created as subfolders of the GoldMine directory, the new folders automatically inherit the trustee assignments of the parent folder. Otherwise, you need to manually assign the above rights to a new folder once the folder is created.

Setting the File Attributes

GoldMine program and data files need the attributes listed below. Use the **FLAG** command to modify the file attributes in the GoldMine folder and all subfolders, as indicated below:

- Flag all .dbf and .dbt files as Shareable and Read/Write.
- Flag all .mdx and .ini files as Read/Write.
- Flag all .exe and .dll files as Shared and Read Only.
- Flag all other files as Non-shared and Read/Write.
- Do not flag any GoldMine files as Transactional. System problems can result from using the Transactional flag, including corrupted indexes and errors.

in this chapter...

Installing Microsoft SQL
Server 2000

Registering the SQL Server

Troubleshooting SQL Errors
When Installing GoldMine

APPENDIX E

Appendix E

Installing Microsoft SQL Server 2000

Overview

The GoldMine® Server Setup requires you to install Microsoft® SQL Server™ 2000 before installing GoldMine. The Microsoft SQL Server 2000 CD included with your GoldMine (Corporate Edition) package provides complete installation instructions in the online Help.

The following instructions include installation procedures and settings pertinent to GoldMine, but should not be considered a SQL Server 2000 administrator's guide. Only experienced SQL administrators should configure SQL Server with anything other than the settings described in these instructions.

Installing Microsoft SQL Server 2000

The server on which you are installing Microsoft SQL Server 2000 *must* have Windows NT® 4 Server (SP5) or Windows® 2000 Server operating system installed prior to installing SQL Server 2000. Windows 2000 Server (any version) is required for some SQL Server 2000 features.

Note

GoldMine 6.0 (Corporate Edition) is compatible with SQL Server 7.x and higher.

If you are using an NT 4 Server as your SQL 2000 Server, you cannot install GoldMine to the same computer. GoldMine requires Windows 2000 or higher operating system.

Note: SQL Server 2000 on Windows NT 4.0 Terminal Server is not supported by Microsoft.

To Install SQL Server 2000

1. Insert the Microsoft SQL Server 2000 Installation CD into the CD-ROM drive of the computer on which you are installing SQL.

Note: The SQL Server 2000 Installation CD is set up to autorun when inserted into your CD-ROM drive. If autorun is not enabled, select **Run** from the **Start** button on the Windows taskbar, and then type **x:\autorun.exe** (where "x" is the letter of the CD-ROM drive).

The main dialog box appears.



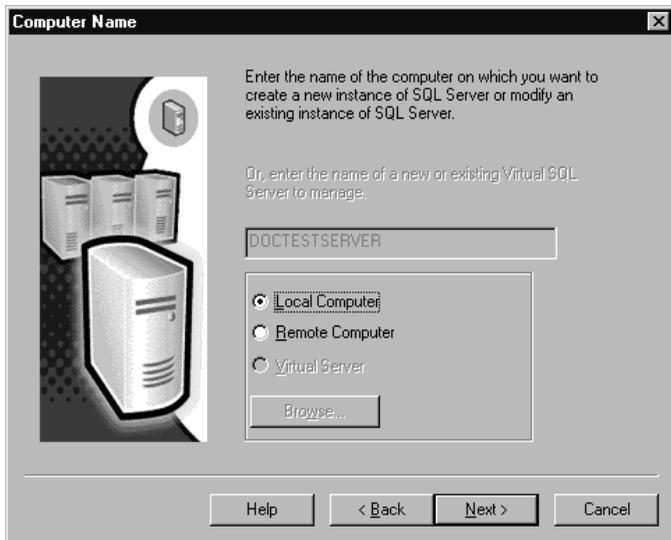
2. Select **SQL Server 2000 Components**.

The **Install Components** dialog box appears.



3. Select **Install Database Server**. The Standard Edition installation window appears with a Welcome dialog box.
4. On the **Welcome to Microsoft SQL Server Installation Wizard** dialog box, click **Next**.

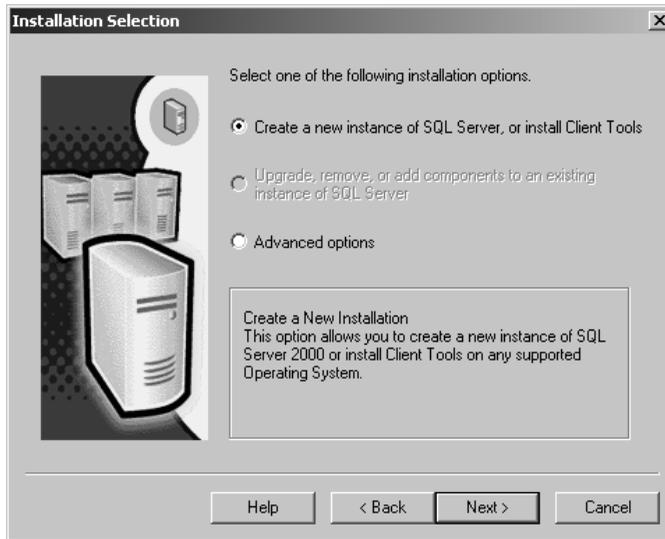
The **Computer Name** dialog box appears.



5. Select **Local Computer**. Click **Next**.

Note: Although the installer permits installation from a workstation to the server, we do not recommend using this procedure.

The **Installation Selection** dialog box appears.



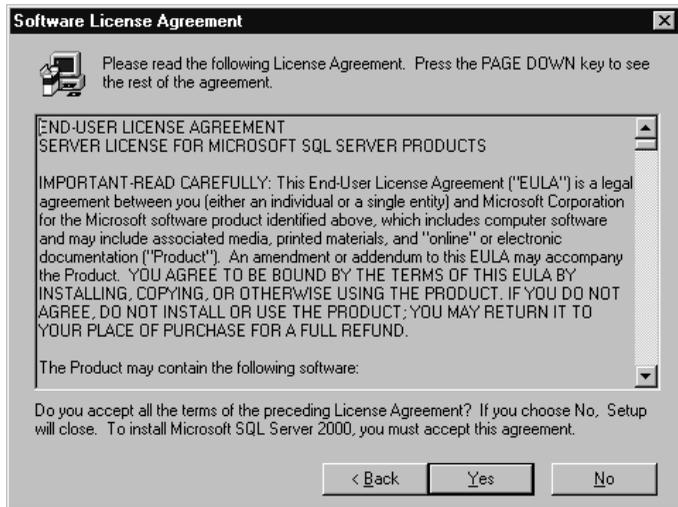
6. Select **Create a new instance of SQL Server, or install Client Tools**. Click **Next**.

The **User Information** dialog box appears.



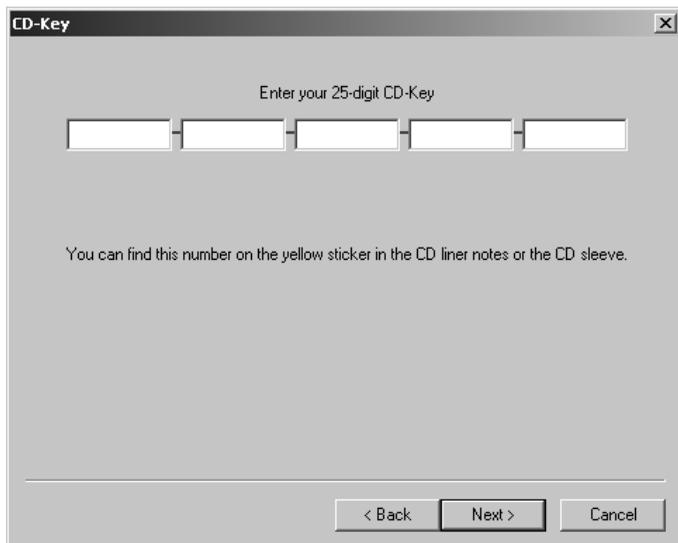
7. Type your name and company, and then click **Next**.

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



8. Read the licensing information. Click **Yes** to agree with the terms of the license agreement, or **No** if you do not agree and wish to cancel the installation process.

If you select Yes, the **CD-Key** dialog box appears.



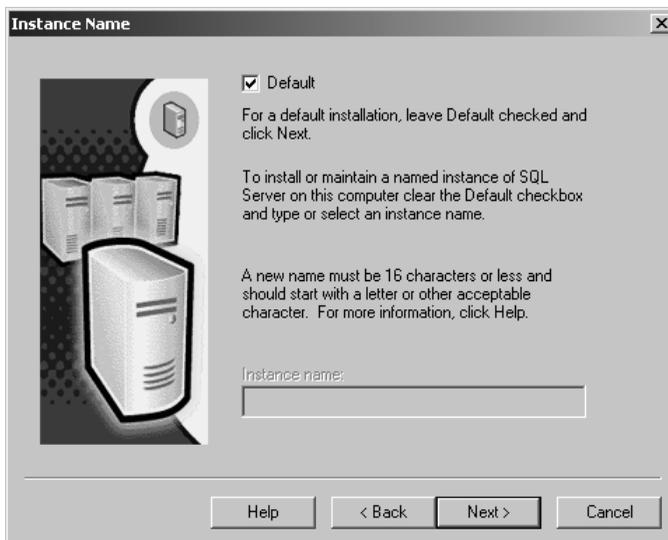
9. Type the SQL license number as it appears on your Delivery Notes and License Certificate, and then click **Next**.

The **Installation Definition** dialog box appears.



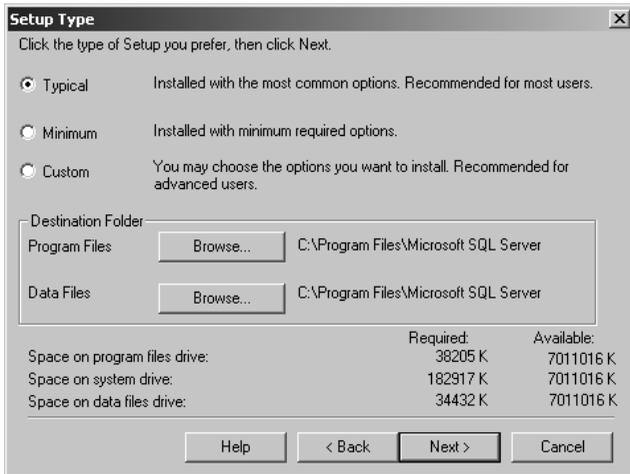
10. Select **Server and Client Tools**. Click **Next**.

The **Instance Name** dialog box appears.



11. Leave **Default** selected. Click **Next**.

The **Setup Type** dialog box appears.



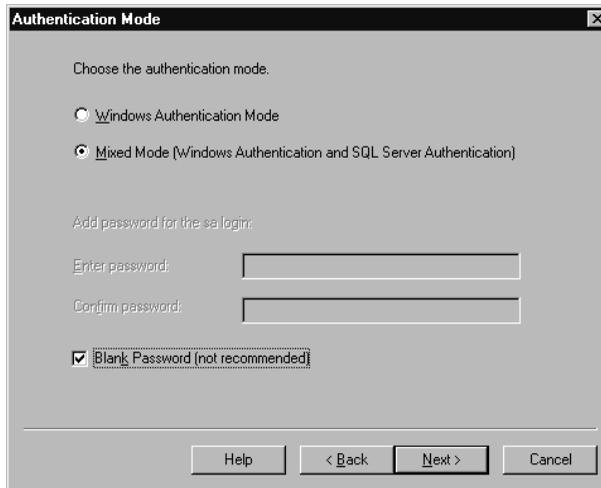
12. Select **Typical** with no changes to the default destination folders. Click **Next**.

The **Services Accounts** dialog box appears.



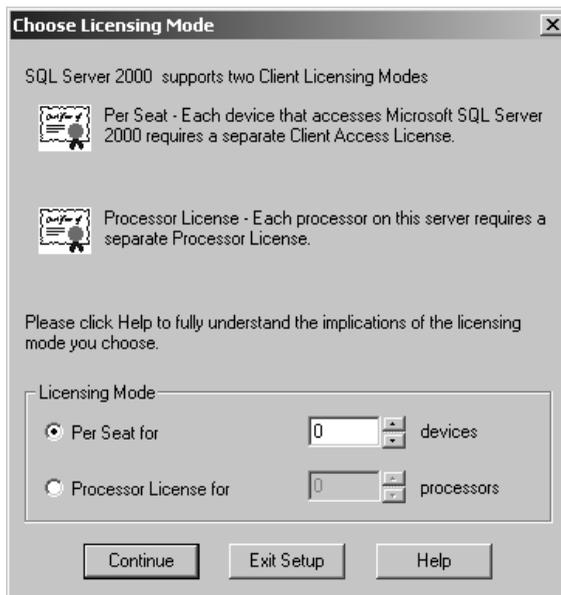
13. Select **Use the same account for each service. Auto start SQL Server Service** and **Use the Local System account**. Click **Next**.

The **Authentication Mode** dialog box appears.



14. Select **Mixed Mode**. Select **Blank Password**. Click **Next**. The **Start Copying Files** dialog box appears.

15. On the **Start Copying Files** dialog box, click **Next**. The **Choose Licensing Mode** dialog box appears.



16. Select **Per Seat**. In the **devices** text box, type the number of GoldMine licenses you purchased. Click **Continue**. The SQL Server begins installing. When the process is finished, the **Setup Complete** dialog box appears.



17. Select **Yes, I want to restart my computer now**, and then click **Finish**.

Registering the SQL Server

Once SQL Server is installed, you may need to register the server. If it is not registered, the GoldMine Installation Wizard cannot locate it and you cannot install GoldMine.

To Register the SQL Server

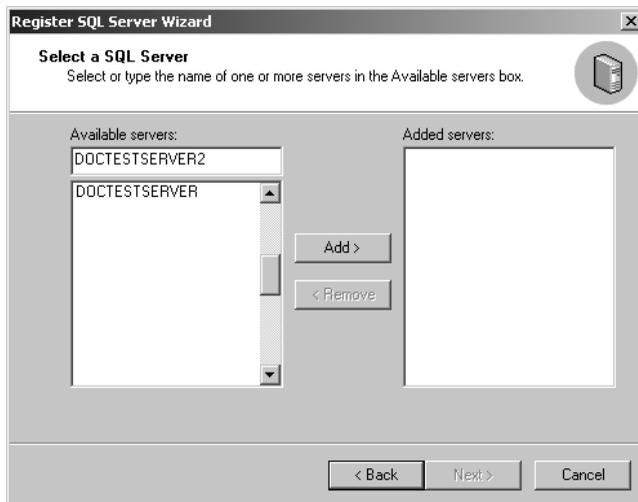
1. To open SQL Server Enterprise Manager, go to **Start>> Programs>>Microsoft SQL Server>>Enterprise Manager**. The **SQL Server Enterprise Manager** window appears.
2. In the Tree pane on the left, expand Microsoft SQL Servers and expand SQL Server Group. Right-click on **SQL Server Group** and select **New SQL Server Registration**.

The **Welcome to the Register SQL Server Wizard** dialog box appears.



3. Review the information and click **Next**.

The **Select a SQL Server** dialog box appears.



4. Select the server from the **Available servers** list or type the server name in the text box if it is not listed. Click **Add** to move the server to the added servers list.

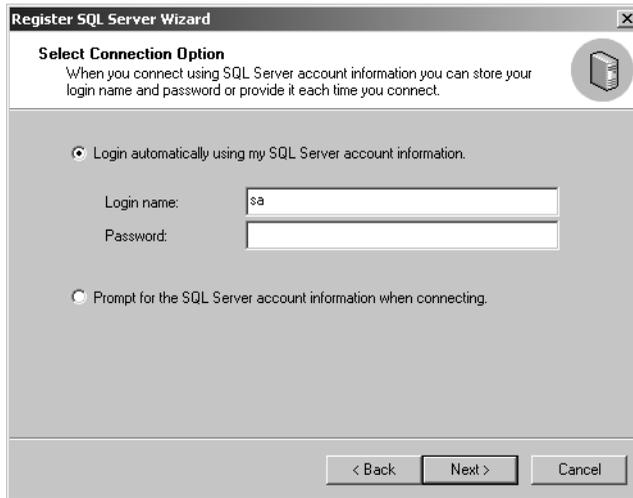
5. Click **Next**.

The **Select Authentication Mode** dialog box appears.



6. Select **SQL Server login information that was assigned to my by the system administrator [SQL Authentication]**. Click **Next**.

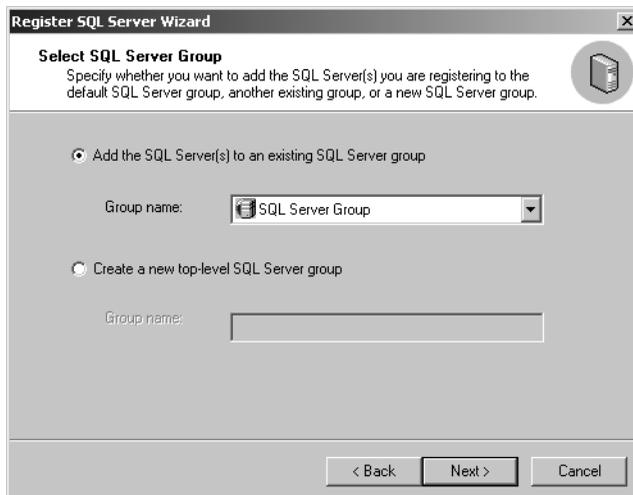
The **Select Connection Option** dialog box appears.



The screenshot shows the "Register SQL Server Wizard" dialog box, titled "Select Connection Option". The subtitle reads: "When you connect using SQL Server account information you can store your login name and password or provide it each time you connect." There are two radio button options: "Login automatically using my SQL Server account information." (which is selected) and "Prompt for the SQL Server account information when connecting." Below the first option are two text boxes: "Login name:" containing "sa" and "Password:" which is empty. At the bottom are three buttons: "< Back", "Next >", and "Cancel".

7. Select **Login automatically using my SQL Server account information**. Type **sa** in the **Login name** text box. Leave the **Password** text box blank. Click **Next**.

The **Select SQL Server Group** dialog box appears.



The screenshot shows the "Register SQL Server Wizard" dialog box, titled "Select SQL Server Group". The subtitle reads: "Specify whether you want to add the SQL Server(s) you are registering to the default SQL Server group, another existing group, or a new SQL Server group." There are two radio button options: "Add the SQL Server(s) to an existing SQL Server group" (which is selected) and "Create a new top-level SQL Server group". Below the first option is a "Group name:" label and a dropdown menu showing "SQL Server Group". Below the second option is a "Group name:" label and an empty text box. At the bottom are three buttons: "< Back", "Next >", and "Cancel".

8. Select **Add the SQL Server(s) to an existing SQL Server group**. In the **Group name** drop-down list, select **SQL Server Group**. Click **Next**. The **Completing The Register SQL Server Wizard** dialog box appears.
9. Review the information and then click **Finish**.
10. The **Register SQL Server Messages** window appears, informing you of successful server registration. Click **Close**.

CONGRATULATIONS! Microsoft SQL Server 2000 is now installed. You can now install GoldMine (Corporate Edition).

Troubleshooting SQL Errors When Installing GoldMine

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.

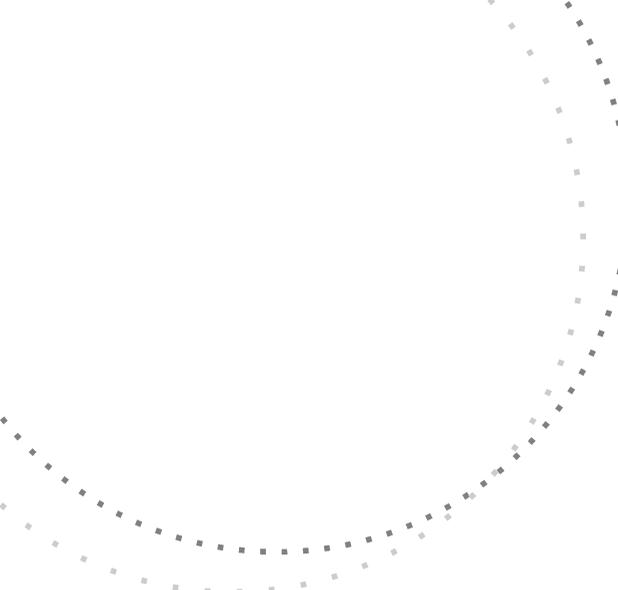
Open the MSSQL Enterprise Manager. Go to **SQL Server Enterprise Manager**. Expand the servers until you see your server name. Right-click your server name and select **Start** in the local menu.

- 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 it 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.



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