



# **GoldMine Premium Edition Installation Guide**

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# Introduction

GoldMine Premium Edition provides a powerful, comprehensive, integrated, automated solution to managing customer relationships. It contains tools to develop contacts, conduct activities, and track progress. With

GoldMine's synchronization features, users working remotely can have their own database of desired data and keep it updated with the company database. GoldMine can also synchronize with Outlook and G Suite Calendars.

GoldMine Connect allows you to use selected features of GoldMine Premium Edition via a web browser.

This guide describes the basic components and steps for installing GoldMine Premium Edition and provides information about integrating GoldMine with your other technology tools.

## About this Guide

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

## Audience and Expertise

This information is pertinent for users and system administrators performing installations. It describes the system requirements, and contains step-by-step installation instructions and tips for server setup, workstation setup, and undocked user installations.

This material assumes that the user understands how to use the Microsoft Windows operating system for installations.



# System Requirements

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

**NOTE:** Before installing GoldMine, review the most current version of the compatibility matrix document available in our Knowledgebase. See [www.GoldMine.com/goldmine-support/](http://www.GoldMine.com/goldmine-support/) to access the Knowledgebase.

## Permissions

### GoldMine

- Only users with local Administrator rights, or users who belong to the Administrator group, can install GoldMine.
- The MS SQL Administrative Username must have permissions to create a new database (for new installations only).

### GoldMine Plus!

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

## Environments

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

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

## Host Requirements

Requirements are listed for the following:

- [Server Requirements](#)
- [Workstation System Requirements](#)
- [Undocked Workstation Requirements](#)

## Software Requirements

- Microsoft Internet Explorer 9.0 or newer
- Microsoft Windows Installer 4.5 or later (may require server restart).

## Server Requirements

### Operating Systems

Ivanti supports these operating systems for the GoldMine Application Server:

- Microsoft Windows Server 2022
- Microsoft Windows Server 2019
- Microsoft Windows Server 2016
- Microsoft Windows Server 2012 / 2012 R2 / 2012 R2 Essentials
- Microsoft Small Business Server 2011

If you are using Microsoft Small Business Server 2011 or Windows Server 2012 or 2012 R2 Essentials, it must be installed and working prior to installing GoldMine. Ensure that SQL Server and SBS service packs are current and applied.

### Network Protocols

- TCP/IP (recommended)

### Database Requirements

**NOTE:** Ensure that the SQL edition and version are compatible with the Microsoft Operating System used at your installation.

- *Server Database* (must be installed and configured)
  - *Microsoft SQL Server 2012 / 2014 / 2016 / 2017 / 2019*
- *Reporting Services* (must be installed and configured to use the Scheduled Reports feature)
  - *Microsoft SQL Server 2012 / 2014 / 2016 / 2017 / 2019*
- *Full Text Search* (must be installed and configured to use Full Text Search feature)
  - *Microsoft SQL Server 2012 / 2014 / 2016 / 2017 / 2019*
- *Client Tools* (must be installed prior to initiating the GoldMine installation process if you intend to perform a Server installation to share your database.)
  - *Microsoft SQL Server 2012 / 2014 / 2016 / 2017 / 2019*

**IMPORTANT:** SQL Express 2012 - 2019 have a **maximum database size of 10 GB**. Advanced Services must be installed in order to use Microsoft SQL Server Reporting Services.

### Additional Server System Requirements

- SCSI or Ultra DMA Enhanced IDE hard drives: RAID Array or mirrored (recommended).
- 1GB/100 MBps network connection (recommended).



## Server Memory Requirements

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

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

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

## Performance Considerations

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

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

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

## Supported versions of Microsoft Office for GoldMine integration

- Word, Excel, and Outlook 2010 / 2013 / 2016 / 2019 / 2021
- Word, Excel, and Outlook 2016 / 2019 / 2021 within Office 365

**NOTE:** It is important to note that 64-bit versions of Microsoft Office are supported (the exceptions are GoldMine Address Book and Synchronize with Outlook). Some third-party applications that also integrate with Microsoft Office may interfere with GoldMine's integration.

## Workstation System Requirements

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

### Supported Web Browsers

- Microsoft Internet Explorer 10 / 11
- Microsoft Edge 38.0 - 40.0

### Operating Systems

This release of GoldMine Premium Edition supports the following operating systems for the GoldMine Network Clients. Refer to the Compatibility Matrix for specific information.

- Microsoft Windows 11
- Microsoft Windows 10
- Microsoft Windows 8 / 8.1
- Microsoft Windows 7

### Hardware Requirements

Operating System	CPU (Intel or AMD)	RAM
Microsoft Windows 11	3.0 GHz or faster (with 2 or more cores)	4 GB RAM (8 GB or more RAM depending on your database)
Microsoft Windows 10	3.0 GHz or faster	2 GB RAM (3 GB or more RAM depending on your database)
Microsoft Windows 8 & 8.1	3.0 GHz or faster	2 GB RAM (3 GB or more RAM depending on your database)
Microsoft Windows 7	3.0 GHz or faster	2 GB RAM (3 GB or more RAM depending on your database)

## Undocked Workstation Requirements

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

### Operating Systems

Ivanti supports these operating systems for the GoldMine Undocked Clients:

- Microsoft Windows 11
- Microsoft Windows 10
- Microsoft Windows 8/8.1
- Microsoft Windows 7

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

### Hardware Requirements

Operating System	CPU (Intel or AMD)	RAM
Microsoft Windows 11	3.0 GHz or faster (with 2 or more cores)	4 GB RAM (8 GB or more RAM depending on your database)
Microsoft Windows 10	3.0 GHz or faster	2 GB RAM (3 GB or more RAM depending on your database)
Microsoft Windows 8 and 8.1	3.0 GHz or faster	2 GB RAM (3 GB or more RAM depending on your database)
Microsoft Windows 7	3.0 GHz or faster	2 GB RAM (3GB or more RAM depending on your database)

### Performance Considerations

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

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

## Additional Requirements

- *Microsoft .NET Framework 3.5* (which includes 2.0 and 3.0) must be installed and enabled in Windows Features to use the Scheduled Reports feature..
- *Microsoft .NET Framework 3.5* (which includes 2.0 and 3.0) must be installed and enabled in Windows Features to use GoldMine Plus! for Microsoft Office.
- *Microsoft .NET Framework 4.5* is required for installation of GoldMine Premium Edition. If it is not found, it will be installed automatically.
- *Microsoft Visual Studio 2008 .NET (for use with MS SQL 2008)* must be installed and configured to create reports for the Scheduled Reports feature. End users do not require this application.

## GoldSync Requirements

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

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

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

## GoldSync System Requirements

Item	Recommended
<input type="checkbox"/> <b>Operating System</b>	Microsoft Windows Server 2012/2012 R2/2016/2019
<input type="checkbox"/> <b>Disk Subsystem</b>	RAID Array or mirrored (for larger databases or heavy synchronization load)
<input type="checkbox"/> <b>RAM Allocation</b>	1 GB (for < 2 GB database with 10 concurrent sync sessions)
<input type="checkbox"/> <b>Network Connection</b>	100 Base-TX TCP/IP



# Installing GoldMine

GoldMine provides various types of installations, a new installation or upgrade, on a server or workstation, in network or remote location. Review the planning items and considerations, determine the type of installation

you are running, and use the associated checklist to ensure a successful installation.

## Planning Your Installation

When planning a GoldMine installation consider:

**Who will be the designated GoldMine administrator?** The GoldMine administrator must have access to network and office resources and be able to address the business-related implementation issues regarding configuration and customization.

**Do you have the proper license and registration information for the version of GoldMine you are installing?**

For detailed information on licensing, see [Licensing and Registration](#).

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

**Are you going to import data?** Verify that you can import the source data into GoldMine.

**Does the system administrator have full administrative rights?** To install GoldMine on a network, the GoldMine administrator must have full administrative rights on the network.

**Are your service packs compatible and current?** Check the version and service pack number for your Microsoft Windows operating system. Verify no issues exist with your current service pack.

■ *Have you reviewed the network structure?*

- Are there multiple domains? Do users have the rights on the GoldMine domain to access GoldMine?
- Is the server outside the regular network? There may be connectivity issues the network administrator needs to address.

**What type of database are you using?** GoldMine supports both Microsoft SQL Server or SQL Server Express.

**Will you be integrating GoldMine with Microsoft Office?** Microsoft Office 2010/2013/2016/2019 are supported for integrating with GoldMine and must be installed/configured before installing GoldMine Plus! or any Microsoft Outlook plug-in component.

The GoldMine PE installer can detect whether Microsoft Office is 32-bit or 64-bit based on a value in the registry key (i.e., Computer\HKEY\_LOCAL\_MACHINE\SOFTWARE\WOW6432Node\Microsoft\Office\XX.X\Outlook, where XX.X is the Office version). Some of the Microsoft plug-ins do not support Microsoft Office 64-bit and will be disabled by default.

**Will GoldMine be used with different languages?** If the Windows setting for "Language for non-Unicode programs" on the machine running GoldMine does not match the setting on the database server, GoldMine may not be able to update records that contain region-specific characters.

To check this setting, go to **Start > Settings > Control Panel > Regional and Language Options**, and click on the **Advanced** tab. The language shown in the drop-down list should be consistent with the language in which your data will be stored.

**NOTE:** You may not be able to use two different non-English languages. Double-byte characters, such as Chinese, Japanese, Korean, and Hindi will not display properly in data fields and list views (i.e., grids) and are not supported.

## Installation of GoldMine on Windows

- You can install and run GoldMine on Windows 7, Windows 8 or 8.1, or Windows 10, but you cannot share your installation with other Networked Workstations over a network (i.e. they are not supported as application server environments).
- The installer will offer customized path settings for GoldMine's program files. The installer, by default, creates the destination folders with correct permissions set for proper use on the local machine. On a GoldMine application server, the GoldMine data path must be shared within the network for other machines accessing Goldmine. If the destination folders you will install to already exist, or if you create them yourself, you must ensure that the selected folders have the correct access permissions.

**NOTE:** Installing to the default path is highly recommended.

## Installation of Universal Search

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

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

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

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

**IMPORTANT:** If you choose to install Universal Search, the Microsoft SQL Server database will create and populate indexes for full-text search. The process of populating indexes may take a *very long* time, depending on the size of your database and the hardware configuration of your computer. During this process, end-user performance may be negatively affected due to additional load on the database server while the indexes are created.

If you terminate the GoldMine process (gmw.exe) from the Windows Task Manager while the indexes are being populated, the Universal Search feature will not work properly. You can re-enable Universal Search at **Tools > Configure > System Settings > Advanced**, using the uninstall/install button. This will delete and then re-create the full-text indexes.

### To Install Universal Search from Within GoldMine

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

### To Install Universal Search from a Command Prompt

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

## Searching E-mails in Windows

If there is an issue when searching for information in the body of an email, refer to an Ivanti knowledge article by clicking [here](#). To view this article, you will need to set up an account to access the online GoldMine Forum Group.

## System Files

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

- *DataDict.xml* includes database and field definitions for creation of required databases and maintenance operations.
- *flags.bin* controls the number of users logged on to GoldMine.
- *LicenseGM95.bin* stores License Manager information and validates incoming sync connections.
- *USER\_info.bin* stores SQL login information.
- *GM.ini* controls how GoldMine launches.
- *dbalias.ini* stores the database username and password.
- *gmbase.bin* is used to maintain system integrity.
- *gmexp.bin* stores revoked licenses.
- *SyncLock.bin* is used to maintain system integrity.
- *USER.ini* stores how GoldMine launches for the user.

## System Files for Supported Operating Systems

When installing GoldMine onto currently supported Microsoft Windows operating systems, a *split-path* installation is used due to security changes in these versions of Window's architecture. The split-path installation will place executables and program libraries into C:\Program Files\GoldMine (32-bit OS) or C:\Program Files (x86)\GoldMine (64-bit OS), while data files, **.INI** files, reports, and templates are placed in \ProgramData\GoldMine.

**NOTE:** It is highly recommended that you install to the default paths.

## Installation Checklists

If you are:	Then run:
Server/Single user: A company that must support multiple GoldMine users using a shared system. Users can then connect to the server copy from their local Networked Workstation using shortcuts installed by running a Workstation installation. This is also the appropriate installation type for a single-user environment.	Full Setup, Installed First



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

**NOTE:** If the GoldMine Premium installation process failed for any reason, an attempt to retry the installation may be blocked. If this occurs, backup the Windows registry and remove the GMinProgress registry key if it exists. This allows a new installation to begin.

On a 32-bit operating system, the registry path is:

HKEY\_LOCAL\_MACHINE\SOFTWARE\FrontRange Solutions\GMinProgress.

On a 64-bit operating system, the registry path is:

HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\FrontRange Solutions\GMinProgress.

## Server Installation Checklist

### Upgrading Customers only

- *Confirm all GoldMine users are logged out of the system.*
- *Back up your database and folders:* Back up your GoldMine database. We also recommend backing up your GoldMine program and data folders and any other folders containing files linked to GoldMine before beginning any upgrade installation. This prevents the loss of valuable information and data.
- *Exit all running system programs and stop services:* Includes third-party utilities that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine if applicable.
- *Uninstall or upgrade linked and integrated 3rd party programs:* As recommended by the manufacturer.
- *Uninstall older version of GoldMine Links for Microsoft Word, Microsoft Excel, or GoldMine Integration Services for Microsoft Outlook Links (GISMO):* If these were installed with standalone installers. For more information, review this article on the Ivanti community: [Is It Necessary to Uninstall Old Microsoft Integration Links Prior to an Upgrade?](#)

### For All Customers

- *Install ancillary programs:* Install necessary programs on the computer serving as the Server or on another computer on your network (see [Additional Requirements](#)). On an Undocked machine, MS SQL must be installed prior to installing GoldMine.
- *Install GoldMine:* Install on the computer serving as your Server. Select the Server Setup installation and follow the directions in this manual.
- *License the server copy of GoldMine:* Licensing registers the Server copy of GoldMine with the appropriate license (see [Licensing and Registration](#)).
- *Verify you can launch GoldMine:* Ensure the server installation is functioning properly before installing any Networked Workstation.
- *Share the GoldMine folder:* In order for the Networked Workstation to connect to the shared copy of GoldMine, you must first share the C:\ProgramData\GoldMine folder. The location of the folder to share may be different if you did not install to the default location.(see [Sharing the GoldMine Folder on the Server](#)).

## Networked Workstation Installation Checklist

### Upgrading customers only

- *Uninstall or upgrade linked and integrated 3rd party programs:* as recommended by the manufacturer.
- *Exit all running system programs and stop services including all third-party utilities:* that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine if applicable.
- *Uninstall older version of GoldMine Links for Microsoft Word, Microsoft Excel, or GoldMine Integration Services for Microsoft Outlook Links (GISMO):* If these were installed with standalone installers. For more information, see the Ivanti community article [Is It Necessary to Uninstall Old Microsoft Integration Links Prior to an Upgrade?](#)

**If applicable, create a mapped drive to the shared GoldMine folder:** See [Sharing the GoldMine Folder on the Server](#).

**Install GoldMine on the Client Workstation:** See [Installation on a Networked Workstation](#)

**Verify you can launch GoldMine:** Ensure the workstation installation is functioning properly.

**NOTE:** If the preview panes in Pending and History tabs in GoldMine Premium have never been viewed from a Windows account with local administrator permission, a non-administrator Windows user will not be able to view the preview panes. As a one-time setup process, a Windows account with local administrator permission must be used to launch GoldMine and view a preview pane in one of these tabs.

## Undocked Computer Installation Checklist

**Create an Undocked license:** For undocked license users only, see [Licensing and Registration](#).

### For ALL installations

- *Disconnect the laptop from the network:* Disconnect to ensure GoldMine configures the laptop to connect only with the database on the local computer and not with the network.
- *Install GoldMine to the undocked computer:* See [Installation on an Undocked Computer](#).
- *License GoldMine:* Use the appropriate U-license information. See [Licensing and Registration](#).
- *Verify you can launch GoldMine:* Ensure the undocked installation is functioning properly.

**NOTE:** If the preview panes in Pending and History tabs in GoldMine Premium have never been viewed from a Windows account with local administrator permission, a non-administrator Windows user will not be able to view the preview panes. As a one-time setup process, a Windows account with local administrator permission must be used to launch GoldMine and view a preview pane in one of these tabs.

### Upgrading customers only

- *Synchronize your data* to the central GoldMine system first and upgrade your central GoldMine installation before converting your remote GoldMine system.  
Upgraded systems will not synchronize with any previous release of GoldMine or GoldSync.
- *Uninstall or upgrade linked and integrated 3rd party programs:* as recommended by the manufacturer.
- *Exit all running system programs and stop services:* Includes third-party utilities that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine if applicable.
- *Uninstall older version of GoldMine Links for Microsoft Word, Microsoft Excel, or GoldMine Integration Services for Microsoft Outlook Links (GISMO):* If these were installed with standalone installers. For more information, see the Ivanti community article [Is It Necessary to Uninstall Old Microsoft Integration Links Prior to an Upgrade?](#)

## Installation on a Server

A server installation requires a GoldMine install to a local path on the server. The database and the data folder are shared with networked clients. Workstation-based users can connect to the server data from their local computers by following the procedure for [Installation on a Networked Workstation](#).

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

**NOTE:** Supported Windows Server operating systems have a split path installation. The `gm.ini` file installs into the `\ProgramData\GoldMine` folder. This folder needs to be shared because it contains `gm.ini`, to which the `realini` setting from the workstation `gm.ini` should point. (`realini`=path to shared `gm.ini`)

## To Install GoldMine on a Server

The following steps are for a *new installation*. If upgrading, use the procedure for [Upgrading GoldMine](#)

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

1. Log directly into the server as a local administrator.
2. Download the most current version of GoldMine from the Downloads section of the Self-Service portal. See [www.GoldMine.com/GoldMine-support/](http://www.GoldMine.com/GoldMine-support/) to access the portal. Run the GoldMine Premium installer (gmpeSetup-version.exe). The *Welcome to the GoldMine Installation Wizard* dialog appears. Click *Next*.



**NOTE:** If the Microsoft OLE DB Driver for SQL Server is not yet installed, the GoldMine installer will direct you to install it. GoldMine PE is only compatible with the MS OLE DB Driver for SQL version 18. Please follow the installation steps with the default values.

3. The README.HTM opens, which contains the most recent information about this version of GoldMine. A copy of this file can be found in the GoldMine ProgramData folder after installation. You can also access a copy of the **Release Notes.rtf** from the GoldMine Help menu or the GoldMine Program Files folder after installation. After reviewing the README content, close the window to proceed with the installation.
4. The *License Agreement* dialog appears. Accept the terms of the license agreement, and click *Next*.



5. The *System Requirements* page appears. Verify that all system requirements have been met, then click *Next*.

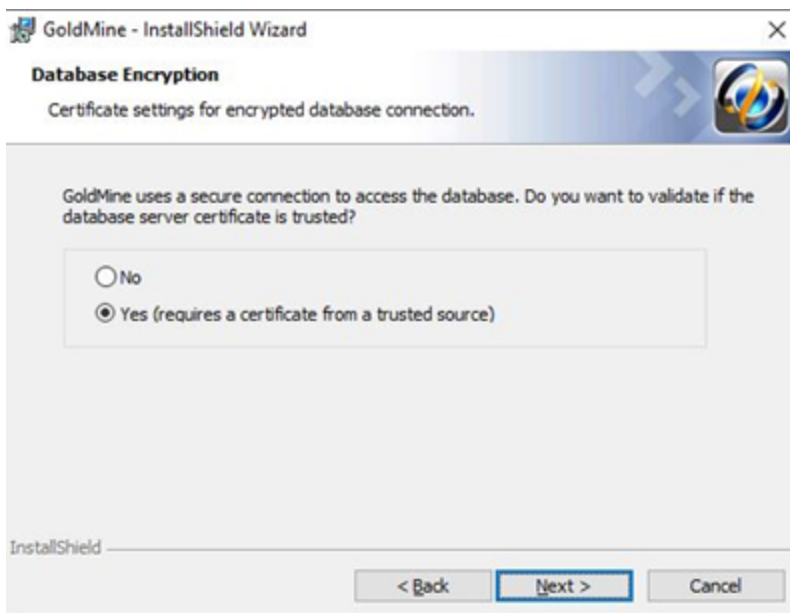


6. On the *License Agreement* dialog, read the information about SQL queries and filters, select the checkbox that you have read and acknowledged the information, then click *Next*.

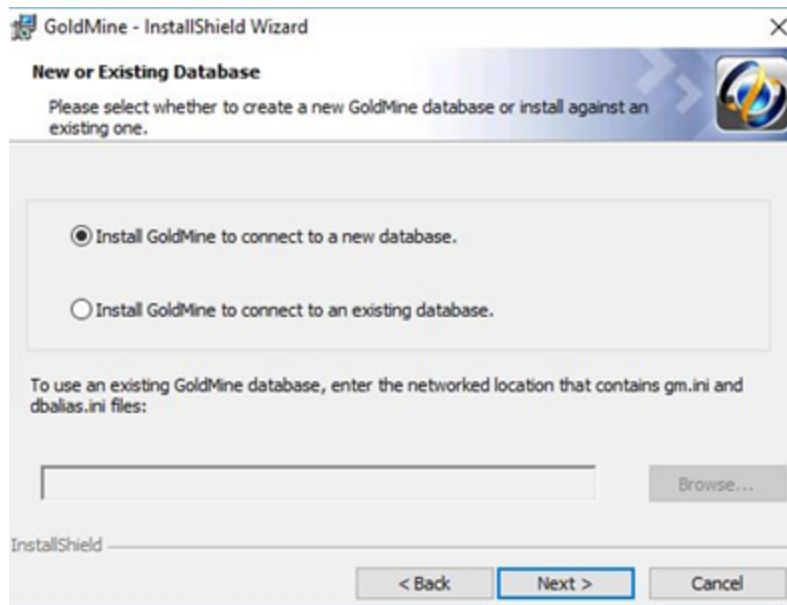


7. The *Database Encryption* dialog appears. By default, GoldMine uses protocol encryption and validates database server certificates to adhere to the “Secure by default” security principle and “Privacy by default” principle.

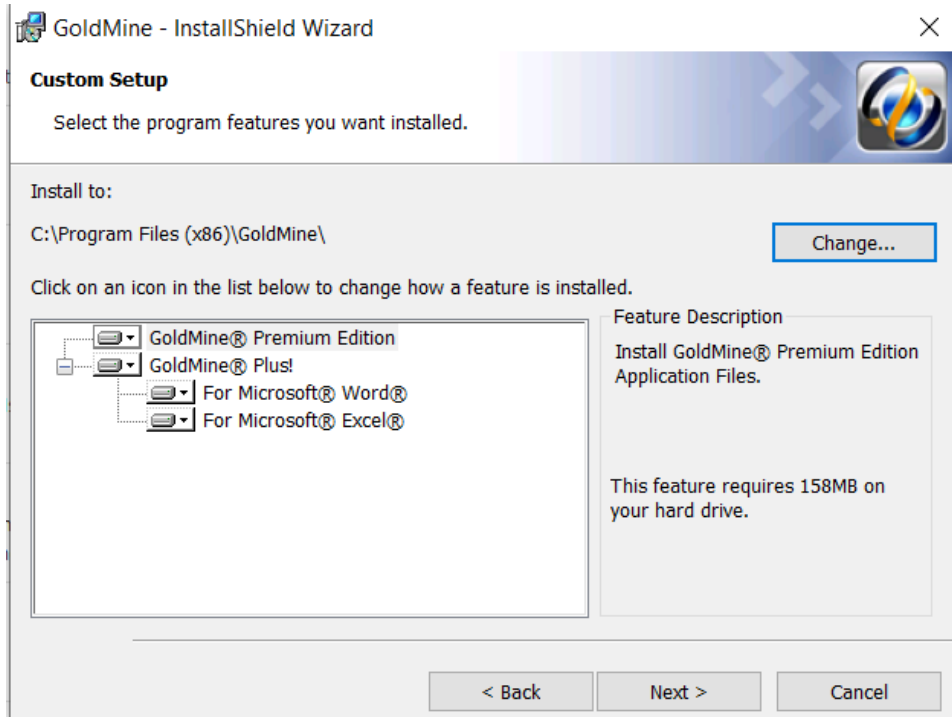
If you have a trusted certificate configured on your database server, select *Yes*. If not, select *No*; otherwise, setup will not be able to create a database for GoldMine. (Note that the majority of GoldMine users will not have a trusted certificate configured). Click *Next*.



8. The *New or Existing Database* dialog appears. Choose the *Install GoldMine to connect to a new database* option. Click *Next*.



9. The *Custom Setup* dialog appears. The **Install to:** path defaults to C:\Program Files\GoldMine\ (for 32-bit OS) or to C:\Program Files (x86)\GoldMine (for 64-bit OS). It is highly recommended that you install to the default path.



**IMPORTANT:** GoldMine *must* be installed to a local drive and folder; do not select a mapped drive during installation. After the install is complete, the data folder needs to be shared for network client access.

The GoldMine Premium Edition and GoldMine Plus! options are selected for installation by default. GoldMine Plus! has additional components you can install for Microsoft Word and Excel. These components require that a supported version of Microsoft Office be installed *prior* to GoldMine installation.

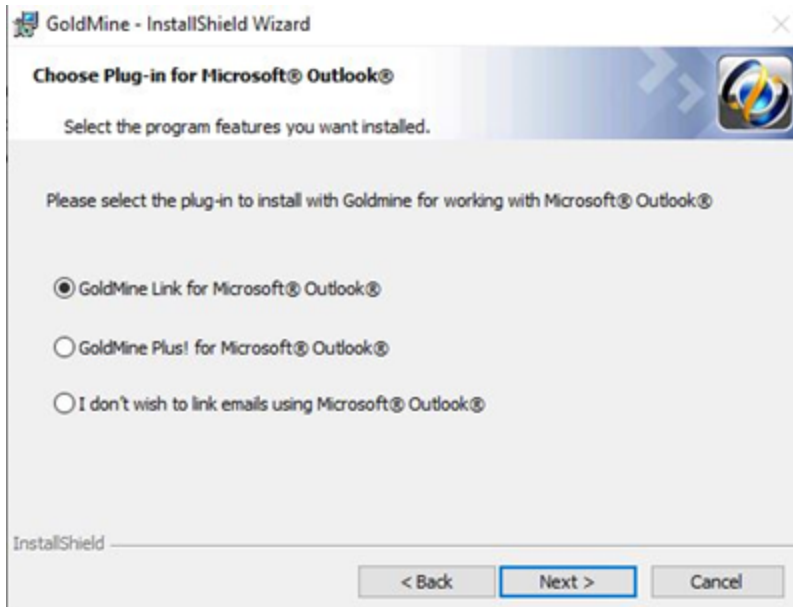
**NOTE:** If you select the Microsoft Excel component and plan on having others use it (besides the current installing user), you must make changes manually to the registry key. See [Modifying the Registration Key](#).

If you do not want to install one or both of the GoldMine Plus! components, click the *GoldMine Plus!* icon, select *This feature is not available* from the drop-down menu, and then click *Next*.

These components can be installed at a later date by going to Windows *Control Panel* > *Programs and Features* > *GoldMine* > *Change* and modifying the existing installation.



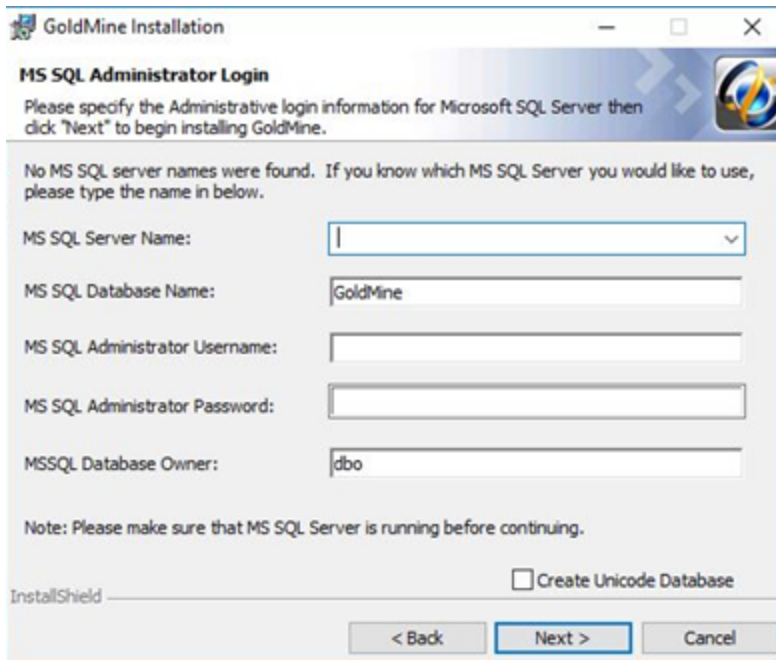
10. Click *Next*. The *Choose Plug-in for Microsoft Outlook* dialog appears. Select if you want to install an Outlook plug-in for GoldMine Link or GoldMine Plus!. If you don't want to link your Outlook emails, select the third option. Note that you can install this plug-in at a later date by going to *Windows Control Panel > Programs and Features > GoldMine > Change* and modifying the existing installation.



11. Click *Next*. The *Demo Data Options* dialog appears. To add the demonstration data to the database, check the *Install Demo Data with GoldMine* box. Also select the correct local version of English for your installation, then click *Next*.



12. The *MS SQL Administrator Login* dialog appears. Enter the required information.



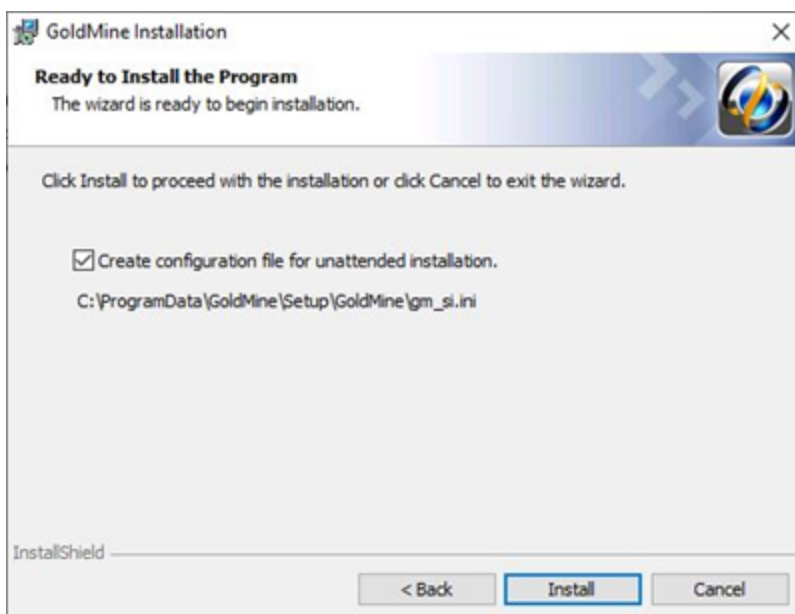
The image shows a Windows-style dialog box titled "GoldMine Installation". Inside, the section "MS SQL Administrator Login" has a message: "Please specify the Administrative login information for Microsoft SQL Server then click 'Next' to begin installing GoldMine." Below this, a note states: "No MS SQL server names were found. If you know which MS SQL Server you would like to use, please type the name in below." There are five 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), "MS SQL Administrator Password:" (an empty text box), and "MSSQL Database Owner:" (a text box containing "dbo"). A "Note" at the bottom says: "Please make sure that MS SQL Server is running before continuing." There is an unchecked checkbox labeled "Create Unicode Database". At the bottom left is the "InstallShield" logo. At the bottom right are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

- **MS SQL Server Name:** Type or select the name of the computer on your network where SQL Server is installed. When using named instances (such as default on MS SQL Express Editions installations), type the name of the MS SQL Server instance; example: MACHINENAME\SQLEXPRESS.
- **MS SQL Database Name:** GoldMine creates and installs the demo data in a SQL database called *GoldMine*. If you want your database to have a different name, type it in the text box.
- **MS SQL Administrative Username:** The default login is *sa*. If your SQL Server user name is different, your SQL administrator must provide the information.
- **MS SQL Administrative Password:** Enter the SQL Server administrator password.
- **MS SQL Database Owner:** The default name of the SQL Server database owner is *dbo*. There is no need to change this value.
- **Create Unicode Database:** Check this option to create a Unicode Database. Checking this option will greatly increase the size of your database.

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

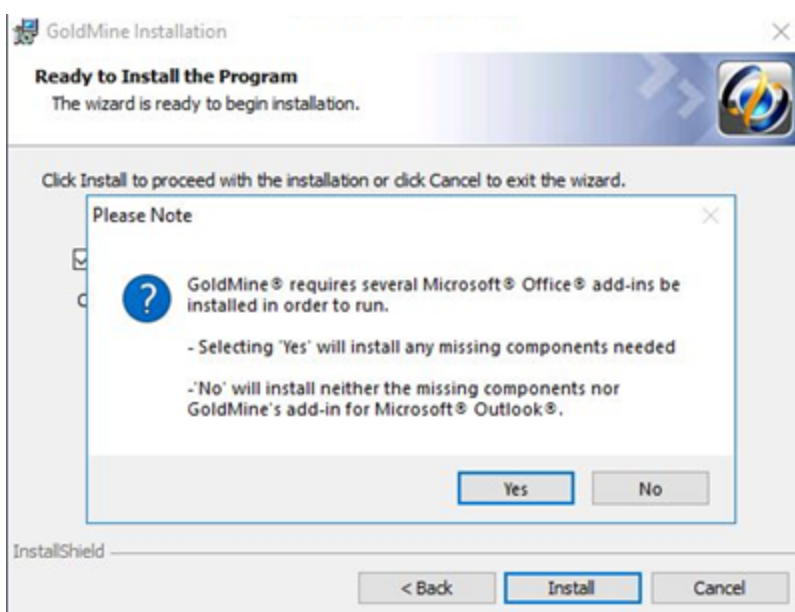
If you selected to use a trusted certificate in the *Database Encryption* dialog and there is no such certificate, an error message appears. In this case, select *Back* to return to the *Database Encryption* dialog and select *No*.

13. Click *Next* to continue. The *Ready to Install the Program* dialog appears. Click *Install* to begin the installation.



**IMPORTANT:** Microsoft SQL Express 2012/2014/2016/2017 is the minimum requirement for the GoldMine database. Compatible SQL Express editions have a maximum database size of 10 GB.

14. If you selected any of the GoldMine Plus! options or an Outlook plug-in, a *Question* dialog appears. Click *Yes* to install the Microsoft Office add-ins, or click *No* to skip installation of these add-ins and only install GoldMine.



15. The *Installing GoldMine* dialog appears and the installation will begin. When the *GoldMine Installation Completed* dialog appears, click *Finish*.



The *Welcome to GoldMine* dialog opens to begin the licensing process. See [Licensing and Registration](#).

## Unattended Installation

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

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

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

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

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

### To Create Configuration File for Unattended Installation

1. Run GoldMine installer as usual.  
For more information on installing, see [Installation on a Server](#).
2. Proceed to the *Ready to Install the Program* dialog.
3. Select the *Create a configuration file for unattended installation* checkbox.
4. In a default install the file will be created in the:

C:\ProgramData\GoldMine\Setup\GoldMine folder, and be named gm\_si.ini

5. Click *Install*.

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

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

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

## To Manually Run the Unattended Installation

Manually run the unattended install using gmsetup\_si.bat file.

**NOTE:** GM installer files gmsetup.exe, gm\_si.ini, and gmsetup\_si.bat should be placed into the same directory.

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

## Automatic Upgrade

Use the following procedure to upgrade networked workstations.

### To Upgrade Unattended Installation

1. Create the configuration file.

For instructions, see [To Create Configuration File for Unattended Installation](#).

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

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

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

## Installation on a Networked Workstation

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

Share the GoldMine data folder on the server. If you plan to access the data folder by a mapped drive, then map the same drive on each workstation to the shared GoldMine folder on the server. It is recommended that a UNC path be used instead of a mapped drive. This is required for use of GoldMine Connect..

## Sharing the GoldMine Folder on the Server

To run the shared folder installation, after installing the Server setup, share the GoldMine data directory (default: C:\ProgramData\GoldMine\) so the Networked Workstation functions properly. All GoldMine users must have rights to read, write, modify, and delete files for GoldMine to function on the Networked Workstation.

**NOTE:** Sharing can expose other applications. *Do Not* install GoldMine as a root folder of the drive, rather, install to C:\Program Files\GoldMine (32-bit OS) or C:\Program Files (x86)\GoldMine (64-bit OS) on the Server. We highly recommend installing GoldMine to the default paths.

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

### To Share the GoldMine Folder on the Server

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

#### Share the GoldMine Folder

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

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

#### Configure The Share Permissions

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

**NOTE:** Full Control of the \ProgramData\GoldMine folder is needed for all GoldMine users.

## Configure the GoldMine Server to Emulate a Network Workstation

If mapped drives will be used to access GoldMine from the networked workstations, the same drive should be mapped on the server.

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

## Mapping a Drive on the Networked Workstations

We recommend that GoldMine be accessed by UNC path. This is necessary if you plan to use GoldMine Connect. If GoldMine will be accessed by a mapped drive, all networked workstations accessing the shared GoldMine folder must be mapped to the same network drive letter (for example, **G:\**) to facilitate GoldMine administration and operations related to linked documents and synchronization.

### Mapping on the Server

The SysDir entry in `\ProgramData\GoldMine\gm.ini` must be changed so that it points to the mapped folder containing the `LicenseGM95.bin` file.

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

The RealIni entry `Program Files\GoldMine\gm.ini` (for 32-bit OS) or `Program Files (x86)\GoldMine\gm.ini` (for 64-bit OS) must be changed so that it points to the `gm.ini` file in the mapped `ProgramData\GoldMine` folder.

For example, if GoldMine was installed to **C:** and `\ProgramData\GoldMine` was mapped to **G:**, the RealIni entry `C:\Program Files\GoldMine\gm.ini` (32-bit OS) or `Program Files (x86)\GoldMine\gm.ini` (64-bit OS) would be changed to: `RealIni=g:\gm.ini`

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

`\ProgramData\Goldmine` folder.

### To Map a Drive in Windows

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

8. Click *OK* and then click *Finish*.
9. Repeat this procedure on each client workstation computer.

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

## Set the GoldMine System Directory on the Server

The GoldMine *System Directory* points to the location of the `LicenseGM95.bin`. This entry must be set appropriately, to allow access by networked clients and by some integrations. Set the *System Directory* using the following procedure.

1. Log in to GoldMine as a user with Master rights.
2. Select **Tools > Options** to open the *USER's Option* dialog.
3. Select the *Login* tab. (This tab is not available for a user *without* master rights.)
4. Enter or browse to the location of the GoldMine Data folder using either a UNC path (recommended) or a mapped drive.

**NOTE:** This is a GLOBAL setting for all GoldMine users.

5. Click *OK* to save and exit **Options**.

## Installing on a Networked Workstation

This procedure installs GoldMine on a workstation and enables the workstation user to connect to a shared copy of the GoldMine database.

1. At the workstation, run the GoldMine Premium installer by double-clicking the executable file (when already adjusted by the GoldMine administrator, this file is `gmsetup-version.exe`; otherwise, it is `gmpeSetup-version.exe`). This file must be the same as the one used for the version of GoldMine installed on the server.

The *Welcome to the GoldMine Installation Wizard* dialog appears. Click *Next*.

**NOTE:** If the Microsoft OLE DB Driver for SQL Server is not yet installed, the GoldMine installer will direct you to install it. GoldMine PE is only compatible with the MS OLE DB Driver for SQL version 18. Please follow the installation steps with the default values.

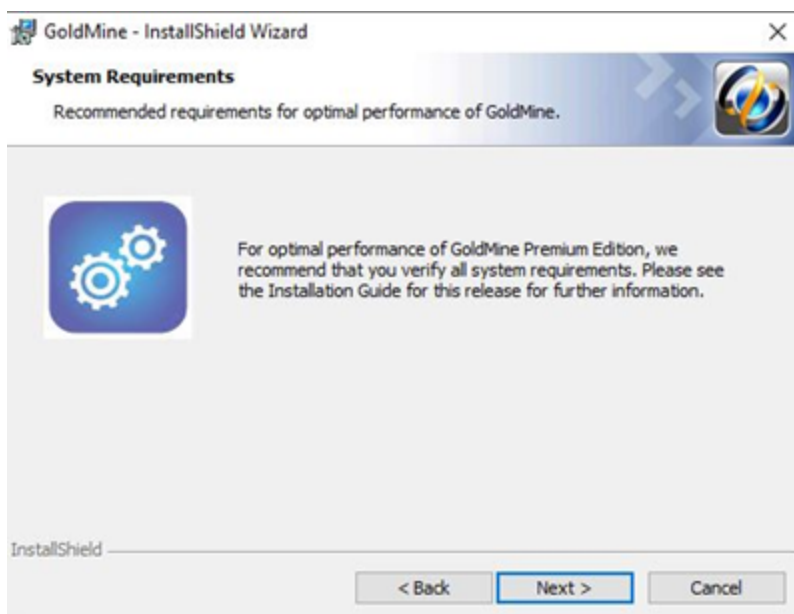
2. The `README.HTM` appears, which contains the most recent information about this version of GoldMine. After reviewing the `README` content, close the window to proceed with the installation. Click *Next*.



3. The *License Agreement* dialog appears. Accept the terms of the agreement, which activates the subsequent checkboxes. These checkboxes must be selected to continue with the installation. Click *Next*.



4. The *System Requirements* page appears. Verify that all system requirements have been met, then click *Next*.

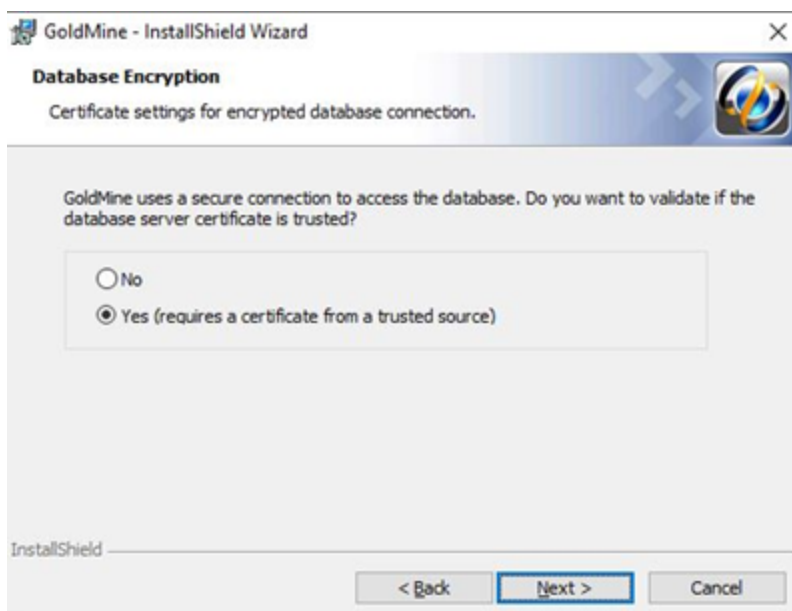


5. On the *License Agreement* dialog, read the information about SQL queries and filters, select the checkbox that you have read and acknowledged the information, then click *Next*.

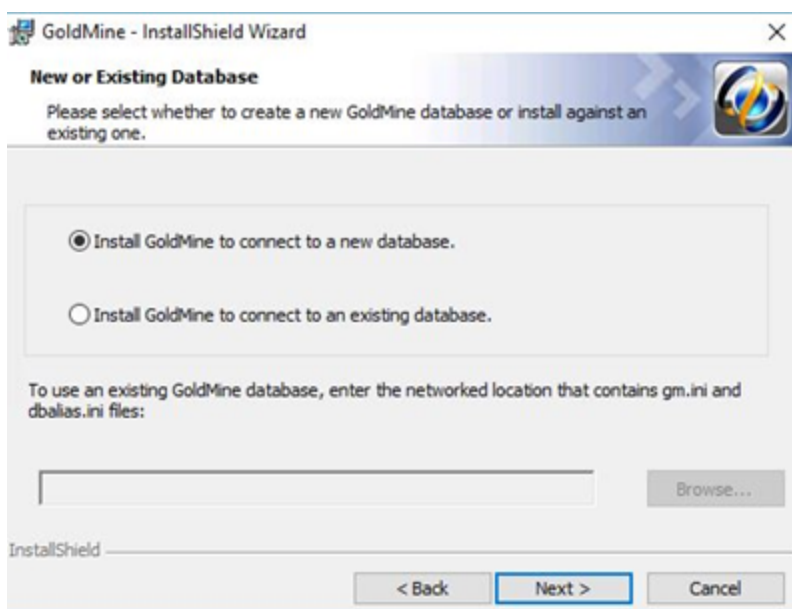


6. The *Database Encryption* dialog appears. By default, GoldMine uses protocol encryption and validates database server certificates to adhere to the “Secure by default” security principle and “Privacy by default” principle.

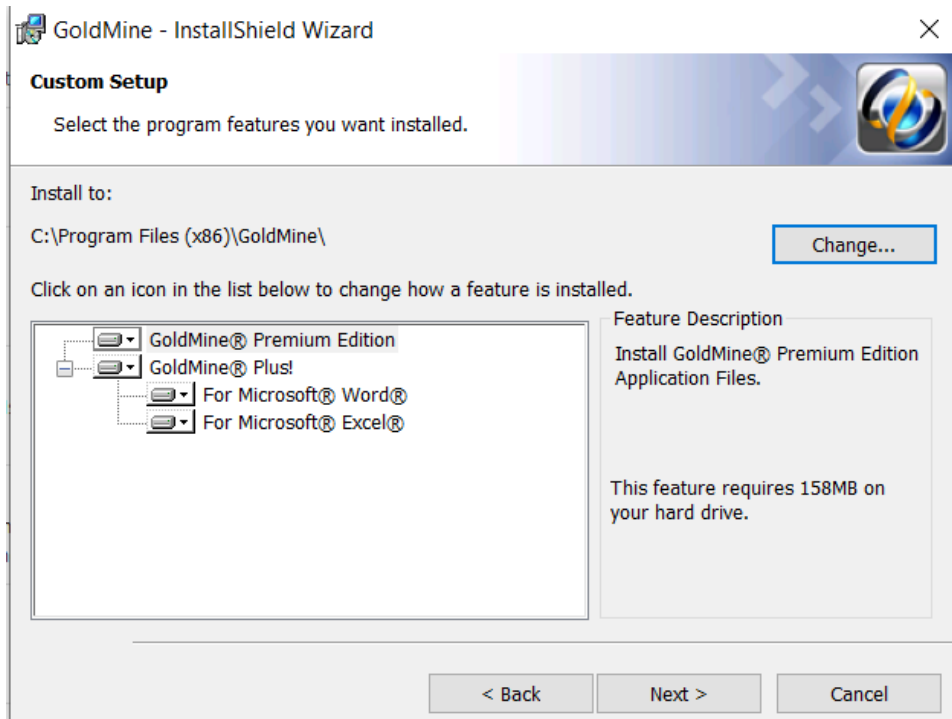
If you have a trusted certificate configured on your database server, select *Yes*. If not, select *No*; otherwise, setup will not be able to create a database for GoldMine. (Note that the majority of GoldMine users will not have a trusted certificate configured). Click *Next*.



7. The *New or Existing Database* dialog appears. Choose the *Install GoldMine to connect to an existing database* option, and then manually enter the shared GoldMine path, for example `\\servername\GoldMine`. Click *Next*.



8. The *Custom Setup* dialog appears. The default installation location is `C:\Program Files\GoldMine` (32-bit OS) or `C:\Program Files (x86)\GoldMine` (64-bit OS). GoldMine *must* be installed to a local drive and folder; do not select a mapped drive during installation.



**IMPORTANT:** Choosing a location outside of the `\Program Files` (32-bit OS) or `\Program Files (x86)` (64-bit OS) directory can cause a loss of certain functionality, such as macro recording. This is due to security requirements which connect certain privileged functions with the locations from which their associated executables are launched.

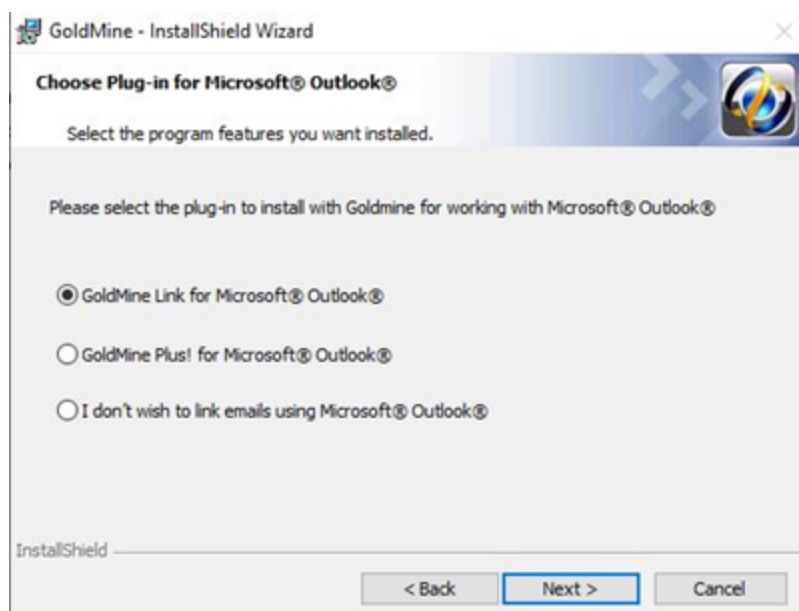
The GoldMine Premium Edition and GoldMine Plus! options are selected for installation by default. GoldMine Plus! has additional components you can install for Microsoft Word and Excel. These components require that a supported version of Microsoft Office be installed *prior* to GoldMine installation.

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

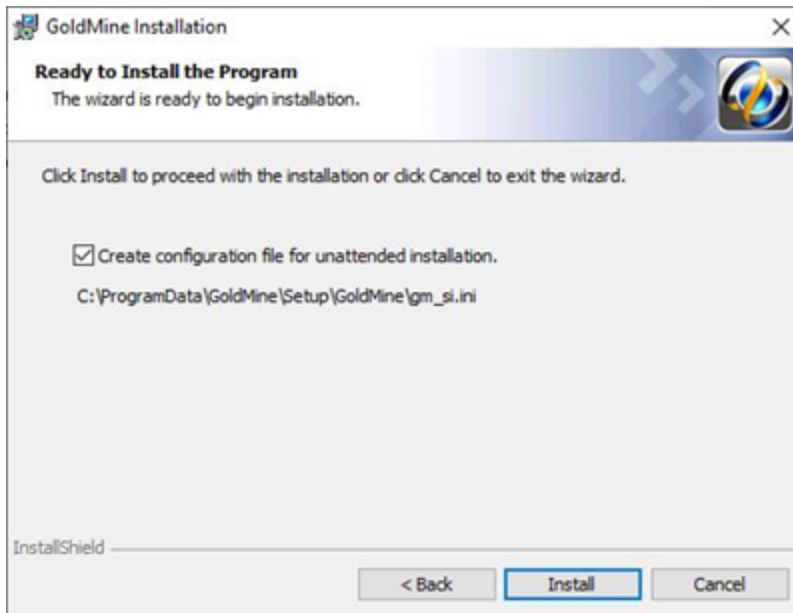
If you do not want to install one or both of the GoldMine Plus! components, click the *GoldMine Plus!* icon, select *This feature is not available* from the drop-down menu, and then click *Next*.

These components can be installed at a later date by going to Windows *Control Panel > Programs and Features > GoldMine > Change* and modifying the existing installation.

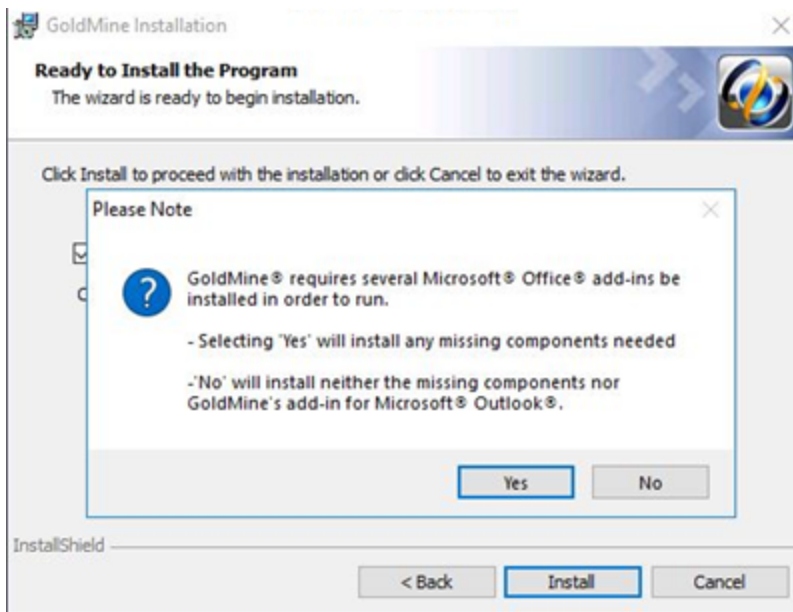
9. Click *Next*. The *Choose Plug-in for Microsoft Outlook* dialog appears. Select if you want to install an Outlook plug-in for GoldMine Link or GoldMine Plus!. If you don't want to link your Outlook emails, select the third option. Note that you can install this plug-in at a later date by going to Windows *Control Panel > Programs and Features > GoldMine > Change* and modifying the existing installation.



10. Click *Next* to open the *Ready to Install the Program* dialog. The *Create configuration file for unattended installation* option allows you to create the `gm_si.ini` file. This file can be used to establish settings for future Workstation installations based on the settings of **this** Workstation. A GoldMine administrator can also create unattended installation scripts for various installation scenarios (see [To Create an Unattended Installation Script](#)). Click *Install*.



11. If you selected any of the GoldMine Plus! options or any Microsoft Outlook plug-in, a *Question* dialog appears. Click *Yes* to install the Microsoft Office add-ins, or click *No* to skip installation of these add-ins and only install GoldMine.



12. When finished, the *GoldMine Installation Completed* dialog appears.
13. Repeat this process for each Workstation accessing GoldMine, or perform an unattended installation if it has been configured by the GoldMine administrator.

## Installation on an Undocked Computer

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

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

Read the following points before running an undocked computer installation:

- If installing an Undocked version of GoldMine while it is in your office, disconnect the laptop from the network so you install a completely independent copy on the computer.
- An Undocked installation is performed for users that frequently work remotely and are not connected to the office network via a faster connection. The user works on a local database on their computer. Data is exchanged between the user's local database and the office database during synchronization. For more information, see the online help for instructions on setting up *GoldSync*.
- Instead of using the `gmsetup.exe` to install GoldMine on an undocked workstation, you can run the installation by using an installation file for One-Button Synchronization. For further information, refer to the "Synchronization" chapter of the **GoldMine Administrator Guide** (or the "Synchronization" topic in the online help).

## Creating an Unattended Installation Script

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

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

### Use Case Scenarios

#### ■ *New Installation*

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

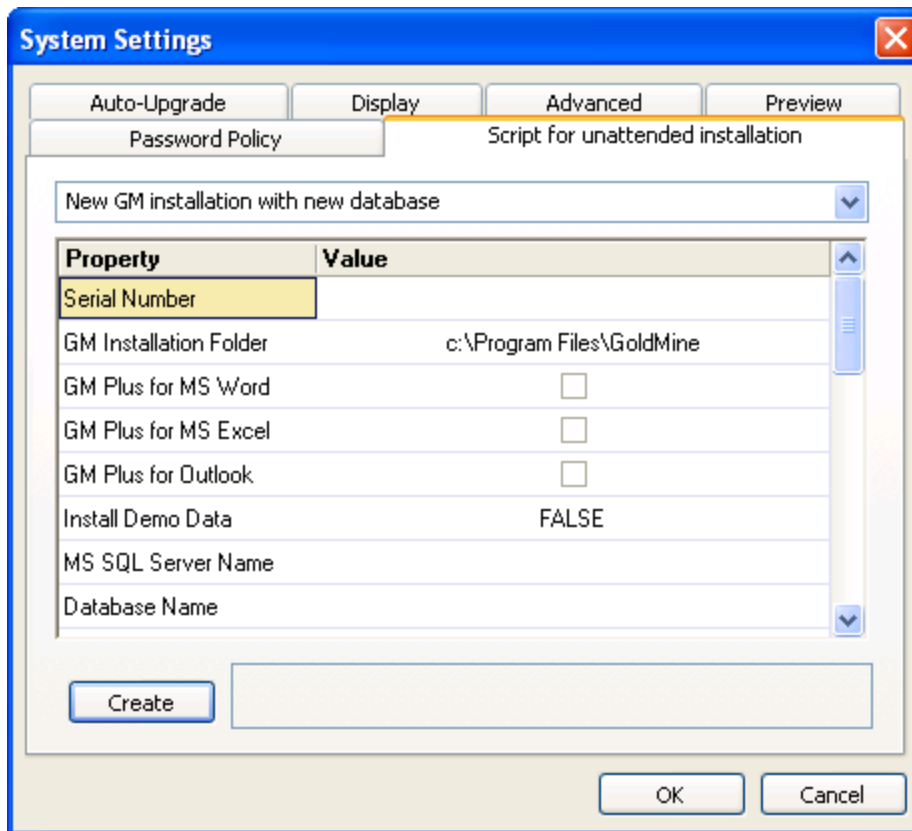
#### ■ *New Installation Connecting to Existing Database*

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

#### ■ *Upgrade Installation*

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

## To Create an Unattended Installation Script



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

Following is an example of the two files created:

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



## To Run an Unattended Installation Script

1. Create an Unattended Installation Script (see [To Create an Unattended Installation Script](#)).
2. Place a copy of the `.INI` and `.BAT` file in the same location as the GoldMine installation file.  
For example, the following files would need to be in the same directory to run the script:
  - `<scriptname>.ini`
  - `<scriptname>.bat`
  - `gmsetup.exe`
3. Run the `<scriptname>.bat` file to start the installation.

## Modifying the Registration Key

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

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

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

1. Login as different user account.
2. Open the Windows **Start** menu and select **Run**.
3. Type `regedit` in the textbox and click *OK*.
4. Expand the tree to:  
`HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\<YOUR VERSION>\Excel`  
The `<YOUR VERSION>` Office folders are as follows:
  - For Office 2010 = `14.0`
  - For Office 2013 = `15.0`
  - For Office 2016 = `16.0`
5. Expand the *Excel* folder.
6. Right-click on *Options* and select *New > String Value* from the context menu
7. Name the new string *OPEN*.
8. Right-click the *OPEN* string and select *Modify*.
9. Enter the following string in the *Value data* textbox:  
`/A "GMPPlusOffice2007.UserDefinedFunctions"`
10. Click *OK* to save the changes.



# Licensing and Registration

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

## General Licensing Information

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

Most organizations generally buy one license—a *Master License* with x number of seats. These seats can then be parsed to users in various combinations of sub-licenses. For example, an organization can create Site sub-licenses for their remote office(s) and Undocked sub-licenses for individual remote users. One seat should always be set aside for administrators.

## License Types

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

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

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

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

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

- **Increases:** Licenses increases are facilitated by obtaining a new E license.

### Master License

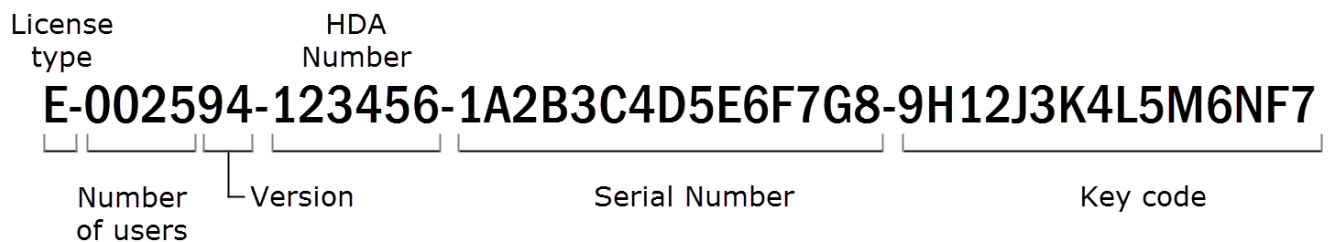
E	Supports SQL databases and includes GoldSync
---	--

## Sub-licenses

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

## License Serial Number

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

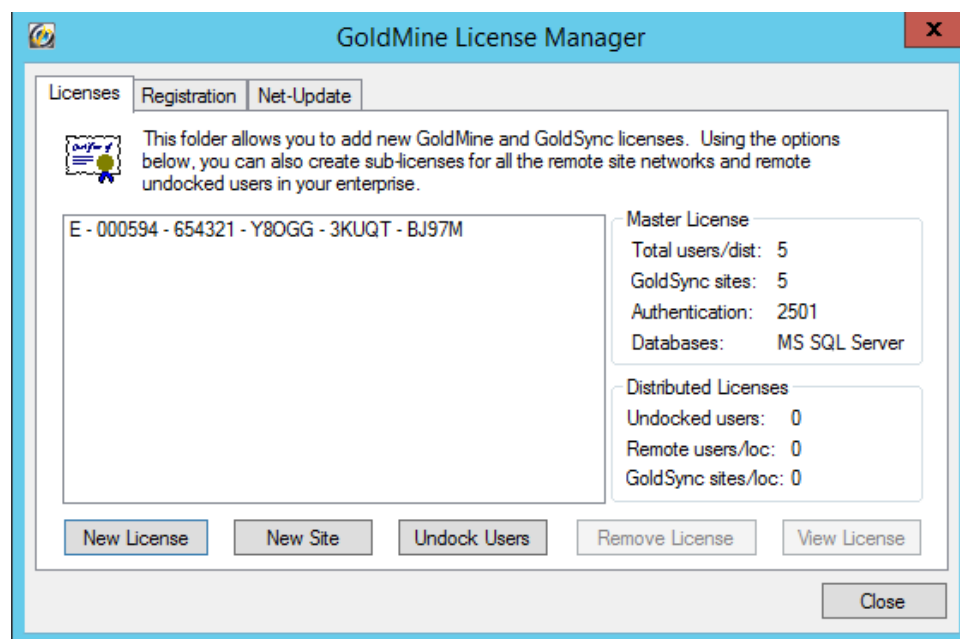


- *License type*: Alpha-prefix denotes the type of Master license.
- *Number of users*: First 4 numbers indicate the license count or seats available in the license. The license count determines the number of users who can log on to GoldMine at one time but does not limit the total number of named users.
- *Version*: A 2-digit version number.
- *HDA number*: A unique 6-digit customer account number, also referred to as the Help Desk Authorization (HDA) Account.
- *Serial number*: 15-character (alphanumeric) serial number uniquely identifying the license for an organization. It is used for registration and support and identifies all sub-licenses as part of the same organization. Collected in 3 groups of 5 characters during licensing.
- *Key code*: 15-character (alphanumeric) key code is a computer-generated check used by GoldMine to verify the license's validity. Collected in 3 groups of 5 characters during licensing.

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

# License Manager

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



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

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

The database support of the Master License is inherited by the site sub-licenses distributed throughout the organization. GoldSync Synchronization capabilities can be distributed separately to sub-licenses.

**NOTE:** Licensing information is stored in the license file, *LicenseGM95.bin*, created at the time you register. This file must exist only in the GoldMine main data directory of each GoldMine installation.

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

## LicenseGM.bin File Locations

The *LicenseGM95.bin* file is located in *\ProgramData\GoldMine* for all installations made to the default (recommended) location. Networked workstations will access the *LicenseGM95.bin* file at the GoldMine server.

## Licensing with a Master License

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

For Example: *E-002594-123456-...*

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

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

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

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

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

## Licensing Following Installation

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

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

The *Enter GoldMine Serial Number* dialog appears.

**Enter GoldMine Serial Number**

Please enter your GoldMine Serial Number and Key Code below:

GoldMine Serial Number:  
[ ] - [ ] - [ ] - [ ] - [ ]

Key Code:  
[ ] - [ ] - [ ]

☐ Evaluation version

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

GoldSync Serial Number:  
[ ] [ ] [ ] [ ] [ ] [ ]

Key Code  
[ ] [ ] [ ]

< Back   Next >   Cancel

2. Type your GoldMine serial number and key code.

3. Click *Next* to open the *Enter License Information* dialog.

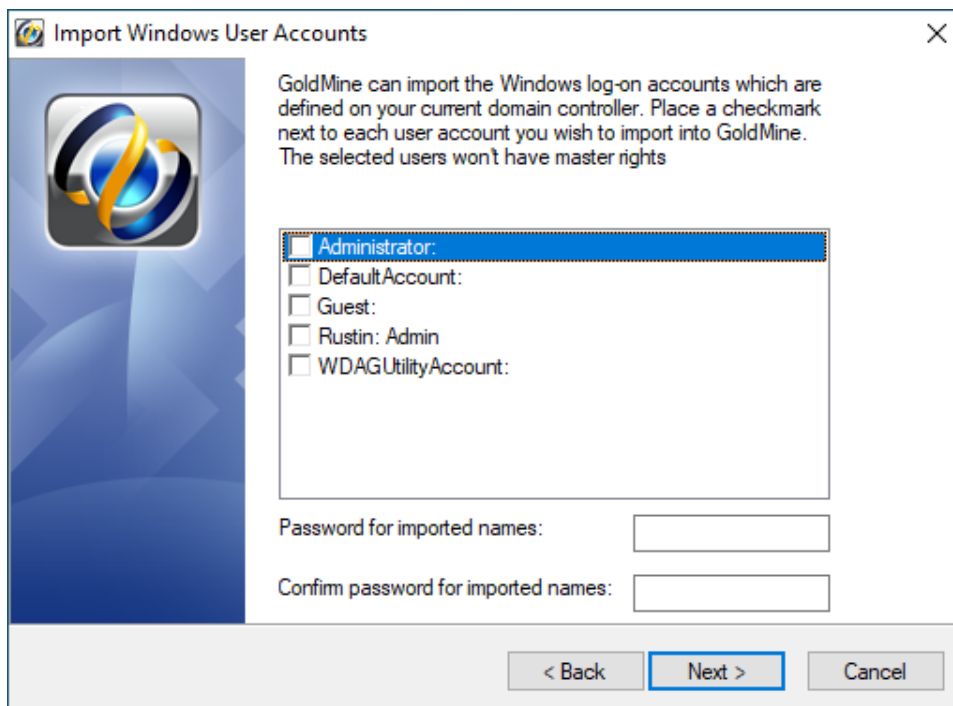
**NOTE:** The following fields are used in GoldMine when using address information for the VCard (.vcf file):

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

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

4. Enter your contact information in the designated text boxes to continue. *Organization*, *Contact Name*, *E-mail address*, *Phone*, *Address1*, and *City* fields are *required*.  
Click the checkbox if you want to receive future product information.

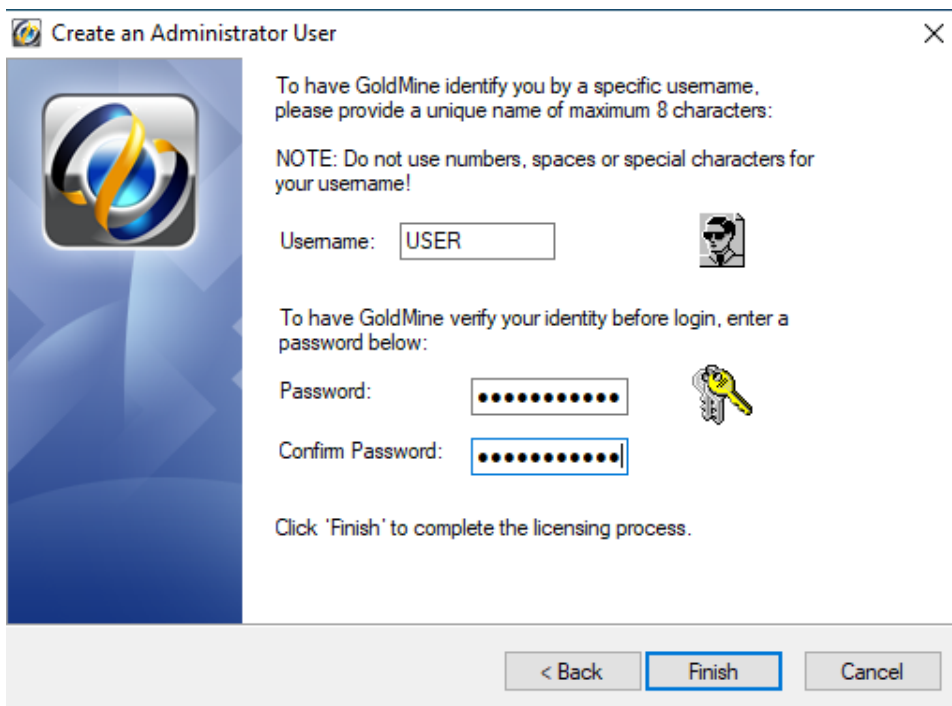
5. Click *Next* to open the *Import Windows User Accounts* dialog.



6. Select each user account you want to import into GoldMine. If appropriate, enter a password for the imported names and then confirm the password.

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

- Click *Next* to open the *Create an Administrator User* dialog.



The dialog box is titled "Create an Administrator User" and features the GoldMine logo on the left. The main text instructs the user to provide a unique username (maximum 8 characters) and a password. A note specifies that numbers, spaces, and special characters are not allowed in the username. The "Username:" field contains the text "USER". The "Password:" field is masked with dots, and the "Confirm Password:" field is also masked. To the right of the password fields is a key icon. At the bottom, there are three buttons: "< Back", "Finish" (which is highlighted with a blue border), and "Cancel".

To have GoldMine identify you by a specific username, please provide a unique name of maximum 8 characters:

NOTE: Do not use numbers, spaces or special characters for your username!

Username:

To have GoldMine verify your identity before login, enter a password below:

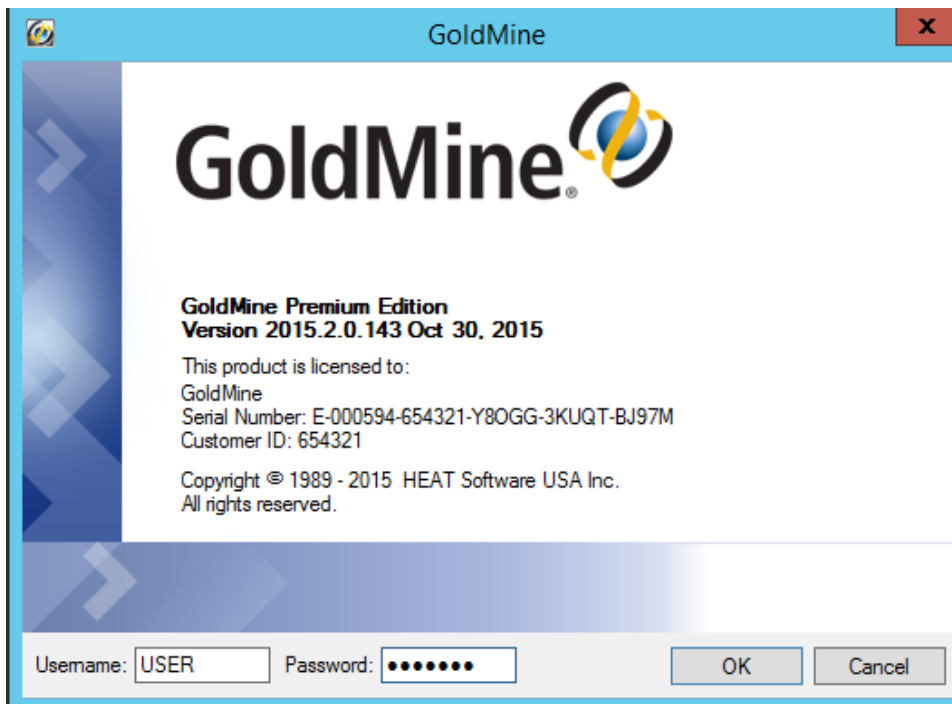
Password:

Confirm Password:

Click 'Finish' to complete the licensing process.

< Back Finish Cancel

- Type a user name (eight characters or fewer). Enter a password in the Password field and then confirm the password. GoldMine requests these at log in. This user has Master Rights in GoldMine.
- Click *Finish* to open the *GoldMine Logon* dialog.



The logon dialog box has a blue header with the GoldMine logo and the text "GoldMine". Below the logo, it displays the product information: "GoldMine Premium Edition", "Version 2015.2.0.143 Oct 30, 2015", and the license details: "This product is licensed to: GoldMine, Serial Number: E-000594-654321-Y80GG-3KUQT-BJ97M, Customer ID: 654321". It also includes the copyright notice: "Copyright © 1989 - 2015 HEAT Software USA Inc. All rights reserved." At the bottom, there are two input fields: "Username:" with the text "USER" and "Password:" with a masked password. To the right of these fields are "OK" and "Cancel" buttons.

GoldMine

**GoldMine Premium Edition**  
**Version 2015.2.0.143 Oct 30, 2015**

This product is licensed to:  
GoldMine  
Serial Number: E-000594-654321-Y80GG-3KUQT-BJ97M  
Customer ID: 654321

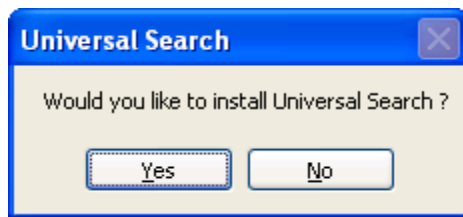
Copyright © 1989 - 2015 HEAT Software USA Inc.  
All rights reserved.

Username:  Password:

OK Cancel



10. Type the user name and password and click *OK* to launch GoldMine.
11. After logging in, the *Universal Search* dialog opens.



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

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

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

## Creating Sub-licenses

After GoldMine is installed and licensed, you can parse seats to your end users with sub-licenses using the License Manager. You must have a Master License to create sub-licenses.

**IMPORTANT:** Plan before creating sub-licenses, keeping in mind each sub-license transfers seat availability which affects how many users can log in on the network system. For example, on the Licenses tab of the License Manager, if the Total users/dist: shows a total number of seats and the total number of sub-licenses as "50\20," only 30 seats are available to users. At a minimum, one seat should always be set aside for administrators only.

## Creating Sub-licenses for Remote Offices

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

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

**NOTE:** When creating any sub-license, note the entire license number created by GoldMine. The sub-license includes the key code and additional information needed when licensing the remote computer.

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

1. From the *GoldMine* menu, select *Tools > Configure > License Manager*. The *License Manager* appears.
2. Click the *Licenses* tab.

3. Click *New Site* to open the *Create a Site Sub-License* dialog.

4. In the *Distributed License Type* area, select the site license you want to create; GoldMine Site License (S-License) for the number of seats the site needs or GoldSync Site License (Y-License) for the number of users who are synchronizing, including at least one for the site.

**TIP:** Write the sub-license number down or copy it to Windows Notepad. The sub-license number is needed for each remote computer installation. Send the remote site license number to the remote user who can type the license number during the GoldMine installation.

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

**NOTE:** GoldMine adds the sub-license to the list of licences on the Licences tab of the License Manager.

## Creating Sub-licenses for Undocked Users

GoldMine has a sub-license for an individual user called an *Undocked License (U-License)*. This license type is created for users who work primarily with GoldMine at a remote location on a laptop, notebook, or home office computer but who may also need to log on to the network occasionally. Consider:

- Creating an undocked user decreases the available users of the network site (Master License or Site License) by one; however, when an undocked user logs on to the site from which they were sub-licensed, they do not take up an additional seat.
- Every user supported by the GoldMine license can have an Undocked license to work on a remote computer. For example, on a 5-user GoldMine system, 5 Undocked licenses can be created. This is in contrast to creating an "S" sub-license which requires one seat to remain available from the Master License.

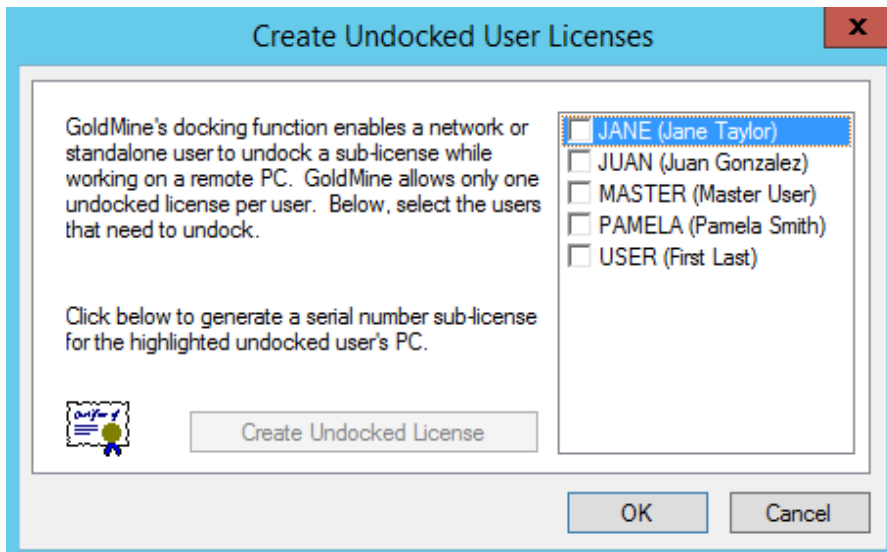
- All undocked users, as well as the total number of users that make up the difference in the total number allowed by the Master License can log on to GoldMine. For example, on a 5-user GoldMine system with 3 undocked users, 3 undocked users plus 2 other users can log on to GoldMine.

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

- When used in combination with GoldSync, administrators can synchronize security settings to undocked users including new passwords, menu items, and preferences in addition to data.
- To work on an undocked basis, users must have an Undocked license on their laptop. Create an Undocked license from the Master License or a Site license.

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

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



3. Select the check box next to the user you want to create a sub-license for, and click *Create Undocked License* to open the *Sub-Licenses* dialog.
4. Review the information and click **I Agree**. The sub-license number for a remote user or an undocked user appears in the *Sub-license for Remote Site [Name of Site]* dialog.

**TIP:** Write the sub-license number down or copy it to Windows Notepad. The sub-license number is needed for each remote computer installation. Send the remote site license number to the remote user who can type the license number during the GoldMine installation.

# Licensing with Sub-licenses

## Site License

A Site License is a multiple-user sub-license for a remote office and is designated with the alpha-prefix “S.” You should have an *S-license* for each user at the remote site.

A GoldSync License (**Y-license**) is required only if you are using an S-license and want to synchronize using GoldSync. You should have one Y-license to synchronize with the Master License and additional Y-licenses for Undocked users synchronizing with your site.

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

If this installation of GoldMine includes its own GoldSync sites, you may enter the applicable Y-type sub-licenses to properly configure synchronization for this system.

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

## Undocked License

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

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

## Evaluation License

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

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



# Upgrading GoldMine

The upgrade process is intended to be used with GoldMine 9.0.0 or higher. There is no need to uninstall the existing version, or remove folders and databases before proceeding . If you are upgrading from a version of

GoldMine Premium lower than 9.0.0, you must first upgrade to version 9.0.0 before upgrading to this version. If you are upgrading from a version of GoldMine Standard or Corporate lower than 6.7, you must first upgrade to version 6.7 before upgrading to version 9.0.0. Please review the ReadMe document and Installation Guide associated with the interim upgrade version(s) during the upgrade process. Contact GoldMine Technical Support if you have questions or need further assistance. See <http://www.goldmine.com/goldmine-support/> for contact information and options.

**NOTE:** Before upgrading, back up your existing GoldMine database, as well as your GoldMine program and data folders and any other folders containing files linked to GoldMine. This prevents the loss of valuable information and data.

- The following are default locations for GoldMine data folders; however, these could have been manually changed, so you must verify your specific environment first:
  - C:\Program Files (x86)\GoldMine
  - C:\ProgramData\GoldMine
- The license file for GoldMine Premium 2020.1 and newer is named `LicenseGM95.bin`.
  - If you are upgrading from a version previous to GoldMine Premium 2020.1, please ensure you have your new license available before beginning the upgrade process.
  - Following upgrade of the server and all client workstations, please delete any remaining instances of `License.dbf`, `License.bin`, or `LicenseGM.bin`, or `LicenseGM94.bin` stored in the GoldMine data directory to prevent conflicts during synchronization.
- If you are upgrading from a previous version of GoldMine Premium, you should understand that after upgrading, you will no longer be able to use this system with any prior version of GoldMine.
- A database conversion might be required when upgrading from earlier versions of GoldMine. This conversion occurs automatically when GoldMine is installed into the path of the existing `gmw.exe`.

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

- After upgrading from a previous version of GoldMine Premium, a user with Master Rights must login. This will allow GoldMine to complete the database upgrade. This step is not necessary when upgrading an undocked (U-license) installation.

- Undocked users must be on the same version and build of GoldMine as the site with which they sync. If you are upgrading the server but are not upgrading Undocked Workstations until a later time, disable their sync sites in the GoldSync Administration Center on the server. Reactivate their site when the undocked computer is upgraded and is running the same version and build of GoldMine as the server.
- Ensure you have adequate disk space available prior to installation.

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

- *If you are upgrading from an earlier version of GoldMine Premium* and are using add-on products, in some cases the add-on products will need to be modified in order to work with this version of GoldMine Premium Edition. Contact the provider of the add-on product for information.
- *Uninstall older version of GoldMine Links for Microsoft Word, Microsoft Excel, or GoldMine Integration Services for Microsoft Outlook Links (GISMO):* If these were installed with standalone installers. For more information, see the Ivanti community article [Is It Necessary to Uninstall Old Microsoft Integration Links Prior to an Upgrade?](#)
- *GoldMine Premium installer may appear to hang* when scanning the Mailbox\Attach directory on installations that have a large mailbox attachment folder and file structure. To prevent this, move the folder "Mailbox\Attach\" to another drive or another location outside of the GoldMine application folder, upgrade GoldMine, and then move the "Mailbox\Attach\" directory back to its original location. For more information, see the Ivanti community article [GoldMine Installer Hangs While Scanning the Mailbox/Attach Directory on Installs with Large Mailbox Attachment Folder](#).
- With the GoldMine Premium upgrade, users may lose their (custom) Speller (TLX) files under the GoldMine shared path \Speller\USERNAME folder. These files should be backed up separately and if applicable, copied back after the upgrade. For more information, see the Ivanti community article [Speller/TLX Files are not Retained During a GoldMine Upgrade](#).

## Upgrading Existing GoldMine

The following procedure describes an upgrade process for customers who have the following:

- GoldMine 9.0.0 or newer
- SQL Server/SQL Server Express GoldMine database

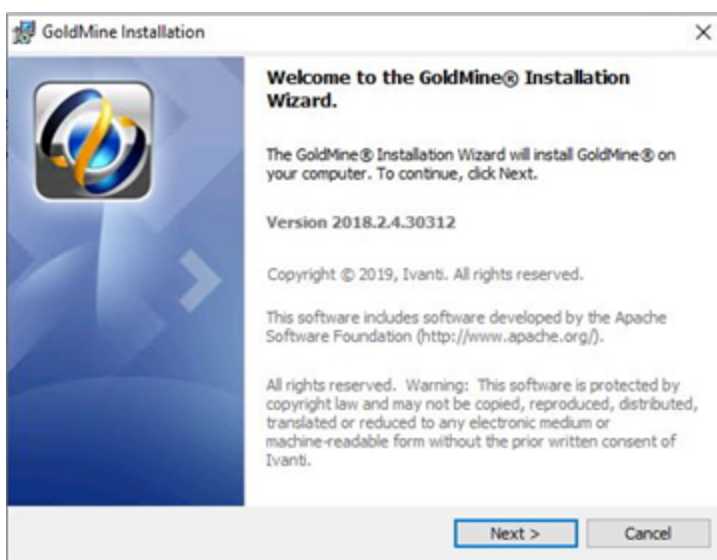
If you are upgrading from a previous version of GoldMine and have a large Microsoft SQL Server database (5GB of data or more), refer to [Migrating Large Databases](#)

If you are upgrading to GoldMine 2018.2 or newer and applying the security update, you must create a read-only database account afterward for your current GoldMine filters to continue working. The GoldMine SQL query editor will not be usable until you apply this procedure. For details, see [Creating a Read-only Account with Database Alias Manager](#).

**IMPORTANT:** Before upgrading, back up your existing GoldMine database, as well as your GoldMine program and data folders and any other folders containing files linked to GoldMine. This prevents the loss of valuable information and data.

## To Upgrade GoldMine

1. Double-click the executable to open the *Welcome to the GoldMine Installation Wizard* dialog. Click *Next*.



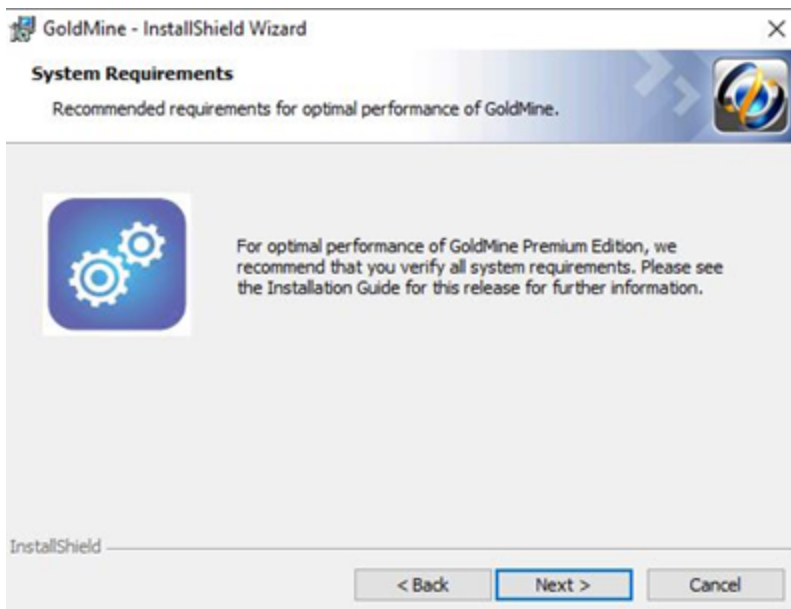
**NOTE:** If the Microsoft OLE DB Driver for SQL Server is not yet installed, the GoldMine installer will direct you to install it. GoldMine PE is only compatible with the MS OLE DB Driver for SQL version 18. Please follow the installation steps with the default values.

2. The README.HTM appears, which contains the most recent information about this version of GoldMine. After reviewing the README content, close the window to proceed with the installation.

3. The *License Agreement* dialog appears. Accept the terms of the license agreement, and click *Next*.

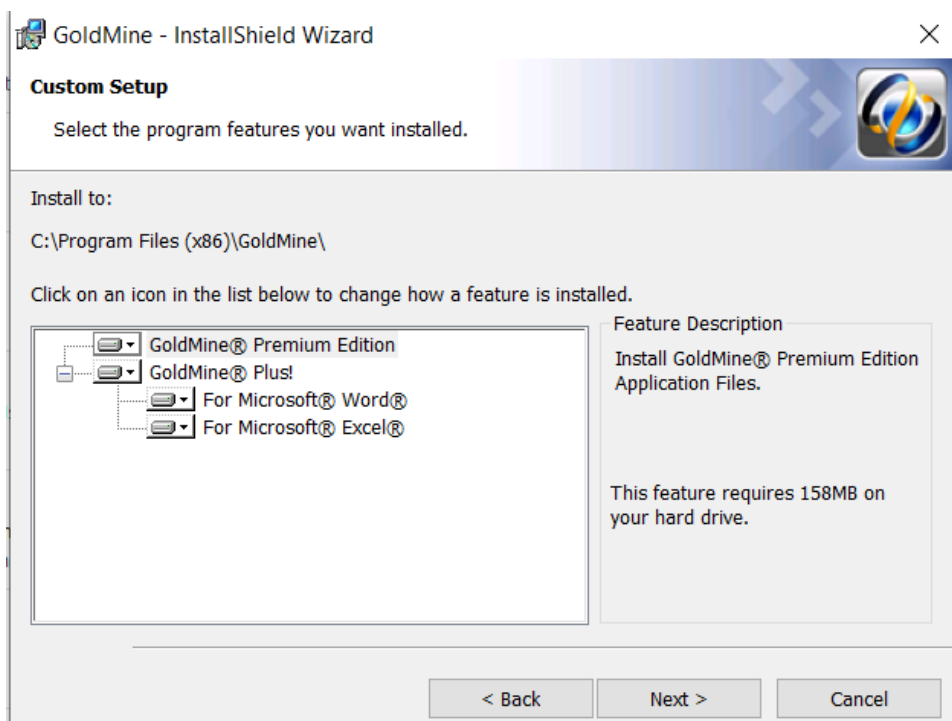


4. The *System Requirements* page appears. Verify that all system requirements have been met, and click *Next*.





5. The *Custom Setup* dialog appears. The path of the existing installation is noted and cannot be changed. To install to a different path, you must first upgrade the existing installation to the desired version. You may then uninstall and reinstall to the desired location.



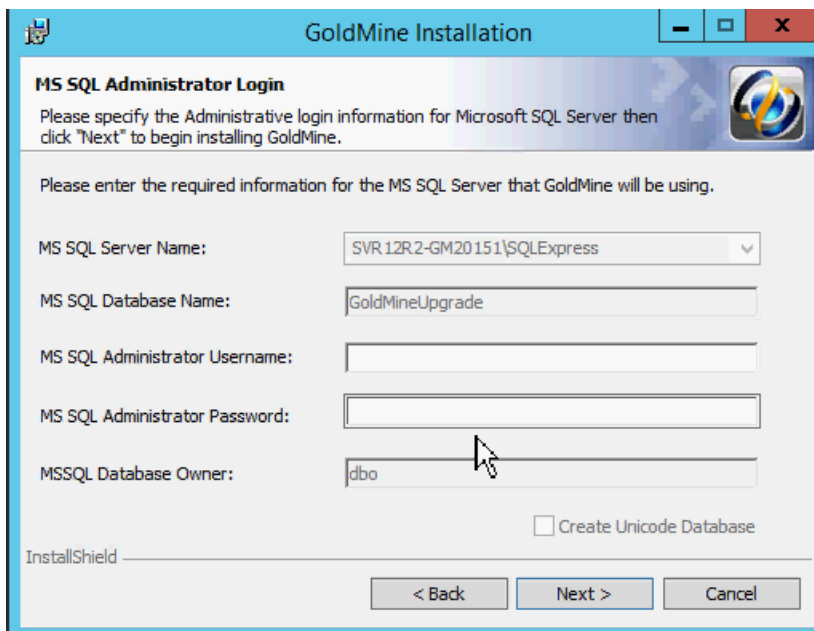
The GoldMine Premium Edition and GoldMine Plus! options are selected for installation by default. GoldMine Plus! has additional components you can install for Microsoft Word and Excel. These components require that a supported version of Microsoft Office be installed *prior* to GoldMine installation.

If you do not want to install one or both of the GoldMine Plus! components, click the *GoldMine Plus!* icon, select *This feature is not available* from the drop-down menu, and then click *Next*.

These components can be installed at a later date by going to Windows *Control Panel > Programs and Features > GoldMine > Change* and modifying the existing installation.

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

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



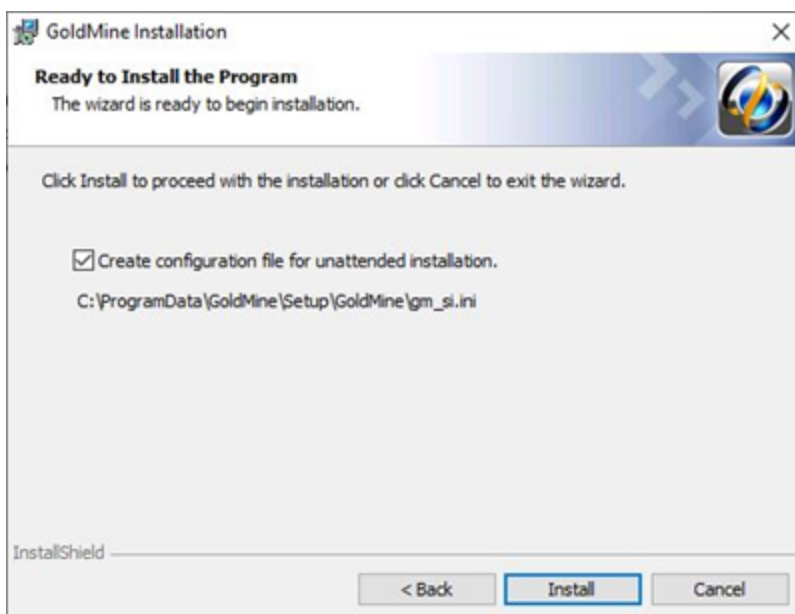
The screenshot shows the 'GoldMine Installation' window with the 'MS SQL Administrator Login' dialog box open. The dialog box has a title bar with the GoldMine logo and standard window controls. The main text reads: 'Please specify the Administrative login information for Microsoft SQL Server then click "Next" to begin installing GoldMine.' Below this, it says: 'Please enter the required information for the MS SQL Server that GoldMine will be using.' There are five input fields: 'MS SQL Server Name' (a dropdown menu showing 'SVR12R2-GM20151\SQLEXPRESS'), 'MS SQL Database Name' (a text box containing 'GoldMineUpgrade'), 'MS SQL Administrator Username' (an empty text box), 'MS SQL Administrator Password' (an empty text box), and 'MSSQL Database Owner' (a text box containing 'dbo'). A checkbox labeled 'Create Unicode Database' is located below the 'MSSQL Database Owner' field. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a mouse cursor.

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

- *MS SQL Administrative Username*: The default login is *sa*. If your SQL Server username is different, your SQL administrator must provide the information.
  - *MS SQL Administrative Password*: Enter the SQL Server administrator password.
8. Click *Next* to continue. If you click *Next* without typing a username and password, the *Insufficient Input* dialog opens. Click *Back*. If you type incorrect information and click *Next*, the *MS SQL Login Failed* dialog opens. Review the troubleshooting tips, then click *Back*.

**IMPORTANT:** Compatible SQL Express Editions have a maximum database size of 10 GB.

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

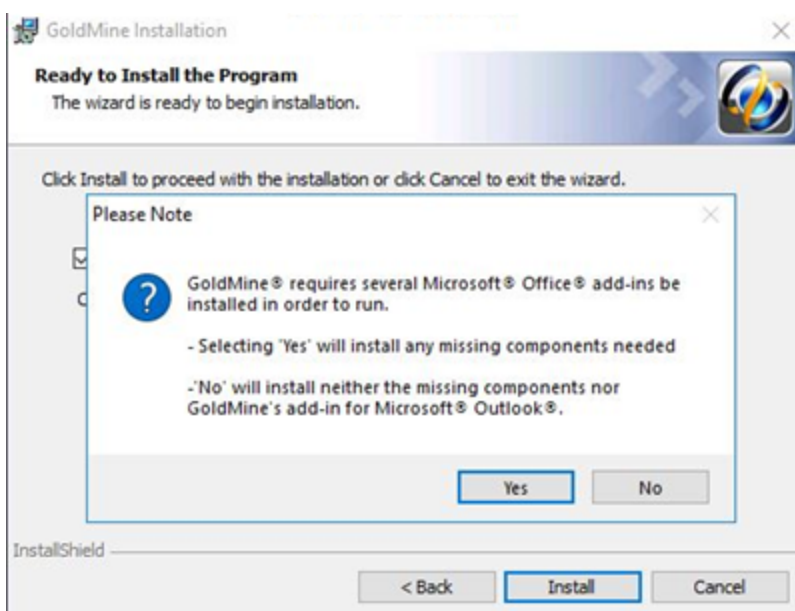


If you will be installing GoldMine on other computers sharing these same configuration settings, check the *Create a configuration file for unattended installation* box to create a configuration file with these settings.

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

10. Click *Install*.

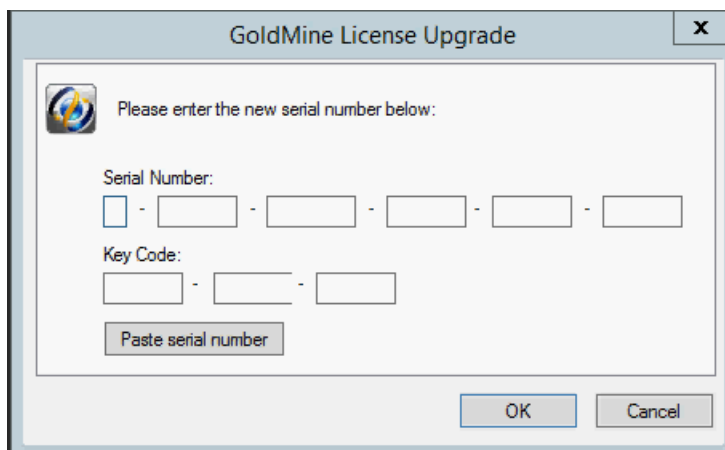
11. If you selected any of the GoldMine Plus! options, a *Question* dialog may appear if required components are missing. If prompted, select *Yes* to install the Microsoft Office add-ins, or click *No* to skip installation of these add-ins and only install GoldMine.



12. The *Installing GoldMine* dialog appears and the installation will begin. When the *GoldMine Installation Completed* dialog appears, click *Finish*.



13. If you are upgrading from version 9.0.x - version 2019.1.x, the GoldMine License Upgrade window will appear. You must enter a new license number before you can launch GoldMine. Contact GoldMine Customer Care if you do not have the new license number.



14. Enter login information for a user with Master Rights. GoldMine updates your database and starts the program.

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

## Creating a Read-only Account with Database Alias Manager

After applying the security update that is part of the GoldMine 2018.2 or newer upgrade, your existing GoldMine filters will no longer work until the following procedure is applied. The procedure creates a read-only database account for GoldMine, which will enable you to continue using the GoldMine SQL query editor.

To perform this action, you must have sysadmin rights in Microsoft SQL Server; therefore, it might be necessary to temporarily change the Login and Password. If applicable, you should then revert the change after creating the read-only user and verifying that the SQL queries and filter preview capability work. Note also that in environments where multiple database aliases exist, you must create a read-only user *for each one*.

### To Create a Read-only Database Account

1. Log into GoldMine as a user with Master Rights.
2. Expand the menus for *Tools > Databases > Alias Manager*, then click the *Edit Alias* button.
3. In the *Edit Alias* dialog, select the option *Enable SQL Queries* and enter the username and password of a read-only SQL user that GoldMine will create for you in SQL (no need to do anything in the SQL program;

GoldMine takes care of this for you).

Alias Definition

Alias Name: GM201

Server Type: MSSQL

Host: WIN-22VS

Database: GM201

Owner: dbo

Login: SA

Password: \*\*\*\*\*

☐ Use Windows Authentication (SSPI)

SQL Queries

☐ Enable SQL Queries

Read-Only User:

Read-Only Pass:

Database Server Manipulations

Create New Database Test Connection

OK Cancel

4. Click *OK* to save the changes. The SQL query editor should now be usable.

## Upgrading Remote Systems

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

- Before any upgrades, you need to back up your GoldMine database. We also recommend backing up your GoldMine program and data folders and any other folders containing files linked to GoldMine before beginning any installation. This prevents the loss of valuable information and data.
- If you are upgrading a Site, the Master installation provides the site administrator with the [gmsetup.exe](#). For more information, see [Installation on a Server](#)
- If updating an undocked computer, the Master installation provides the undocked computer user with the [gmsetup.exe](#). For more information, see [Installation on an Undocked Computer](#)
- If you are upgrading the server but are not upgrading a remote system until a later date, disable the site in the GoldSync Administration Center until it is running the same version of GoldMine as the server.

## To Upgrade a Remote System

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

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

3. Remote users must run the installation CD or the `gmsetup.exe` on their computer following these upgrade instructions.

After remote users upgrade to the same version of GoldMine as the server, they can begin synchronizing again.



# Configuring

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

## Configuration Considerations

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

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

### To Enhance GoldMine, Configure Other Areas:

- Automated Processes
- Reports

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

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

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



## Placing a Custom Image in the Logon Window

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

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

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

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

For example, if you place the graphics file `MyLogo.bmp` in your GoldMine directory, type this statement:

```
UserLogo=C:\GoldMine\MyLogo.bmp
```

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



## Installing Microsoft SQL Server

The Server setup requires that you install Microsoft SQL Server before installing GoldMine. Microsoft SQL Server 2014 Express with Advanced Services is used as the example in this section. Microsoft SQL Express includes 10

GB of storage per database. It may be appropriate to consider another Microsoft SQL Server Edition such as Microsoft SQL Standard for use in your environment and to meet your needs. For information to help you determine the appropriate edition of Microsoft SQL server and guidance for installing other supported editions or versions of Microsoft SQL Server, please refer to documentation available from the Microsoft website..

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

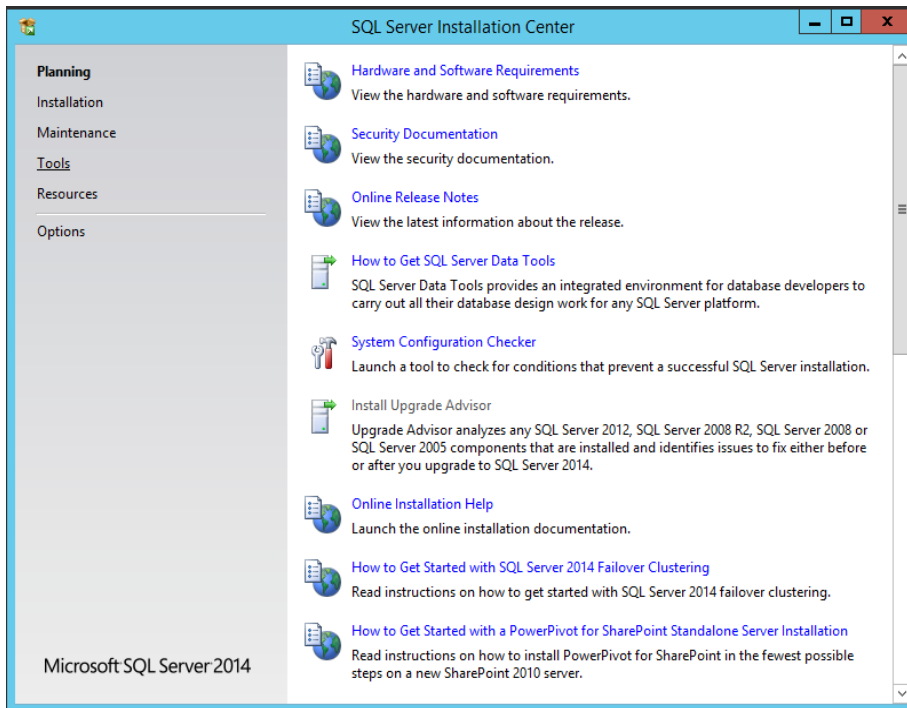
## Installing Microsoft SQL Server 2014 Express with Advanced Services

Supported operating systems for Microsoft SQL Server 2014 Express include Windows 10, Windows 8.1, Windows 8, Windows 7, Windows Server 2012, Windows Server 2012 R2.

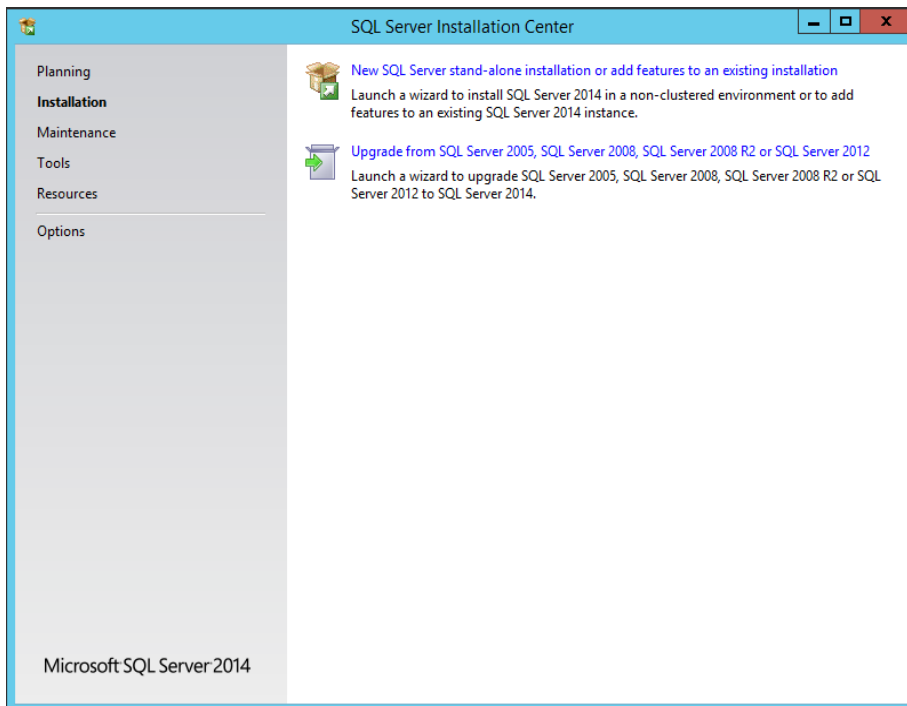
**NOTE:** For detailed hardware and software requirements for installing supported versions of Microsoft SQL Server please check documentation available from the Microsoft website.

1. Download Microsoft SQL Server 2014 Express from the Microsoft website. In order to use Microsoft SQL Server Reporting Services, you must download Express with Advanced Services. Run the downloaded .exe to start the installation. Choose your desired directory to save the extracted files.

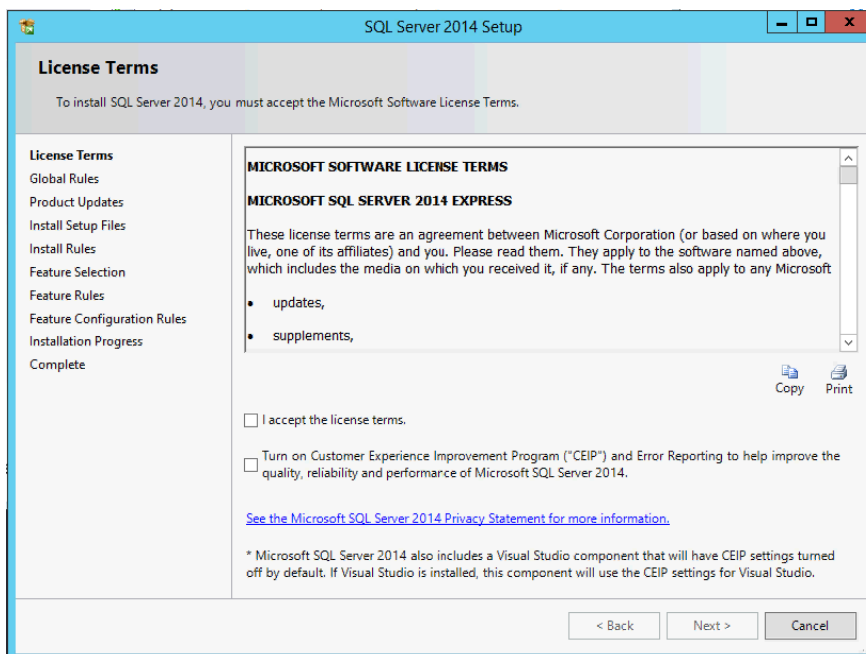
The *SQL Server Installation Center* opens.



- From the menu list on the left, select *Installation* then select *New SQL Server stand-alone installation or add features to an existing installation* from the options on the right.

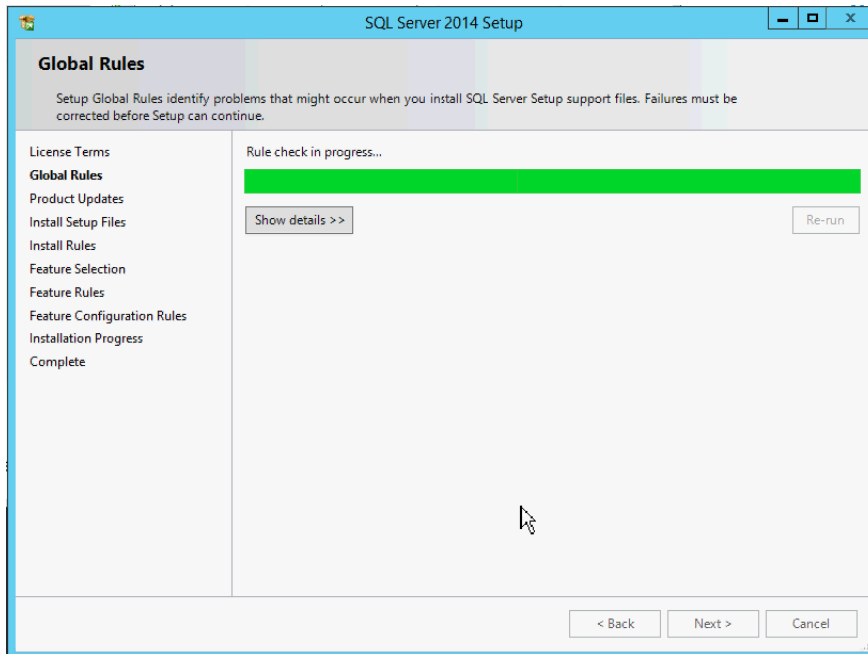


- The SQL Server 2014 Setup dialog opens to the *License Terms*.

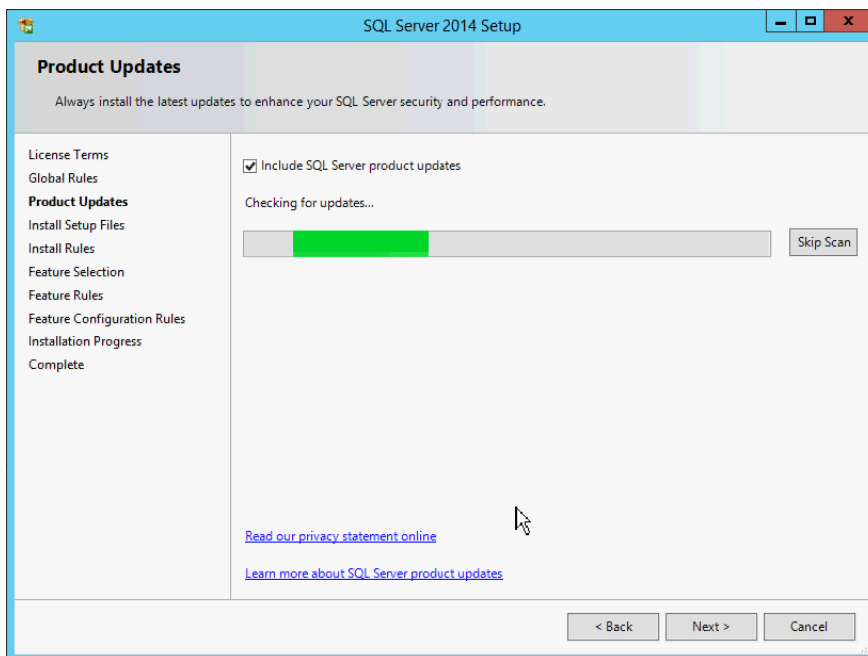


Read the licensing agreement and check the *I accept the license terms* box to indicate agreement. Check the box to turn on Error Reporting if desired.

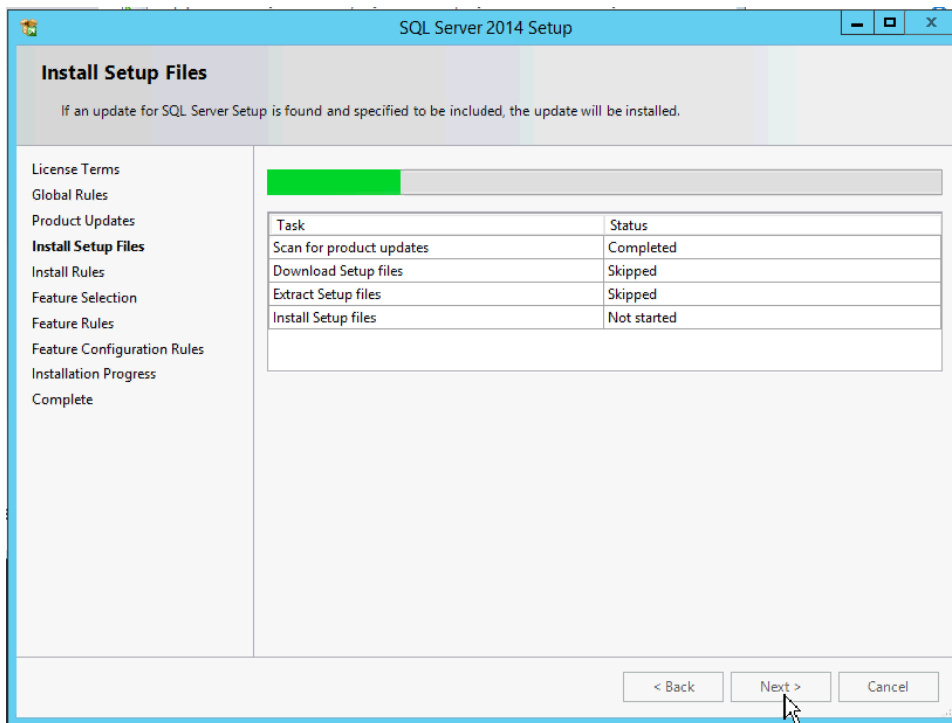
4. The Global Rules dialog runs the Rule check to identify problems that might occur. Failures must be corrected to proceed. Check the Microsoft website for further information about any failures.



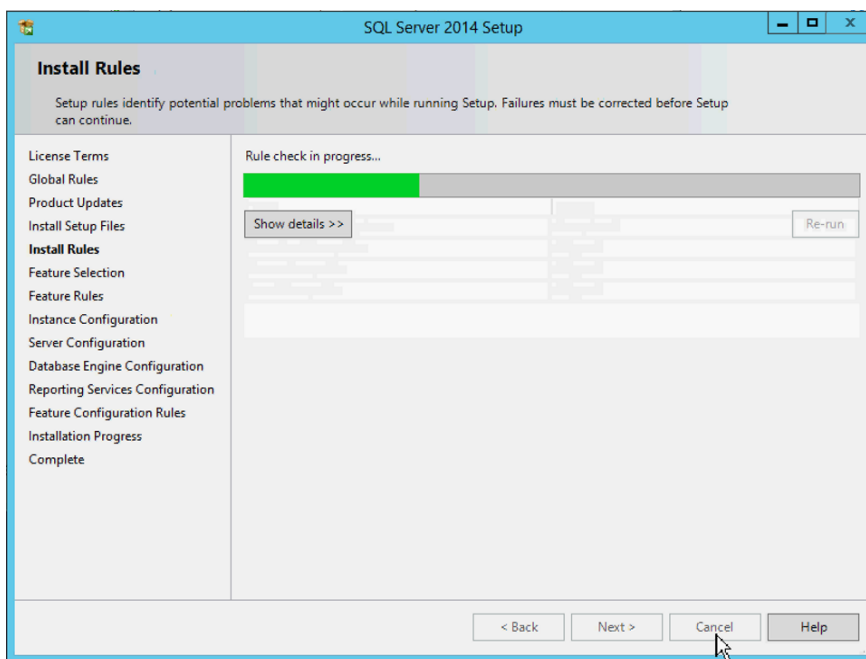
5. If no failures occur, the *Product Updates* page opens. Include SQL Server product updates as desired. Click *Next* to proceed.



6. *Install Setup Files* runs.

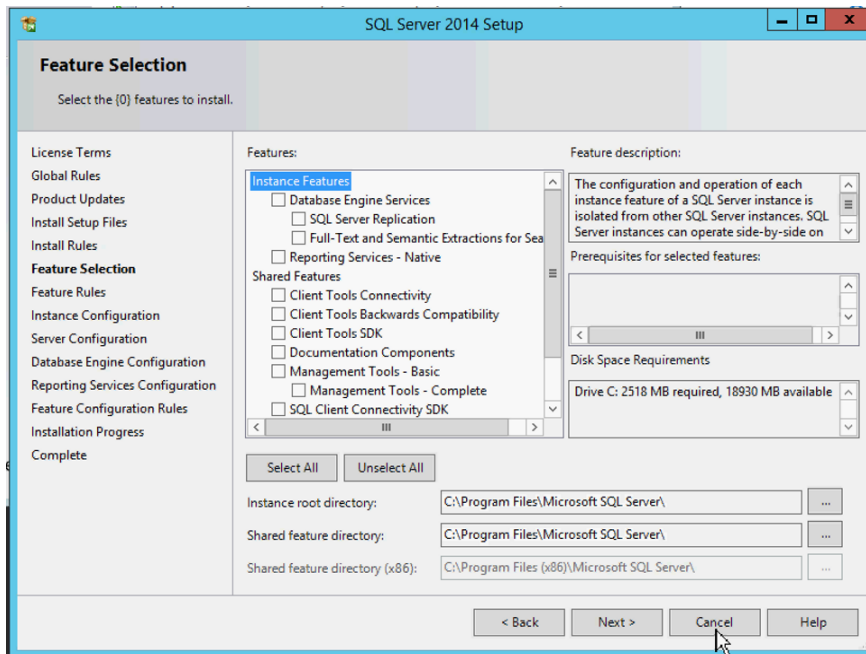


7. *Install Rules* will run. If no failures occur the Feature Selection dialog will open.



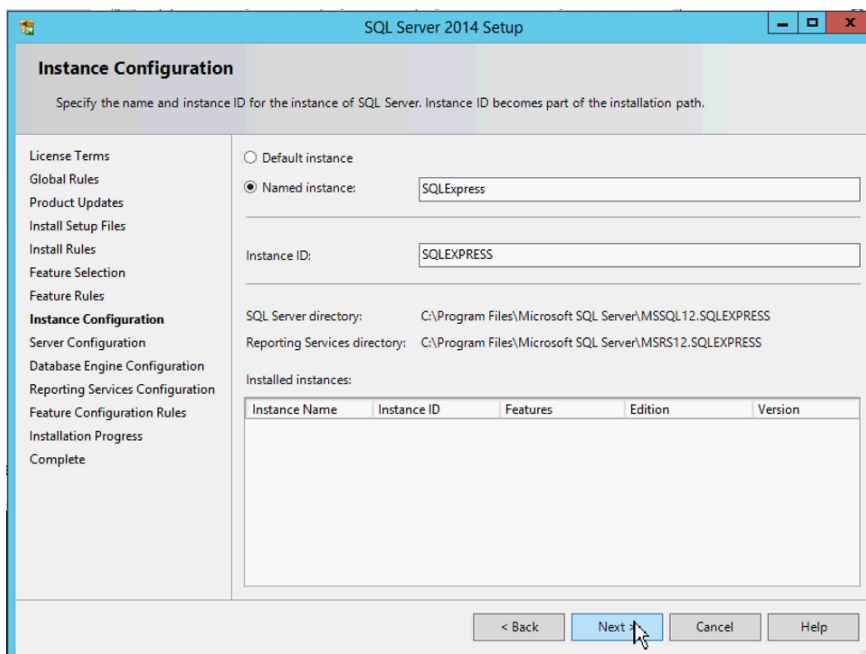
8. Select the *Instance Features: Database Engine Services, Full-Text and Semantic Extractions for Search, Client Tools Connectivity, Client Tools Backwards Compatibility, and Management Tools - Basic and Complete*

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

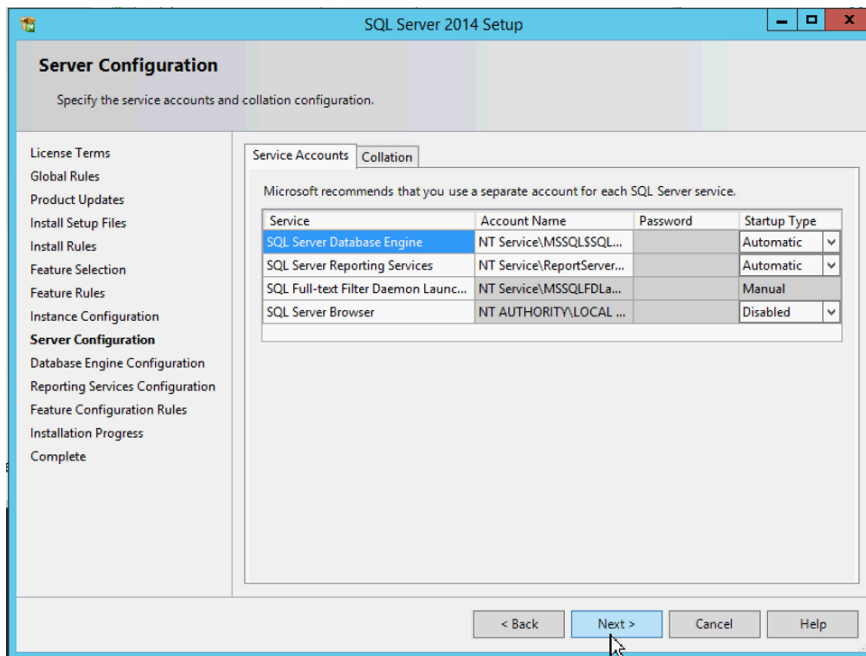


Then click *Next*.

9. At the *Instance Configuration* dialog select the *Named instance* option and click *Next*.

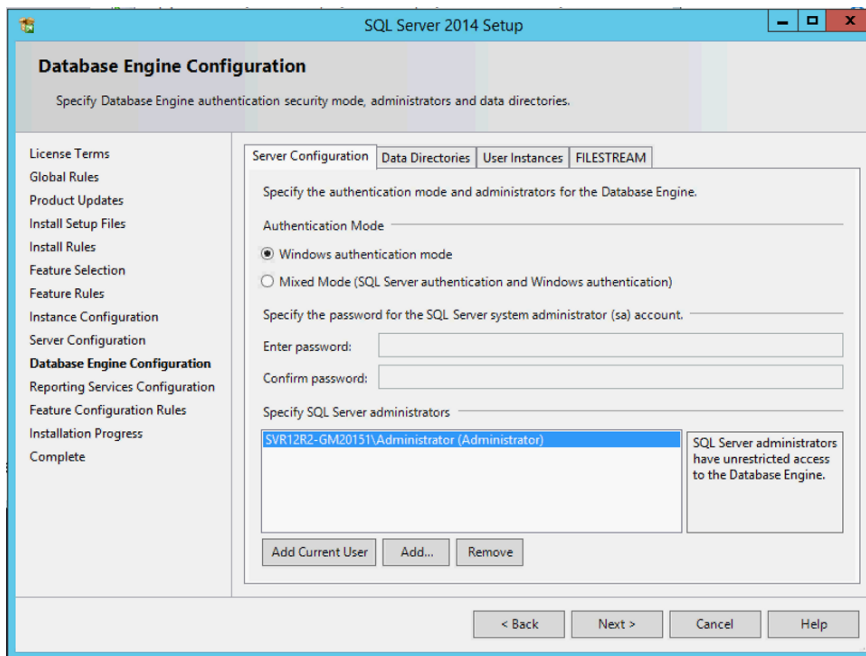


10. Click *Next* at the *Server Configuration* dialog since no changes need to be made to the configuration.





11. Click *Next* to open the *Database Engine Configuration* dialog.

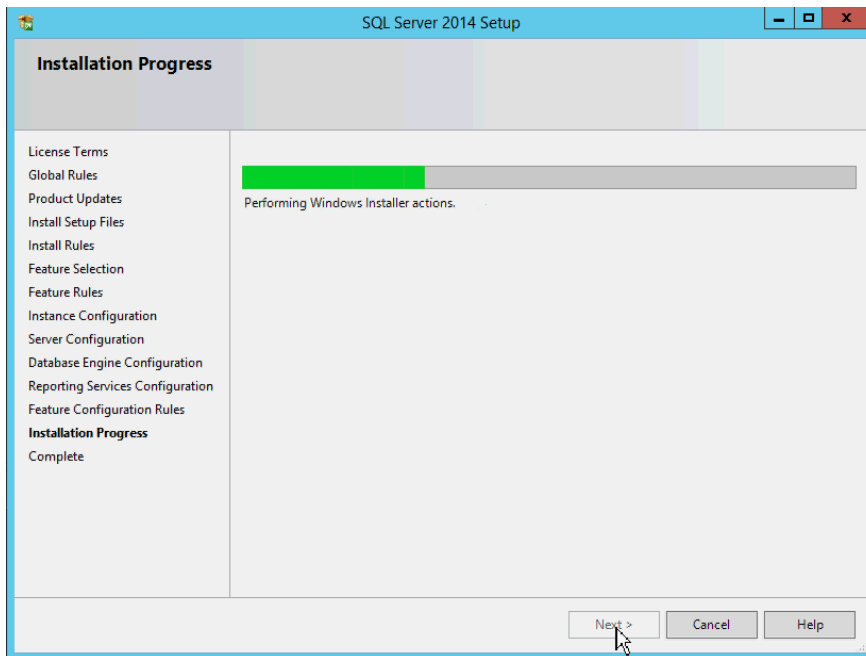


Select the *Mixed Mode* option, then enter and confirm the password. You may also specify SQL server administrators.

**IMPORTANT:** Passwords should be retained in a safe place. The SQL Administrator Password used in the GoldMine installation process must *not* include a semicolon.

12. If you selected to install *Reporting Services*, the *Reporting Services Configuration* page will open. Consult the Microsoft website for more information regarding this.

13. Click *Next* to open the *Installation Progress* dialog .



14. When installation is complete the *Complete* dialog displays advising you to restart your computer.
15. Click *OK* on the *Computer restart required* window.
16. Click *Close* on the *Complete* window, close other open applications or files and restart your computer.
17. Go to Windows Control Panel > Administrative Tools > Computer Management. Expand *Services and Applications* and select *Services*.
18. Stop and restart the service *SQL Server (SQLEXPRESS)*.

## Post-Installation Configurations

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

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

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

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

## Setting Named Pipes and TCP/IP on the SQL Server Configuration Manager

The following applies to **SQL Server Network Configuration**, **SQL Server Native Client Configuration (32-bit )** on **64-bit MS SQL installations** and **SQL Server Native Client Configuration** on **32-bit MS SQL installations**

1. On Microsoft SQL Server machine,
2. From the **Start** menu, click **All Programs** then go to:  
**Microsoft SQL Server xxxx > Configuration Tools > SQL Server Configuration Manager**, where **xxxx** is the SQL Server version that you are using (such as 2014).
3. Browse to **SQL Server Network Configuration > Protocols**.
4. Ensure that **Named Pipes** and **TCP/IP** are enabled.
5. Browse to **SQL Server Native Client Configuration 32-bit** (on 64-bit installations of MS SQL Server) or **SQL Server Native Client Configuration** (on 32-bit installations of MS SQL Server) > **Client Protocols**.
6. Make sure that **Named Pipes** and **TCP/IP** are enabled and that **Named Pipes** is ordered prior **TCP/IP**.
7. It may be necessary to restart the MS SQL Server services.

The following articles provide further information

[http://msdn.microsoft.com/en-us/library/ms190425\(v=sql.105\).aspx](http://msdn.microsoft.com/en-us/library/ms190425(v=sql.105).aspx)

<http://msdn.microsoft.com/en-us/library/ms181035.aspx>

<http://msdn.microsoft.com/en-us/library/ms189083.aspx>

## Starting the SQL Server Browser Service

On certain environments also the SQL Server Browser Service needs to be started, in these cases the related port (by default UDP port 1434) should also be opened in the Firewall.

1. On the Microsoft SQL Server machine,
2. From the **Start** menu, click **All Programs** then go to:  
**Microsoft SQL Server xxxx > Configuration Tools > SQL Server Configuration Manager**, where **xxxx** is the SQL Server version that you are using (such as 2014).
3. Browse to **SQL Server Services**.
4. Start **SQL Server Browser**.
5. From **Windows Services** (services.msc), configure and start **SQL Server Browser**.

The following article provides further information about the **SQL Server Browser Service**:

[https://technet.microsoft.com/en-us/library/ms181087\(v=sql.105\).aspx](https://technet.microsoft.com/en-us/library/ms181087(v=sql.105).aspx)

## Troubleshooting

If you receive an error message such as *MSSQL Login Failed* during the installation of GoldMine, check the following:

- Is the SQL server running? If not, start SQL Server.

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

- **Is the SQL administrative name and password you typed when installing GoldMine different from the name and password in SQL? Are you using sa with no password, or did you change the password in SQL?**

Open the SQL Server Enterprise Manager. Expand Microsoft SQL Server and then expand SQL Server Groups. Right-click your server name and select *Edit SQL Server Registration properties*. Verify the login name and password.

- **When you installed SQL, did you select Mixed Mode for the authentication mode?**

If you do not know, go to the server name in the MSSQL Enterprise Manager. Expand Microsoft SQL Server and then expand SQL Server Groups. Right-click your server name and select *Properties*. Select the *Security* tab. Select *SQL Server and Windows*. Stop and restart SQL Server. The installation continues.

If the prerequisites install dialog appears for ALL prerequisites (although the system is 64-bit and all prerequisites are already installed), refer to this Ivanti community article for a workaround:

[https://forums.ivanti.com/s/article/The-prerequisites-install-dialog-appears-for-ALL-prerequisites?language=en\\_US](https://forums.ivanti.com/s/article/The-prerequisites-install-dialog-appears-for-ALL-prerequisites?language=en_US).



# Migrating Large Databases

If you are upgrading from a previous version of GoldMine to version 2023.3 and have a large Microsoft SQL Server database (5GB of data or more), we recommend you consider the following steps before proceeding with

the upgrade. Certain computers (limited computing power) require manual steps to upgrade the database successfully.

## Database Preparation

### Back Up Your Database

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

### Truncate the Transaction Log

For SQL 2012

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

```
Alter Database dbname Set Recovery Simple  
Alter Database dbname Set Recovery Full
```
4. Purge the **syslog** table from your current GoldMine version. Ensure you have backed up your database prior to purging.
  - To purge logs, select **Tools > Logs > GoldMine Logs** to open the System Logs dialog. Select either **Process Monitor Logs**, **Maintenance Logs**, or **Error Logs**. Right-click and select **Purge Logs**.
  - Select the check boxes for **Process Monitor**, **Maintenance**, and **Error** logs. Accept the default date (1 month) or adjust to extend. If you require more logs, revise according to the GoldMine Online Help or the **GoldMine Administrator Guide**.

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