Installing GoldMine on a Network

This addendum contains instructions for installing and upgrading *GoldMine* 4.0 on the following network systems:

- Windows NT 4.0/Windows 95
 - Novell NetWare
 - Windows NT 3.51

If you are upgrading to *GoldMine*, be sure to continue with "Upgrading to *GoldMine* 4.0" before starting the installation.

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Indexing errors have been linked to VREDIR.VXD, which is shipped with Windows 95 version 4.00.950B, and is contained in some Microsoft patches. Microsoft has since fixed this problem. You can download a fixed version of this file from the Internet. To find a link to the updated file, go to http://www.goldminesw.com/html/support.htm. Be sure to verify that all systems that

will run *GoldMine* have a copy of VREDIR.VXD that will not cause these errors.

During installation, *GoldMine* automatically installs the Borland Database Engine with a configuration applicable to most network uses. If you want to customize the BDE settings, see "Working with the Borland Database Engine (BDE)" at the end of this document.

Upgrading to GoldMine 4.0

If you are upgrading from a previous version of GoldMine, you must make a backup of your existing GoldMine system before continuing. Make sure that you have at least 2.5 times the size of your largest database free. For example, if your largest database is CONTHIST, which has a 85 MB .DBF and a 15 MB .DBT for 100 MB total, you should have 250 MB free disk space before continuing (2.5 x 100).

If you are installing on a Novell or Windows NT 3.51 network, you must perform the installation from a workstation (a computer other than the server console). During the upgrade process, temporary space will be used on the workstation which will be removed when the upgrade completes successfully. For this reason, you should also ensure as much free disk space as possible on the local C: drive of the installing workstation.

An upgrade installation uses the same installation instructions as a new installation of *GoldMine* 4.0; you should install to the same directory as the previous version of *GoldMine*.

GoldMine 4.0 is not compatible with previous versions of GoldMine Software products, including *GoldSync* 1.x, *GoldMine* 1.x, *GoldMine* 2.x, and *GoldMine* 3.x. We recommend upgrading all *GoldMine* and *GoldSync* licenses at the same time. For more information, please contact your Authorized GoldMine Solutions Partner, or GoldMine Software Corporation.

Installing GoldMine on a Windows NT 4.0 or Windows 95 Network

A Windows NT 4.0/95 Network environment has no dedicated server because of the peer-to-peer nature of this environment. With *GoldMine*, however, you must select a workstation to act as your nondedicated *GoldMine* server. Select a workstation based on which machine has the best processor speed, disk speed, and amount of RAM. All of the other computers connected to the server are referred to in this document as "workstations."

Starting the Installation

Insert the CD-ROM into the CD-ROM drive of the server. On most systems the installation will start automatically. If installation does not start automatically after a few seconds, select **Start|Run**. The **Run** dialog box appears. Type d:\gm4setup (replace d: with the drive letter of your CD-ROM drive, if necessary).

The Welcome to GoldMine dialog box will introduce the installation process.

When you have read the introduction, select Next>

The License agreement will be displayed. If you agree, click Yes.

Click Custom.

Click Browse.

Type C:\APPS\GOLDMINE then click OK.

Click Next>

Check Workstation Setup Files.

Click Next>

Once the files are copied, a prompt will request your registration information. *You must enter the required information to complete the installation.* You will be prompted for your serial number, which can be found on the License Certificate included in the software package.

Sharing the Directory

From the server system, right-click on **Start**, then select **Explore**. If directories on the C drive do not appear, click \pm beside the C drive so that they appear. Select the APPS directory.

Finding the APPS directory

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apps 🔄	- E <u>h M</u> & B B		₽=₽= ₽=₽=
All Folders	Contents of 'apps'		
Borney Source Source	goldmine	File Folder	12/1/95 3:11 PM
My Documents Hotorn Gaplus			

Right-click, then select **Sharing**.

naring folder		? ×
General Sharing		
C Not Shared		
🕞 🖸 Shared As: —————		
Share <u>N</u> ame: APPS		
Comment: Shared for Gold	Mine	
Access Type:		
C <u>R</u> ead-Only		
🖲 Eull		
Depends on Password		
Passwords:		
Read-Only Password:		
Full Access Password:		
OK	Cancel	Apply

Select <u>Shared As</u>. In the <u>Share Name</u> field, type APPS. In the <u>Comments</u> field, type Shared for GoldMine. For Access Type, select <u>Full</u>.

When done, select **OK**. Windows will place a graphical "hand" icon underneath the **APPS** folder in **Explorer** to indicate that the directory has been correctly shared, as shown in the following figure.

Sharing a Directory

Configuring the Workstations

At each workstation, launch **Explorer**. Select **<u>T</u>ools|Find|Computer**. Select the computer that is working as the *GoldMine* server. As shown in the following figure, the computer is called MARK.

Find dialog box

Find: Compute	ſ		<u>_ ×</u>
Computer Name		×	Find Now Stop New Search
Name	Location	Comment	
Mark	Network Neighborho	MARK	
1 computer(s) found			1.

Double-click on the name of the computer designated as the server. A dialog box with available shared resources appears.

Working with Shared Resources

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3	Mark			•	£	*a *	X	a C	ко III	X
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2 obj	ect(s)									//.

Select **APPS**, then right-click, and select **Map Network Drive**. Use the same drive letter for all workstation computers; for example, use G: for all workstations. Select **Reconnect at logon.**

Map Network Drive dialog box



Repeat this procedure for each workstation.

Creating the GoldMine Icon

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At each workstation, minimize all programs. On the workstation desktop, right-click, then select **New|Shortcut**. In the **Command Line** field, type G: \GOLDMINE\GMW4.EXE. In the **Name** field, type GoldMine 4.0.

The *GoldMine* icon appears on the desktop. Repeat this procedure for each workstation.

Adding Contact File Mapping for the Workstations

To complete the installation and be able to run *GoldMine*, you *must* enter contact file listings for the workstations as described below.

Double-click on the *GoldMine* icon. In the **Username** field, type MASTER. In the **Password** field, type ACCESS. Press and hold Ctrl, then select **OK**. **The GoldMine Contact Files** window appears with a list of available contact files.

Position the mouse pointer within the **GoldMine Contact Files** window, and rightclick. Select **Attach Database**. In the **Description** field, type Workstations map for Common. In the **Files Path** field, type G:\GOLDMINE\COMMON. (If you mapped the server as a different drive, substitute that letter) Select **OK**.

Highlight this entry, then select Open.

To add users to *GoldMine*, see "Setting up *GoldMine* Users" in the *GoldMine Reference Manual*.

Installing GoldMine on a Novell NetWare Network

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

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

Prior to starting the installation, read this entire network installation section to best determine which sections are necessary for your network configuration and security requirements. The following sections describe a complete network installation of *GoldMine*. Depending on how you want *GoldMine* configured on your network, many of these steps might be unnecessary.

Creating the GoldMine Group

To add a new network group for *GoldMine* users, use the SYSCON System Configuration Utility. You can select any name for this group; however, the group will be called *GoldMine* in the following sections of this procedure. Assign membership to the *GoldMine* group to each network user who will access *GoldMine*.

Selecting the Installation Drive

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

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

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

You cannot run *GoldMine* from a root directory or a "mapped root" directory. For example: If *GoldMine* is in the SYS:APPS\GOLDMINE directory, you could map *GoldMine* by MAP ROOT G:=SYS:APPS (you would run *GoldMine* from G: \GOLDMINE). But, you would not MAP ROOT G:=SYS:APPS\GOLDMINE, because that would cause *GoldMine* to be mapped to the G:\ root directory.

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

 Method 1: Modify the system login script using the SYSCON system configuration utility. The following sample will map drive G: to the GoldMine directory on volume SYS:, whenever a member of the GoldMine group logs into the network: IF MEMBER OF "GOLDMINE" THEN BEGIN MAP G:=<fileserver>/SYS:GOLDMINE

END

When this method is employed, you will need to modify some users' private login scripts, if another MAP command overrides the initial mapping of drive G: in the system login script. NetWare will assign the drive designator to the volume to which it was last mapped.

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

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Configuring Workstation Drivers

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You can use *either* Microsoft's drivers for Novell, *or* the existing ODI driver. You *cannot* use NETX or VLM drivers. We do *not* recommend using Novell's Client32 drivers, as users at some sites have found them problematic. If you must use Client 32, be sure to follow the instructions in Factsback #348. To order a bulletin, use your FAX machine to dial 310-459-1222, then press 3 for *Factsback*. Factsback documents are also available in Word 6 format from the following resources:

- GoldMine Software World Wide Web site at http://www.goldminesw.com
- GoldMine Software forum on Compuserve (go GoldMine)
- GoldMine Software Bulletin Board System (BBS) at 310-459-3443—see Bulletin #383 for more information about the GoldMine BBS

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

Installing GoldMine to the Server

Be sure to read "Upgrading to GoldMine 4.0" on page 1 before continuing.

Make sure that you are logged into the network as Supervisor or with Supervisor Equivalent security.

Insert the CD-ROM into the CD-ROM drive of a workstation. On most systems, the installation will start automatically. If it does not start automatically after a few seconds, select **Start|Run**. The **Run** dialog box appears. Type d:\gm4setup (replace d: with the drive letter of your CD-ROM drive, if necessary).

The Welcome to GoldMine dialog box will introduce the installation process.

When you have read the introduction, select Next>

The License agreement will be displayed. If you agree, click Yes.

Click Custom.

Click Browse.

Type G:\GOLDMINE then click OK.

Click Next>

Check Workstation Setup Files.

Click Next>

Once the files are copied, a prompt will request your registration information. *You must enter the required information to complete the installation.* You will be prompted for your serial number, which can be found on the License Certificate included in the software package.

Setting Trustee Rights

GoldMine's installation program copies the *GoldMine* program and data files to the appropriate directories. To maintain adequate security while allowing maximum

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flexibility, the following trustee rights should be granted to the *GoldMine* group using the SYSCON system configuration utility:

GOLDMINE

This directory contains the *GoldMine* program files and system data files, such as the user database, reports database, printer database and help files. Grant the following trustee rights in the directory:

NetWare v2.x:

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

NetWare 3.x and 4.x:

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

When contact databases are created as subdirectories of the GOLDMINE directory, the new directories will automatically inherit the trustee assignments of the parent directory. Otherwise, you will need to manually assign the above rights to a new directory once the directory is created.

Setting File Attributes

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

- All .DBF and .DBT files should be flagged as Shareable and Read/Write
- All .MDX and .INI files should be flagged as Read/Write
- All .EXE and .DLL files should be flagged as Shareable and Read Only.
- All other files should be flagged as Nonshareable and Read/Write



Do not flag any GoldMine files as Transactional. System problems can result from

using

the Transactional flag, including corrupted indexes and errors.

Setting Up Workstations

At each workstation, minimize all programs. On the workstation desktop, right-click, select **New|Shortcut**. In the **Command Line** field, type G:\GOLDMINE\GMW4.EXE.

In the Name field, type GoldMine 4.0. The GoldMine icon appears on the desktop.

Repeat this procedure for each workstation.

To add users to *GoldMine*, see "Setting up *GoldMine* Users" in the *GoldMine Reference Manual*.

Installing GoldMine to a Windows NT 3.51 Network

GoldMine 4.0 uses Windows 95 features, such as calling Windows 95 API to access TAPI to dial telephone numbers. However, Windows NT 3.51 does *not* provide support for the entire Windows 95 API. Therefore, *GoldMine 4.0* will *not* run on a Windows NT 3.51 workstation. Although *GoldMine 4.0* will not run on a Windows NT 3.51 workstation, you can use Windows NT 3.51 as the file server for *GoldMine* files. You can run *GoldMine 4.0* from that server on Windows NT 4.0 and Windows 95 workstations.

You can also run *GoldMine 4.0* on Windows NT 4.0—see "Installing *GoldMine* on a Windows NT 4.0 or Windows 95 Network" in this document.

Configuring the Server for GoldMine

In a Windows NT environment, you must decide which station is to become your *GoldMine* server. This decision should be based on which machine has the best processor speed, disk speed, and amount of RAM. All of the other computers connected to the server are referred to in this document as "workstations."

If you do not have a C:\APPS directory on the file server, you must create this directory before installation. From the server system, in the Program Manager, select <u>File|Run</u>. The **Run** dialog box appears.

Type COMMAND, then select **OK**. Type the following at the prompt: C: <enter>

MD \APPS <enter> EXIT <enter>

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Sharing the Directory

From the server system, in Program Manager, double-click on the File Manager icon. Select the **Apps** directory. The **File Manager** window will look like the following figure.

-					Fil	e Manager			•
<u>F</u> ile	<u>D</u> isk	Tree	⊻iew	<u>O</u> ption	s Too <u>l</u>	s <u>W</u> indov	/ <u>H</u> el	р	
	Disk	Iree	¥iew	Option	s Tool	s <u>W</u> indov	<u>v H</u> el	p C: [NEW_FRED]	q = s = t
+									
C:14	4,032KE	free, 5	25,984K	B total		Total 2 fil	e(s) (0 b	oytes)	

Selecting the APPS directory

Select **Disk|Share As**. The **New Share** dialog box appears. In the **Share Name** field, type APPS. In the **Path** field, type c:\apps. In the **Comment** field, type Shared for GoldMine. When done, the **New Share** dialog box will look like the following figure.

New Share dialog box

1	New Share	
<u>S</u> hare Name:	APPS	ОК
<u>P</u> ath:	C:\apps	Cancel
<u>C</u> omment:	Shared for GoldMine	Pe <u>r</u> missions <u>H</u> elp
User Limit: ⁻ <u>M</u> aximum <u>Allow</u>	Allowed	

After these settings have been entered, select **Permissions**. Make sure that everyone has Full Control permission for APPS. When done, the screen will look like the following figure.

Find dialog box

Access Through Share P	Access Through Share Permissions				
Access Through <u>S</u> hare: APPS <u>O</u> wner: Name [:]					
le Everyone Full C	iontrol				
Type of Access: Full Control	<u>+</u> <u>R</u> emove <u>H</u> elp				

To set the access permissions, select **OK**. To set the New Share, select **OK**.

Configuring the Installation for Workstations

At the workstation, launch **Explorer**. Select **Tools|Find|Computer|Find Now**. Select the computer that is working as the *GoldMine* server. As shown in the following figure, the computer is called MARK.

Find dialog box

🔜 Find: Computer			- I X
<u>File E</u> dit <u>V</u> iew <u>H</u> elp			
Computer Name		<u>.</u>	Find Now Stop ew Search
Name	Location	Comment	
Mark	Network Neighborho	MARK	
1 computer(s) found			1.

Double-click on the name of the computer designated as the server. A dialog box with available shared resources appears. Select **APPS**, then right-click, and select **Map Network Drive**. The drive letter used should be consistent between all workstation computers, that use G: for all workstations. Select **Reconnect at Startup**. For example:

Map N	etwork Drive dialog box	
Map Net	work Drive	? ×
<u>D</u> rive:	G: \\MARK\APPS	ОК
<u>P</u> ath:	\\Mark\apps	Cancel
	Reconnect at logon	

Installing GoldMine to the Server

The installation must be performed from a workstation (a computer other than the server) that is running Windows 95 or Windows NT 4.0.

Be sure to read "Upgrading to GoldMine 4.0" on page 1 before continuing. Insert the CD-ROM into the CD-ROM drive of a workstation. On most systems, the installation will start automatically. If installation does not start automatically after a few seconds, select **Start|Run**. The **Run** dialog box appears. Type d:\gm4setup (replace d: with the drive letter of your CD-ROM drive, if necessary).

The Welcome to GoldMine dialog box will introduce the installation process.

When you have read the introduction, select Next>

The License agreement will be displayed. If you agree, click Yes.

Click Custom.

Click Browse.

Type G:\GOLDMINE then click OK.

Click Next>

Check Workstation Setup Files.

Click Next>

Once the files are copied, a prompt will request your registration information. *You must enter the required information to complete the installation.* You will be prompted for your serial number, which can be found on the License Certificate included in the software package.

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Creating the GoldMine Icon

At each workstation, minimize all programs. On the workstation desktop, right-click to display a local menu. Select **New|Shortcut**. In the **Command Line** field, type G: \GOLDMINE\GMW4.EXE. In the **Name** field, type GoldMine 4.0.

The *GoldMine* icon appears on the desktop. Repeat this procedure for each workstation.

To add users to GoldMine, see "Setting up GoldMine Users" in the GoldMine

Reference Manual.

Working with the Borland Database Engine (BDE)

GoldMine uses the *Borland Database Engine* (*BDE*) to access the databases. For *GoldMine* to run properly, each workstation must have access to the BDE. Other applications also use the BDE, such as Delphi and other applications written by Borland or with Borland compilers. Most of these applications require the BDE to be installed to each workstation that uses the application.

If BDE is already installed on some of your workstations, check that *GoldMine* supports the installed version. At publication time, we currently *support only version 4.01*. You can get information about the current version, as well as supplemental BDE information, from Factsback bulletin #500. To order a bulletin, use your FAX machine to dial 310-459-1222, then press 3 for *Factsback*. Factsback documents are also available in Word 6 format from the following resources:

- · GoldMine Software World Wide Web site at http://www.goldminesw.com
- GoldMine Software forum on Compuserve (go GoldMine)
- GoldMine Software Bulletin Board System (BBS) at 310-459-3443—see Bulletin #383 for more information about the GoldMine BBS

Finding the BDE in Setup\BDEShare

GoldMine does not require you to install BDE to each workstation. We have simplified the administration of BDE installation and upgrading the BDE by allowing all *GoldMine* users on a LAN to use a shared installation of BDE. When *GoldMine* is installed across a network, the Setup\BDEShare directory is automatically created under the GoldMine directory.

When launched on a workstation, *GoldMine* checks the registry for the location of the BDE. If *GoldMine* finds the BDE, then *GoldMine* will load the BDE from that location. If the BDE is *not* found in the registry, *GoldMine* will check Setup\BDE; once the BDE is found, *GoldMine* will load the BDE, then update the registry to reference that location. If the BDE cannot be found, *GoldMine* displays a dialog box, similar to the following figure.



To correctly designate the location of the BDE, you must select the IDAPI32.DLL; for example C:\[*directory*]\idapi32.dll, then select **OK**.

Finding the BDE with GM.INI

If you do not have the BDE in Setup\BDE and have many workstations to configure, use the command statement NetIDAPI32DLL= in GM.INI to reference the location of IDAPI32.DLL. By using this INI entry, you can avoid having to manually select the directory for IDAPI32.DLL on each workstation. After loading, *GoldMine* will update the registry with this location. Add the following lines to GM.INI (located in the GoldMine directory):

[GoldMine]

NetIDAPI32DLL=g:\apps\shared\bde\idapi32.dll (replace this with the location of idapi32.dll)

Registry Settings

GoldMine can use different methods to initially locate the BDE. Regardless of the method used to locate the BDE when GoldMine is run for the first time on a workstation, the registry will be updated with this location. When GoldMine is launched subsequently, it will attempt to load the BDE from the registry location first.