



[CLOSEST CONTACT FOR GOLDMINE]

Configuration Guide and User Manual

Table of contents

Installing the software	3
Installation options	4
Post install	5
Adding a licence key	6
Removing a licence key	6
Assigning users	6
Running the application for the first time	7
Finding the database connection information	7
GoldMine 5.x/6.x users	7
GoldMine 7.x/PE users	8
Multiple GoldMine contact sets	8
Creating Goldmine shortcuts	9
Using the application	10
Using the results	11
Sorting the results	11
Showing an additional field	11
Filtering the results	11
Selecting a direction	12
Creating a GoldMine group from the results	13
Viewing the group in GoldMine	13
Tips for administrators	14
Where is the configuration information stored	14
Overriding the default database connection	14
Finding the database configuration information in the dbalias.ini	14
Other configuration information in the user.ini file	15
Database timeout errors	15
Maximum records returned	15
System requirements	15

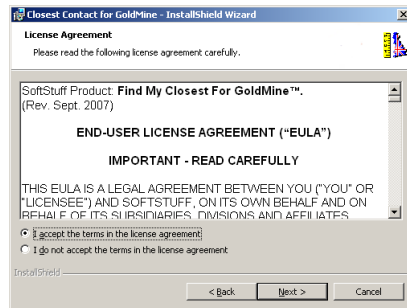
Installing the software

Run **Closest Contact for GoldMine.msi** file, either by manually finding it in windows explorer, or manually entering it into the windows File | Run dialog box.

Within a few moments the following dialog will appear.

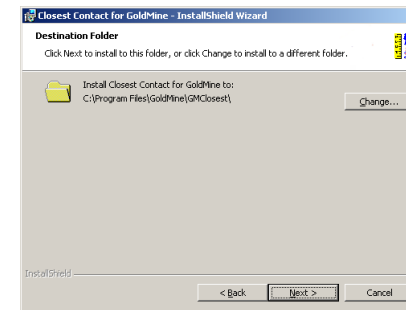


Pressing **Next** will continue.



Review the information contained within the licence agreement, and select **"I agree"** to continue.

Next, select a location to install the files into. For a full network install, this should be a sub directory contained within the main GoldMine network folder.



Press **Next** once a suitable directory has been selected.

Two install options are available.

Full Install – This will install everything, and ideally should be the first install performed into the server environment. This will install the database drivers, the actual application and any associated documentation.

Client Support Files Only – This option will not install the actual client application, only the required support files. This option is available for advanced users, who wish to have a single copy of the application on the network but available as a shortcut to all users within the GoldMine application.

Select an install type.

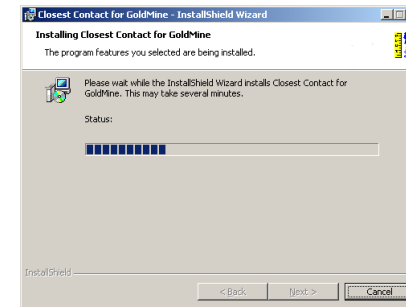


Once an install type has been selected press **Next**.



Pressing **Next** again will begin the install.

Each stage of the installation can be seen on the progress bar.



After a few moments the installation will complete.



Press **Finish** to close the installation dialog.

Configuration Options

The application may be installed in a number of different configurations.

Application on each client machine

Each GoldMine client PC will have a full installation of the application installed locally. For each client PC run the **Full Install** option and this will copy the required support files, and the actual client application to the local disk.

Network client

A single install of the client on the network into a shared directory, and each client only has the support files installed to it. This option makes it easier to upgrade the application.

The exact installation type will depend on various factors, including space available on each client, and speed of the network.

On each client PC install using the **Client Support Files Only** option. To create icons/menu items within GoldMine manually run the **GMClosest.exe** application on each client from within the network share where the **GMClosest.exe** application is loaded.

Post install

A full client installation will create two icons in the program menu.



Before the application can be run, an appropriate licence key will need to be entered. A fully functioning time limited key is available from your software vendor if you wish to evaluate the application. Licence keys are linked to the serial key of your GoldMine installation, and details of this must be supplied for a key to be issued.

E.g.

GM5.x/6.x

E-0001-12345678-xxxxxxx

GM7.x/GMPE

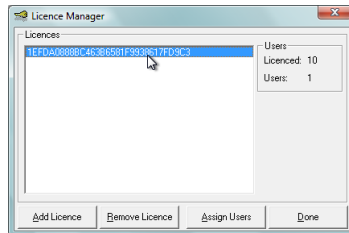
E-000112-345678-9xxxxxxxxxxx

The highlighted parts of the GoldMine serial number are needed to obtain a licence key.

GoldMine must be running while the application is being licensed.

Licensing the application

Run the license manager from the icon in the program menu. Or locate the GMClosest.exe file and manually run it with a /L command line.

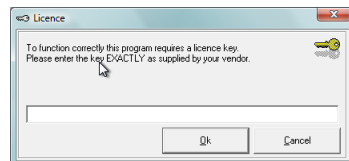


The software is licensed on a per user basis, so that for example a GoldMine installation with 100 users, who only wish to provide the client for 5 users, would not need to purchase a full 100 user license.

The licence file is stored within the Goldmine directory as GMCLOSERNET.LIC.

Adding a new license key.

Press **Add Licence**.

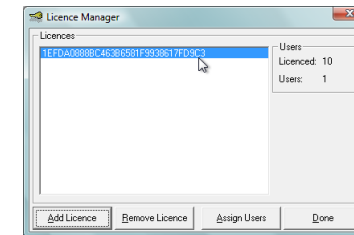


The key must be entered exactly as provided by your software vendor.

Press **OK** when finished.

Removing a licence key

Highlight the license key to remove, and then press **Remove Licence**.

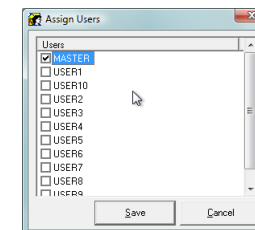


The key will be removed and the count of users available will be updated.

Evaluation licence keys must be removed before a full licence key can be added.

Assigning GoldMine users

Press the **Assign Users** button.

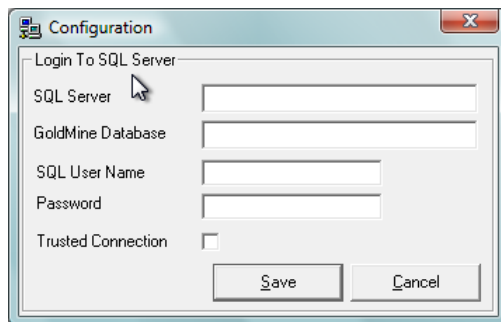


After a few seconds a list of all available GoldMine users will be displayed. To enable them to use the application you must first ensure there is a check box next to their username.

Press **Save** when finished.

Running the application for the first time

The application does not use the GoldMine API to connect to the SQL Server, so this will need to be configured next. The first time you run the GMCloser.exe application a dialog box like the one below will appear.



If you do not have this information available contact your Network/GoldMine/database administrator.

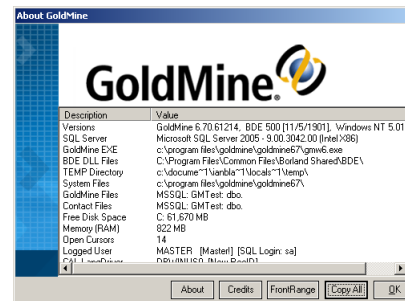
Enter the name of the SQL server where the GoldMine database is located and the actual name of the GoldMine database as it appears in the SQL Enterprise Manager. (Not the GoldMine alias as it may not be the same)

There are two methods to connect to the database, the first is using a SQL username/password which is the default method used by GoldMine, and account details with at least read only access to the GoldMine database is required. The second method is a trusted account, where the access to the SQL database is granted depending upon your login to the Windows network.

Finding the database connection information

GoldMine 5.x/6.x SQL users.

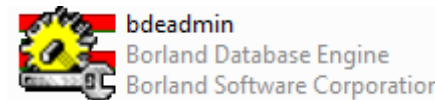
The first step is to find the Alias that GoldMine uses to connect to the database. The easiest way to do this is to go to the GoldMine **Help** menu, and select **About**. On the dialog that appears press the System button.



On this screen, look for a line starting '**Contact Files**' and the information MSSQL: xxxxxxx: dbo. The xxxxxxx section is the part you need.

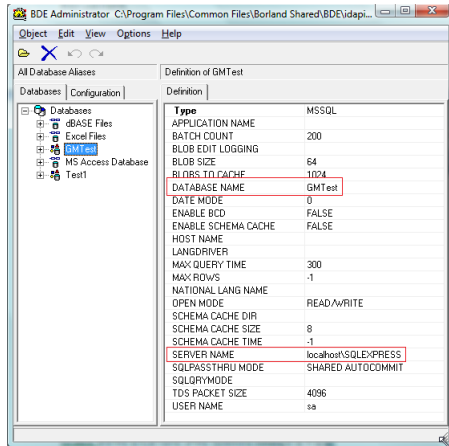
Next open the BDE Administrator from within the windows control panel. If there is no icon for it here, the file is normally located in

<network GoldMine folder>\setup\bdeshare.

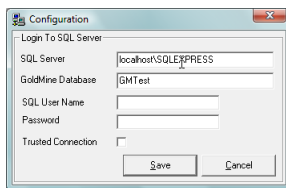


(If you are unsure here, contact your network administrator for further help).

Within the BDE Administrator find the Alias. (In this example *GMTest* is being used)



The sections highlighted in red are required, **Server Name**, and **Database Name** will then be used to fill in the respective areas on the Closest Contact connection dialog.



If you need a valid username/password to connect and are unsure contact your GoldMine/Database administrator for more help.

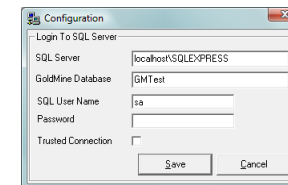
Goldmine 5.x/6.x dBase users

The program will automatically find and connect to the correct dBase database. No other configuration is required.

GoldMine 7.x/PE SQL users

GoldMine from version 7 onwards uses a different method to connect to the database.

When the connection dialog appears



If possible it will be pre-populated using information contained within the dbalias.ini file.

If this information is not present it may be necessary to speak to your GoldMine/Database administrator for more information.

Multiple GoldMine contact sets

Connection information is stored for each GoldMine contact set. If these sets are held in a SQL database, the connection dialog will appear the first time a user opens that contact set.

Creating Shortcuts in GoldMine

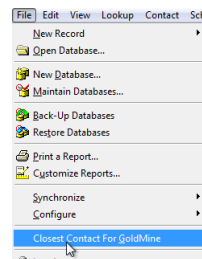
The application will display the option of creating shortcut icons and menu items within GoldMine automatically.

The following dialog box will appear



This dialog will appear each time the application starts, until either Shortcuts have been created, or the **'Don't ask me again'** box is ticked.

The menu option will be created under the **File** menu.



The Task Bar icon will behave differently according to the version of GoldMine in use.

In versions prior to GoldMine PE the Task Bar is displayed down the left hand side of the main window, and a section is created here for each user.



In GoldMine PE the task bar will be displayed on the main button toolbar at the top of the screen.

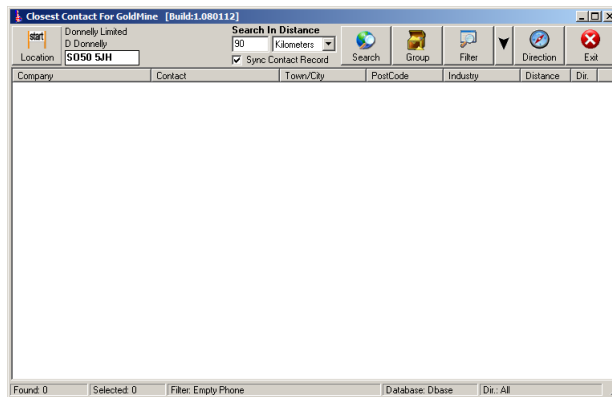


For both menu items, and task bar items the links created will only be for each user, not global.

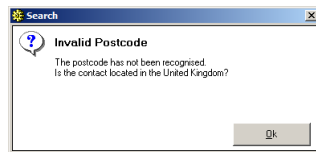
For more information about customising both systems refer to your GoldMine user documentation, or your GoldMine administrator.

Using the application


All functions are available from the main screen. When the application starts it will automatically read the *Company Name*, *Contact Name* and *Postcode* of the currently selected GoldMine contact.




If the postcode is not recognised as being within the top level postcode groups in the UK the following error message will be displayed.



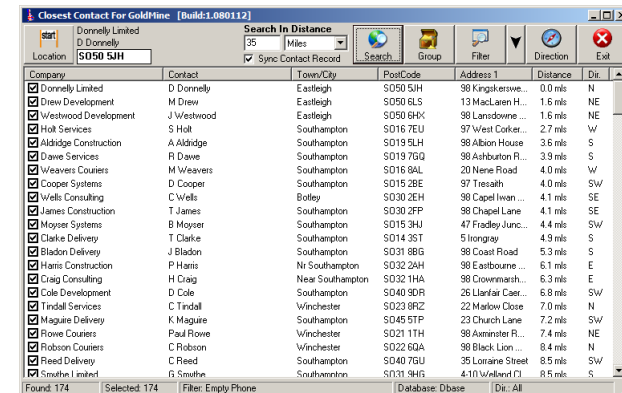
This may be down to either the postcode being incorrect, or the formatting being wrong.

Please check and correct or select another GoldMine contact and press the location  button to read the current information from GoldMine.

Next select the distance in either Miles or Kilometers to search.

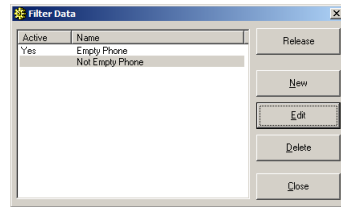
The press search. 

Within a few seconds a list of contacts that are within the distance specified will appear.



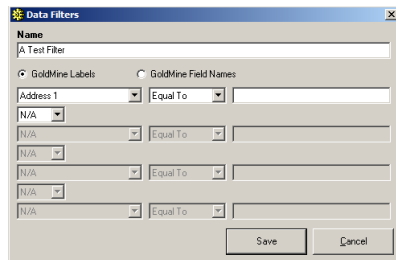
Filtering the results

To create a filter press the filter button.



A maximum of 8 filters can be created and selected as required.

A new filter can be created by pressing New.



Each filter must be named.

Fields can be selected from the drop down lists either from the on-screen definitions or the GoldMine field names. A variety of operators can be selected, and the expressions can be joined with either AND or OR operators.

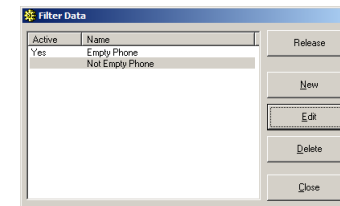
For Example

Phone1 is Empty. This will list all the records with no phone numbers.

Pressing Save will store the filter.

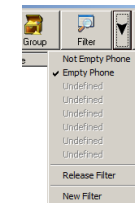
Activating a filter.

A filter can be activated in one of two ways.



From the filter dialog box pressing Activate will make the filter active.

Or



Selecting the filter from the drop down menu from the main screen.


The newly activated filter will be used for each further search.

Releasing a filter

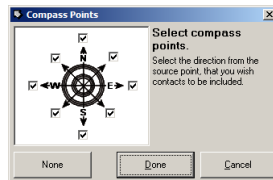
The filter can either be released by selecting the filter in the filter dialog box, and pressing release, or selecting release from the filter drop down menu on the main screen.

Selecting a direction

When selecting a group of contacts it is also possible to select the direction from the start point. This function is most useful when travelling, and a list of people to see is required within easy travelling distance from the first contact.

To select direction press the Direction button 

In the direction dialog tick all the relevant directions you wish to include.



Selected directions will be used for future searches.

Using the results

Clicking on each contact in the list will cause the GoldMine contact behind to move to show that contact. This is similar behaviour to the GoldMine option 'Sync Contact Window'

Double clicking on a contact will close the application and make that contact current in GoldMine.

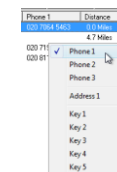
Sorting the results

Clicking on the headers of each results column will sort the results in ascending and descending order.

Showing an additional field

The application can show a field selected by the user in the search window. Initially this is set to the Phone1 field, but can easily be changed at any time.

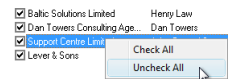
To change the field, perform a search and then in the results window right click in the 5th column from the left. A menu will appear to allow the selection of a new field.




The new field will be displayed from the next search onwards, until it is changed again.

Creating a GoldMine group from the results

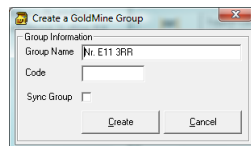
Each contact shown in the results window has a tick box to the left. By default this will be ticked. A tick here will ensure it gets included if a GoldMine group gets built.



Right clicking in 1st column will allow all records to be selected or unselected in a single action.

To create a group press Group. 

The following dialog will appear.



The group will automatically be named 'Nr. Xxxxx' where xxx is the postcode of the first contact you selected. This can be changed to anything to make it more memorable.

Code is for a quick reference code to be displayed in GoldMine.

Tick the Sync Group box if you are using GoldMine synchronisation and wish to share the contents of the group with remote users, or other sites.

The group will be created for the currently logged in GoldMine user.

Press Create to begin building the group.



After a few seconds when the group building is complete the following dialog will be displayed.



Viewing the group in GoldMine

For more information on Groups within GoldMine refer to your user documentation or speak to your GoldMine administrator.

Select the groups window to view your group. (Note. Depending upon the version of GoldMine in use, it may be necessary to select a different user, and then return to your username to refresh the groups list)

Each member of the group contains the postcode and the distance from the original contact.

This group can then be used for other GoldMine functions, e.g. Email Merging, Merging Letters, and Scheduling Telephone Calls etc.

Tips for administrators

Where is the configuration information stored?

The logon information by default is stored within each users .ini file within the GoldMine directory.

```
[GeoClosest]
Server-GMTest=SQLSERVER
Database-GMTest=GOLDMINE
Password-GMTest=4DA63DDC47DD56BB
UserName-GMTest=GMUser
Trusted-GMTest=False
```

All passwords entered into the system are stored using Blowfish encryption.

For users with multiple SQL contact sets the connection for each database is stored separately. The key for each item is suffixed with the name of the GoldMine database name.

For an easier way to deploy for multiple users, this information can be manually added to the GM.INI file where it will be automatically read by all users.

Overriding the default user database connection

By placing the connection information in the GM.INI file it is possible for all users to share the same database connection settings. This section is processed before the connection settings for each user.

Example GM.INI section

```
[GeoClosest-Override]
Server-GMTest=SQLSERVER
Database-GMTest=GOLDMINE
Password-GMTest=4DA63DDC47DD56BB
UserName-GMTest=GMUser
Trusted-GMTest=False
```

This is set up by configuring a single client, then copying the connection information manually into the GM.INI file using notepad or a similar text editor, and changing the name of the section header in [] where necessary.

Finding the database information from the dbalias.ini file

GoldMine 7.x and higher store database connection information in the dbalias.ini file within the main GoldMine directory. This information can be used to configure Closest Contact For GoldMine. Open the file in notepad or similar text editor and look for the following sections.

```
[Alias2]
Name=Test1
Active=1 (if 1 then it is the current connection)
HOST=MSS_SERVER (SQL Server)
DATABASE=GMDB (Database Name)
LOGIN=MYNAME (UserName)
PASSWORD=
USE_SSPI= (Is it a trusted connection)
```

Other configuration information held in the username.ini file.

ExtraField=Phone1

This is the extra field that is displayed in the search results.

Units=0

Setting this to 1 will change the default units to Kilometers.

SyncContact=TRUE

Setting this value to FALSE will stop the GoldMine contact following the selected contact in the search results.

Distance=10

This is the default distance displayed in the search box when it is started.

DontAskShortcut=0

Setting this to 1 will prevent the user from being asked to add shortcuts to GoldMine even if the shortcuts are not already present.

Database timeout errors

On large databases, large distance queries may take a long time to process and the default database timings may be exceeded. This figure may be increased with the following .ini file setting.

```
[GeoClosest]
```

```
Timeout=180
```

This can also be added to the GM.INI file under the [GeoClosest-Override] section.

Maximum records returned

A default maximum of 10000 records is returned for each query, and this can be increased or decreased by modifying the following setting.

```
[GeoClosest]
```

```
MaxRecords=10000
```

This can also be added to the GM.INI file under the [GeoClosest-Override] section.

System Requirements

GoldMine 5.x/6.x Dbase/SQL7/SQL2000

Goldmine 7.x/PE SQL2000/2005

Windows 2000/XP/2003 Server/Vista.

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