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Tip

Read each section through, in its entirety, once, before attempting any changes on your GoldMine Premium. Then review the section as you are making the changes to your GoldMine Premium.

Note

Henceforth, in this chapter, the Gold-Mine Premium product will be addressed simply as GoldMine.

Note

*Feel free to add as many UserIDs as you would like. You are not limited by the number of users that you can have under the **Users' Master File**. You are only limited by the number of users that can log into GoldMine concurrently, and this is controlled by your purchased licenses.*

Tip

*The GoldMine Administrator can access the **UserID Properties** dialog form for a given user by simply double-clicking anywhere on the users record in the **Users' Master File** dialog form.*

Users' Settings

The GoldMine Premium Edition line has been available to GoldMine users for over a year as of the date of this writing. This is the second edition of **The Hackers Guide to GoldMine Premium**, and this book is being rewritten primarily to accommodate the changes that have been incorporated into the GoldMine Premium 8.1 product.

Users' and User Groups are where much of the Security in GoldMine Premium will be established. I will do a detailed walk through of this section of the GoldMine Premium application. From within the **Users' Master File** dialog form, the GoldMine Premium Administrator will pre-define the UserID.ini files, and configure/control the rights that a user has, while using the GoldMine Premium application. Within the **User Groups Setup** dialog form, the Gold-Mine Premium Administrator will establish user clusters that could be applied to further control security in the GoldMine Premium application in areas such as Record Ownership or Field Level Record Typing. The **Resources' Master File** dialog form is where the GoldMine Premium Administrator will configure their corporate resources if they so choose. The **GoldMine License Manager** is the area where the GoldMine Premium Administrator will manage license distribution as well as maintaining the GoldMine Premium Registration information. They may also update their GoldMine Premium from here, as newer builds/versions become available. Typically, your GoldMine Premium may be updated to newer builds of the same version regardless of whether you have an active Maintenance Plan with FrontRange or not. Typically, your GoldMine Premium version may be updated to newer versions of GoldMine Premium, however, this should only be possible if you are currently active on a Maintenance Plan with FrontRange Solutions.
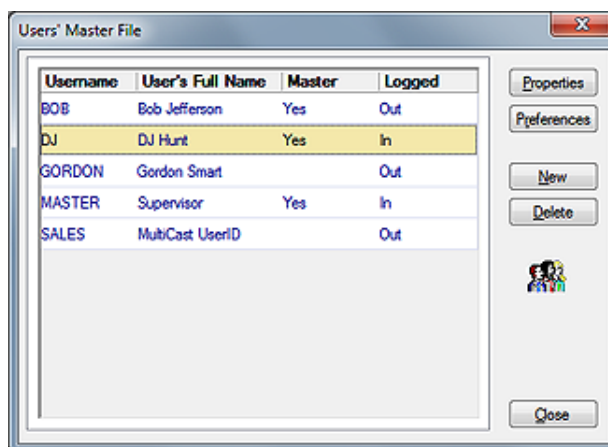

Figure 2-1

Let's start right in, shall we, with the **Users' Master File** which is accessed from the GoldMine main menu under **Tools | Users' Settings...**, and will bring up the dialog form shown above in Figure 2-1. By the way, this is the first security feature, as this menu choice will not even be available unless the user trying to access the option has **Master Rights** within GoldMine. In Figure 2-1, the reader can see five buttons, and they are:

Properties
Preferences
New
Delete
Close

As well, on this dialog form are displayed all of the users that have been set up to date to use your GoldMine installation. From this dialog form the Gold-Mine Administrator can view some basic information about each user. There is a column for the **Username**, the **User's Full Name**, whether or not the user has **Master Rights** (Yes or blank if No), and finally, whether the GoldMine application believes that they are currently Logged In or Out. From this dialog form, the Administrator can view some basic information about each user.

The **Properties** button will allow the GoldMine Administrator to edit the properties of the currently highlighted user. This dialog form is the same dialog form, that results from the clicking of the **New** button, the opening page of which is shown in Figure 2-3. I'll discuss the properties based upon the **New User Properties** dialog form in a moment.

Before I actually begin discussing the properties assigned to a user, I would like to briefly mention the **Preferences** button which, in other areas of GoldMine Premium, is also known as the users **Options**. The Preferences button allows the GoldMine Administrator to access, and preset the networked individuals GoldMine User Preferences/Options. As these are user preferences/options, they can be modified at any time, by any user. The user preferences/options will be discussed in detail in Chapter 3, however, having the ability to adjust the users preferences/options here, just allows the GoldMine Administrator to apply any corporate standards that have been established for new GoldMine users. Personally, I would prefer to set my corporate standard through the use of the GM.ini, and its Corporate Override capabilty which I will discuss later in Chapter 3.
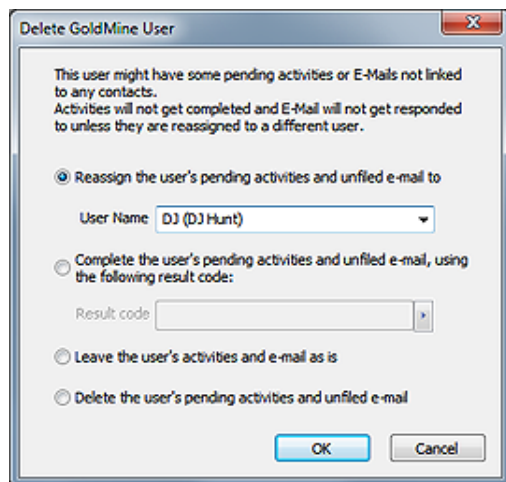

Figure 2-2

The **Delete** button, in Figure 2-1, does just what it states. Clicking this button will delete the highlighted user, but not until you select an option. This is a total revision in GoldMine Premium since the last edition of this book was released. Hence, we have a lot more to discuss in this edition of the book about the **Delete** button.

I would like to quote the explanatory dialog on this form:

"This user might have some pending activities or E-Mails not linked to any contacts.

Activities will not get completed and E-Mail will not get responded to unless they are reassigned to a different user."

FrontRange has added this dialog form in its attempt to reduce the orphaning of records within the GoldMine database. You will notice that you have four radial button options from which you may choose. The first of which being the option that is selected in the default state:

⦿ **Reassign the user's pending activities and unfiled e-mail to**

User Name DJ (DJ Hunt)

Keeping this option will assign all of the deleted UserIDs Pending Activities, and any Unfiled E-mail Messages, which are also Pending Activities for the deleted UserID, to a new UserID selected by you from the list of remaining UserIDs. Choosing this option willl allow another UserID to handle, or not, the activities that were assigned to, and should have been handled by the deleted UserID.

○ **Complete the user's pending activities and unfiled e-mail, using the following result code:**

Result code COM

Utilizing this option, will cause all of the deleted UserIDs activities/unfiled e-mails to be Completed. No one will have a chance to review these to see if they should have been Completed, and the records will just be relegated to history.

And finally we have the last two options which I will list here, and explained below.

○ **Leave the user's activities and e-mail as is**
○ **Delete the user's pending activity to an unfiled e-mail**

To leave the uses activities and unfiled e-mails as is, is to abandon them and leave them at the orphaned records. Obviously this is not a good option, and in my opinion was unwise for FrontRange to add as an option.

On the other hand, to delete the users activities and unfiled e-mails, would at the very least, take care of any possible orphaning of records, however, there is always the possibility that some of these user activities in unfiled e-mails should have been addressed. I think that I would be cautious of using this option as well.

In the **New User Properties** dialog form, shown on the next page in Figure 2-3, the first field is the **Username:** field. The GoldMine application forces capitalization of the information contained in

this field, and the field will accept up to eight characters (refer to sidebar Note).

The next field is the **Full Name:** field, which is the name that GoldMine relates with this UserID. In this field you may enter up to 26 characters representing this UserIDs full name. GoldMine will pull the information from this field wherever the user employs the **&UserFull-Name** macro (refer to Appendix B). This macro will most commonly be employed in e-mail templates, document templates, and reports, and the users may find it useful in many other areas. It is for this reason that you

Figure 2-3

would want to employ a corporate standard for the presentation of this information.

New in GoldMine Premium v9 is the **E-mail address:** field. You are encouraged to include a UserID E-mail Address for this new user. You will understand the logic for this better when we discuss the **Email Options** frame which is also new in this dialog form.

Next, on the **New User Properties** dialog form, is a frame for the **Security** settings. At this point, the GoldMine Administrator may want to fill in the **Password:** field with a temporary password while creating this UserID in GoldMine. The user will have the chance to change their password at any time through their own **Options** dialog form. Personally, I do not see any requirement to assign any user a password with which they would need to use to log into the network GoldMine except for those users possessing Master Rights, or in a cut throat environment. On the other hand, I would require all of my remote users to have a password on their Gold-Mine. All users will have access to any other users Calendars, Groups, Filters, etcetera, unless these rights are specifically removed from the user. Applying a password to the user name for login, in most situations, is for the users perception of security, and not for actual data security.

If, and where, passwords are employed, the period of time for which they are valid should be specified. GoldMine supplies the **Valid for days:** field in which the GoldMine Administrator may select a number of days from the drop-down list (**Always** being the default state). Even though you may type into this field, only information validated from the drop-down list will be saved into the field. This list is not user definable within GoldMine. Once any numeric value is entered into this field, the **Next change:** date field, will immediately be enabled.

The date, in the **Next change:** field, defaults to the creation date of the UserID within GoldMine. The GoldMine Administrator creating this user identity may set the date that the user must first change their password. All required changes to the password, thereafter, will be based on the **Valid for days:** entry, and this will be counted from the date that the user actually makes the change to their password.

New in v9 is the disabled **Unblock Account** button. If a user fails to login after 3 attemps, the account becomes disabled in GoldMine and can only be reinstated by a user with Master rights. To enabled the user's account once it has been disabled, simply click on this button, and then on the **OK** button.

The next option, to the right, in this frame that I want to discuss, and the single most important setting in GoldMine, is whether to allow this user to have ☐ **Master Rights** which, by default, is not selected. Allowing any user Master Rights is to allow them full access anywhere in GoldMine. A person given Master Rights can see everything, and I mean absolutely everything within GoldMine. If an e-mail is marked as Private, a user having Master Rights can see and read it whether it is theirs or not. Usually Master Rights are reserved for the GoldMine Administor(s). I have seen many companies distribute Master Rights to many users in the company, and then have the audacity to turn around and wonder why the GoldMine Security features do not work properly. As my wife might say: "Go Figure".

Figure 2-4

You next encounter the **Ownership** button. I will discuss this now as it is present in this dialog form in the Security frame which I am currently discussing, however, it will be more meaningful after the GoldMine Administrator has defined User Groups. Clicking on the **Ownership** button will bring up the dialog form shown here in Figure 2-4. What I am defining here is the default ownership for any new contact record that may be created by this UserID within GoldMine. If a new record is created with ownership, then no one can edit the information contained on portions of the record unless they are the Owner, or a member of the User Group that owns the record, or unless they have Master Rights (trump). The default **New records owner:** is the User Group (public). The GoldMine Administrator may change this to any existing UserID, or existing User Group by selecting that item from the drop-list. The GoldMine Administrator may choose to change this later, after they have had a chance to setup the User Groups.

In addition, at this time the GoldMine Administrator may establish Record Curtaining. The default setting is ◉ **None**, and means that all users will be able to see the information contained in the contact record while not necessarily having the ability to edit the information in some areas of the record. An administrator may select a UserID default curtaining of ○ **Semi-partial (hide tabs)** which blanks the display of the tabs area, however, there is no longer any curtain displayed as us old time Gold-Mine users had been used to seeing. Selecting a ○ **Partial** curtain, on the other hand, will blank out most of the contact record for all users that do not own or are not part of the user group that owns the record. Only the top few rows of the contact record will be visible to non-owners. Selecting ○ **Complete** will hide the record completely for any of those UserID's that are not the Owner or part of the User Group that is the Owner. Where, in past versions of GoldMine, a non Owner could schedule an activity against a fully curtained record, in GoldMine Premium they will no longer have this ability.

Figure 2-5

In v9, we next encounter the **Forced Logout...** button as depicted in Figure 2-3 on the previous page. Clicking on this button results in the dialog form shown here in Figure 2-5. The **Forced Logout** is often overlooked by GoldMine Administrators, yet I feel that it should play an important role in your organization, and that its use should be considered. This is not the perfect mechani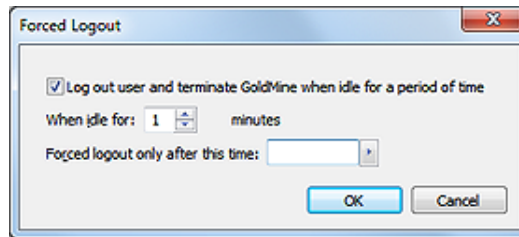sm by any means, but it does work. Most backup programs will not allow the backing up of open files. This dialog form allows the GoldMine Administrator to force the user out of GoldMine when there is no activity within GoldMine for a specified amount of time. Once the GoldMine Administrator selects the ☑ **Log out user and terminate GoldMine when idle for a period of time** option, the rest of the dialog form is enabled. From there, it is only necessary to set a **When idle for: x minutes** setting, however, I normally suggest that the **Forced logout only after this time:** field be set to around **6:00 pm**. In most offices, most users should have finished work by that time of the day, and, again, they will not be forced out at that time if they are actively utilizing GoldMine. I usually set the **When idle for:** setting to **1 minutes**. Oh, well, I'm taking this right off of the dialog form, don't blame me for the grammar. Anyway, with these settings, you are instructing GoldMine to shut itself down if it is after 6:00 pm, and if there has been no keyboard/mouse activity within GoldMine for that UserID for at least 1 minute. As the GoldMine Administrator, you may want to tweak these settings to better meet your corporate needs. At the least, with this, you have somewhere to start.

v9 also provides us with more new options in this area. We now have a frame labeled **E-mail Options** which includes one choice as a two radio button selection. This choice will determine the requirement for or not the need for an **E-mail address:** for this UserID. The preface for your selection reads as follows: **Choose how to deliver e-mail messages to this user:**, and one of the options is clearly marked as recommended.

- ◉ **Always use e-mail server (recommended)**
  Send e-mail message through the address above

- ○ **Use GoldMine messaging when available.**
  Use GoldMine user-to-user messaging for e-mail sent within GoldMine
  (these messages will not be visible outside of GoldMine).

After years of my advising you to establish a GoldMine record for each of your GoldMine UserIDs. After years of my advising you to use Internet E-mail to communicate with your users as opposed to the GoldMine internal messaging system, well, FrontRange has now rubber stamped my advise with the addition of this section to the **New User Properties**.

I will skip right over the **Membership** tab, and continue on with the **Access** tab. The **Membership** tab deals with **User Group** membership which I will be discussing later in this chapter in the User Groups section. Under the **Access** tab, shown here in Figure 2-6, the GoldMine Administrator is offered four frames under which they may control the access rights for a given UserID. The **Contact Record** frame, the **General Access** frame, the **Notes Access** frame, and the **Access to Others** frame. These are the four frames in which you will define a users access rights.
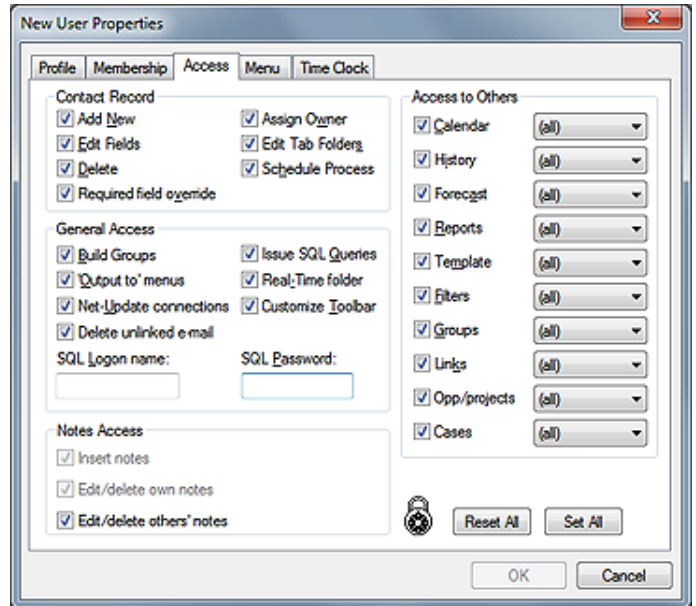

Figure 2-6

I begin by looking at the **Contact Record** frame. This frame contains seven option switches which the GoldMine Administrator may turn Off (☐) or On (☑). They are all on in the default configuration shown above.

The first option allows the UserID to ☑ **Add New** contact records to the GoldMine database. You may have assigned the adding of records to a specific user, or to a group of users, in your organization for consistency of data input, and you may **not** want certain individuals to have the ability to add contact records. If that is the case, then, for those individuals UserID, you would uncheck this option.

I discussed another way of accomplishing the same end result as this next option does when I previously discussed **Ownership**. The ☑ **Edit Fields** option means that this UserID is allowed to Add, Modify or Delete field data within GoldMine. Remove the check from this option, and the user will not be able to modify field data, even if they are the owners of the record. I want to emphasize the word **field**. This means any field on the screen, those that are contained in the **Contact1**/**Contact2** tables at least, are or are not editible as determined by this setting. This would be any field in the top portion of the main GoldMine screen including the **E-mail:** and **Web Site:** fields (Yes, I know that these are not really fields, nor are they in the Contact1/Contact2 table), as well as any field under the **Summary**, the **Fields** and the **Notes** tabs of the main GoldMine screen. You should be aware that the user will still be able to add E-mail Addresses and Web Sites, but it must be done under the **Details** tab, and not from the displayed field information.

The ☑ **Delete** option allows this UserID to delete contact records from the GoldMine database on an individual record basis. Only users possessing Master Rights have the ability to perform en massé deleting of the contact records in the database. If your organization wants to assign the right to delete individual records to a select group of individuals, then this is where you would do that. Remove the check, and you remove this UserIDs ability to delete contact records from the GoldMine database. This time I want to emphasize **contact records**. The user will still maintain the right to delete pending and historical information. Should you have a group of users that you have removed their ability to delete records, then you should provide them with another way of flagging a record for deletion. This way, those that have deletion rights will be able to group these records, and will be able to delete the records en massé that they have determined should actually be removed.

There is an option that has been available since GoldMine 6.6 for ☑ **Required field override**, and although I'd played with it for a while, I could not get it to function as specified. From the GoldMine Help files: *"Required field override: Authorize an override on a required field"*. From my previous testing, any user can select any other user and override any required field. I have retested this in the current Beta build of GoldMine Premium v9, and it still does now appear to function as expected.

The next option, over which you have control, is whether the user may or may not ☑ **Assign Owner** to a record. I had discussed ownership earlier in this chapter. If you have assigned ownership based on the UserID creating the contact record, then this option is probably redundant, and any changes to ownership should be accomplished by a GoldMine Administrator. Alternatively, changes in ownership may be controlled via your Lookup.ini (discussed elsewhere in this book). If you are not assigning ownership at the time of record creation, and based on the UserID, then, possibly you would not want to leave this right to your user(s). See my recommendation in the sidebar on this page for Workstation/Remote users as a possible beginning point for your configuration.

The ☑ **Edit Tab Folders** option allows the user to create new, modify existing, and delete records under the **Contacts**, **Detail**, **Referrals**, **History**, **Links**, and other tabs. Remove this option, and they will not be able to create, modify or delete records under these tabs. If this option is removed for the user, they will still be able to **Complete/Schedule** activities under the **Pending** tab, but they will not be allowed to modify or delete any existing activity there under the tab, or anywhere that the activities are being displayed. Activities are displayed on the **Graphical Calendar**, and in the **Activity List** as well as under the previously discussed **Pending/History** tabs.

The last option in the **Contact Record** frame is whether the user is allowed to ☑ **Schedule Process**. This refers to the users ability to attach a GoldMine **Automated Process**, and not to an actual scheduling of an activity. In the best set GoldMine environments, each record automatically has one automated process attached at the time of record creation (refer to the chapter on Automated Processes the Observer Track). This process then watches for various activities, or actions, and, in turn, attaches any additionally required Automated Process Tracks to the contact record in question. The user is rarely required to attach an Automated Process Track, and this whole activity might be best left to the GoldMine Administrator. Possibly you could develop a **S**tandard **O**perating **P**rocedure (**SOP**) by which this process could be escalated to an authorized individual.

The next grouping that I will handle, and as was shown in Figure 2-6 on the previous page, is the **General Access** frame. The rights in this frame are not contact record specific, but instead, apply to GoldMine as a whole. As before, the user begins with all these rights set in the default state, and it is up to the GoldMine Administrator to determine if this UserID should retain these rights.

In the first option, you must decide is if you want this UserID to have the ability, or not, to ☑ **Build Groups** in GoldMine. In this case, I am talking about the ability to build Contact Record Groups, and this should not be confused with the GoldMine Administrators right to create User Groups.

The next option that you have for the UserID is, do you want them to have the access to the ☑ **'Output to' menus** item of the local menus. If an organization is really concerned about their contact information being taken outside of the corporation, then this may be an option that one would be likely to take away from their everyday GoldMine user. As I explain in a later chapter, the **Output to ▶** option, from the local menu, will allow the user to output data to the Printer, Word, Excel, or to the Clipboard. I discuss the powerful advantages of this ability under the **SQL Queries** section in the **Gathering the Data** chapter of this book, while I discuss its disadvantages here. As the GoldMine Administrator, you will need to weigh the advantages against the disadvantages, and your corporations security needs to determine whether this option should remain selected for the everyday GoldMine user. Taking away this right for the user may be unnecessary, however it does erect another barrier that one must overcome to abscond with your data. Using the Microsoft SQL back end, however, affords you the greatest opportunity for keeping your GoldMine data in your hands alone.

Between the backend and the GoldMine access rights, you should have no trouble securing your data. If this is your goal, you should not use general SQL access to your database, but, instead you should use SQL Secure Logins.

The next option is the option that I alluded to previously. I have found that most organizations will uncheck this option for their everyday GoldMine user. The ☑ **Net-Update connections** in a network environment is not required, and could cause problems if not performed by the GoldMine Administrator, as well, a Net-Update can not be accomplished against an Undocked or Site License. Only one person, the GoldMine Administrator, should be capable of updating the GoldMine application to the latest version or build. This right should not be given, in most cases, to the individual user. There are conditions where this option might remain selected, yet none come to mind at the moment. In most cases, however, this option should not be selected.

GoldMine Premium, while removing some of the previous **General Access** options that we were used to having, had added a much needed option which is the ability to ☑ **Delete unlinked e-mail**. Haven't we longed for this option, and it is selected by default also. Do you remember in GoldMine past when you had to Read/File an e-mail of this type before you were permitted to delete it? Well, this is no longer the case. I think that you'll learn to appreciate this option, and will opt not to deselect it for any of your users. Yet, that is your decision to make, but don't blame me if you do and you receive tons of complaints from your endusers.

Now you are asked if you want this UserID to have the ability to ☑ **Issue SQL Queries**. All of these user rights settings go hand in hand. You really wouldn't need to worry as much about the previously mentioned Output to option, if you took away the users right to issue SQL Queries. Once you have made the decision for one, then you would probably apply the same rule to all of these options. I believe that the SQL Query tool is probably the single most important data mining tool within your GoldMine solution, although, Universal Search is right up there in importance.

The ☑ **Real-Time folder** should probably not be selected. The Real-Time tab is viewed from the **Activity List** dialog tab, and selected from the Navigation Pane tree. This tab view displays all of the completed activities for all of the users in the order in which they were completed. Many GoldMine Administrators had been asking for the ability to remove this tab from their users view for many years. The FrontRange organization has supplied this option to fulfill that purpose. Now that it is available as an option, I find that most GoldMine Administrators are unchecking this option. When this option is not checked, the **Real-Time** option will still display on the Navigation Pane tree, yet it will not be enabled. Remember, Master Rights for a UserID trumps all, including the **Real-Time** option setting.

The ☑ **Customize Toolbar** allows the users ability to Customize their Toolbar. If you have a need for a Corporate Standard Toolbar, then you may want to unselect this right for your non Master Rights users.

The last two fields in the **General Access** frame pertain to the SQL Login/Password, and how the SQL databases were setup for that environment. If the SQL environment was setup with the default username **sa** (System Administrator), with no password (not recommended), then these two fields should remain blank. If, on the other hand, your SQL environment has individual security accounts (recommended), then you would want to include the users **SQL Logon name:** and **SQL Password:** in the respective fields. This will permit the user to bypass the SQL Server login dialog form when entering GoldMine Premium, and they are not utilizing the aliased login. The **SQL Logon name:** and **SQL Password:** fields will each accept, what appears to be, unlimited alphanumeric characters, at least in GoldMine Premium 9.0.0.55. Obviously, I think, the password field will only display asterisks (*) or bullets (•) depending on your OS, and will never display the actual password nor will the actual password be saved unencrypted.

In the next frame, the **Notes Access**, which is new to this build of GoldMine Premium, we now have the ability to control a UserIDs capabilities to work with Notes. I do have to explain this functionality a little as these are check box options with an intelligent relationship. The default condition is displayed here in Figure 2-7. Please notice that the first two options are selected, albeit, disabled, while the third option

Figure 2-7

is selected, but enabled. If one were to remove the UserIDs ability to ☑ **Edit/delete others' notes** then the ☑ **Edit/delete own notes** would then become enabled. Finally, if one removes the UserIDs ability to ☑ **Edit/delete own notes** then the ☑ **Insert notes** option is enable, and you must decide whether to permit this UserID to insert notes into GoldMine at all. So we now have a cascading selection for the control of the users capabilities under the **Notes** tab.
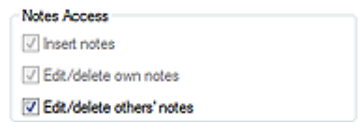
In the last frame, the **Access to Others** frame, all of the options function the same, and selecting or deselecting will turn on, or off, access to others ☑ **Calendar**, ☑ **History**, ☑ **Forecast**, ☑ **Reports**, ☑ **Template**, ☑ **Filters,** ☑ **Groups**, ☑ **Links**, ☑ **Opp/projects**, or ☑ **Cases**. The latter two being new additions to GoldMine Premium as of 8.1.0.40. Also new in that build, and not as noticeable, is that the order of the options has been changed. In fact, I did not even notice the change until I started updating this chapter.

In addition, for those options that are selected, you may further qualify to which User Group this option, for this UserID, pertains. You may set, for this UserID, that they have the right to access others ☑ **Forecast** (not recommended) sales, but only if those forecasted sales belong to members of the (sales) User Group. I will be discussing User Groups later in this chapter, however, this is one of many instances where the User Groups could be employed within the GoldMine environment.

I want to move on now to the **Menu** tab, as shown on the next page in Figure 2-8. From this tab, you can define what will appear or function in the users Main GoldMine menu, and, of course, what you do not want to appear or function there as well. Some of the menu items, though listed in this area as being definable, will not even show on the users menu if that user does not have Master Rights. For instance, though it shows up as being definable, the **Tools | Users' Settings...** menu item will not show on the users menu, regardless of the setting established here, if they do not possess Master Rights.

One of the important items on the **Menu** tab is the ability to **Save** a menu, once defined, as well as **Delete** a defined menu. If you have a standard UserID defined with menu options, and you are cloning that user to create new standard users, then the ability to save menus in different configurations may not be as useful to you. If, on the other hand, you are creating each user individually, you may wish to create positional menus. For example, you might create a menu for the manager positions, another for the secretarial positions, and yet another for any other positions in your organization. Then you would only need to select the menu for the user position that you are defining, instead of having to create a menu for each and every user individually.

The actual act of defining a menu is very simple. I suggest that you begin by clicking on the **Expand** button. This will expand all levels of the menu tree to its fully opened tree menu structure. In the
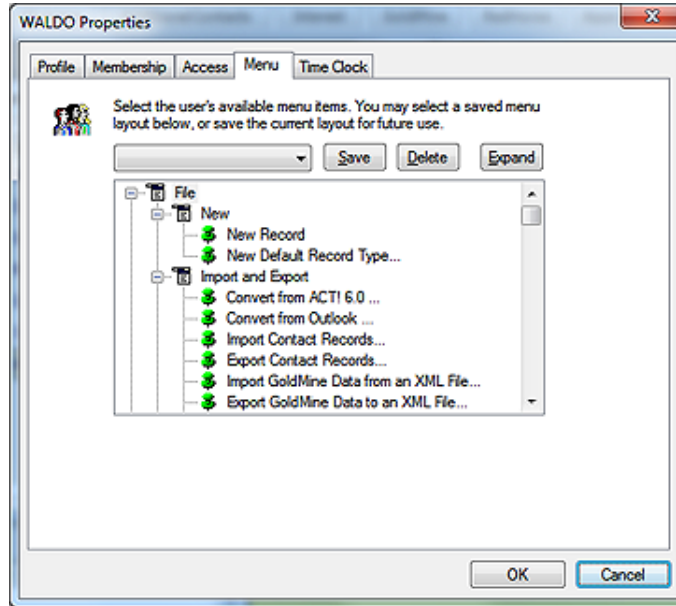
Figure 2-8

screen shot, shown here in Figure 2-8, the individual menu items have a thumbtack icon to the left of each item. The green thumbtack indicates that the menu option is to be displayed on the menu for the user having the correct rights, while a red thumb tack indicates that the menu item is not to be displayed nor enabled. Please note, in Figure 2-8, that I am showing you a screen shot of a menu tree that has been fully expanded. You long time GoldMine users won't recognize this menu any longer as it is a complete revamp of the menu to be more consistent with the Windows definitions for Menus.

As the GoldMine Administrator, you would now begin at the top of the expanded menu tree, and turn off those items that you do not want enabled and functional for this users menu. By default all of the menu items are set to on, and unless you change them, they will have every GoldMine menu item that their user rights level mandates. When done, if this user is a typical user, or a secretary, or in some position where it is possible that the menu created would apply to other users in your organization that you may be configuring, then you would, should, could save the menu for later use. It is recommended that you sit down and define what menu items should and should not be available based upon the users position within your organization. For instances, you may not want the secretary to be able to create a **New Database...**, or to **Maintain Database....** In general, you probably don't want anyone to be able to **Maintain** the **Database...** except for you or your alternate designated GoldMine Administrator. One would expect that you would do that through the SQL Server Management Studio in an automatic fashion or by hand through the GoldMine menu option.
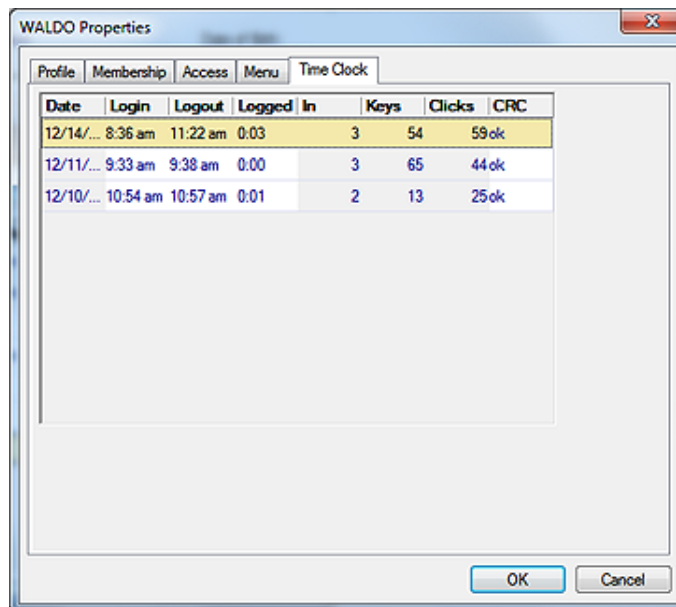

Figure 2-9

I only show you the next tab **Time Clock**, Figure 2-9, because it exists. This is the GoldMine version of George Orwells - **"Big Brother"**. There is nothing that you, as the GoldMine Administrator, can setup under this tab. This will show you when this UserID logged in and out, and for how long they were logged in. It will display the number of keystrokes made during that session, and clicks of the mouse that were performed during the period of time for which the user was logged in. And, lastly, there is the old **CRC** column which will probably just have an **ok** in it. This shows that no one has tampered with these records in the database to make it look as though they were working when, in fact, they were in the parlor with Colonel Mustard plotting the demise of Professor Plum. The information contained in this tab is not reliable. There are times that GoldMine believes that a user is logged into GoldMine, when in fact, they have gone home, and had shut their computer down while GoldMine was still running. Also, it could have been that their computer crashed while GoldMine was running. I wouldn't recommend docking anyones pay based on this information.

User Groups

User Groups are extremely important. As we saw earlier in this chapter, **User Groups** can be used when assigning **Access to Others** activities, or in record **Ownership**. A well defined user group structure will assist the GoldMine Administrator when defining the rights of individual users throughout GoldMine. Also, when established properly, user groups should eliminate the need to give anyone Master Rights, as only the GoldMine Administrators should have Master Rights anyway. To bring up the dialog form, shown here in Figure 2-10, I selected **Tools | User Groups...**, and from this dialog form, the **User Groups Setup**, one can setup their

Figure 2-10

various **User Groups**. Many organizations lay their group structure out on paper first, and then transpose that information to user groups through this dialog form. More often than not, however, the structures end up in a pyramid shaped structure with the user groups having the most access being at the top of the pyramid. While those with the least access appear, more commonly, toward the base of the pyramid.

The actual setup of the **User Groups** is a rather simple process. One defines a group name, and then adds existing users to this group. Flip a coin. Heads you define your users first, and then build your user groups. Tails you define your user groups first, and then build your users. If you already have your structure laid out on paper, then most GoldMine Administrators find it easier to name their user groups first, and defining the users membership as they add the users in GoldMine. I have reversed the process in this book only because of the way that I have laid out the book, and I prefer to create my user groups after I have created my UserIDs. Doing it the way the book flows, once the GoldMine Administrator has defined the **User Groups**, they would then need to go back and reestablish the user rights. It doesn't really matter which way you choose as long as it gets you to your end goal upon completion.

I won't discuss the **Edit** and **Delete** buttons as they are rather self explanatory. When you click on the **New** button, however, you bring up the dialog form shown here in Figure 2-11. Try to name the user group something meaningful, and representative of the group while staying within the character constraint of the **Enter the User Group's name:** field.
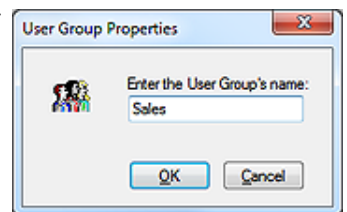

Figure 2-11

I have chosen **Sales** as a user group that I wish to define. Once you have named your user group, you click on the **OK** button to accept the name. The GoldMine application will then add the new user group name to the list of User Groups available for member setup. In fact, once the first user group is defined, the Members Setup button becomes enabled if it was not previously enabled.

Clicking on the **Members Setup** button, as can be found in Figure 2-10, will bring up the dialog form displayed here in Figure 2-12. This dialog form clearly shows two lists on the left hand side, and a single list on the right hand side. The one thing that the dialog form does not display is for which user group you are currently building a group of users. You must remember that piece of information, or manipulate your dialog forms around to see which group is highlighted in the **User Groups Setup** dialog form.
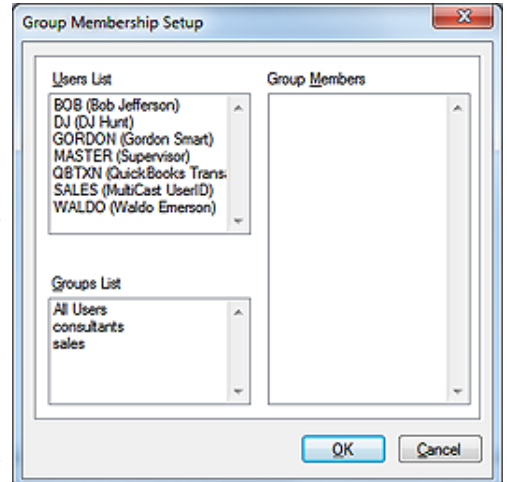

Figure 2-12

You can add **Group Members** to the group in one of two ways. The first is to add members individually one at a time. If that is your preferred method, then you simply need to double-click on the user name from the **Users List** on the left hand side. Sometimes a new group may include all of the members of an existing user group, and maybe one or two others. If this is the case, then there is no need to add the users individually. You may add the users by double-clicking on the user group name from the **Groups List**

on the left hand side of the dialog form. This will add all of the members of that particular user group to the **Group Members** list for this group. Fear not, if a user belongs to more than one user group their name will only be appended to this group member list once. You may then add any additional members to the user group from the **Users List**. The observant reader will notice that GoldMine has supplied a default user group of **All Users**. Sometimes it is easier to add all users, and then to re-move those UserIDs that should not be in the **Group Members** list by double-clicking on the UserID from within the **Group Members** list.

As in all cases, once satisfied that you have defined the group membership properly, click on the **OK** button to accept the newly created/modified user group membership list. Once accepted, the new members will show up in the **Group Members** list for the highlighted **User Groups**, refer back to Figure 2-10.

If you are following along with this book, and you have finished defining all of your **User Groups**, you would now want to return to the **Users' Master File** dialog form, Figure 2-1, and specifically to the UserID **Properties** (see Figure 2-3), and proceed with the setting of any **Ownership** by group that may be required. Additionally, you may need to re-address the **Access to Others** rights as they may pertain to **User Groups**. This would be under the **Access** tab for the given UserID (refer back to Figure 2-6).
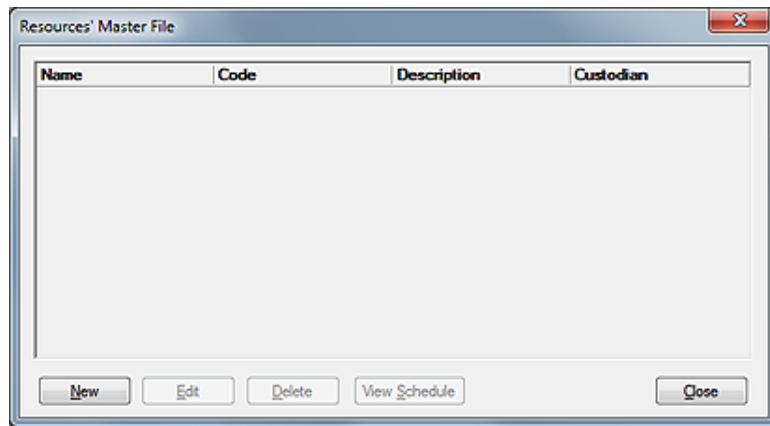
Resources

Figure 2-13

Next I venture into the **Resources' Master File** dialog form within the GoldMine environment. The user may bring up the dialog form, shown in Figure 2-13, by clicking on **Tools** | **Configure ►** | Com-**pany Resources...** from the main GoldMine menu.

There are a couple of things that I would like to mention concerning Resources within the GoldMine environment. The first being that, by default, **Company Resources...** appears on every users Gold-Mine menu regardless of whether they have Master Rights or not. This means that any user can utilize the **New**, **Edit**, or **Delete** option of a resource from the **Resources' Master File** dialog form. I feel that this is a task that is best left to the GoldMine Administrator or to a UserID that has been specifically delegated to monitor corporate resources.

The second item, I would like to mention, is the improved usage of resources within the GoldMine Premium environment. So much so, in my previous books, I actually recommended not using the **Resources' Master File** at all, and, instead, recommended adding the resources as special users within the GoldMine environment. In previous books I recommended adding these as **^Comp1** type of users which forced the resource to the bottom of the **F2 Lookup** list of Users. I made these recommendations as GoldMine would not perform conflict checking against any resources that were scheduled along with the activity. In todays builds of the GoldMine Premium product there is conflict checking, and resolution for users and resources alike. I commend FrontRange on their consistent implementation of user requested changes and features. This i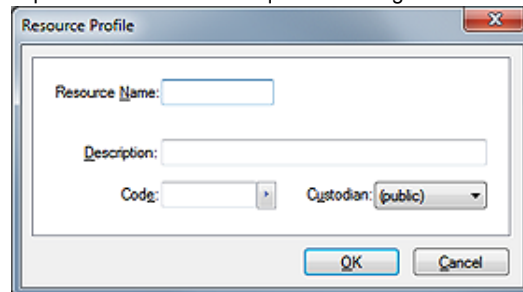s one of the many features that was often requested by the end user, and, consequently, implemented by the coders at FrontRange.

Having stated that, and in that I can now endorse the usage of the **Resources' Master File** dialog form for maintaining corporate resources (assets), although, GoldMine is, by no means, an Asset Man-agement System. I shouldn't need to dis-cuss the **Edit** or **Delete** buttons on this dia-log form, however, when the user clicks on

Figure 2-14

the **New** button the dialog form, Figure 2-14 on the previous page, is displayed. In this dialog form, the user may add/edit a new/existing resource. The **Resource** **N**ame: field will accept up to an eight character name for the resource. The **Description:** field will accept up to a forty character colloquial name for the resource. The **Code:** field, while it will accept up to ten characters, is not really designated for any purpose. The GoldMine Administrator may determine that they wish to store the serial number for the resource in this field or even the asset tag number. Another use for this field might be the physical location of the resource when it is in-house. The GoldMine Administrator is free to employ this field in any manner in which they see that fits their organizational requirements. The **C**ustodian: field is a drop list of users, and is used to indicate which user, if any, is the custodian of this resource/asset. This article may not be a resource of a user group unless that user group is the **(public)** user group. In the default configuration, GoldMine will default this field to the (public) user (no custodian). The custodian must be the (public) user group or assigned to a UserID. When you are satisfied with the additions/edits to this resource, you may click on the **OK** button to accept the addition/edits for this resource.

The GoldMine Administrator may add as many resources as they deem necessary, and that need to be scheduled along with their users' GoldMine activities. I would point out that resources can not be viewed along with users in the **Planner** tab under the graphical Calendar, however, GoldMine will check for conflicts when scheduling, and will be cognizant of resources when checking **Free/Busy** for an activity that is being scheduled as shown below in Figure 2-15.
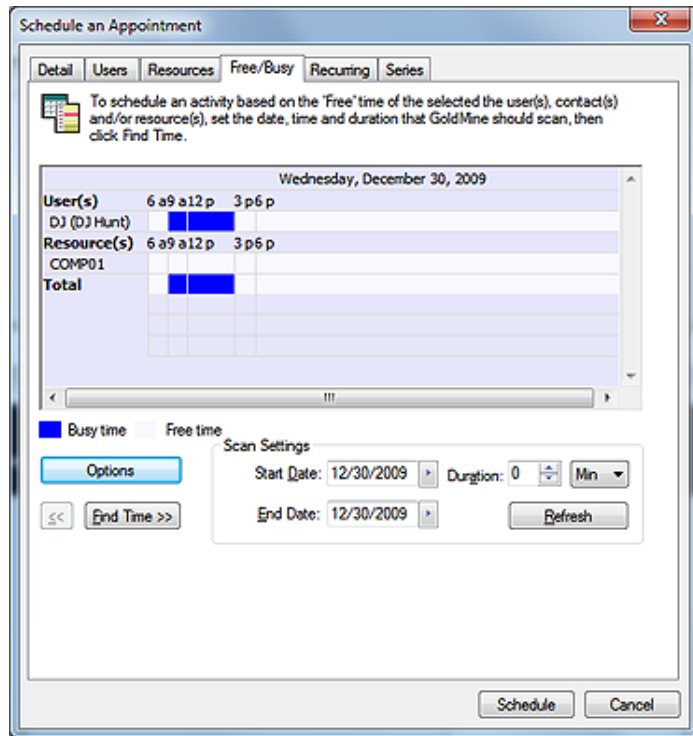
Figure 2-15

On the other hand, if you wanted to view the scheduled resources, you would need to do that through the **Resource(s) Activity List** dialog form as shown below, Figure 2-16.
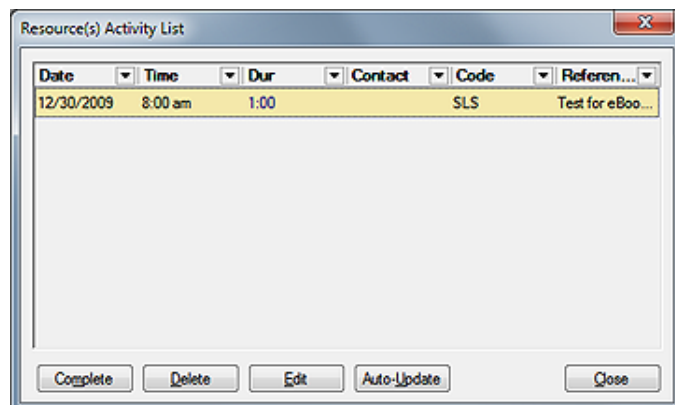
Figure 2-16

License Manager

From here you may actually **Complete**, **Delete**, **Edit**, or **Auto-Update** the resources scheduled information. Therefore, if you have company assets that do need control, the **Resources' Master File** may assist you in this effort, and I can now endorse the use of this tool within GoldMine.

By clicking on **Tools** | **Configure ►** | **License Manager**... from the menu, the user will bring up the **GoldMine License Manager** dialog form, Figure 2-17. By default the user will not even be able to get to this point unless there is at least one license entered to start GoldMine, the Master License. License numbers are broken down into different segments.
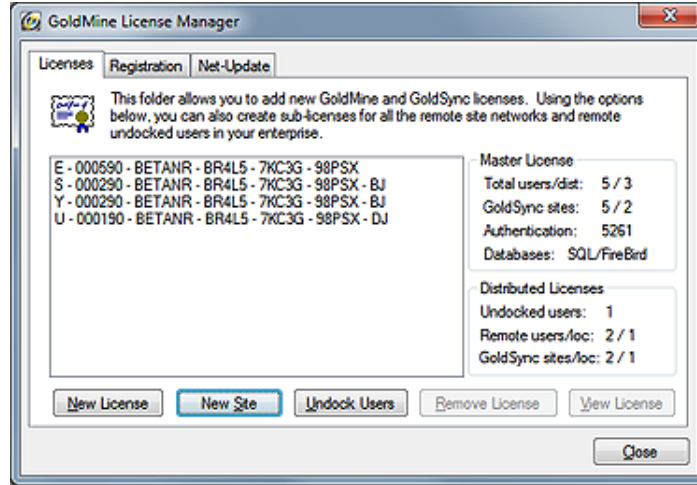

Figure 2-17

Here are a couple of examples of different licenses that I'll talk about later:

E - 000590 - BETANR - BR4L5 - 7KC3G - 98PSX - 6ZY40 - Q3S66 - GDY0G
U - 000190 - BETANR - BR4L5 - 7KC3G - 98PSX - TFYDB - ZYYNU - QXQI2 - 8591 - DJ

The first segment of any license identifies the type of license that it is using, and is a single character:

B - Bump license
E - Premium Edition (SQL/FireBird) license
J - Premium Edition (SQL/FireBird) Bump license
S - GoldMine Site license
U - Undocked User license
Y - GoldSync Site license

The next segment of any license identifies the number of licenses that are included within the given number as well as the version number against which the license is empowered. Using this license number as an example:

Position: **123456**
         | | | | | |
E - **000590** - BETANR - BR4L5 - 7KC3G - 98PSX - 6ZY40 - Q3S66 - GDY0G

You will notice that the first 4 characters of this, the second section of the license number, represents the total number of licenses, in this case **5**, in this the Master License. Characters 5 & 6 of this represents the version of GoldMine against which this license can be utilized.

The next segment, segment 3, contains the owners HDA number as registered at FrontRange. Segments 4, 5, and 6 are the serial number. These 4 segments will be consistent throughout all licenses cut from the Master License, while the last 3 segments of the license are known as the **KeyCode**, and they will not be consistent. Some licenses (Undocked & Site) have two more segments, a 4 character long **Authentication Code**, and a final segment that contains the UserID/Site (all caps) that the license was cut against. Look at the Undocked (**U**) license above as an example of this type of license.

The default license is the Master License while almost all others are derivatives of that license. For example, if I wanted to increase the Primium Edition Master license, previously shown, to thirty licenses, I would need another 25 user Premium Edition Bump license. To do this, I would click on the **New License** button, click on the **I Agree** button to the upgrade statement, and then enter the new license which is either an **E** license or a **J** license.

Note

*As of GoldMine Premium v9, the **O** - GISMO license has been removed from the GoldMine license coding system.*

Note

*The 3rd segment, in this case **BETANR**, will consist of your HDA as registered with FrontRange, and will need to be utilized whenever communicating with FrontRange.*

Note

*You will never see the **KeyCode** in the **GoldMine License Manager** dialog form. You must have the original certificates for the Master license, and you can regenerate the Undocked or Site License to realize the KeyCodes for those types of licenses.*

The refreshed **GoldMine License Manager** dialog form might contain this information after having done so:

E - 003080 - BETANR - 0KUMA - 5MA4B - SMMSG
B - 002580 - BETANR - 46GAV - 9MDQE - KUI9D

The number of licenses in the Master License was bumped up from 5 to 30 licenses, while the newly added license type code was designated as a **B**ump (**B**) license to the Master license. Nothing will decrease the number of Master licenses on the screen, however, some of these licenses may be distributed to other Sites or Undocked users. Looking at Figure 2-17 on the previous page, the reader will see a non-editible frame to the right entitled **Master License**. Here the user can see how the Master License is currently allocated.

For example, as can be seen in Figure 2-17:

Total users/dist:	**5 / 3**
GoldSync sites:	**5 / 2**
Authentication:	**5261**
Databases:	**SQL/FiredBird**

Let's take a look at another example. This time, I want to cut a Site license for our location here in Fitchburg, Massachusetts (or another Department within our office). I click on the **New Site** button to bring up the **Create a Site Sub-License** dialog form shown here in Figure 2-18.
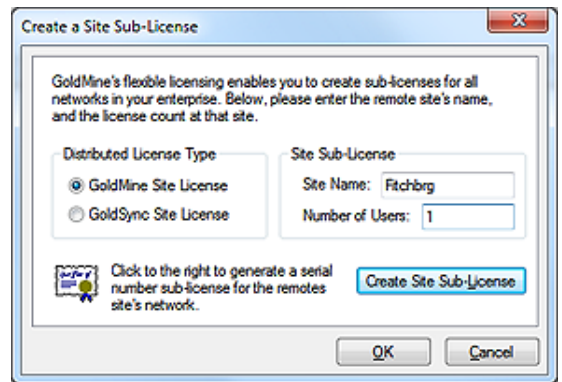
I then select the type of license that I wish to distribute, which, by default, is the ◉ **GoldMine Site License**. I use the **Site Name:** field to enter **Fitchbrg**, and the **Number of Users:** to identify how many licenses I wish to distribute to the Fitchbrg site. In this example, I am **Figure 2-18**
distributing **1** license. When completed, I click on the **Create Site Sub-License** button to generate a license for that site. The license might look like the one shown here after you click on the **I Agree** button that will present itself:

S - 000180 - BETANR - 0KUMA - 5MA4B - SMMSG - TFYDB - ZYYNU - QXQI2 - 8591 - Fitchbrg

Additionally, the Master License information will have changed. Cutting a Site License will reduce the number of licenses that you have available for your network installation of GoldMine. For example:

Total users/dist:	**5 / 4**
GoldSync sites:	**5**
Authentication:	**5261**
Databases:	**SQL/FiredBird**

That is slightly different than if you were to create an **Undocked User**. This one is a bit harder to explain, but I'll give it a try. If you cut an Undocked User license, you do reduce the number of licenses, in your pool of licenses, by one, however, when that undocked user is on site, and using the network GoldMine, they are not using a license from the pool of remaining licenses. Instead, they are using their undocked license even while on the main system, therefore, all of the pool licenses are still available for your network users of GoldMine.

The **GoldMine License Manager** dialog form, for what I have described so far, might look like the one shown in Figure 2-17. Pay particular attention to the **Master License** information frame, and the **Distributed Licenses** information frame whenever you are adding or removing licenses.

The next tab is the **Registration** tab, and it shows your GoldMine registration information as it should have been submitted to FrontRange upon registration, see Figure 2-19 on the next page. This information is employed when using **MapQuest** through GoldMine to look up directions to a contact record location from the registered location. This information can be changed if it is not accurate, however, there is a little trick to allow you to change this information. You must click on the **Net-Update** tab, and select the checkbox that is shown on that page. First select this option ☐ **Update registration information**, then go back to the **Registration** tab. You will find that the fields under the **Registration** tab are now enabled, and are ready for editing. Once you have made the appropriate corrections they will be maintained. Well that seems obvious. So why do I mention it at all? In past versions of GoldMine this information would only be retained though the active GoldMine session unless one se-
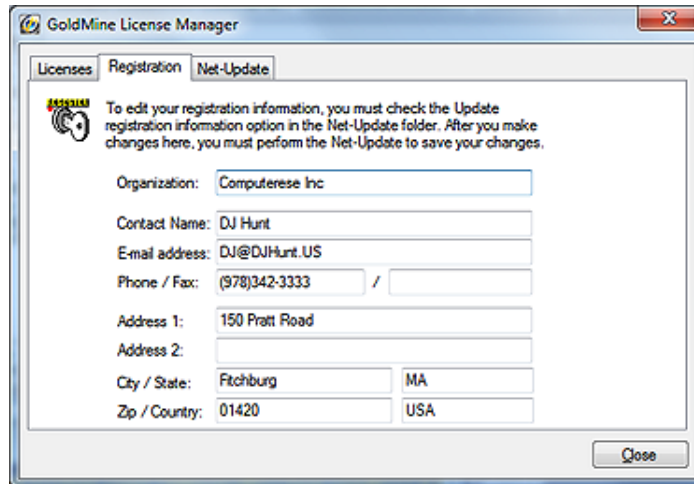
Figure 2-19

lected the **Net-Update Now** button, therefore, this is a change that needs to be discussed.

Previous readers of my Hacker's Guide series of books will remember that there Used to be an **Install Locally** tab following the **Net-Update** tab. It should be obvious from Figure 2-19 that this tab no longer exists. In fact, FrontRange now mandates that you do Workstation installs (Local Installs) from the CD or the batch process if you have configured that properly on the Server from the saved files of the first Workstation install. You should be able to find this information in the last edition of the **GoldMine Install Guide**, a PDF, distributed by FrontRange.