



C3M-GM Conference Computer Related Instructions **Equipment, Software and File Sharing**

Needed Equipment: As is our practice, our conferences and workshops are very "hands-on" with few paper handouts but many shared files. Although certainly not required, we again are recommending that each college bring enough lap-top/notebook/desktop computers with your full system installed (on its hard-drive and at least the full demo data base) for your team's use. As always, all presenters will be projecting their computer screens during their sessions. Specific instructions on installing your system if you are not already using GoldSync are below. Depending on the actual number of attendees from your institution, multiple representatives from the same college certainly may share a computer. Please contact C3M if you need any assistance.

Please have your system operational by the time the workshop/conference begins.

All options below assume you have an up-to-date demo file. Please make sure to update your demo subdirectory on your network before utilizing it to setup your laptop – it needs to reflect your current common file. To fully update demo, we recommend copying over common to demo (you will need your SQL administrator to assist if you are using GoldMine-CE [SQL]), then deleted all records -- make sure you uncheck "scheduled activities" on the delete wizard since the contacts in demo are also now in common file. Now that the file structure of Demo is the same as Common, sync-copy a smaller group of records from common to the refreshed demo system. Normally a group of applicants and accepts from the previous year provides a good data set. You may also need a few hundred inquiries to provide good testing data.

System Setup Options: To install your system customizations to a free standing portable, there are a number of options. Please look through these and decided which makes the most sense for your environment. Please post a tech issue (www.c3msupport.com) and call C3M (ask for Tech Support) if you have difficulty. For all options that require access via the internet, since we will be using a hotel's (or other venue's) system, C3M provides no guarantee of access, speed or data privacy.

Option A: Utilize GoldSync with an updated demo file – dBase and SQL.

Only a good option for those already using GoldSync.

Option B: Copy complete system – temporary dBase only.

Although not supported by GM, if there is enough room on the hard-drive, copying the entire GoldMine related subdirectory (i.e. G:\AdmitGold or G:\DonorGold) on your real system, is also possible. You may have to install the Borland-database drivers from the setup file to get the idapi32.dll installed and registered properly. If you use this method, make sure you use the custom install option of the gm*setup.exe and uncheck everything other than the first option: database driver.

Option C: Set Up Demo with selected customizations – dBase only.

1. For a free-standing portable computer -- undock a user license on your network and install GoldMine from the most recent gm*setup.exe that matches your system. If you desire to update to the latest versions, it is highly recommended that your entire system be updated so any changes/updates made will match the undocked user.
2. Copy the following from your main system to the portable – the best method is to get the laptop connected to your network so all files can be transferred without copying to CD. If you do utilize a CD, remember to change the properties of all files copied to CD from Read-Only to Archive once they are on the conference computer.
 - a. GMBase subdirectory (especially fields*.*, lookup.* and tracks.* but entire subdirectory preferred);
 - b. Demo subdirectory – include your current lookup.ini for that subdirectory
 - c. Reports subdirectory for unique reports
 - d. The current master.ini and user.ini files for those who are coming to the conference – not really necessary but will make the conference computer or your laptop reflect the same tools and preferences as you use at home.
 - e. Template subdirectory to install unique letters, etc.
3. Install the files into the appropriate subdirectories onto your portable computer.

Option D: Set Up Demo with selected customizations from a SQL installed system – SQL only.

If you are not using GoldSync in your SQL environment, setting it up just for the conference is probably far more than anyone would want to go through (Option A). Therefore, this is a variation on the Option C approach. Per John, “there is a simple, practical way to get a dBase copy of a SQL-based system, using the GoldMine interface.”

1. Update DEMO database to reflect Common.

From the PC being brought to the conference...

2. Copy over all files desired (per Option C instructions) EXCEPT for the actual GMBase and Demo folders (as these are in SQL).
3. Log into the SQL-based GoldMine.
4. Open the DEMO database.
5. Go to File | Open Database.
6. Select NEW.
7. Enter a description to be used on the PC being brought to the conference.

8. Select the dBase database files option and click NEXT.
9. Check "Create a new contact database" and set the path below this check box to the desired location of the COPY of the Demo Database for use at the conference (most likely the C: drive of the PC, e.g. C:\GoldMine\Demo).
10. Check "Host GoldMine files to another server" and set the path below this check box to the desired location of the COPY of the GMBase files for use at the conference (most likely the C: drive of the PC, e.g. C:\GoldMine\GMBase).
11. Check "Copy the data from the current files to the new databases" and click NEXT.
12. Enter a Contact Set Code (any bogus code will do) and click NEXT and then FINISH.
13. GoldMine will now CHURN away and essentially export all the GMBase tables AND the Demo database to the locations set above. This may take a while.

*** VERY IMPORTANT issue below ***

14. Once this process completes, a prompt will come up asking if you wish to switch over to these new GMBase tables/files. ANSWER NO!!!! This is asking if this SQL-based GoldMine system wishes to be SWITCHED to the new dBase GMBase files just created. You clearly do NOT want to do this. We're going through this process simply to get a COPY for use at the conference.
15. While still in the SQL-based GoldMine system, go back to File | Open Database.
16. You'll see a new entry related to the dBase copy of the demo database just created. DELETE this entry. It does NOT need to stay as an option on the LIVE SQL-based GoldMine system.
17. Exit the SQL-based GoldMine system.
18. Now you should have dBase copies of your GMBASE tables/files AND your DEMO database on the PC being taken to the conference.
19. Before logging into this NEW, dBase copy of GoldMine, you'll want to EDIT the GM.INI file located on this PC (NOT the real LIVE GM.INI file). Edit it and REMOVE any DIR entries (such as GoldDir=, SysDir= or CommonDir=). These entries all point to SQL components, which do NOT apply to this dBase copy of GoldMine.
20. When logging into this dBase copy of GoldMine for the very first time, hold down the CTRL key so that the Contact Databases window will open up automatically. Make sure you select this NEW, dBase database to open.

21. Once logged into GoldMine, go to Help | About and click the SYSTEM button.
22. Verify all paths and locations are LOCAL to this PC and NOT pointing to the SQL-based LIVE GoldMine system. (One exception is the BDE DLL Files entry, which will be addressed later.) Click OK when finished.
23. Now go to File | Open Databases one last time and DELETE ALL entries EXCEPT for this one dBase database that will be used at the conference.
24. Lastly, you very well may have to contend with the BDE issue for local usage, just as your document already mentions.

Again, per John, "That's it. It's actually a lot easier than it looks." Right??

Option E: Access your AdmitGold system remotely.

Depending on the accepted protocols at your institution, remote access options may include Remote Desktop Connection, GoToMyPC (C3M's preferred tool), NetMeeting, PCAnywhere and other products. C3M attempts to provide shared wireless access to the internet as part of the conference. Wired access may also be possible but will be limited to those closest to the router who bring their own CAT5 cables. As stated earlier, since we will be using a hotel's (or other venue's) system, C3M provides no guarantee of access, speed or data privacy.

Option F: Setup user computer with a temporary version of the C3M template.

As a last resort, make arrangements prior to the conference to meet with C3M – the night before the conference. Doing this the morning of the conference will be extremely difficult. Just bring a laptop with Windows 2000 or XP (Standard or Pro) operating systems and have C3M install a temporary version of the appropriate template for use just during the conference. This will require agreement that the file cannot be copied and must be removed by C3M prior to leaving.

Software: In addition to GoldMine, the following programs should also be available/installed:

1. An up-to-date virus checker
2. An unzip utility – included in XP but can get WinZip from www.pkware.com or www.shareware.com if not available from your IS department.
3. Adobe Acrobat Reader
4. Microsoft Word and Excel
5. For those attending the GoldBox sessions – make sure that GoldBox is installed on your portable and updated to the latest version from the Redstone Software web-site.
6. For those attending the Crystal Reports session – it is preferable by far to have Crystal Reports installed on your portable.
7. Although C3M will demo BusinessMap, it is not necessary to have this installed on your system.

Sharing: In order to share ideas of what works best, please find your best work for your college. You can this to us a number of ways: e-mail before the conference to C3M or bring on a Flash Drive or CD (we will be sharing files so please virus scan your files/disks). If you would please save all of these files within a folder named for your college, it will help avoid confusion as we will be merging all of these files for distribution. Remember, we are in this together so please share with your colleagues! Here is what to e-mail or bring in one school named folder:

- a. unique screens -- screen prints of any special screens in your system. (Use PrintScreen on your keyboard and paste it as a Word or PDF document.)
- b. lookup.ini
- c. mail merge templates -- *.dot files of your more complicated templates. *.pdf will also work -- check the field codes button in the Tools-Options-View menu before printing the template
- d. reports (GoldMine and Crystal) – your more complex ones
- e. special/unique documentation – including GM documentation in the Info-Center.