

**General Suggestions and
Suggestions submitted to FrontRange – GM**

| # | Description | Priority | Status | Notes/Comments |
|----|---|----------|-------------|--|
| 1. | Updating WordLink for Vista and Word 2007 | A1 | 1-Submitted | 3/1/07 – this is most critical for ALL GM 6.7 (CE and SE) installs – abandoning current clients who have to replace a computer is very unlike FRS |
| 2. | Security settings for detail tabs – similar to user-defined field view tabs – more like with both read/write access | A1 | 1-Submitted | 2/21/03 – Steve – submitted in confirmation of earlier submissions 2/25/03 – Natalie – on the road map for the release after next. 2/27/03 – Steve – discovered that attempts to hide extended detail tabs (all) from a user does not work either. This is now a much bigger problem with giving records in DonorGold. 11/6/03 – Angel – re 6.5 still not working, talking about a total redo of security in the future 1/20/04 – Marty – submitted at FrontRange Partner Summit 3/5/04 – Angel at C3M Conf – looking at whole security system. Also needs to deal with history items and e-mail security access. Some clients just want certain individuals to view certain histories and e-mails. Most critical for DonorGold is the detail tab security. 11/19/04 – Angel - security modifications still under consideration and on track – May release will be in both – look at 6.7 API. UIAPI can be worked to make this more user-defined. Must be on UPP to get this in dBase. 3/4/05 – UI API is available, 7.1 will include functionality 3/6/06 – still needs to be addressed |
| 3. | Updating GM to work with SQL Server 2005 – AP’s skip steps | A2 | 1-Submitted | 2/15/07 – experience at NW Christian and testing by John Neighbors proved that there is clearly a problem. Going back to Server 2000/03 appears to be the only temporary solution. |
| 4. | Completing multiple actions offered to all users – accidentally can complete all actions | A2 | 1-Submitted | 12/2/05 – per Brian (JBU) – actions scheduled as part of a multiple assignment can all be completed accidentally quite easily. There should be a second dialog box, at least, asking “Are you sure” or a |

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| | | | | <p>check box some where to turn this off when creating</p> <ol style="list-style-type: none"> 1. Create a filter to generate a set of calls 2. Close the first call on the list. 3. A message asks if you want to complete ALL of the calls. 4. Answer No - sometimes it completes all the calls anyway. <p>Is there any way to create a list of calls from a filter without having them linked? Or is there a way to get rid of that link once the calls are created?</p> <p>Several times it has happened that thousands of calls got "completed" when they were not actually made, and that caused a lot of extra work. Once, our administrator even hovered while the employee chose NOT to close all the calls and they closed anyway.</p> <p>1/18/06 – added per client as a fix request – ticket 497 3/2/06 – submitted to FRS – needs to be looked at Only way so far to avoid this is by creating the item using AP</p> |
| 5. | SQL Auto Process speed – What’s the problem? | A3 | 1-Submitted | <p>3/5/05 – will look at this – BDE will no longer be needed, may speed up. Optimize queries. Will consider limiting the number of records scanned to only those that have an AP.</p> <p>3/2/06 – need to make sure tracks are removed Newest Word links are ridiculously slow – EMU experience</p> |
| 6. | For large e-mail efforts, need some way to send email every 5 seconds or some type of delay to avoid being marked as spam | A4 | 1-Submitted | <p>3/5/05 – per Angel, Que and send manually – will consider an enhancement request</p> <p>3/2/06 – no change</p> |
| 7. | Ordering items on detail tabs by date of creation – not consistent | A4 | | <p>10/26/03 – Steve, especially important for DonorGold – contributions and pledges</p> <p>11/6/03 – Angel – re 6.5 – still not working – future</p> <p>1/20/04 – Marty – submitted at FrontRange Partner Summit</p> <p>3/5/04 – Angel at C3M Conf –will look at this</p> <p>11/19/04 – Angel – resetting the date may be causing. He will check this further.</p> <p>3/4/05 – Angel, needs to see this</p> <p>3/2/06 – may not longer be a problem</p> |
| 8. | For new records created with record type expanded new record screen, zip code auto-filling city | A4 | 1-Submitted | <p>3/5/04 – Angel at C3M Conf – Per conversation with Marty, thinks that should be working. Need to check this out more.</p> <p>11/19/04 – Angel, added in 6.7 – plus consistent naming of linked</p> |

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| | and state and lookup ini not being invoked properly. | | | documents – [C3M needs to test this] 3/4/05 – should be working for all -- expect have to have City and State (even though you leave them blank) if you want to have Zip fill these in. 3/2/06 – only works for the first time per session |
| 9. | Literature Fulfillment – generating labels within GoldMine does not work (We would like the Lit Fulfillment Center to use internal GoldMine report labels and envelopes rather than Word Templates) | A4 | 2-In Process | 2/21/03 – Steve – submitted in confirmation of earlier submissions 2/25/03 – Natalie – presented as a bug, but I am not sure that such capability exists – however, mailings/lit fulfillment is on the road map for the next release as well. 11/6/03 – Angel – re 6.5 – still not working – future 1/5/04 – Marty has figured out a way to send items to a group as a temporary fix. More on this expect from FRS. 1/20/04 – Partner recommended check out Sales Magic LFC 1/20/04 – Marty – submitted at FrontRange Partner Summit 3/5/04 – Angel at C3M Conf – should be fixed in 6.X release 11/19/04 – Angel still on the ToDo list. Hopefully by 7.0. 3/4/05 – still working on this Angel will check on the getting web-site to reflect the latest item 3/2/06 – still a problem – all types of problems with Lit Fulfillment |
| 10. | Being able to choose which result codes (when adding them to the Result code lookup table) are Successful or Unsuccessful as a default if desired | A5 | 1-Submitted | 3/5/05 – Angel – will consider 3/2/06 – no change at this point |
| 11. | Bug in autoproccess -- create history form vrs literature request | A6 | 4-Testing | 5/11/04 – discovered that when creating an autoproccess that adds a history item, after choosing create history and clicking options -- choosing form as the history action creates a <u>LITERATURE</u> activity not a <u>FORM</u> . As directly merged documents are FORM (L) and literature requests are LITERATURE (F) this makes no sense. Some clients are trying to do subsequent ap actions based on whether a particular item is in history -- if created by a manual merge it is a FORM, if created by AP it is a LITERATURE. This is the same problem in v5.5 and 6.5. – in any case the result of a successful print must be PRN not SNT or anything else. 11/19/04 – Angel, should get on this one pronto. 12/06/04 – Steve added clarifying codes to the above discussion |

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| | | | | 3/4/05 – Angel still outstanding, will get with the team 3/2/06 – should be fixed per Scott |
| 12. | Deleting items in a group without deleting the group name – or shell. Esp important in the <u>add to group</u> action option of AP (if you delete the group and then recreate it, AP will not recognize the new group) | A7 | 1-Submitted | 1/1/03? – Paul/Marty created GroupZapper using GoldBox. Would be great to have this type of capability auto-invoked with GM 1/20/04 – Marty – submitted at FrontRange Partner Summit (Talked about GroupZapper) 3/5/04 – Angel at C3M Conf – wants to see GroupZapper but will check for future release. 11/19/04 – Angel – looking at this 3/2/06 – possibly consider SQL triggers |
| 13. | Blank dates having to be set to “1/1/1980” | A7 | 2-In Process | 1/1/03 – problem for a long time with our enhancement programs. Outside programs that blank a date field must reset to a bogus date. However, inside the application, GM can blank a date to null. Need to be able to blank dates and have those recognized by outside programs. ?? – 3/5/04 – Angel at C3M Conf – will check the issue. 11/19/04 – Angel, will check this more. 3/4/05 – API, Angel will check this more 3/2/06 – run this by Dales to see if this is still a problem |
| 14. | Zip code populating city, state and zip on Supplemental Contacts – same process as primary address process | A7 | 2-In Process | 2/21/03 – Steve – submitted in confirmation of earlier submissions 2/25/03 – Natalie – on the road map for the next release 11/6/03 – Angel – re 6.5 still not working – future 3/5/04 – Angel at C3M Conf – should be possible. Will check for future release. 11/19/04 – Angel, added in 6.7 – [C3M needs to test this] 3/4/05 – some inconsistency, Angel will work on this 3/2/06 – only works for the first time per session |
| 15. | E-mail attachment – rename option | A8 | 1-Submitted | 3/15/06 – when bringing in an attachment and using the move option to another location, it is sometimes necessary to rename the file to avoid over-writing. Once the file is manually renamed, it is no longer attached to the original e-mail. Adding a rename option to the attachment local menu would be very helpful. |
| 16. | Calendar Display options do not work properly – must manually enter “ShowHistActvCode=1” into each users ini since the | A8 | 2-In Process | 1/20/04 – submitted at FrontRange Partner Summit by another partner 2/25/03 – Natalie – Month view support of completed activities is also on the road map for the Next Release. 2/26/03 – Steve – The above actually has two issues -- having to put |

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| | options do not work | | | <p>into the user ini the ShowHistActvCode=1 deals with the display of the project code on the history tab. There are buttons for this on the Preferences - Calendar - Display Details -- Scheduled Activity and Complete Activity. Neither button - Show Activity Code works properly. The one that is the most problematic is the Completed Activity -- that is where we typically have our users do the manual changes to the [ActvObj] section of the ini. The button puts something like it into the [CalObj] section -- "HistShowActvCode=1" but it does not do anything.</p> <p>2/26/03 – Natalie – assuming you are still using GM 5.7, but we will test in GM 6.0.</p> <p>3/5/04 – Angel at C3M Conf – will check out and get this fixed</p> <p>11/18/04 – Angel, may be able to fix this in the future but for now will be manual</p> <p>3/4/05 – the calendar display is not the issue, need to do the modification to the user.ini</p> <p>3/2/06 – still need to fix this</p> |
| 17. | Locking records – two people at the same time hitting the same record, don't know it's a problem until after all work is completed – happens on fields as well as activities | A8a | 1-Submitted | <p>3/5/05 – Angel. – ESPECIALLY SQL.</p> <p>3/2/06 -- Use a macro to flag</p> |
| 18. | Locking calls on Activity List for SQL | A8b | 1-Submitted | <p>11/28/05 – per Brian (JBU) -- In the Dbase version of Goldmine, when a tele-counselor made a call they could keep other users from making that same call. Now that we have moved to SQL, however, the record isn't locked while the call is in process. Is there a way to either lock this record so that it works like it did with Dbase or to mark the call so that it visibly warns the second user that a call is in progress?</p> <p>1/18/06 – added per client request – ticket 492</p> <p>3/2/06 – still a problem</p> |
| 19. | Word Link problem when using Outlook | A9 | | <p>5/24/06 -- Noted by Roberts Wesleyan – WordLink having to be reinstalled constantly if using Outlook</p> <p>6/17/06 -- If the programs are opened in the following order Word, Outlook, AdmitGold, then WordLink will work. If the programs are</p> |

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| | | | | opened in the following order Outlook, AdmitGold, Word, then WordLink will NOT work. However, when WordLink is working depending on the order you shutdown your programs, you can get WordLink to work when opening Outlook first then AdmitGold and Word. John H. added this to the suggestion list for FRS. |
| 20. | Defining record type as a primary should be across all users – make it the default | A9 | 1-Submitted | |
| 21. | E-mail attachment – move – create folder option | A9 | 1-Submitted | 3/15/06 – when moving an attachment, it is sometimes helpful to create a new sub-directory versus closing the move function, go to Windows Explorer, creating the sub-folder and starting the move process again. Adding a folder creation option to the move function during the browsing process would be very helpful. |
| 22. | Groups (as pulled from the Automated Process) show up out of alphabetical order | B | 2-In Process | 9/7/04 – Submitted by JBU – Allyson. Not yet sent to FRS. Think this is just a matter of setting the sort order when creating the group. Suggested that submitter check that out. It may not be very easy to fix that order for the group without resubmitting 11/19/04 – Angel, will be fixed in 7.0 3/4/05 – may be squeezed into the 6.7 patch 3/2/06 – not working consistently – check to see if the sort is defined correctly |
| 23. | Printing groups in GoldMine, each record that is printing appears in the main record window and you can't do anything on GoldMine at all - it sort of takes over everything. | B | 3-Hold | 9/7/04 – Submitted by JBU – Allyson. Not yet sent to FRS. 11/19/04 – Steve will get more detail on this 3/4/05 – possibly just need to minimize the Word screen. Is mostly on more recent Fast way is to create one doc with all pages and then the printer Contact, Mail, Merge, send to a group, send to the printer, Merge Destination – say NO, it creates the history. Using the Word mail merge, can get this all to one doc Need mass delete capability within the Closed tab to allow multiple deletes 3/2/06 – still needs to be checked |

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| 24. | Optimize groups not working consistently | B | 3-Hold | 3/2/06 – Submitted by JBU. Get more information from them |
| 25. | Creating a history with AP that has a date other than today | B1 | 1-Submitted | 3/5/05 – Angel -- will look at to see why disabled 3/2/06 – still disabled |
| 26. | Literature Fulfillment ability to choose which item will be added to history file | B1 | 1-Submitted | 3/5/05 – Angel – multiple items, toggle 3/2/06 – no change at this point |
| 27. | Word merge out of office 2003/XP taking great amounts of time | B1 | 1-Submitted | 3/5/05 – Angel issue The more merge fields, the slower it with go Tools, Options, General 3/2/06 – make sure using the latest – may need to try multiple versions to see which one works Have to go to older builds of the Word link |
| 28. | History item security | B1 | 1-Submitted | 3/2/06 – need to have a security option to block view of particular history items |
| 29. | Create user-defined print/merge macros – an address macro that is unique to the install | B2 | 1-Submitted | 3/5/05 – Angel indicated that he does not think this is possible at this point. Has been discussed. 3/2/06 – still only possible with &Contact and &FullAddress |
| 30. | Cloning Filters | B2 | 1-Submitted | 6/13/06 – Support ticket 643 by Kim Porter – desires to copy or clone a filter |
| 31. | Completed Appointment and Event displaying on the Monthly especially – Events are not even in the list – although other options for completed activities are there but grayed out. | B2 | 1-Submitted | 2/21/03 – Steve – submitted in confirmation of earlier submissions 2/25/03 – Same as above – Natalie – Month view support of completed activities is also on the road map for the Next Release. 2/26/03 – Natalie – I am forwarding this to QA to duplicate and log. 11/6/03 – Angel – re 6.5 – now included for complete items 1/1/04 – Still does not work 3/5/04 – Angel at C3M Conf – should be fixed soon 11/19/04 – Angel, check on technical reason for this – found out there was a technical reason\ 3/2/06 – will still need to be resubmitted to FRS |
| 32. | Contact swap with primary – will drop first name even coma (not triggering lookup.ini) | B3 | 1-Submitted | 3/5/05 – Angel will check out 3/2/06 – Still the case with 6.7 |
| 33. | Using more than one expression field in Quadrant1 of the primary screen | B5 | 1-Submitted | System gives an error if more than one expression field is used in the primary screen, quadrant1 |

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| 34. | Integrating system and user defined tabs – allowing mixing the order | B6 | 1-Submitted | 2/21/03 – Steve – submitted in confirmation of earlier submissions 2/25/03 – Natalie – This is high on the road map for the Next Release. 11/6/03 – Angel – re 6.5 – unclear as to whether this has or has not been added 3/5/04 – Angel at C3M Conf – was discussed. Probably not possible. Will check on possibility 11/19/04 – Angel coming in 7.x 3/4/05 – Angel, coming in 7.1 – UI re-write 3/2/06 – not available yet |
| 35. | Track change by date in another tab than history – especially Student Status | C | 1-Submitted | 3/5/05 – Angel will see if a unique button is possible for those that need their own history item 3/2/06 – possibly in SQL to its own detail tab – dBase only possible with lookup.ini 5/9/07 – determined not to be critical |
| 36. | When creating a history with AP, changing the drop down reference doesn't prompt to clean out notes | C | 1-Submitted | 3/5/05 – Angel -- will look at but not likely 3/2/06 – not changed |
| 37. | Merge/purge of visible records sometimes loses the detail items | C | 1-Submitted | 3/5/05 – Angel possible index related issue 3/2/06 – may need to run reindex even in SQL – must do only MP in dbase systems. |
| 38. | Advance search – for more than one field at the same time -- contact and dear to find unique name (lastname, first or dear) | C | 3-Hold | 3/5/05 – Angel -- maybe sometime later (7.2?), will look at 3/2/06 – create a SQL query and trigger it from the contact search center for now Added sufficient capability for now |
| 39. | Modifying C3MDX for Graduate programs | Int-A1 | 1-Submitted | 3/1/05 – Discussion has begun – Chris Lux has been heading up this effort 3/2/06 – Reported on progress that a more generic DX is possible – Dale and I need to pursue the development option with ProEdge folks. |
| 40. | Modifying C3MDX/C3MIL (possibly C3MCP) security to work in non-trusted SQL environments | Int-A1 | 4-Testing | 10/18/04 – Steve – approved processing in dBase – will install in SQL environment to test 10/19/04 – Dale will work on setting up new installer using Install Shield or Deployment Wizard. Bryan will check out what we provided to Lou. 11/24/04 – Installed at SCUHS and it works fine – still need new |

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| | | | | <p>installer package</p> <p>2/21/06 – Updated all install packages for the User’s Conference. Still need to update the documentation and see that the non-trusted portion makes sense for users.</p> |
| 41. | DX AutoLaunch Capability | Int-B | 1-Submitted | <p>12/1/06 – From discussion with Roberts Wesleyan on their import. Being able to launch DX (and CP) either by a timer or at the end of an import seems to be the natural progress from the above filter/flag capability. This will need to be discussed as part of the programming agenda.</p> |
| 42. | Modifying DX to do the extract on a filter or group of records | Int-B1 | 4-Testing | <p>3/24/06 – Ticket 566 - Submitted by Jason Schwanz for George Fox</p> <p>3/27/06 – response from Dale:</p> <p>The easiest way to accomplish this goal would be to add a CONTACT2 field “UDXUPDATE”. For example, if this field has a value of Y then an update is required; N means not required.</p> <p>When updating any field externally, the UDXUPDATE would be set to Y. The DX program would be changed to allow a runtime flag (perhaps BATCHMODEUPDATE) that would limit the actions of the program to items with UDXUPDATE=Y. During a run, all UDXUPDATE values would be set to N as they are processed.</p> <p>Add field: .25 Add flag to limit clearing phase: 1.0 Add flag limit to extract phase: 1.0 Test: 1.0 Build: .5</p> <p>Estimate: 4 hours</p> <p>This option has the advantage that a group would not have to be built; rather, the records could be set during the import.</p> <p>3/28/06 – comment from Steve -- I think I would rather use the filter/group logic since our folks already know that process. If they do set a flag field in importing, that could be used to easily filter</p> |

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| | | | | <p>also. Can you investigate further to see if there is some logic that we can build on to minimize the time to build it this way. I think it would be worth it in the long term.</p> <p>12/1/06 – updated interest from Kim Porter’s comments on ticket 753 – Roberts Wesleyan – Dale estimates 3-6 hrs.</p> <p>12/1/06 – from e-mail to Dale: Would it be easier to do this with a date field so it would not have to be reset but compared to the last time DX was run and if the date is greater, run it? Would that save a clearing function for this field? -- it also seems that any update mode should clear the flag (if an individual or auto is triggered after the flag is set, it would accomplish the same thing so why run on this record?)</p> <p>Provided by Dale – needs testing for the conference</p> |
| 43. | DX Password creation for IL – for those not using DX | Int-B2 | 1-Submitted | <p>3/23/06 – Ticket 564 -- submitted by Jason Schwanz of George Fox -- I am setting up IL for our Graduate installation of AdmitGold. Since there is not DX for Graduate installations of AdmitGold we need a way to generate the user.ini values for login information currently done by the DX.</p> <p>3/27/06 – comment from Dale: As you have indicated, the IL program does not have the ability to generate passwords. This work is done by the DX program. Here are the options that make sense to me: OPTION 1: Add DX in this environment and use it only for password entry. Menu options in the user's INI file can be established to limit the use to password. OPTION 2: Use DX in the undergrad environment to create the user's password. This creates a [C3MDX] section in the user's INI file, which can be copied and pasted to the user's INI file in the Graduate environment. Please let me know if you need help implementing either of these options.</p> <p>7/24/06 -- The client's issue here has been resolved, but leaves open the question of IL not having a password setup utility. I'll leave this to you as an open suggestion. Anticipating your next question, I estimate that it would take about 4 hours to copy the password section of DX over into IL and test and release it.</p> <p>8/17 – E-mail to Dale as ticket was closed -- is it possible to have it</p> |

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| | | | | both ways? If DX is running to use it's password function and if not, have the same in IL? |
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Completed and Rejected Items

| # | Description | Priority | Status | Notes/Comments |
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| 1. | Problem when modifying filters used with e-mail merges | A | | <p>1/7/05 filed by Adam Nance -- Another bug has been identified in GoldMine 6.70.41114</p> <p>Any filter that has been edited or has been created using dbase expressions entered by hand will not be honored when used with e-mail merges. A filter that is built entirely using the wizard will work properly as long as the filter is not changed in any way after being created.</p> <p>This means that if a custom filter or a modified filter is used in the sending of an e-mail, the filter is ignored and the e-mail will be sent to ALL records in the database.</p> <p>This has not been tested against a merge with Word, just on e-mail merges.</p> <p>3/4/05 – Angel will confirm specifics</p> <p>3/2/06 – no longer a problem</p> |
| 2. | Numeric fields in DBASE versions will truncate any trailing zeros placed in a numeric field. | A | | <p>1/4/2005 filed by Adam Nance -- Another bug has just surfaced in GoldMine 6.7 - DBASE only</p> <p>Numeric fields in DBASE versions will truncate any trailing zeros placed in a numeric field. Example: The value 1022 is placed in a numeric field, the value remains as 1022. The value 1020 is placed in a numeric field, it is truncated to 102. As is 10, 100, 1000 end up as 1 and so on. This problem doesn't seem to affect the SQL versions, however the decimal rounding in SQL still exists.</p> <p>3/4/05 – Angel, this has been fixed will be in new release</p> |

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| | | | | 3/2/06 – fixed in latest release |
| 3. | E-mail refresh happens every 60 seconds and can't be shut off. | A | | <p>1/4/2005 filed by Adam Nance -- Everyone that uses GoldMine's E-mail Center is complaining about an annoying refresh that happens every 60 seconds. It disrupts whatever you are doing to refresh the Inbox, it can not be turned off.</p> <p>3/4/05 – Angel – see the gm release notes in the subdirectory for 6.7, there is a setting in the GM.ini</p> <p>3/2/06 – no longer a problem in the latest build</p> |
| 4. | MSI version will not allow more than one install – C3M laptops with three installs (client, AdmitGold, DonorGold) – how to update all of these. | A | | <p>1/4/2005 filed by Adam Nance -- One thing to be aware of is, they are abandoning the old installer in favor of the MSI version. This means that if you already have GoldMine installed on a system, it will not allow you to install another version, you can only upgrade the existing version.</p> <p>3/4/05 – Angel – gimli.exe (see Partner website)</p> <p>3/2/06 – gmli has corrected</p> |
| 5. | dBase system shutting down | A | | <p>1/4/2005 -- dBase system shutting down immediately – must reinstall (per FRS announcement)</p> <p>3/4/05 – Angel, is checking this.</p> <p>3/2/06 – doesn't seem to be a problem any longer</p> |
| 6. | Creating new fields in the top four quadrants | A | 5-Complete | <p>12/15/03 – per GM, cannot place Contact2 field in the top four quadrants. We have been doing this for years and were shown this first by FRS. We have never had an error related to this even though we have tons of installs with our templates set this way.</p> <p>3/5/04 – Angel at C3M Conf – this is not a problem. He has talked with the Support team. Concerned about moving phone1 – but others should be OK.</p> |
| 7. | Contsupp item headers are disappearing – assuming double-header (H records) | A | 5-Complete | <p>3/5/05 – Angel needs more info</p> <p>3/2/06 – can be rectified but unknown cause</p> |

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| 8. | Starting in 2005 the new SAT will have 3 sections (Writing/Critical Reading/Math) instead of 2 (Math/Verbal). Just wondering how AdmitGold will handle these new scores. For a few years we will have some students who have taken both the old SAT and the new SAT. | A1 | 5-Complete | <p>10/11/04 – Submitted by Jeff Babbitt</p> <p>10/11/04 – Steve – we have heard some about the changes but no real specifics yet that would give us field lengths, etc. in order to modify the system. For other instances of this, we have a few choices:</p> <ol style="list-style-type: none"> 1. create a new detail tab to deal with the issues of the new SAT that are different from the old -- with that will come required changes in the DetailExtract program to deal with this as well as new fields on the Extract tab. 2. modify the existing fields in the current tabs (SAT and Extract) to add the third sub-score. Not knowing if these are going to still be straight adds for a "composite" score is problematic in knowing how to deal with the DetailExtract. <p>10/13/04 – Jeff – Either option could work. Having all the scores on the current SAT tab would probably be easiest for the end-user, as long as there is a way to flag the "new" SAT from the "old" and as long as the detail extract could distinguish when recalculating the scores.</p> <p>8/3/2005 – DetailExtract was modified to handle the new scores. Version 12097 included these changes.</p> |
| 9. | Certification of XP-SP2 for GoldMine and external applications | A3 | | <p>11/18/04 – currently, we are not recommending updating to XP-SP2. API programs may be the problem area.</p> <p>11/19/04 – Angel - link to Excel is the only problem at this point. Everything else should work fine. SH will test this.</p> <p>2/1/05 – other than Excel seems to work fine on all C3M enhancements\</p> <p>3/4/05 – QuickBooks link and Excel is still a problem – new release that is COM based will work but only with 6.7 or higher, Angel will check to see if this works with older version</p> <p>3/2/06 – is not longer an issue</p> |
| 10. | Upgrading problem with GM-CE | B | | <p>1/19/05 – as filed by Adam Nance</p> <p>The following applies to Corporate Editions / SQL only.</p> <p>When upgrading a previous version of Corporate Edition / SQL GoldMine to 6.7 do not choose the Corporate Edition option in the Installer, choose the Standard Edition instead.</p> |

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| | | | | <p>I ran into this one first hand this morning at a client's site. GoldMine 6.7 is available via the new Installer only. While walking through the new Installer, choose Upgrade. On the next screen, you must choose what type of system you are upgradingCorporate Edition, Standard Edition or Workstation. If you choose Corporate Edition, on following screens, you will be prompted to enter in the path to GoldMine, and the SQL database / SQL login info for the SQL database. No matter what you enter in for the SQL info, the Installer will return an error saying that the database can't be upgraded and to "contact your GoldMine Administrator". I talked to FrontRange support. They confirmed that this happens about 95% of the time an upgrade is attempted. Tony with FrontRange tech support said, that support had opened a dialog with the developer on this issue due to the number of problems they are seeing with the new Installer.</p> <p>The work-around is to pick the option for upgrading a Standard Edition of GoldMine, then point the Installer to the GoldMine folder. The Installer will upgrade the .exe, .dll and related files. The first time that you login with the new version, you will need to have DB Admin rights to the GoldMine SQL database because GoldMine will attempt to update the databases (add a new table and indexes) upon the first login.</p> <p>3/4/05 – Angel will check</p> <p>3/2/06 – no longer a problem – Make use a current backup is available</p> |
| 11. | BDE update wipes out all BDE alias and BDE settings. | B | | <p>When installing GoldMine 6.7, either new or as an upgrade, there is a screen in the install process that has a check box that is checked by default. The check box is to update the BDE along with GoldMine. If you are performing an upgrade and fail to uncheck the box to update the BDE files, it will remove all existing BDE files and replace with a new set, thus wiping out any and all BDE aliases and BDE settings that are in use.</p> <p>This dangerous option is checked by default, if you are doing an upgrade to 6.7, it is best that you uncheck the box to upgrade the BDE</p> |

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| | | | | files. 3/4/05 – Angel needs more information 3/2/06 – should not be a problem |
| 12. | Web access to BCM -- GM system | B | 5-Complete | 2/21/03 – Steve – submitted in confirmation of earlier submissions 2/25/03 – Natalie – This is available via GMEverywhere Thin Client – but it is for SQL GM users only currently, as an optional add-on. 10/24/03 – Steve – we need to look more closely at iGoldMine 3/5/04 – Angel at C3M Conf – no real reason this is not available with iGoldMine. 11/19/04 – Angel, still under consideration 3/4/05 – restricted access to CE – marketing discussion 3/2/06 – iGoldMine only available |
| 13. | Allowing duplicate e-mail addresses for some clients with only a general address used for multiple staff e.g. admissions@someschool.edu . | B | 5-Complete | 5/1/03? – Steve – submitted 5/7/03 – Natalie – we are very pleased to inform you that your suggestion has been included in GoldMine! It is available using the following setting under the GM.ini – AllowDupEmails=1 |
| 14. | Merge codes for records and e-mail (primary/supplemental contact <u>matching</u> e-mail address) – especially when entering e-mails and addresses from the supplemental contact | B | 5-Complete | 2/21/03 – Steve – submitted in confirmation of earlier submissions 2/25/03 – Natalie – This is by design, we wanted to allow users to define mail merge codes for e-mail addresses separately from the main mailing address. However, the request for displaying the coded during input is valid. 2/26/03 Steve – Having the two separate lookup tables is fine -- some may want them different -- we just do the import option of the table setup to get the values the same. To differentiate, we use table names of "Merge Codes - Mail" and "Merge Codes - E-Mail" for ease of finding the right table in the import values function of the table setup. You did get the point -- being able to put in the "Merge Code - Mail" (which you can do now) as well as the "Merge Code - E-Mail" while entering or editing a supplemental contact would save a ton of missed e-mail merge codes. Most folks forget to go up to the e-mail area to enter the e-mail's merge code. 11/6/03 – Angel – re 6.5 – has been added to supplemental contact screen – not automatic but will be a great improvement |

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| 15. | DX and IL – adding the Prior College detail name as an alternative to Transfer College | B3 | 5-Complete | <p>3/23/06 – Ticket 563 – submitted by Jason Schwanz of George Fox -- I am setting up IL for our Graduate installation of AdmitGold. In this installation we use the detail name of Prior College, rather than Transfer College. This request is to cause the same action for the Prior College details that is done for Transfer College details.</p> <p>3/27/06 – completed – new exe for both IL and DX were made</p> |
| 16. | Security problem with Interland mail servers – timing out due to security breach | C | 5-Complete | <p>2/21/03 – Steve – submitted in confirmation of earlier submissions</p> <p>2/25/03 – Natalie – Please provide details for this.</p> <p>2/26/03 – Steve – On the Interland issue -- about 14 months or so, Interland changed their security scripts (or something similar) and only has a problem with GoldMine using their mail server. In my conversations with them they do stop short of bad-mouthing GM but do make it very clear that GM is the only problem e-mail client. I called them again in early December to see if this was being resolved. The issue ticket from them is below. If you wish to get a more direct explanation, Interland Support should be able to explain what they did in their security that has caused this -- (800)589-5060. If you would like access to my mail server to test this, I can create an account for you or whoever may be assigned this fix. – Comment from Interland: Solution history on ticket: 12/3/2002 3:26:31 PM - Michael Ayoola - With regard to your request, I did contact the mail admin and was made to understand that goldmine is not stable on our mail server cause goldmine require a certain script to be written on our name server and that can not be done for security reasons.</p> <p>3/5/04 – Angel at C3M Conf – Steve will send contact info to Angel re the problem.</p> <p>11/19/04 – Angel will check on these</p> <p>3/4/05 – Angel work on this</p> <p>3/2/06 – no longer a problem</p> |
| 17. | E-mail text changes colors from default for replies | C | 5-Complete | <p>11/18/04 – Steve– it is not clear how to shut off this “feature.” One suggested fix disabled another critical function (?). The whole text changes colors, not just the old text.</p> <p>11/19/04 – Angel, using “Include original message” and take off quote entire message by default – or leave both off and highlight portion of original message you want to quote.</p> |

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| | | | | 3/2/06 – no longer a problem |
| 18. | Ability to create a new userdefined field with multiple databases in 1 easy step. Include a checkbox option for other database. If checked create field in that database as well. | A | 6-Rejected | 1/20/04 – Marty – submitted at FrontRange Partner Summit – Keeping databases parallel is very important for our clients – not only Common and Demo but also regular data files. Having to remember to add newly created fields to other databases is a problem. The label does show but the field is N/A. 3/5/04 – Angel at C3M Conf – does not think this is possible. |
| 19. | Outside programs triggering lookup.ini | A5 | | 1/1/04 – need to be able to trigger lookup.ini at the end of an update sequence with an outside program. For example, IL updates the last attended high school but the lookup.ini is not triggered to update the counselor. 3/5/04 – Angel at C3M Conf – should be doable now. New programmer will have to verify. 11/19/04 – Angel, was not possible but still under consideration. 3/4/05 – still a problem and not expected to be added. May need to use SQL triggers 3/2/06 – should be the responsibility of the developer |
| 20. | Link to GroupWise – sharing calendar information especially | B | 6-Rejected | 2/21/03 – Steve – submitted in confirmation of earlier submissions 2/25/03 – Natalie – This is not on the road map currently due to limited overall demand – but let me see if the iCAL standard we support is also one the GroupWise handles. 3/5/04 – Angel at C3M Conf – not being considered except through iCAL. |