GoldMine Connect Installation Guide

For GoldMine Web

Release 2019.1

GoldMine

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Updated: August 2019

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Installation

GoldMine Web is designed to help manage your day-to-day business activities, maintain business relationships, manage time, establish and achieve goals.

GoldMine Connect includes GoldMine Web and G Suite integration. It is installed by running the `gmconnect-<version>.exe`. This file is included in the GoldMine download available from our Self-Service portal. See www.GoldMine.com/GoldMine-support/ to access the portal.

The installation process for GoldMine Connect involves several prerequisites depending on your Windows Server version. You must first have GoldMine Premium Edition installed.

GoldMine Web requires no additional licensing and can be used by any user of GoldMine Premium Edition.

Before you Install GoldMine Connect

Following are some requirements and recommendations to ensure a successful installation of GoldMine Connect:

- If you have GoldMine Mobile installed you must uninstall it completely before installing GoldMine Connect (**gmconnect.exe**). This includes deleting all associated files and folders.
- If you have a version of GoldMine Connect installed prior to 2015.1 you must uninstall it completely before installing the current version. This includes deleting all associated files and folders.
- If you have GoldMine Connect 2015.1 or newer installed, it is not necessary to uninstall it. You may run a newer installer to upgrade the existing installation.
- Using HTTPS protocol to access GoldMine Web is highly recommended for network security and may require an SSL (Secure Sockets Layer) certificate and configuration in IIS. If you have other web applications already running HTTPS on port 443, GoldMine Connect may not work properly when also configured to use port 443. You will want to do one of two things when setting up the product:

  - Select a different available port to use with HTTPS.

  - Or -

  - Use SNI in IIS.

  For details about either of these fixes, see the Ivanti community article about Using HTTPS with GoldMine Connect.
- Using IMAP is recommended for GoldMine Premium **User Options > Email > 'Getting Mail' Server** settings.

See the GoldMine Administrator's Guide for information on how to configure GoldMine Premium Edition for use with GoldMine Web.

Supported OSes and browsers

GoldMine Connect supports the following operating systems and browsers.

Operating systems:

- Windows Small Business Server 2011
- Windows Server 2012 / 2012 R2

- Windows Server 2012 Essentials / 2012 R2 Essentials
- Windows Server 2016 / Windows Server 2016 Essentials
- Windows 2019

NOTE: All supported operating systems require .NET 4.5 framework or higher.

Microsoft IIS Versions: 7.5, 8.0, 8.5, 10.0

Mobile (Smartphone and Tablet) Operating Systems:

- iOS 9.0 - 10.x
- Android 4.4x - 6.0

Mobile Browsers:

- iOS - Safari 9.3.5 - 10.3.2
- Android - Chrome 4.2x - 5.1

Desktop Browsers:

- Safari 9.1 - 10.1 for OS X 10.9 - 10.10
- Chrome 60 - 65
- Microsoft Internet Explorer 11.0
- Microsoft Edge 38.0 - 40.0

NOTE: When using GoldMine Web, you must turn on cookies and JavaScript for browsers. After installation, you need to clear the browser cache.

Prerequisites

This section lists the prerequisites for specific versions of Windows Server. In addition, you must also determine an installation process based on your set up (see Installation Options).

- You must first install GoldMine Premium Edition on the dedicated GoldMine Connect server with the Web Server (IIS) role enabled. GoldMine Premium Edition and GoldMine Connect must be the same version (**2019.1.0**.xxx) but build numbers (2019.1.0.**xxx**) are not required to match. The GoldMine Premium Edition installation may be the shared server installation or may be a workstation installation accessing a shared server installation on another server. Refer to the *GoldMine Premium Edition Installation Guide* for more details.
- All supported Windows Server versions require GoldMine PE 2018.1 or newer and .NET 4.5 framework or higher.
- You must add the Web Server (IIS) role and some related features *prior* to installing GoldMine Connect. See Configuring IIS for more information.

NOTE: GoldMine Connect is not supported for use on Domain Controller, unless the operating system on the Domain Control is “Small Business Edition.”

Hardware requirements

The following minimum requirements are based on number of users accessing GoldMine Connect.

Small environments, with 5 to 10 GoldMine Connect users.

Typically single server environments, where the server is used as both the GoldMine application server, and the Microsoft SQL server. For these environments a version of Microsoft SQL Server compatible with GoldMine Premium Edition is required.

Operating System	CPU	RAM
Server 2012	3.0 GHz using 2 Processors with 2 Cores each.	4GB RAM, plus what is needed for your SQL database.
Server 2016	3.0 GHz using 2 Processors with 2 Cores each.	4GB RAM, plus what is needed for your SQL database.

Medium environments, with 10 to 25 GoldMine Connect users.

Two servers are required. One server will operate as the Web Server for GoldMine Connect and the second server will have Microsoft SQL installed. You may use either the Web Server or the Microsoft SQL server as the GoldMine Application Server. Microsoft SQL Standard edition is required to support this number of GoldMine Connect users, in conjunction with your network workstation clients for GoldMine Premium Edition.

Server Role / Operating System	CPU	RAM
GoldMine Connect / Web Server.	2.0 GHz using 2 Processors with 2 Cores each.	4GB RAM.
Microsoft SQL Server	2.0 GHz using 2 Processors with 2 Cores each.	2GB RAM, plus what is needed for your SQL database.

NOTE: Using a single server environment to support 10 to 25 GoldMine Connect users is not recommended. This may lead to loss of connectivity between the Web client users and the Web Server due to high CPU usage generated by the IIS application and the SQL server activity when multiple records are created or updated at the same time. This will be further impacted by activity generated from your network workstation running GoldMine Premium Edition.

Large environments, with 25 to 50 GoldMine Connect users.

Two servers are required. One server will operate as the Web Server for GoldMine Connect, and the second server will have Microsoft SQL. Microsoft SQL Standard edition is required to support this number of GoldMine Connect users, in conjunction with your network workstation clients for GoldMine Premium Edition. An additional server is recommended for use as application server, this is particularly important if you have a large number of internal desktop clients or you are using GoldSync to synchronize with other GoldMine sites or undocked installations of GoldMine.

Server Role / Operating System	CPU	RAM

GoldMine Connect / Web Server.	3.0 GHz using 2 Processors with 2 Cores each.	4GB RAM.
Microsoft SQL Server	3.0 GHz using 2 Processors with 2 Cores each.	4GB RAM, plus what is needed for your SQL database.

Additional Factors That Will Impact Performance.

It is not recommended to use GoldMine Connect on a Server where iGoldmine, Terminal Server or Citrix is actively used. This may result in poor performance of the Web Server when responding to requests from GoldMine Web when accessed by users.

GoldMine Web has a minimum connection speed requirement for both the device, and for the server from where the web application is published. Using speeds lower than the required speed may lead to loss of data, a disconnect between the device and the server, or a general failure when loading on the end-users device.

A Smartphone or Tablet device must have a cellular connection type of 3G, or higher, with a connection speed of 3mb download and a 2mb upload. For devices using a WiFi connection, a 100mb connection or faster is required. For both Cellular and WiFi connections, at least 2 bars of radio signal should be present when either application is used.

For the Web Server there should be at least a consistent 3mb download, and 2mb upload connection speed to support 10 to 15 users. The more users that access the GoldMine Web via the Web Server, the more bandwidth will be needed between the Web Server and your ISP.

Installation Options

There are three installation options available for installing and configuring GoldMine Premium Edition with GoldMine Web. Each option contains different configurations for the database, the GoldMine Application Server, and GoldMine Connect. The diagrams that follow depict a few variations of these scenarios, and the associated installation procedures:

- Installation on a Local Server
- Installation in a Workgroup
- Installation in a Domain

You must first install and configure IIS before you can install and configure GoldMine Connect. See Configuring IIS for more information.

Configuration

Once you have completed the installation on the selected Windows Server platform, the GoldMine Connect server and the GoldMine Premium Edition application must both be configured to allow access by GoldMine Web. These steps include the following topics:

- Grant Access to the GoldMine Connect Web Server
- Configure Alarm Messages for GoldMine Connect. For more information see the GoldMine Administrator's Guide.

NOTE: If you receive error messages after competing the installation and configuration, refer to Error Messages and Troubleshooting Logs.

Configuring IIS

GoldMine Connect requires that you add the IIS role and related features on the server designated for the installation *before* installing GoldMine Connect.

This includes adding an SSL certificate in order to be HTTPS compliant. The recommended option is to use a certificate from a trusted authority that can be verified. For companies that do not want that, we also allow the usage of self-signed certificates.

To add an SSL certificate

1. Open Internet Information Services (IIS) Manager.
2. Click the IIS Server instance.
3. In the *Features View* pane, double-click the **Server Certificates** icon.
4. In the right-side *Actions* pane, select either **Import** or **Create Self-Signed Certificate**.
5. Fill in the details.
6. Click **OK** and restart IIS.

To configure IIS

The following procedure configures IIS for Windows Server 2019. For information beyond these steps, we recommend that you consult Microsoft documentation or an IT professional.

A few notes to consider before starting this procedure:

- Microsoft .Net 3.5 must be installed *before* IIS configuration and setup.
- The Features > User Interfaces and Infrastructure section is no longer available, as it's already installed when selecting to configure IIS for Windows Server 2019.

To configure IIS for earlier versions of Windows Server (2012/2012 R2 or 2016), see this article on the Ivanti community website: IIS Role and Feature Installation on Different Server Operating Systems.

1. From **Start > Administrative Tools**, select **Server Manager** and open the *Server Manager Dashboard*.
2. Select **Add roles and features** from the *Configure this Local Server* pane to open the wizard.
3. Click **Before you Begin** (if it is not selected by default), review the information, then click **Next**.
4. At the *Installation Type* window, select **Role-based or feature-based installation** and click **Next**.
5. At the *Server Selection* window, select **Select a server from the server pool** and verify the appropriate server is selected. Click **Next**.
6. On the *Server Roles* window, check **Web Server (IIS)**. If a window opens advising that tools are required to manage this feature, click **Add Features**. The window will close. Click **Next**.

7. In the Features window, check the options listed below if they are not already installed.

- In the .NET Framework 3.5 Features section select:
  - ☐ .NET Framework 3.5 (includes .NET 2.0 and 3.0)
- In the .NET Framework 4.7 Features section select:
  - ☐ .NET Framework 4.7
  - ☐ ASP .NET 4.7

- In WCF Services section select: TCP Port Sharing
- In the Windows PowerShell section select:
  - Windows PowerShell 5.1
  - Windows PowerShell ISE
- Select WoW64 Support

Click **Next**.

8. Review information regarding *Web Server Role (IIS)* and click **Next**.
9. At *Select Roles Services* window, check the options listed below if they are not already checked. If a window opens advising other roles services or features must also be installed, click **Add Features**. The window will close.

   Once all specified Roles are checked, click **Next**.

   Web Server section:

   - In Common HTTP Features select:
     - Default Document
     - Directory Browsing
     - HTTP Errors
     - Static Content
   - In Health and Diagnostics select:
     - HTTP Logging
     - Request Monitor
   - In Performance select:
     - Static Content Compression
   - In Security select:
     - Request Filtering
   - In Application Development select:
     - .NET Extensibility 3.5
     - .NET Extensibility 4.7
     - ASP .NET 3.5
     - ASP .NET 4.7
     - ISAPI Extensions
     - ISAPI Filters

   Management Tools section:

     - IIS Management Console
10. Click **Install**.

Once the installation is complete, enter `http://localhost` in web browser address bar to verify that the default IIS website opens.

Installation on a Local Server

A **Local** installation is one where GoldMine Premium Edition and GoldMine Connect are both installed on the same local computer. However, the GoldMine database can be on a different location. Refer to the GoldMine Premium Edition Installation Guide for installation details.

Installation Scenarios

Local Installation (with Remote Database)

Local Installation (on a Single Server)

Installing on a Local Server

The following instructions apply to all compatible servers.

Before installing GoldMine Connect for access to GoldMine Web, ensure that:

- SQL Server is running and GoldMine Premium Edition is installed on the GoldMine Connect server.
- You have added a trusted certificate and configured IIS. For information, see Configuring IIS.

To Install on a Local Server

1. Run the **gmconnect.exe** file to start the wizard.

   If you haven't already installed the **IIS URL Rewrite Module**, the setup wizard will require you to do so.

   Follow the prompts until the module is installed. Click **Finish** and rerun the wizard to begin the GoldMine Connect installation.

a. At the *Welcome* dialog, click **Next**.

b. Accept the license agreement and confirmation options, and then click **Next**.

c. Select an HTTPS host name and port, as well as the IIS certificate you created, and click **Next**. Note that If you have other web applications already running HTTPS on port 443, GoldMine Connect may not work properly when also configured to use port 443. For details about a fix, see the Ivanti community article about Using HTTPS with GoldMine Connect.

d. Review the *Systems Requirements* dialog and click **Next**.

e. Choose the **Complete** installation type, and then click **Next**.

f. Click **Install** to start the installation process.

2. Click **Finish** to complete the installation.
3. Grant the **Users** group permissions to modify the **\ProgramData\GoldMine** directory.
4. On the GoldMine Connect Server, assign the application pool identity.

NOTE: This is required for users to access email attachments and Linked Documents in GoldMine Web.

a. From **Control Panel > Administrative Tools** open **Internet Information Services (IIS) Manager**.
b. Expand **Server** select **Application Pools**.
c. Right-click on **GMMobileAppPool** and select **Advanced Settings > Process Model > Identity** then click the **ellipses** button (...)
d. Select the **Custom account** radio button and click **Set**.
e. Enter a *Windows User name* and *Password* for a user with full access to GoldMine Email attachments and Linked Document. (You may wish to create a new user (**gmconnect**) for this purpose.)
f. Confirm the password and click **OK** on all subsequent dialogs to Save.

5. Restart IIS.
   a. **Start > Run**
   b. Type `iisreset` and click **OK**.

Installation in a Workgroup

A **Workgroup** installation is an accessible server where the **GoldMine Application Server** (installed GoldMine Premium Edition connected to the GoldMine Database) and **GoldMine Connect Server** (installed GoldMine Premium Edition and GoldMine Connect) are installed on separate computers located in the same workgroup. Refer to the GoldMine Premium Edition Installation Guide for installation details.

Installation Scenarios

Workgroup Installation (with Remote Database)

Workgroup Installation (with Local Database)

Installing in a Workgroup

The following instructions apply to all compatible servers installed in the same workgroup.

In this example, the GoldMine Application Server and GoldMine Connect Server are part of the same workgroup, but on different computers in the Workgroup. For additional installation details, refer to the GoldMine Premium Edition Installation Guide.

IMPORTANT: The following steps use **gmconnect** as the user added in each step. If you choose to use a different user name, substitute that name instead of **gmconnect**. Ensure that the user name and passwords you enter, are consistent across all locations where the user is added.

1. On the GoldMine Connect Server, Install GoldMine Premium Edition using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server.
2. Configure IIS on the GoldMine Web Server. For information see Configuring IIS.
3. Install **GoldMine Connect** for access to GoldMine Web.
   a. Run the **gmconnect.exe** file to start the wizard, then click **Next**.
   b. Accept the license agreement and confirmation options, then click **Next**.
   c. Review the *System Requirements* dialog, then click **Next**.
   d. Choose the **Complete** installation type, then click **Next**.
   e. Click **Install** to start the installation process.
4. Click **Finish** to complete the installation.
5. Add a user (e.g, **gmconnect**) at the GoldMine Connect Server to the **Users** group.
   a. **Start > Programs > Administrative Tools > Computer Management**.
   b. On the Computer Management tree, expand **Local Users and Groups**.
   c. Select the **Users** folder, then right click and select **New User**.
   d. Add the **User name** (e.g, **gmconnect**) and a **Password** that you remember.
   e. Click the **Create** button.
6. Add the user (e.g, **gmconnect**) to the GoldMine Connect Server **IIS_IUSRS** group.
   a. On the Computer Management tree, expand **Local Users and Groups**.
   b. Select the **Groups** folder.
   c. In the panel on the right, select the **IIS_IUSRS** group, then right-click and select **Properties**.
   d. Click the **Add** button and add the user (e.g, **gmconnect**) created in the previous step.
   e. Click **OK** and then **OK**.
7. Add the user (e.g., **gmconnect**) at the GoldMine Application Server to the **Users** group.
   a. **Start > Programs > Administrative Tools > Computer Management**.
   b. On the Computer Management tree, expand **Local Users and Groups**.
   c. Select the **Users** folder, then right click and select **New User**.
   d. Add the **User name** (e.g, **gmconnect**) and a **Password** that you remember.
   e. Click the **Create** button.
8. Grant the user (e.g., **gmconnect**) permission to modify the appropriate **~\GoldMine** application folders on both the GoldMine Application Server and the GoldMine Web Server.
9. On the GoldMine Connect Server, assign the application pool identity to the user .

a. From **Control Panel > Administrative Tools** open **Internet Information Services (IIS) Manager**.
b. Expand **Server** and select **Application Pools**.
c. Right-click on **GMMobileAppPool** and select **Advanced Settings > Process Model > Identity** then click the ellipses button (**...**)
d. Select the **Custom account** radio button and click **Set**.
e. Enter a *Windows User name* (e.g. **gmconnect**) and *Password*.
f. Confirm the password and click **OK** on all subsequent dialogs to **Save**.

NOTE: The **User name/Password** combination must be the same in all locations where the User (e.g. **gmconnect**) is added. This user must have full access to email attachments and **Linked Documents** in order for these files to be accessed by GoldMine Web users.

10. Restart IIS.
    a. **Start > Run**
    b. Type `iisreset` and click **OK**.

Installation in a Domain

A **Domain** installation is an accessible server where the **GoldMine Application Server** (installed GoldMine Premium Edition connected to the GoldMine Database) and **GoldMine Connect Server** (installed GoldMine Premium Edition and GoldMine Connect) are installed on separate computers located in the same domain. Refer to the *GoldMine Premium Edition Installation Guide* for further information.

Installation Scenarios

Domain Installation (with Remote Database)

Domain Installation (with Local Database)

Installing in a Domain

The following instructions apply to supported servers in the same domain.

In this example, the GoldMine Application Server and GoldMine Connect Server are part of the same domain. For additional installation details, refer to the GoldMine Premium Edition Installation Guide.

> **NOTE:** GoldMine Connect is not supported for use on Domain Controller, unless the operating system on the Domain Control is "Small Business Edition."

1. On the GoldMine Connect Server, Install GoldMine Premium Edition using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server (refer to the GoldMine Premium Edition Installation Guide).
2. Configure IIS. For information see Configuring IIS.
3. Install **GoldMine Connect** for access to GoldMine Web.
   a. Run the **gmconnect.exe** file to start the wizard, and then click **Next**.
   b. Accept the license agreement and confirmation options, and then click **Next**.
   c. Review the *Systems Requirements* dialog and click **Next**.
   d. Choose the **Complete** installation type, then click **Next**.
   e. Click **Install** to start the installation process.
4. Click **Finish** to complete the installation.
5. Restart IIS.
   a. **Start > Run**
   b. Type `iisreset` and click **OK**.
6. Grant the **Users** group permissions to modify the **\ProgramData\GoldMine** directory.
7. On the GoldMine Connect Server, assign the application pool identity.

   > **NOTE:** This is required for users to access email attachments and Linked Documents in GoldMine Web.

   a. From **Control Panel > Administrative Tools** open **Internet Information Services (IIS) Manager**.
   b. Expand **Server** select **Application Pools**
   c. Right-click on **GMMobileAppPool** and select **Advanced Settings > Process Model > Identity** then click the ellipses button (...)
   d. Select the **Custom account** radio button and click **Set**.
   e. Enter a *Windows User name* and *Password* for a user with full access to GoldMine Email attachments and Linked Document. (You may wish to create a new user (**gmconnect**) for this purpose.)
   f. Confirm the password and click **OK** on all subsequent dialogs to **Save**.

Grant Access to the GoldMine Connect Web Server

Users access GoldMine Web through a web server, which must be accessible from the Internet. By default, the **GoldMine Connect** installer creates the virtual directory **/goldmine**.

- The URL used by GoldMine Web users is specified as **http://*<server-IP-address>*/goldmine/web** (or **https://** if you are using SSL). To use a URL (such as, **mycompany.com**) you must configure the DNS server.

server-IP-address refers to the IP address of the server where **GoldMine Connect** is installed.

Use **https://** only if you are using SSL for a secure connection.

> IMPORTANT: **HTTPS** (HyperText Transfer Protocol Secure) is optional and requires an SSL (Secure Sockets Layer) certificate and configuration in IIS. It is strongly recommended to use HTTPS in order to protect your data and to prevent network sniffing.

In this case, ensure that the following items are set:

- The server has a public IP address that is reachable by the Internet.
- The Domain Name System (DNS) should be able to resolve the web server name to an IP address.
- The web server firewall needs to allow data exchange using HTTP or HTTPS protocols.

> NOTE: For information about setting up your Firewall, refer to the documentation provided by the manufacturer.

Login to GoldMine Web

You are required to login to GoldMine Web or GoldMine Mobile with the same username and password used to log in to GoldMine Premium.

> NOTE: Passwords are sent in encrypted form when using either HTTP or HTTPS. HTTPS provides a higher level of security and also encrypts customer data sent over the network.

To Open GoldMine Web from a Link

If you were sent a link to the URL in a message, follow the steps below.

1. Open the message (email or text) and tap the link.
2. Your default web browser opens to the login screen.
3. Enter your Username and Password and then tap **Login**.

To Open GoldMine Web from your Mobile Phone's Home Screen

1. Tap the **GoldMine Web** shortcut on the Home screen
2. Your default web browser opens to the login screen.
3. Enter your Username and Password and then tap **Login**.

Create a Shortcut on your Mobile Phone's Home Screen

If you do not have a shortcut to GoldMine Web on the Home screen of your mobile device, follow these steps to create one.

> **NOTE:** The shortcut is created from the GoldMine Web Login screen. You must logout before creating the shortcut.

1. Open the GoldMine Web location in your mobile browser.
2. Tap the **Bookmarks** button on the tab bar.
3. Tap **Add to Home Screen**.
4. Enter GoldMine Web (or your desired text) as the title, and click **Add**.

Error Messages and Troubleshooting Logs

After installation and configuration of GoldMine Connect the `GMConnect.log` file is created in the `C:\Program Files (x86)\GoldMine Connect\Logs (64-bit OS)` folder. The Logs folder also contains sub-folders for the Messaging Service, GoldMine Mobile, and GoldMine Web. Each of these sub-folders contain a log file to capture further information about the related functionality. Administrators can use these logs to troubleshoot problems or to provide to GoldMine Technical Support for further assistance.

Logs are set to Info level by default. For more details about information contained in the logs or steps to change the logging level, please see our Knowledge base or contact technical support. See https://forums.ivanti.com/s/ for contact information and options.