

## MasterMine Installation and Getting Started

MasterMine typically installs to your local workstation (the same machine as MSOffice, to which it supplies an add-in). See below for terminal services installations.

### Have ready:

- On your workstation, you should already have Microsoft Windows XP or higher and Microsoft Office 2000 or higher.
- GoldMine need not be installed on your workstation, but you must at least have “write” access to the drive on which GoldMine resides, so that both support files and MasterMine reports can be saved there. In a dBase environment, for example, finished MasterMine reports are written to a “MasterMine” folder within the GoldMine contact set they relate to.
- **Office 2000 or higher:** No special requirements, but it is useful to have MSQuery (a non-standard component) installed for maximum capability.
- **SQL GoldMine users:** For installation, you will need to enter a valid username/password combination for your SQL database that has “write” capability when prompted. For the long run, you may choose to use a read-only SQL login.

### Basic Install:

1. Launch Excel on the local machine, and be sure to resolve any internal Excel issues BEFORE attempting to install MasterMine. In Excel, set macro security to “medium”. Exit Excel before beginning the installation.
2. Log into GoldMine as a user who will use MasterMine.
3. Download MasterMine from the website if you have not already: [www.mastermine.net](http://www.mastermine.net)  
Save the downloaded file to your computer.
4. With local administrator rights, run MM6Install.exe.
5. MasterMine will install all necessary components for you. Choose a location on a local hard drive to install the application. The installer may attempt to launch Excel to remove earlier installations of the MasterMine add-in and to test for the presence of necessary components.
6. When installation is finished, re-log into GoldMine and check one of the following menus for the two MasterMine items, “Open MasterMine Report...” and “Create MasterMine Report”.  

For GoldMine 4.x thru 7.x:	“View” menu
For GoldMine 8.0:	“File” menu
For GoldMine 8.5 and higher:	A taskbar under “MasterMine”
7. Launch MasterMine by selecting “Create MasterMine Report...”. Click “Demonstration Mode” if you do not yet have a license. Create a test report by simply hitting “Finish” without selecting any additional parameters. The resulting report will be a default “Prospect Analysis” overview of the accounts in your database.

Further help with any installation issues can be found in our online knowledgebase at [www.mastermine.net](http://www.mastermine.net) under “Support”. Give us a call toll-free at 877-877-7212 if you have taken the steps above and your install does not look like this.

## Special Installations:

### Adding MasterMine to other users' menus without installing again:

Normally, MasterMine is installed on each users' workstation, and added to each user's menu at that time. To accomplish ONLY the addition of MasterMine items to the menu of a user, do the following:

1. Launch GoldMine under the name of the new MasterMine user
2. In the MasterMine application folder, double-click on "MMconfig.bat" and indicate preferred setup if requested.
3. Re-log into GoldMine as the new user

### Terminal Services:

Install MasterMine on your terminal server as you would any other application. Make sure at install time that the installing user has administrative rights to the GoldMine application folder and its subsidiary folders. Follow the instructions above to add menu items for each user without re-installing multiple times.

Note that MasterMine has only one MMINI.xls file, which holds user preferences, per workstation. In a terminal services environment, all users will therefore have the same preferences set.

### SQL GoldMine with multiple databases

You may wish to use MasterMine with more than one contact set/database combination. To simplify logging into these different SQL databases (e.g. so as not to be asked each time for a SQL username and password), MasterMine allows for storage of multiple sets of SQL parameters in its MMINI.xls file.

Locate this file in the "Support" folder within the MasterMine application folder. Open it using Excel, and go to the GMSQL tab. On rows 2, 3, etc. enter parameters for each different SQL database, then save the MMINI.xls. Now when you launch MasterMine, it will step through these parameter sets and try each one before resorting to a request to user for SQL servername, database, username, and password.

Note that SQL passwords are stored in encrypted form. However, you may enter passwords in normal form for these purposes, and MasterMine will immediately encrypt any password found in the MMINI.xls when it makes use of the database in question.

### Updating Existing MasterMine Installations

Install to the exact same location as the existing application, in order to prevent mismatching with the existing menu calls to the MasterMine application. If you install to a different location, you will need to open users' username.ini files (in the GoldMine application folder) and update paths to the MasterMine.exe file.

### Launching options:

MasterMine can be launched in the "create" or "open" mode from menus or from the GoldMine taskbar (v5.7 or higher) by appending a "/C" or "/O" respectively. Individual MasterMine reports can be launched by using "/l;x:\path\reportname.xls" where the switch is a capital "eye"- semicolon, followed by the path and name of the report you wish to launch.

### More Documentation:

User Manual – see the MasterMine user manual under "Help" in the report creation dialog  
Online – See our online knowledgebase under "Support" at [www.mastermine.net](http://www.mastermine.net)