



*GoldVisionPro*  
*v6*

Installation Instructions

(updated Sept.2007)



# GoldVisionPro Installation Instructions

## Overview:

GoldVisionPro is a comprehensive, full-featured Enterprise Content/Document Management system. It is most effective when used by everyone in an organization. In this way, all information is captured, stored, retrieved and managed in a uniform, reliable manner. After all, *if you can't find your information, then having it is useless.*

## Requirements

GoldVisionPro seamlessly integrates FrontRange's "GoldMine" as its back-end database [both SQL and non-SQL versions]. GoldMine must be at least minimally installed and working properly on your system, in order to install and use GoldVisionPro.

## Program Activation

These instructions will guide you through the entire installation of GoldVisionPro. This is the complete program, not a "limited" evaluation version. This process enables you to auto-generate a request to GoldVision Software to issue a one-time, short-term [30-day] Activation Key, for product-evaluation purposes. This process can also be used to purchase a license and Activation for the program. The program will not function without an Activation Key.

Requests for Activation are processed during normal business hours [MST]. After you receive the Activation Key, these instructions will guide you through the secondary steps for activating/ configuring your system.

## Program Location

GoldVisionPro may be installed on a local workstation; however, it is more commonly installed on a central server, so that it is available to everyone on the network. Installation is primarily 'unpacking' files for storage on the machine, and generally does not require reconfiguration of any existing settings, or interfere with other programs. Even for evaluation purposes, it is recommended that the program be installed on the "central" server/workstation, and evaluated from another workstation on the network. Then when purchased, minimal local installation is required for all other users on the network.

## File Storage

During the normal operation of the program, GoldVisionPro transfers user files to the locations [folders] you designate for long-term storage. In order for users to retrieve files with GoldVisionPro, it is important that this/these primary location(s) are accessible to all the users on the system. As per the instructions below, these folders should be created before installing the program, so that their existence is identifiable when configuring GoldVisionPro.

## GoldVisionPro Installation Steps:

Throughout this process you will need:

- a Windows Username and Password allowing write-access to the Registry
- a GoldMine UserID and Password with “Master” authorization
- access to GoldMine
- access to e-mail
- access to the Internet

The steps involved for complete installation are:

1. Review/Prepare the overall system for installation
2. Download the program from the GoldVision Software website
3. Server-side Installation & Configuration [prior to Activation]
4. Server-side Activation & Authorization [after receipt of Activation]
5. Review/Prepare each Client workstation for installation
6. Client-side Installation & Configuration

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1. Review/Prepare the overall system for installation
    - 1.1. Identify/Create a network-accessible path for GoldVisionPro installation location
    - 1.2. Identify/Create network-accessible path(s) for centralized file storage.
      - 1.2.1. Primary location for general files (e.g., “K:\Files\General”)
      - 1.2.2. Restricted location for sensitive files (e.g., “K:\Files\Restricted”)
    - 1.3. Configure GoldMine, as appropriate [a correctly configured and working installation of GoldMine is required for GoldVisionPro to function. Additional detail for performing these steps is included in the GoldVisionPro v6 Configuration Instructions.]
      - 1.3.1. Confirm the appropriate BDE SHARED MEMLOCATION setting.
      - 1.3.2. Identify/Create a User Defined Field for your Document Title list
      - 1.3.3. For each User, confirm ownership of “New Contact Record Creation”
      - 1.3.4. Confirm “curtaining” of Contact Records with sensitive information, as appropriate.
      - 1.3.5. Identify/Create GM User Groups for restricting access to GVP functions, per your individual preference.
  2. Download the install exe [GoldVisionPro65.exe] (as received from GoldVision Software Corp. site).
    - 2.1. store on server/machine to be used for initial GVP installation
      - 2.1.1. Windows logon must have rights to write to the Registry.
      - 2.1.2. NOTE: server/machine should have access to the primary GoldMine license for initial registration/activation of GoldVisionPro.
      - 2.1.3. When selecting the machine to be used, bear in mind that GoldVisionPro will require that the “VzxServer” (or VzxService) program will always be running on this machine during normal operation.

3. **Server-side Installation & Configuration:** [prior to Activation] This should be the machine that will run the VZXSERVER (or VzxService) program, whether a “server” or just a “workstation”.
- The server process of GoldVisionPro can only be running on one machine on the network.
  - The active machine is configured as the “server” during the Wizard process. While this can be changed, using the designated machine will reduce the need for later re-configuration.
  - Active system safeguards [anti-virus, anti-spyware, etc.] may indicate a false-positive during your installation of GoldVisionPro. See your system administrator for enabling an exception for this application.

**3.1. Run a Windows “System State Backup” and save it to a file on your machine** (using Windows Backup Utility).

**3.2. Uninstall and remove any previously existing version of GoldVisionPro on this machine.**

3.3. Run the install exe for installation on the designated machine.

**3.3.1. Read and accept the License Agreement and ReadMe text files.**

These files describe restrictions on the use of the program and limit liability. You should not proceed without reading these files entirely.

3.3.2. When prompted, select the location for installing the program files. After installation the program files will be located in a “GoldVisionPro” sub-folder.

3.4. The GoldVisionPro Wizard will open when the install program finishes.

Complete Steps 1 through 4 listed on the form, and outlined below:

3.4.1. Step 1: “Start GoldMine”. This will enable GoldVisionPro to “read” the current configuration of your GoldMine setup. Throughout the initial installation of GoldVisionPro you should use a GoldMine UserID with “master” authorization.

3.4.2. Step 2: “Review System Settings”: Identifies/stores GM location/version/license, and on SQL systems, allows entry of the SQL Username and Password.

3.4.2.1. From the “Tools” menu, select “Set [SQL/DBF] Parameters” to identify/confirm GoldMine Contact Set and Database files. [On a SQL system, you will need the SQL database name from the SQL Enterprise Manager.]

3.4.2.2. Select the checkbox for “[SQL/DBF] Backend Active”, and the OK button. The settings will be validated at this point.

3.4.2.3. When prompted for the GoldVisionPro login, use a GoldMine UserID with “master” authorization.

3.4.3. Step 3: “Review Admin Settings”: You can initially accept the program defaults for these settings. You will be prompted to approve adding the GoldVisionPro Taskbar to the GoldMine Taskbar.

3.4.4. Step 4: “License Manager Settings”: This starts the program [VzxLicManager.exe] to generate the Register file needed for Activation.

- 3.4.4.1. You will be prompted to login again.
- 3.4.4.2. Select the “File-Activation-Registration” menu
  - 3.4.4.2.1. Using the button to the right of the Register Code box, browse/select the default “###\*.VZX\_LicReq” file displayed [in the “GoldVisionPro\V6\License” subfolder]. Select the “Open” button to continue.
  - 3.4.4.2.2. At the bottom of the form, select the GoldVisionSoftware hyperlink to request a Trial Activation or Purchase Activation.
  - 3.4.4.2.3. On the web page that opens, if necessary select a new total seat count to include any additional seats that will be needed beyond the GoldMine seat count minimum.
  - 3.4.4.2.4. A one-time TRIAL Activation Key can be requested by selecting the “TRIAL Activation” checkbox.
  - 3.4.4.2.5. Select the “Request an Activation Key” button.
  - 3.4.4.2.6. Complete the information form. A VALID E-MAIL ADDRESS AND COMPLETE CONTACT INFORMATION ARE REQUIRED TO RECEIVE AN ACTIVATION KEY. Select “Submit”.

*NOTE: The request will be processed by the GoldVision Sales Department, during normal business hours. When Activation is approved, an Activation file will be e-mailed back to the sending e-mail address. If you experience any problem processing the License Request, please contact [sales@goldvisionsoftware.com](mailto:sales@goldvisionsoftware.com).*

- 3.4.4.3. Exit the License Manager
- 3.4.5. Step 5: “Review User Default Settings” can be configured now or deferred until after the Activation Key is received. See the GoldVisionPro v6 Configuration Instructions for more details when configuring these settings. Close the Wizard form.

4. **Server-side Activation & Authorization:** [after receipt of Activation] When received, copy the GoldVisionPro Activation file [#####.VZX\_LicAct] to the “\License” sub-folder of GoldVisionPro.

4.1. From the Start-Programs-GoldVisionPro menu, select the “GoldVisionPro License Manager” program, logging in with a “master” GoldMine UserID.

4.2. Register the Activation file.

4.2.1. Select the “Activation-Registration” menu.

4.2.1.1. Using the button to the right of the Activation Code box, browse/select the “#####.VZX\_LicAct” file displayed [in the “\License” subfolder]. Select the “Open” button to continue.

4.2.1.2. Below the Activation Code box, select the “Register GoldVisionPro” button. This will return you to the License Manager form.

4.3. Authorize Users/Machines/Sessions. [Individual users and machines will not be able to start GoldVisionPro until they are “authorized” in this process.]

4.3.1. Select the “Tools - Edit Authorized Users” and “Tools - Edit Authorized Machines” menu items

4.3.1.1. Users and Machines can be selected from the individual “Available” lists and added to [right-arrow] or removed from [left-arrow] the “Selected” lists.

4.3.1.2. Authorization for multiple concurrent sessions can be implemented by selecting the same User or Machine multiple times.

4.3.1.3. Each selection represents a license seat. The available seat limit is displayed at the top of the window. The count of currently selected/assigned seats is displayed at the bottom of the window.

4.4. Designate the machine which will run the GoldVisionPro Server process.

4.4.1. Select the “Server-Server Settings” menu item.

4.4.1.1. If the displayed Server Name is not the machine to be used to run the GoldVisionPro Server process, select the desired machine on the network from the drop-down list.

4.4.1.2. Note the Port Number to be used. By default, this is set to “12399”. This will be the communications port between the user workstation and the “server” process, and so must be available to the program. If a firewall is being used that blocks this port, either enable this port in the firewall, or assign a port here that is already enabled for your system. See your system administrator for these items.

4.4.1.3. Select the OK button when finished.

4.4.2. **ONLY IF YOU WILL BE USING THE VzxServer:** Select the “Server-Install to Startup Folder” menu item. This will start the GoldVisionPro VzxServer process whenever the machine is restarted. NOTE: If you have selected a machine to be the GoldVisionPro Server other than the machine you are currently using, you will need to access this menu while you are logged on to that selected machine. **IF YOU WILL BE USING THE VzxService:** Follow the instructions in the document “*GoldVisionPro VzxServer Instruction*”.

4.5. Exit the License Manager.

- 4.6. From the Start-Programs-GoldVisionPro menu, select the “GoldVisionPro Options Wizard” program.
  - 4.6.1. Click-through the first four steps to reach Step 5.
  - 4.6.2. “Review Default User Settings”: Configure the default User settings; most importantly, enter the primary and secondary “Path Settings” to be used for storing all content/document files that will be managed by the system. **THIS IS A CRITICAL SETTING.**
  - 4.6.3. Select “Close”.
- 4.7. Start the Server process.
  - 4.7.1. **ONLY IF YOU WILL BE USING THE VzxServer:** If the installed machine is the designated server, from the Start-Programs-GoldVisionPro menu, select the “GoldVisionPro VzxServer” program on this machine. [a form should display the message “GoldVisionPro Vzx Process Active”]. **NOTE: THIS PROGRAM MUST BE RUNNING FOR GOLDVISIONPRO TO BE AVAILABLE TO USERS.** If this program is not running, users will not be able to use GoldVisionPro. If this machine needs to be restarted, confirm that this program has restarted as well. **IF YOU WILL BE USING THE VzxService:** Follow the instructions in the document “*GoldVisionPro VzxServer Instruction*”.
  - 4.7.2. If another machine is to be used for the Server process:
    - 4.7.2.1. logon that machine, browse to the GoldVisionPro folder [\\GoldVisionPro\v6] for the following programs:
      - 4.7.2.1.1. run the workstation install [VzxWorkStationInstall.exe]
      - 4.7.2.1.2. start the “GoldVisionPro VzxServer” program on this machine. (See the notes above regarding assuring this program is running.) **NOTE: This process can not be followed when using the VzxService method – it must be installed and run on the machine on which it is installed.**
- 4.8. From the Start-Programs-GoldVisionPro menu, select the “VzxSelect” program, and confirm the program is working properly. Exit the program by right-clicking on the GoldVisionPro “eye” icon in the Windows System Tray, and selecting “Exit” on the pop-up menu. Proceed to installing the client workstations.

5. Review/Prepare each Client workstation for installation:

**5.1. Login to workstation with Windows rights to write to the Registry** (e.g., logon is a member of the Domain Administrator group)

**5.2. Run a Windows “System State Backup” and save it to a file on your machine.**

5.3. Uninstall any existing versions of GoldVisionPro (if they exist).

5.4. GoldMine must be able to be run from the client workstation. GoldVisionPro does not require GoldMine to be running, but must be able to access the GoldMine system. Open and close GoldMine on the workstation to confirm it is available and working properly.

5.4.1. Confirm the BDESHAREDMEMELOCATION setting is correct for this user/workstation. See “Configuring existing GoldMine settings” in the GoldVisionPro v6 Configuration Instructions for details on this issue.

5.5. Confirm that the Primary and Secondary Paths configured for file storage in GoldVisionPro are accessible from this workstation.

5.6. Microsoft Office Considerations:

5.6.1. NOTE: All MSO programs to be configured [Word, Excel, PowerPoint] must have been run at least once since they were initially installed on the workstation. [Certain required files are registered when the MSO programs are run for the first time.]

5.6.2. START EACH MSO PROGRAM AND SET THE SECURITY TO “MEDIUM” BEFORE INSTALLING GOLDVISIONPRO ON A WORKSTATION. If any errors/messages appear when the MSO application starts, resolve these issues FIRST before installing GoldVisionPro. Each MSO application should start cleanly before continuing.

5.7. Any scanners should be installed and working satisfactorily.

5.8. PDF Considerations:

5.8.1. If using Adobe Acrobat as a PDF printer:

5.8.1.1. in Printers, right-click on “Distiller” [up to v6, or “Adobe PDF” for v6+], select Printing Preferences – PDF Settings – **Uncheck** “Do Not Send Fonts to Distiller”.

5.8.2. if using PaperPort:

5.8.2.1. in Printers, right-click on PaperPort PDF, select Printing Preferences – Destination - set Naming Method to Autodefault; and set the path to the PDF Temp folder [“\GoldVisionPro\V6\PDFTemp”] under the GoldVisionPro Program folder.

6. **Client-side Installation & Configuration:** Client installation is relatively minimal, and designed to facilitate future upgrades/fixes without requiring local re-installation. This is further enabled by using the VzxSelect options, discussed in the “Configuration Instructions” manual.

- Active system safeguards [anti-virus, anti-spyware, etc.] may indicate a false-positive during your installation of GoldVisionPro. See your system administrator for enabling an exception for this application.
- NOTE: for Terminal Server, logon w/ TS Administrator rights, use "Add Remove Programs" to run the first GVP install on that machine.

6.1. On each client machine, browse to and run the workstation install [VzxWorkStationInstall.exe] program in the GoldVisionPro folder on the central machine.

6.1.1. Select the “Setup Workstation” button

6.1.1.1. registers system dll and ocx files to the local machine

6.1.1.2. runs the MSO Installer

6.1.1.2.1. registers and installs VzxCOMaddin dll [MSO 2000+] or

6.1.1.2.2. copies VzxAddInStart files to startup folders [MSO < 2000]

6.2. Start the local GoldVisionPro session [NOTE: The GoldVisionPro MSO Add-Ins will not load without GoldVisionPro running.]

6.2.1. From the Start-Programs-GoldVisionPro menu, select the “VzxSelect” program to start GoldVisionPro.

6.2.1.1. Login the local User [this creates the individual user’s INI file]

6.3. Start each MSO program to authorize the GoldVision Software security certificate for Word, Excel PowerPoint. See “Configuring Microsoft Office Certificate Acceptance” in the GoldVisionPro v6 Configuration Instructions for details on this issue.