

MigrateAdmin[™]
ASDS COMPUTER

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MigrateAdmin



Welcome to MigrateAdmin. Want to Get Your Conversion Right the First Time?
MigrateAdmin will do the job.

System Requirements

- Computer with a Pentium III or better processor.
- Microsoft Windows 2000, XP or 2003.
- ACT! 2005 Standard or Premium.

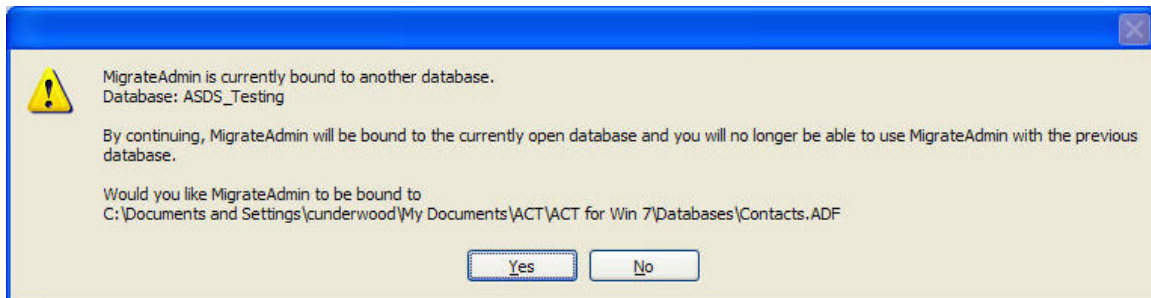
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Getting Started

Launching MigrateAdmin

Once MigrateAdmin is installed it is launched from inside of ACT!. To launch MigrateAdmin, go to **File > MigrateAdmin**. You will typically get the screen below or something similar if it is the first time you have launched MigrateAdmin or if you have switched databases.

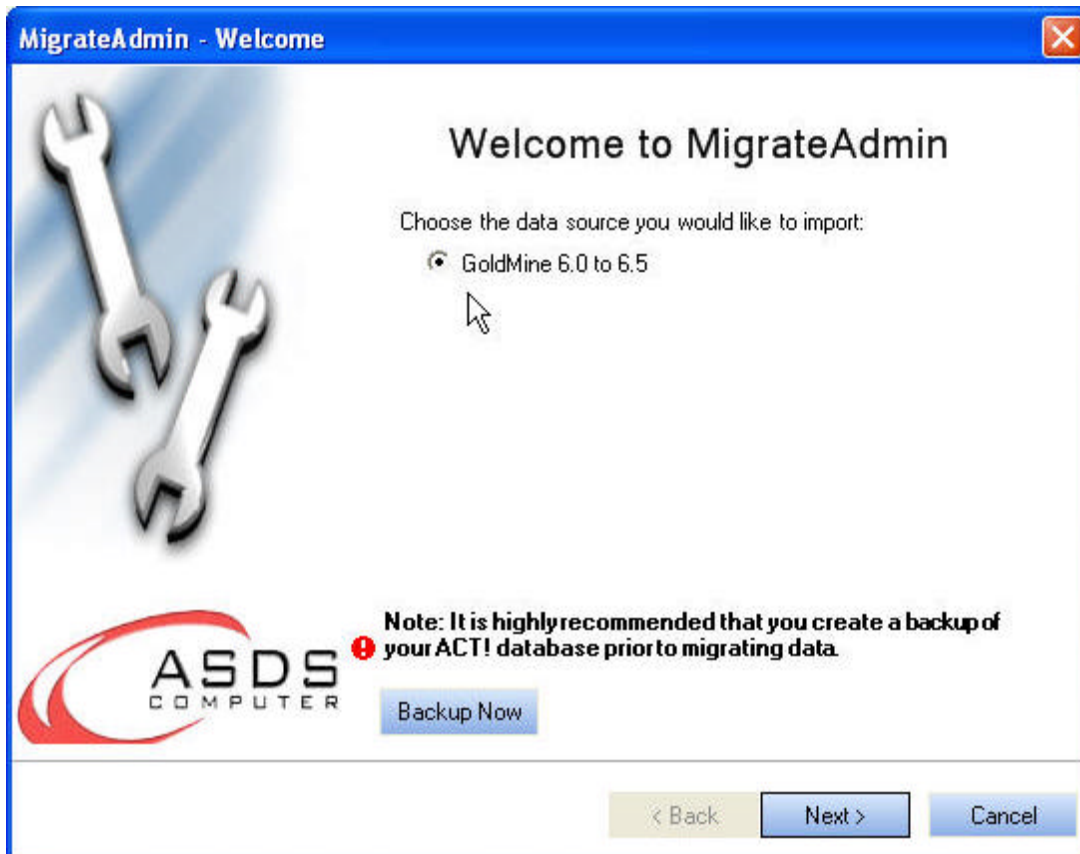


If you are in the database that you would like to migrate contacts into, click **Yes** to link MigrateAdmin to the database you have opened.

Goldmine Conversion Wizard

Choosing the Data Source

The first step in migrating data into ACT! 2005 is to choose your data source. The screen below shows the box in which you choose your data source.

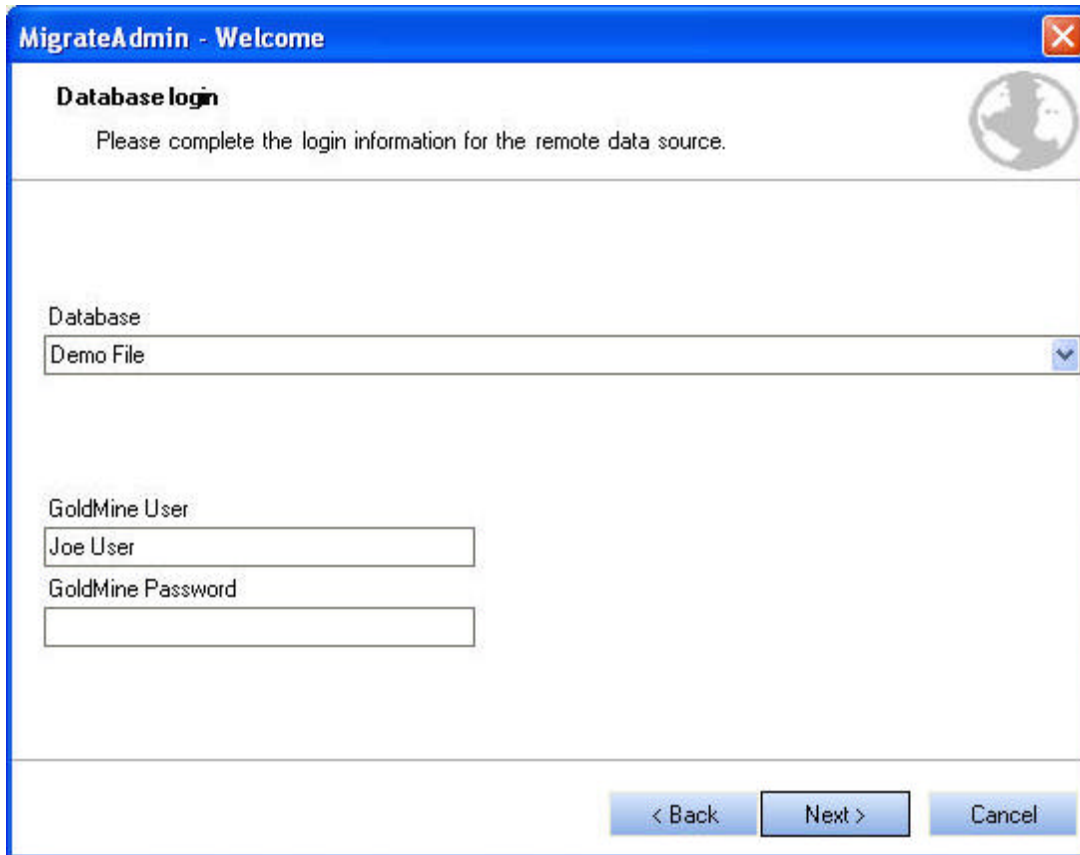


Additional Options to Consider:

"Backup Now" button - This will allow you to create a complete backup of your ACT! database prior to migrating your data into ACT!.

Logging Into the Data Source

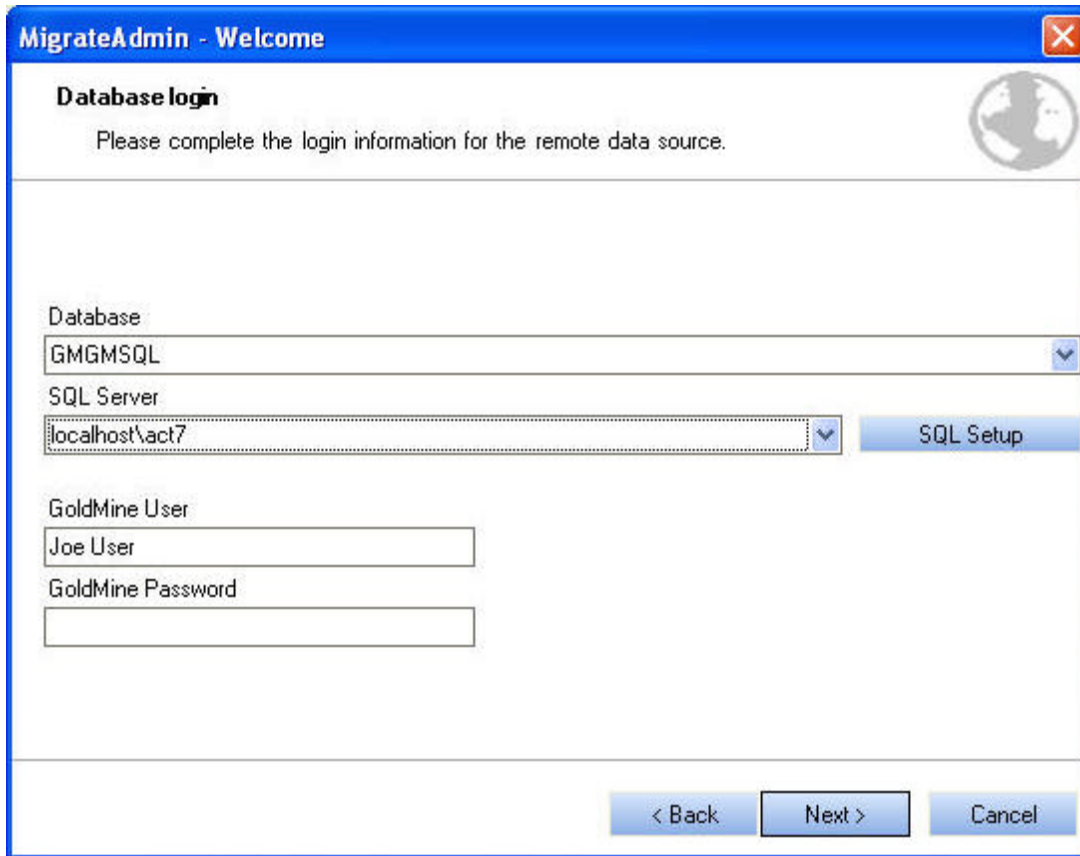
The next step in the migration process is to log into your data source. You will be presented with the following screen in which you can log into the data source.



The screenshot shows a window titled "MigrateAdmin - Welcome" with a close button in the top right corner. The main content area is titled "Database login" and includes a globe icon. Below the title, there is a prompt: "Please complete the login information for the remote data source." The form contains three input fields: a dropdown menu for "Database" with "Demo File" selected, a text box for "GoldMine User" containing "Joe User", and an empty text box for "GoldMine Password". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

Logging into a SQL Data Source

If you are using a SQL based database in Goldmine, you will be presented with the following screen once you choose the SQL database from the Database drop down list. You should choose the SQL server that houses your database.



The screenshot shows a window titled "MigrateAdmin - Welcome" with a close button in the top right corner. The window contains a "Database login" section with a globe icon and the instruction "Please complete the login information for the remote data source." Below this, there are several input fields and buttons:

- A "Database" dropdown menu with "GMGMSQL" selected.
- An "SQL Server" dropdown menu with "localhost\\act7" selected.
- A blue "SQL Setup" button to the right of the SQL Server dropdown.
- A "GoldMine User" text box containing "Joe User".
- A "GoldMine Password" text box that is currently empty.

At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

SQL Setup Button

This button will contain the server information that will be used to log into the server. You must fill out this information in addition to logging into the data source. Use the option of "Use Integrated Security" if you have configured your SQL server to do so. Here is an example of what you will see when pressing the SQL Setup button:



The screenshot shows a dialog box titled "SQL Setup" with a blue border and a close button in the top right corner. The dialog contains the following fields and controls:

- SQL Server:** A text box containing the value "localhost\act7".
- Use Integrated Security:** A checked checkbox.
- Server User ID:** An empty text box.
- Server User Password:** An empty text box.
- SQL Database:** A text box containing the value "GMSQL".
- Buttons:** "Cancel" and "OK" buttons at the bottom.

Specifying the Record Types

Next you will need to specify the record types you will be migrating into your ACT! 2005 database.

"Contact Records" - Imports Goldmine account records primary and secondary contacts as ACT! contacts.

"Company Records" - Imports accounts from Goldmine and brings them in as companies in ACT!.

"Group Records" - Imports groups from Goldmine and brings them in as groups in ACT!.

The screen below shows the box in which the record types are chosen.

MigrateAdmin - Specify Import

Specify the record types to import

GoldMine 6.0 to 6.5 databases can contain the following record types. Place a check next to each you would like to import.

<input checked="" type="checkbox"/> Contact records	<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Histories	<input checked="" type="checkbox"/> Attachments
	<input checked="" type="checkbox"/> Sales	<input checked="" type="checkbox"/> Activities	
<input checked="" type="checkbox"/> Company records	<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Histories	<input checked="" type="checkbox"/> Attachments
	<input type="checkbox"/> Sales	<input type="checkbox"/> Activities	
<input checked="" type="checkbox"/> Group records	<input type="checkbox"/> Notes	<input type="checkbox"/> Histories	<input type="checkbox"/> Attachments
	<input type="checkbox"/> Sales	<input type="checkbox"/> Activities	

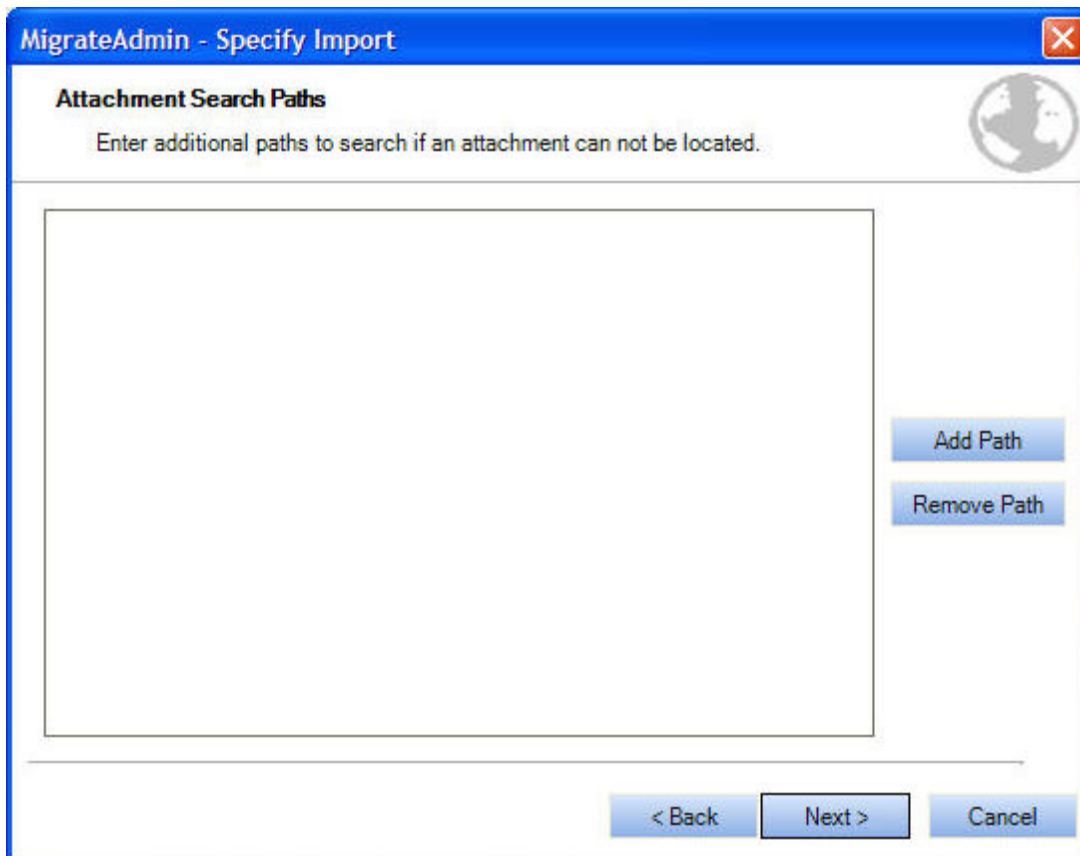
< Back Next > Cancel

NOTE: By placing your mouse cursor over the various items such as "Notes", "Histories", etc. you will see what data in Goldmine is being migrated. In addition only the items that are available to migrate into ACT! will be highlighted.

Additional Attachment Paths

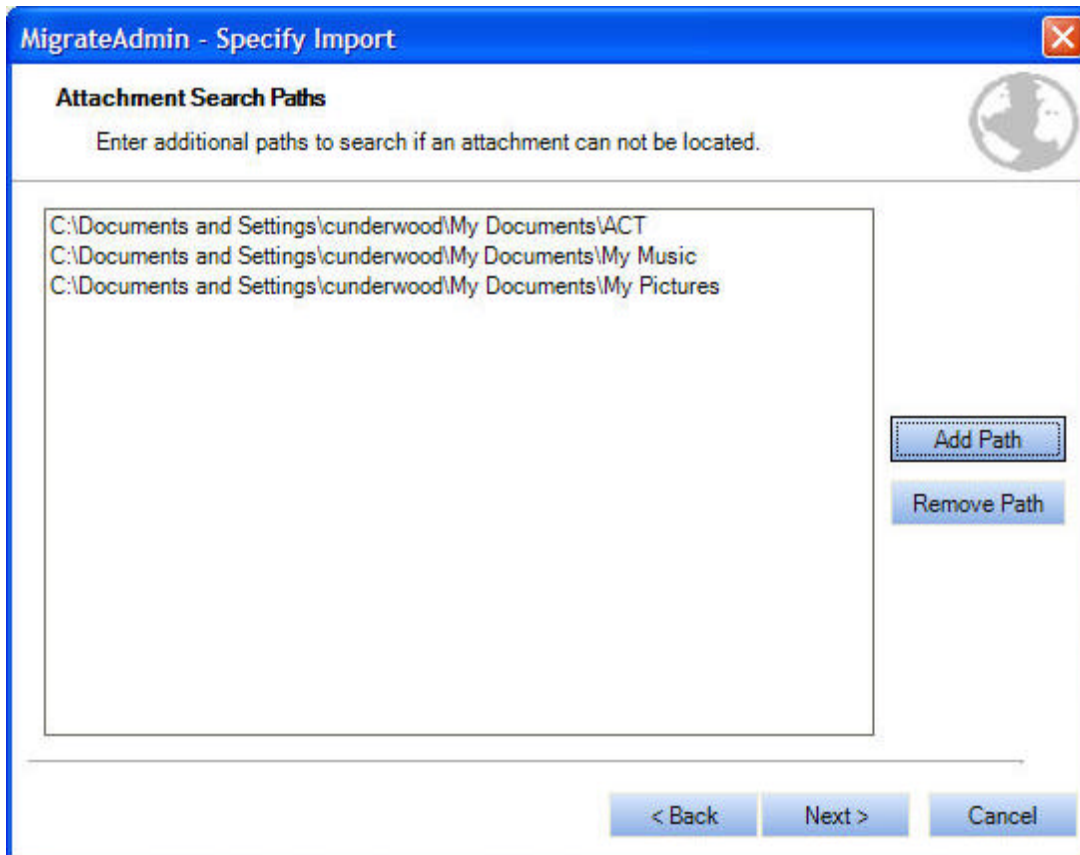
One of the most common issues with migrating data from GoldMine into ACT! is the loss of attachments. This is due to the attachments being in various locations on your computer. To solve this problem, you can now add these additional file locations for MigrateAdmin to search.

When you check the selection for "**Attachments**" you will be presented with the "Attachment Search Paths" dialog box as seen below. This will allow you to select multiple locations where MigrateAdmin should check for attachments to migrate into ACT! 2005.



By clicking "**Add Path**" you will be presented with a standard dialog box to search your computer for various folder locations. You will navigate through this box and select your multiple file locations.

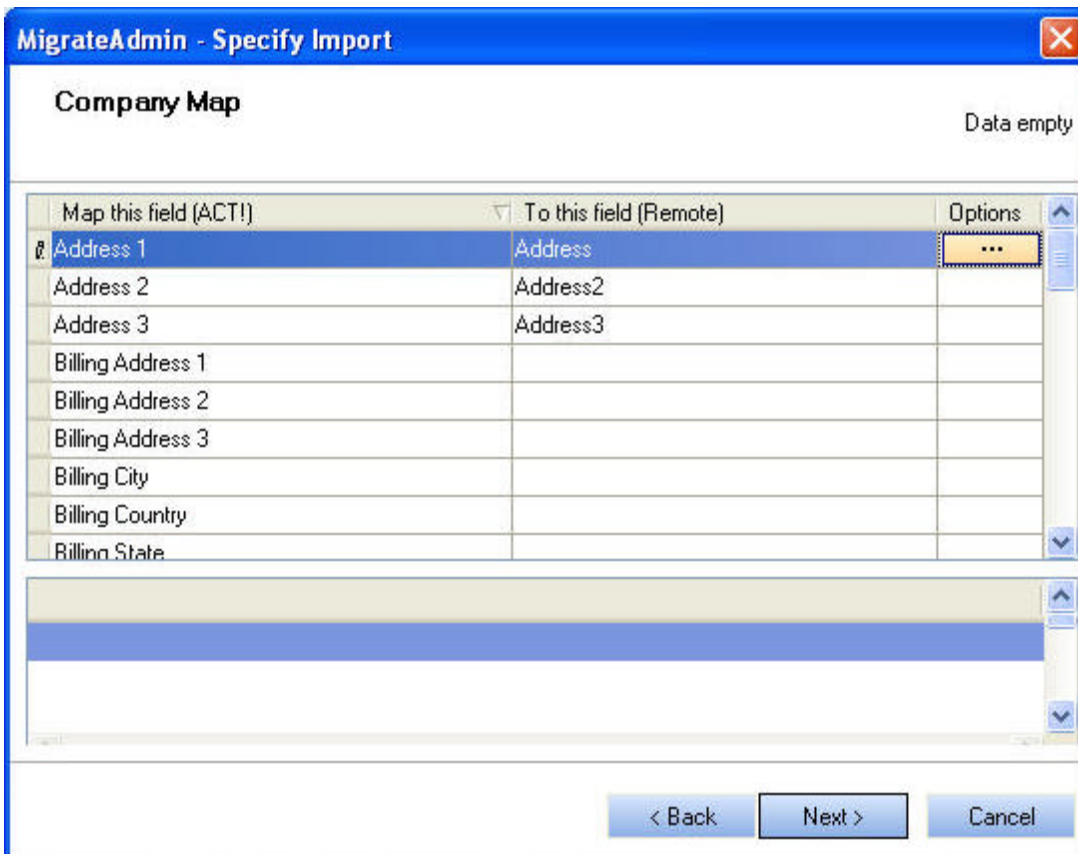
Below is an example of several paths added to the "Additional Search Paths" box. When you are finished adding your additional paths you will choose the "Next" button.




Mapping Data

Now you will need to map your data from Goldmine into ACT! 2005. You will use the mapping boxes as shown below. There will be some fields mapped by default. In addition, field names that match will be mapped by default.

NOTE: There will be three mapping boxes total. One for Company, Contact and Groups. When you are finished mapping fields for "Company", you will click the "Next" button to proceed to the next map screen.



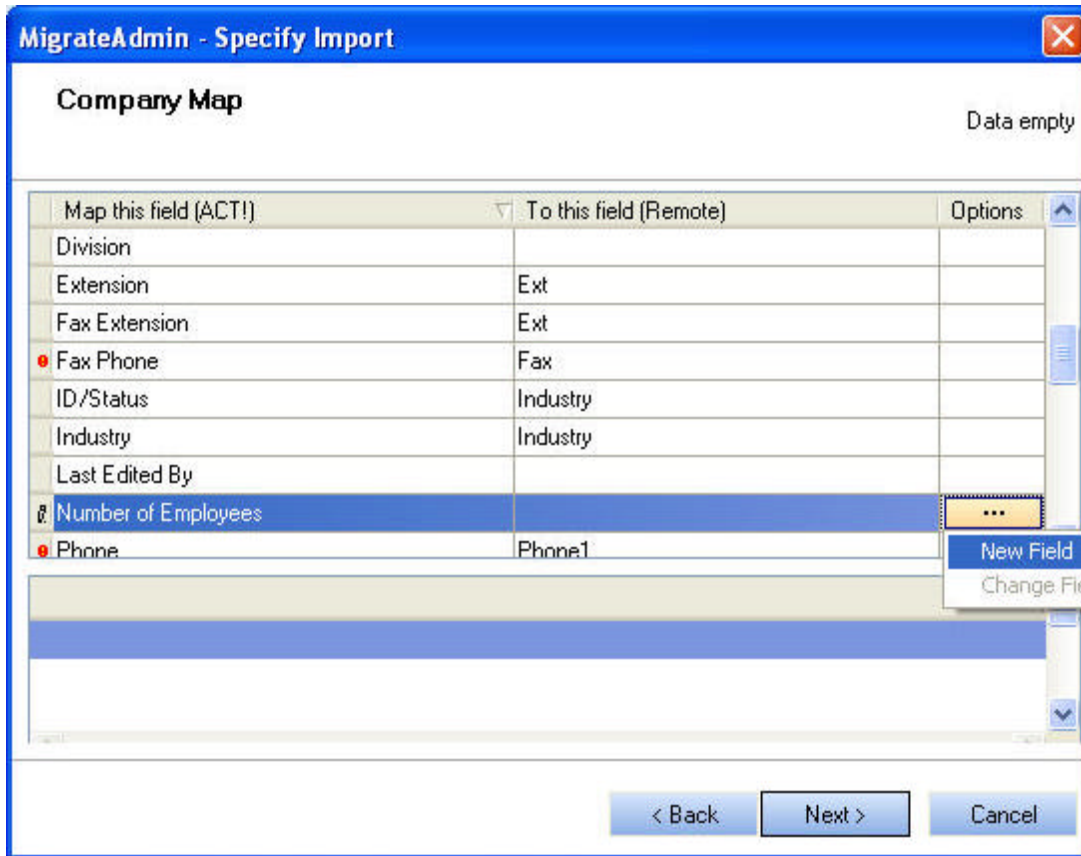
During the mapping process you may come across warnings messages. These warnings can include destination fields not being long enough, or mismatched field types etc. When this occurs, you will see a  red circle with an exclamation point in the "Warning" column. By holding your mouse over the red circle you will see the problem. See the example below.

MigrateAdmin - Specify Import

Company Map Data empty

Map this field (ACT!)	To this field (Remote)	Options
Division		
Extension	Ext	
Fax Extension	Ext	
Fax Phone	Fax	...
ID/Status	Industry	
<div style="border: 1px solid black; padding: 2px;"> ✘ The field types are not the same. Some data may not convert correctly. </div>		
Last Edited By		
Number of Employees		
Phone	Phone1	

During the mapping process, you may find that you need to create a new field in ACT! or change the length of a field already in ACT! to accommodate the data coming in. The "Options..." area on the map will allow you to do this. See the example below:

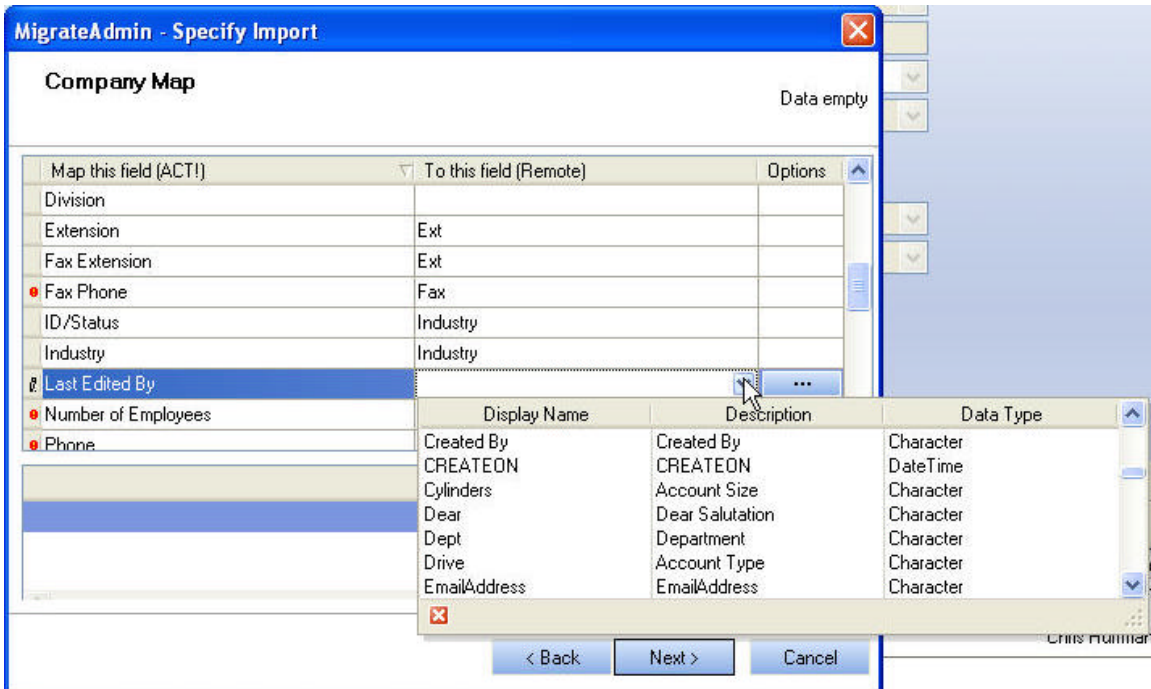


IMPORTANT Information Regarding Notes, Activities, Attachments, Sales and Histories

These items are mapped by default to the proper locations in ACT!. You may see some of these items listed in the mapping screen with nothing to map to. You DO NOT need to map these in order for them to convert. They are processed automatically.

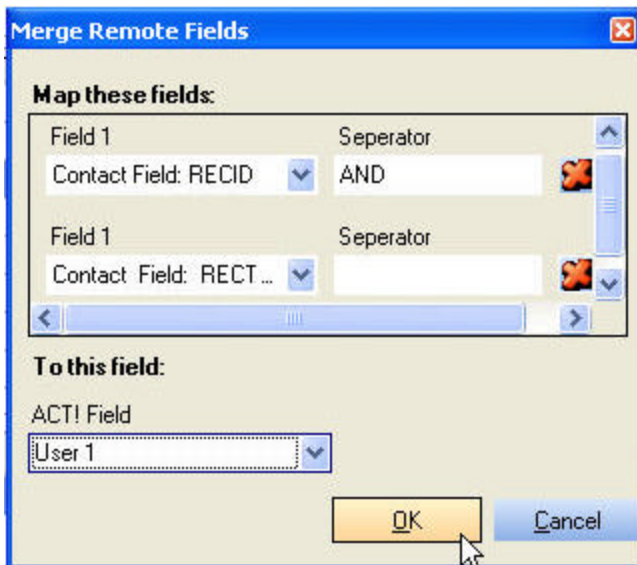
Other Tools using during the mapping process

When clicking into the "To this field (Remote)" box to choose which field in Goldmine to map to your field in ACT!, you will see the screen below appear. This allows you to see what data type and the description of the field is in Goldmine to ensure you are picking the correct field to map.



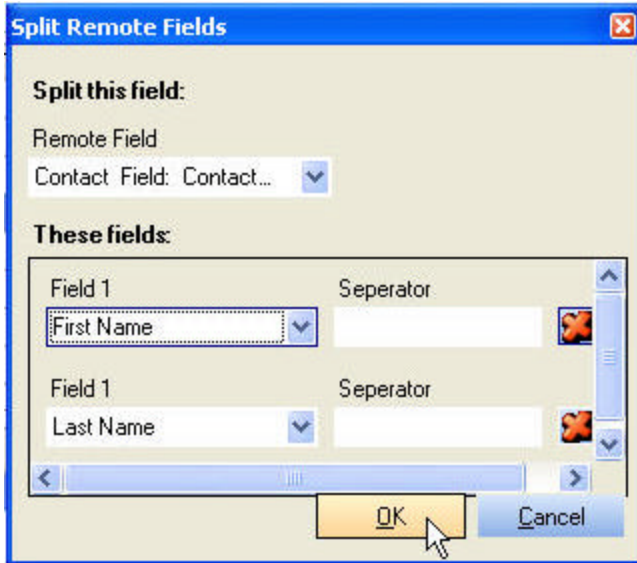
Merging multiple fields from Goldmine into a single field in ACT!.

One selection from the "To this field (Remote)" box that you may need to use is "*Merge Field". This box will allow you to take multiple fields from Goldmine and merge them into a single field in ACT!. Below you will see the "Merge Remote Fields" box.



Splitting one Goldmine field into two ACT! fields.

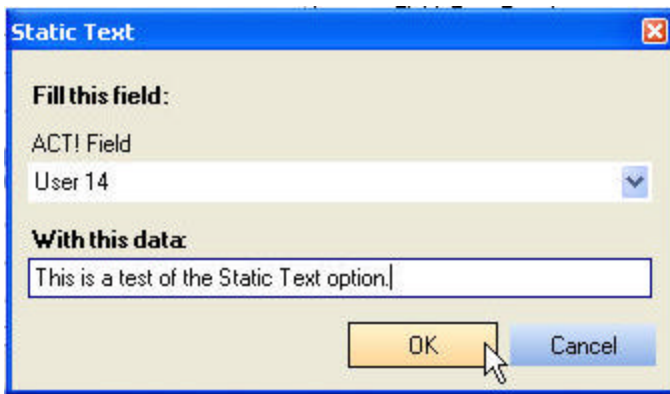
Another selection from the "To this field (Remote)" box you may need to also use is "*Split Field". This will allow you to take a single field from Goldmine and split it into multiple fields in ACT!. Below you will see the "Split Remote Fields" box.



NOTE: The Separator is what is between the data in Goldmine. For our example above, we choose to split the "Contact" field in Goldmine to the "First Name" and "Last Name" fields in ACT!. So the separator in Goldmine would be a space between the first and last name. To enter a space in the separator box, just click into the separator box and hit your spacebar.

Entering Static Text into an ACT! field during the migration.

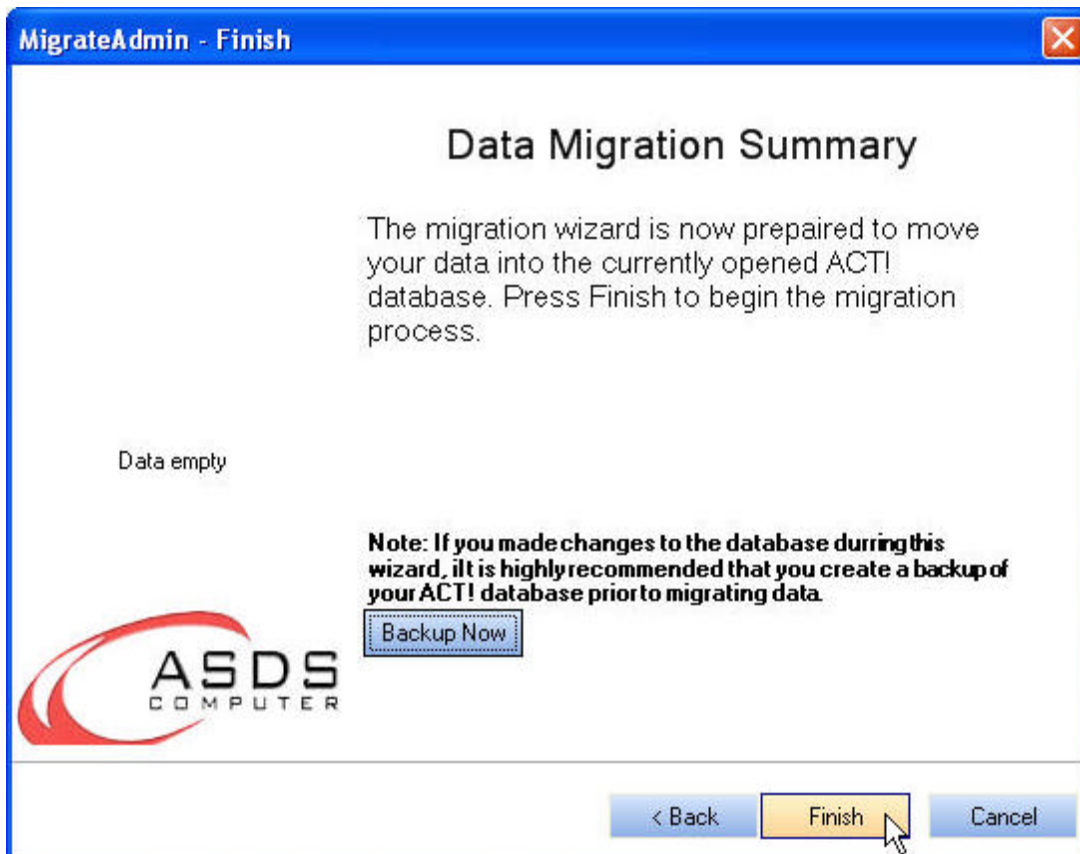
Another selection from the "To this field (Remote)" box you may need to also use is "*Static Text". This will allow you to choose a field in ACT! and input a string of text into this field during the migration.



This as well as the tool mentioned above may only be necessary if your data structure requires it.

Finalizing the Conversion

The last step in the process is the "Data Migration Summary" screen. By clicking Finish this will process the migration and after it is completed your Goldmine database will be migrated into ACT! 2005 based on the mapping and the settings you chose throughout the migration process. This final screen also gives you the opportunity to backup your database prior to doing the migration. If you have made changes to the ACT! database or this is not a brand new database you may want to consider doing a backup.



Migration Error Log

Viewing the Migration Error Log

When the migration is completed you will be prompted to view the migration error log. It is highly recommended to open this log and look through it. This will give you insight to things you may notice post migration. If you choose "No" to viewing the error log you can go back and look at it later by browsing to the following location:

NOTE: This is assuming you have ACT! installed to the default folder location.

C:\Program Files\ACT\ACT for Win 7

The error log is titled "ASDSMigrate.log"

NOTE: If you need to call into Technical Support regarding issues with the data migration, you will be asked to provide support with your error log.

Troubleshooting

Where do I map my Notes, Histories, etc.?

IMPORTANT: Information Regarding Notes, Activities, Attachments, Sales and Histories

These items are mapped by default to the proper locations in ACT!. You may see some of these items listed in the mapping screen with nothing to map to.

You DO NOT need to map these in order for them to convert. They are processed automatically.

Technical Support

Contact Us

Technical support is available by visiting the ASDS Computer Co. Website. We offer several services to meet your technical support needs. Please visit us today!

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