Installing Contact Management Database

Setup Instructions for Single-User and Multi-User Access.

You may choose to install the **Contact Management Database** for use by a single user, or for shared use by a number of users who all have access to a common network drive/folder.

If you have previously installed **GI Contact Management,** ensure you have made a back up copy of the data table file '**Contact Management BE.mdb'** before continuing. (Note* depending on your computer settings file extensions might not be displayed in which case you may see the file name as '**Contact Management BE**' instead of '**Contact Management BE.mde**')

Single User Access

Follow this process to set the database up for a single user:

1. Double click the *'Contact Management.zip'* file to access the zipped files
2. Double click the *'Setup'exe'* file and when prompt, click 'Next'
3. After reading and agreeing to the End User's Licence Agreement, click 'Next' > 'Next'
4. Click the button to the left of 'Typical' and then click 'Install'

Start the database from the shortcut provided on the desktop or the shortcut in the 'Start' menu.

Multiple User Access

There are two methods that will provide shared access to the database for two or more simultaneously users. In both cases all users who will be operating the database MUST have full read / write / update / delete permissions to the folder containing the database and/or the database data tables.

Method 1

The first method is to simply install the database in a folder on you network server. (Note** the folder in which the database is installed but be identically mapped on each user's computer.)

1. Before installing the database create a folder in a shared network location.

2. Run the installation process as outlined under single user, with the following exception

3. On the 'Setup Type' page, click the button beside the 'Custom' install option.

4. Use the browser button to navigate to the shared folder you created on the network and then click 'OK'

5. Continue by clicking 'Next' and then 'Finish' to complete the installation.

Other users can now access the database by creating a shortcut on their desktop to the *'Contact Management.mde'* file in the folder where you installed the database and start the database by clicking on the shortcut.

Method 2

Method 2 provides a more efficient way of providing multi-user access to the database. To employee this method each user firstly installs the database on their local computer and then deletes the local data tables and attach to a set of shared data tables on the network.

1. Before installing the database create a folder in a shared network location.

2. Run the installation process as outlined under single user.

3. After the database has been installed, and before starting the database use windows explorer (or My Computer) to navigate to the folder *"C:\Program Files\GI Contact Management"*

   a. **If you are the first to install the database** then 'MOVE' the file named '*Contact Management BE.mdb'* to the shared folder that you created on the network.

   b. **If the database has previously been installed** then simply delete the file *'Contact Management BE.mdb'*file.

4. Close Windows Explorer / My Computer

5. Start the Contact Management Database from the icon on your desktop

6. Read and indicate you agreement to the EULA by clicking the 'Accept' button

7. 'Click 'OK' when informed that the database can not locate the data tables.

8. Click the browser '…' button on the 'Checking Data Connectivity' form, and navigate to the network folder where you relocated the data tables, select the *'Contact Management BE.mdb'* file and click 'OK'

9. Click the 'Attach' button

After a few moments the database will be ready for use.