

## **GOLDMINE SYSTEM ADMINISTRATOR TRAINING**

### **CLASS OUTLINE**

#### **SYSTEM CUSTOMIZATION**

##### **DATABASE MANAGEMENT**

- TABLE STRUCTURE
- CUSTOM FIELDS, VIEWS & LABELS
- MANAGING FILED & RECORD LEVEL SECURITY
- MANAGING FIELD LOOKUP LISTS
- EFFECTIVE USE OF DETAIL FIELDS (MANY-TO-ONE)
- CREATING FIELD RELATIONSHIPS – LOOKUP.INI

##### **TASKBAR & TOOLBAR CUSTOMIZATION**

- CREATING / MODIFYING TOOLBARS & ICONS
- CREATING / MODIFYING TASKBARS & ICONS
- GLOBAL VS. PERSONAL TASKBARS
- RELATIONSHIPS – REFERRALS VS. ORGANIZATION TREE

#### **SYSTEM ADMINISTRATION**

##### **USER ADMINISTRATION**

- ADDING/REMOVING USERS
- SETTING USER SECURITY
- CUSTOMIZING USER SETTINGS & PREFERENCES
- HOW THE USER.INI FILE WORKS

##### **DATA INTEGRITY MANAGEMENT**

- DATA IMPORT / EXPORT
- MERGE/PURGE DUPLICATE RECORDS
- ADVANCED GLOBAL REPLACE
- TERRITORY REALIGNMENT

#### **SETTING UP USER TOOLS**

##### **OFFICE ADD-INS**

- WORD ADD-IN
- EXCEL ADD-IN
- OUTLOOK ADD-IN

##### **OTHER**

- SETTING UP GOLDMINE EMAIL
- GM+ VIEW
- WEB IMPORT (GENERAL OVERVIEW)