

Administration

Course Outline for ACT! 6.0

Database Creation & Design

Installation & Database Creation

- ◆ Installing ACT!
- ◆ Acquiring the Latest Updates
- ◆ Database Creation & Deletion

User Management

- ◆ Adding Users
- ◆ Deleting Users
- ◆ Editing an Existing User

Field Customization

- ◆ Adding Fields to the Database
- ◆ Editing Field Attributes
- ◆ Managing Drop-Downs
- ◆ Deleting Fields From a Database
- ◆ Creating Custom Indexes

Layout Customization

- ◆ Opening the Layout Designer
- ◆ Managing Tabs & Fields in a Layout
- ◆ Adding Objects to a Layout
- ◆ Changing The Appearance of Objects
- ◆ Setting Field Entry Order

Setting Preferences

- ◆ Setting General Preferences
- ◆ Setting Color & Font Preferences
- ◆ Setting Calendar Preferences
- ◆ Setting Scheduling Preferences
- ◆ Setting Email Preferences
- ◆ Setting Names Preferences
- ◆ Setting Startup Preferences

Importing & Exporting

- ◆ Controlling Duplicate Merging During Imports
- ◆ Importing a Text File
- ◆ Importing Palm Desktop Data
- ◆ Importing Outlook Data
- ◆ Exporting Contact Data

Administering an ACT! Database

File & Directory Structure

- ◆ Identifying ACT! Database Files
- ◆ Identifying ACT!'s Folders

Database Maintenance

- ◆ Compressing & Reindexing
- ◆ Cleaning Up Old Data
- ◆ Scanning for Duplicates
- ◆ Backing Up a Database
- ◆ Restoring a Database
- ◆ Setting Maintenance Reminders

ACT! Diagnostic Tool (ACTDIAG)

- ◆ Running the ACTDIAG
- ◆ Undeleting Records
- ◆ Resetting Options & Window Positions
- ◆ Running a Database Quick Check
- ◆ Scanning & Repairing a Database
- ◆ Backing Up the ACT! Registry
- ◆ Database & System Reports

Troubleshooting

- ◆ Using the ACT! Knowledge Base

Using Sample Administrator Documents

- ◆ Workstation & Network Recommendations
- ◆ Sync & Maintenance Procedures
- ◆ ACT! Crash Reports
- ◆ Sample Company ACT! Policy
- ◆ Data Entry Guidelines
- ◆ Tips for Speeding Up an ACT! Database
- ◆ Opportunistic Locking
- ◆ Administrator Training Pre-Class Skills Assessment

Course Prerequisites:

Advanced knowledge of ACT! is assumed for this course. Students should have mastered all end-user features of the product and should have an advanced knowledge of general computing and troubleshooting.