

GEM – GETTING STARTED, THE EASY WAY

Before Installation

Watch Video on website or CD. To view on CD prior to installation:

Double-click: **D:\Videos\GEM Brief Overview.exe**

To Pause/Restart the video, just press the spacebar. Use a right mouse click to see other commands.

OR:

Read 'System Overview' on website or in booklet that comes with CD.

Installation

Either download & install software for FREE or purchase a CD from www.GEMnetworking.com.

To install from the CD simply insert it into your DVD/CD Drive. It should start automatically. Just follow the on-screen instructions. Both will also install a video and User Manual on the Windows Start Menu. If it fails to start run **D:\Setup.exe** where D: is the letter of your CD Drive.

Getting Familiar

Watch Video on the Start Menu, if not already seen on CD or website.

Run GEM Networking for first time. Activate when requested. This also identifies you or your Organisation as the 'Owner' of your system and sets you up as an 'Administrator'. Install it as a 'Stand Alone PC' or 'Server' for the trial period. (Either can be used as a 'Server' later on if you wish.) Login as yourself - your password will have been set to 'Password' by default.

Input User's Details Enter the Names and contact details of any other People you want to use the system. They must be setup either as employees of the Owner, or they must live at the same Address.

Run GEM Administration on the Windows Start Menu.

Login as yourself - your password will have been set to 'Password' by default.

Select **User Management, User Accounts, Add**. Then use 'ADD New User' Wizard to add all the other people entered earlier as 'Users'.

Use Trial Data to familiarise yourself with the system.

Work your way through the functionality outlined in the 'System Overview' and the 'Introductory Training Modules' that will be E-mailed to you. Use the trial data that came with the system as it is much easier to understand how a system works when it has a reasonable amount of data in it and the exercises in the 'Introductory Training Modules' also use this data. (If you're in a real hurry they can now be downloaded from www.GEMnetworking.com/downloads/download-centre too.)

Press F1 for HELP - when required. Or refer to User Manual, which is on the Start Menu. It's also in:

D:\GEM User Manual.pdf so can be viewed prior to installation if required.

You will need a copy of Adobe Acrobat Reader on your computer to be able to view and print the manual.

In case you don't have it on your machine already, we have included one in:

D:\Install\Adobe Acrobat Reader V6.exe

To install double-click file and follow the on-screen instructions.

Starting to Use

Clear Trial Data before you want to add any significant quantity of your own data. Otherwise you will lose it when you do! When ready run GEM Administration on the Windows Start Menu:

GEM Administration, Registration, Clear All User Data

Extend Own Use as it is now safe to add as much of your own data as you like, you can give the system a really thorough work out. Once you are happy with the functionality of the system for your own use:

Register System

Use **GEM Administration, Registration, Registration**. This is required if you want to keep your system beyond the end of your 30-day trial period – even for a FREE Personal Version.

Once you have successfully registered your system you will be able to use GEM Administration to:

Create Automated Backup to protect your precious data.

Setup Replication so that selected notebooks can still have access when out of the office.

Additional Setup Tasks

There are some additional setup tasks you may want to do. Unlike those above, these can be done prior to Registration if you wish. You may never have need for some of them, but it's nice to know they are there - just in case.

If you are running your own stand alone system, or are an Administrator of a networked system, we suggest that you have a look at each of these sometime just so you know what's possible.

Since most of these are done with Wizards you can probably accomplish most of these just by reading on-screen information if puzzled read the User Manual or use F1 for HELP.

GEM Administration program on the Windows Start Menu can:

Import Data from multiple data sources without duplicating records

(Please read the instructions in User Manual or work your way through 'Introductory Training Module' on subject first.)

Add an Owners Logo for printing on reports etc

Setup Menu in GEM itself enables you to setup:

WORD Templates for use with E-mails, Faxes and Letters.

If you are not used to Microsoft Templates read User Manual first or work your way through 'Introductory Training Module' on subject first.

Password-Protected User Signatures so they can be used to sign documents

Categories if you want to setup your own set of 'Hierarchical Categories' to enable you to record:

- Skill levels
- Sales Processes / Pipelines
- or anything else you can think of.

Calling Cards can help you save up to 60% on long-distance Phone Calls.

Others that you are less likely to use are:

Define Hours Worked by Users if needed for Projects.

Diary Note Contact Types Add your own.

First Names These are 'learnt' by the system as you add new ones.

But you might need to use this to remove spelling mistakes.

Countries GEM already knows all of these - but we could get more in future.

States or Counties are already in for Australia, Canada, UK, USA and NZ.

Towns or Cities already in for major Cities in World and all of NZ.

Entity Types change their behaviour.

Relationship Types add your own.

Lookup Types even all the little lists GEM uses - can be modified if needed.

System Parameters modify behaviour of system.