

# ACT!2005 Layout Manager

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## Installation and Usage

ACT!2005 Layout Manager automatically changes the layout for the Contact Detail, Company Detail and Group Detail views in ACT!2005, based on the value in the selected field on the current record.

Using the Preferences window, you determine which field should be used in each ACT! Detail view to control which layout is shown, and the default layout to use when the selected field doesn't match any available layout. Layout Manager takes over, and as you move from record to record, the layout automatically changes.

Each user can specify which field controls their view of the data in each database, providing complete flexibility and control over who sees what, and how they see it.

Now the Finance department can immediately see if the contact they are viewing has a good or bad credit rating, and have different fields displayed and available for editing. The Sales department can immediately see whether the company has a high or low revenue potential. The Support department can immediately see whether the contact they are viewing has an open issue and see different fields for opening a new "ticket" or updating and existing one.

You get complete control over the what you see and how you see it, making ACT! easier, faster and more informative.

(Please refer to the ACT!2005 documentation for more information on designing and saving layouts.)

## Installation

1. Shut down all running programs.
2. Run **Install\_LayoutManager.exe**.
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will create the \tnhg folder and \tnhg\LayoutManager subfolder within the Windows "Program Files" folder (usually c:\program files), preparing for the storage of Layout Manager preferences.

It will also add the LayoutManager.dll (and supporting files) to the \ACTACT for Win 7\Plugins folder in the Windows “Program Files” folder (usually c:\program files), and add “Layout Manager Preferences” to the Contact View Tools menu.

## Usage

Layout Manager reads the current record in the current view, and determines the value in the field selected as the “controlling field”. It then attempts to find an available layout with EXACTLY THE SAME NAME as that value. If it finds one, it makes that the current layout. If a layout with that name is not available, then it locates the layout selected as the “default layout”, and makes that the current layout. If the selected default layout cannot be found, then it leaves the current layout unchanged.

## Layouts

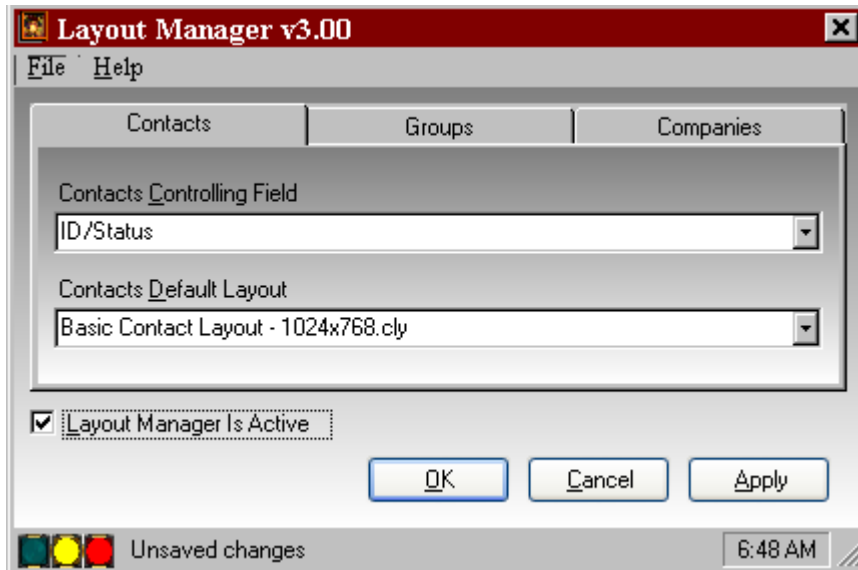
Layout Manager uses layouts that you have previously created using the ACT! Tools > Design Layout menu. There are different layouts for Contacts (having a .cly extention), Groups (having a .gly extention) and Companies (having a .aly extension). (Please refer to the ACT! documentation for more information of creating, naming and saving layouts.)

When naming your layouts, keep in mind that Layout Manager will be looking for names that exactly match the values in one or more fields. For example, if you plan on using the “Credit Rating” field to control Company layouts seen by users in the Finance department, and the “Credit Rating” field uses a dropdown list of values consisting of “High”, “Low” and “Unknown”, then you will want to name you layouts “High.aly”, “Low.aly”, and “Unknown.aly”. If the dropdown list of values consists of “A”, “B” and “C”, then you’ll name you layouts “A.aly”, “B.aly” and “C.aly”. Note that the matching is EXACT, including upper-/lower-case, punctuation and spacing.

## Preferences

Once you have created and named your various layouts, you can set the preferences for each user for each database. Open the database as the user whose preferences you want to set. (This is important, since the layouts that are “seen” or available to each user may be different – depending on security settings – and you want to select fields and layouts that will be available to the user during normal usage.)

Select the Tools menu > Layout Manager Preferences option on the Contact Detail view, to open the Layout Manager Preferences window:



On the “Contacts” tab, click the “dropdown arrow” at the right end of the “Contacts Controlling Field” textbox to display a list of fields available to the user. Scroll through that list, and select the single field whose value will control the Contact layout for the current user. Then click the “dropdown arrow” at the right end of the “Contacts Default Layout” textbox to display a list of contact layouts available to the user. Scroll through that list and select the single layout to be displayed when the selected controlling field contains a value that doesn’t match a layout name..

Repeat this process on the Groups tab and the Companies tab.

You can use the “Layout Manager is Active” checkbox to control whether or not Layout Manager will monitor the ACT! application and automatically switch layouts. If you want Layout Manager to leave the layouts alone, and not switch the layouts automatically, just UNcheck this option. You can turn Layout Manager “on” again at any time, by opening the Tools > Layout Manager Preferences and “checking” this option. You will need to restart ACT! to activate any change to this setting!

You can save your changes at any time by clicking the [Apply] button. You can cancel you unsaved changes at any time, and leave Layout Manager preferences by clicking the [Cancel] button. You can save your changes and leave Layout Manager preferences by clicking the [OK] button.

Preferences are saved in the `\LayoutManager.ini` file in the `\TNHG\LayoutManager` subfolder within the Windows “Program Files” folder

(usually `C:\Program Files`). This is also where Layout Manager will check for the settings it should use, including whether or not it should be “active”. Therefore, any changes to preferences must be made on all machines that need those preferences.

## Exporting/Importing Preferences

Layout Manager preferences are specific to the combination of user and database. A user may have availability to different fields and/or layouts when using a different database. Therefore, preferences need to be set to allow for these differences. However, there are cases when a user who uses different databases has availability to the SAME fields and the SAME layouts when using those different databases. And there are cases when multiple users in a single database will have availability to the same fields and the same layouts, and will want to control their layouts using those same fields and defaults.

Layout Manager offers the ability to Export the settings for the current user in the current database, and to import a previously exported set of preferences. This can save significant time, especially if there are multiple users who will require the same set of preferences.

Use the File > Export option to export the current settings. Select and name a file to hold the settings, being sure to select a storage location that is also available to the other users who will need these settings.

If the same user will use the same settings in a different database, simply open that other database. If a different user will use the same settings in the same database, reopen the database as that other user. If the settings are to be used on a different machine – by the same or a different user, in the same or a different database – go to that other machine and open the appropriate database as the appropriate user.

Select the Tools menu > Layout Manager Preferences option. Now, instead of making all the individual selections, simply use the File menu > Import option and select the exported file created above. When you choose OK, Layout Manager will read the file being imported, adjust the User to the current user and the Database to the currently open database, and save those preferences in the `LayoutManager.ini` file on the current machine.

That same set of preferences, including the Controlling Fields and Default Layouts for Contacts, Groups and Companies will now be in effect for this current user in the currently open database.