

# ACT!2005 Limited Access Manager

© 2004 The New Hampton Group

## Installation and Usage

ACT!2005 Limited Access Manager provides a quick and easy way to assign a single Access List to all the contacts in the current lookup.

In ACT!2005 Premium, the access to individual contacts is controlled via an “Access List”, which names the users and teams (of users) who can see the contact. The users included in a contact’s Access List can view and update information about that contact. However, ACT!2005 will only assign this Access List to a single contact. If you want to assign an identical Access List to another contact, you must again go through the process of selecting all the members of the Access List and assign it to the other contact.

ACT!2005 Limited Access Manager provides a way to select the users and teams that comprise an Access List, and then assign that Access List to all the contacts in the “current lookup” of contacts, without repeating the process.

(Please refer to the ACT!2005 Premium for Workgroups documentation for more information on Limited Access, Access Lists, Record Ownership and other data security topics.)

## Installation

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

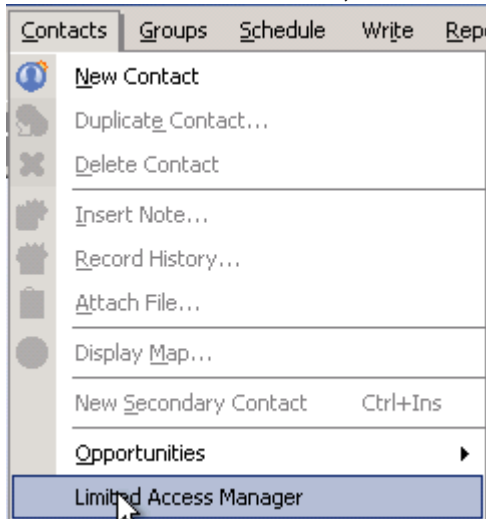
This will create the \tnhg folder and \tnhg\LimitedAccessManager folder within the Windows “Program Files” folder (usually c:\program files) and add the LimitedAccessManager.dll file to that subfolder, along with all the necessary supporting files.

It will also add the LimitedAccessManager.dll (and supporting files) to the \ACT\ACT for Win 7\Plugins folder in the Windows “Program Files” folder (usually c:\program files), and add “Limited Access Manager” to the Contact View Contact menu.

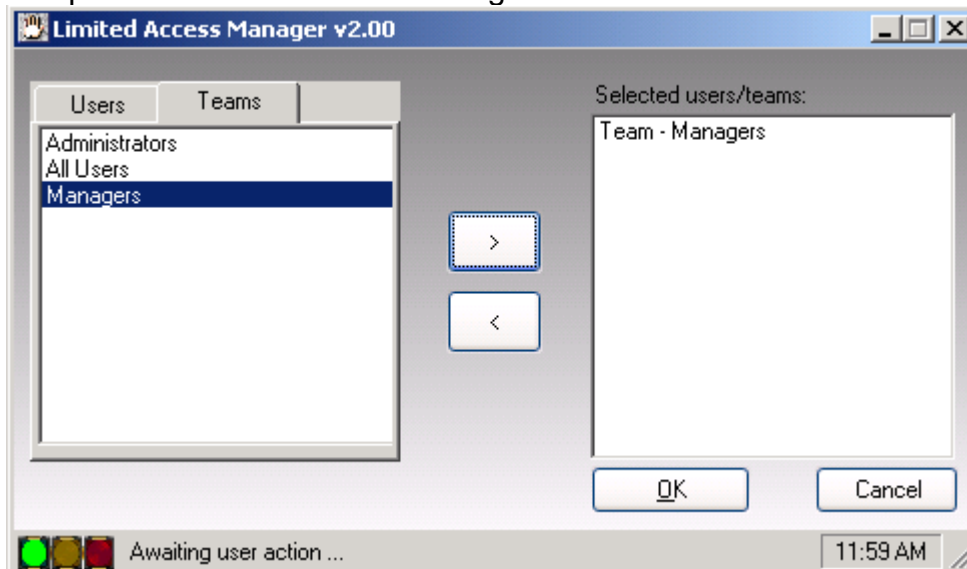
# Usage

While on the Contact view in an ACT!2005 Premium database, create a lookup of all the contacts that should share an Access List.

From the Contact menu, select the Limited Access Manager option:



to open the Limited Access Manager window:



Use the tabs to view the lists of Users and / Teams. Select/highlight any item(s) displayed on the left, then click the [ > ] add button to add the selected item(s) to the list on the right. You can remove any items from the Selected list by selecting/highlighting the item(s) in the list on the right and clicking the [ < ] (remove) button.

When the list on the right contains the proper entries for the Access List you want to assign to the current lookup, click the [ OK ] button. A confirmation screen will appear – click [ Yes ] to begin the assigning process, or the [ No ] button to abort the assignment.

You can now create a new lookup of contacts if you need to assign a different Access List.

Limited Access Manager records a log of changes it has made in the \tnhg\LimtedAccessManager.log file, within the windows “program files” folder (usually c:\program files).

Please refer to the ACT!2005 Premium for Workgroups documentation for more information on Access Lists, Limited Access, and other security topics.