

Limited Access Manager Pro

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Installation and Usage

Limited Access Manager Pro provides a quick and easy way to assign a single Access List to all the contacts, companies or groups in the current lookup.

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

Limited Access Manager Pro provides a way to select the users and teams that comprise an Access List, and then assign that Access List to all the contacts, companies or groups in the corresponding "current lookup", without repeating the process.

(Please refer to the ACT!2005 (or later) 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 **LimitedAccessManagerProInstaller.exe**.
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will create the \tnhg folder and \tnhg\LimitedAccessManagerPro folder within the Windows "Program Files" folder (usually c:\program files) and add LimitedAccessManagerPro support files to that subfolder.

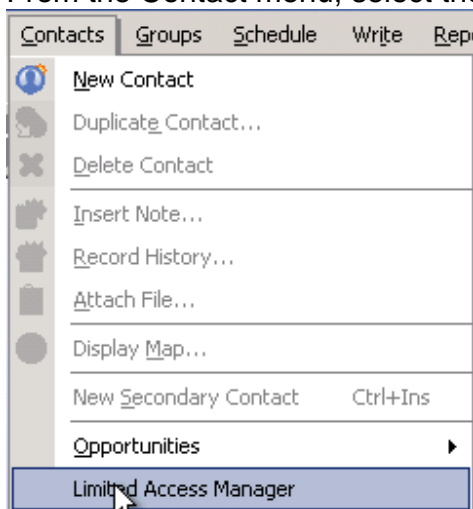
It will also add the LimitedAccessManagerPro.dll (and supporting files) to the \ACT\ACT for Windows\Plugins folders in the Windows "Program Files" folder (usually c:\program files), and add "Limited Access Manager" to the Contact menu, the Groups menu and the Companies menu.

Usage

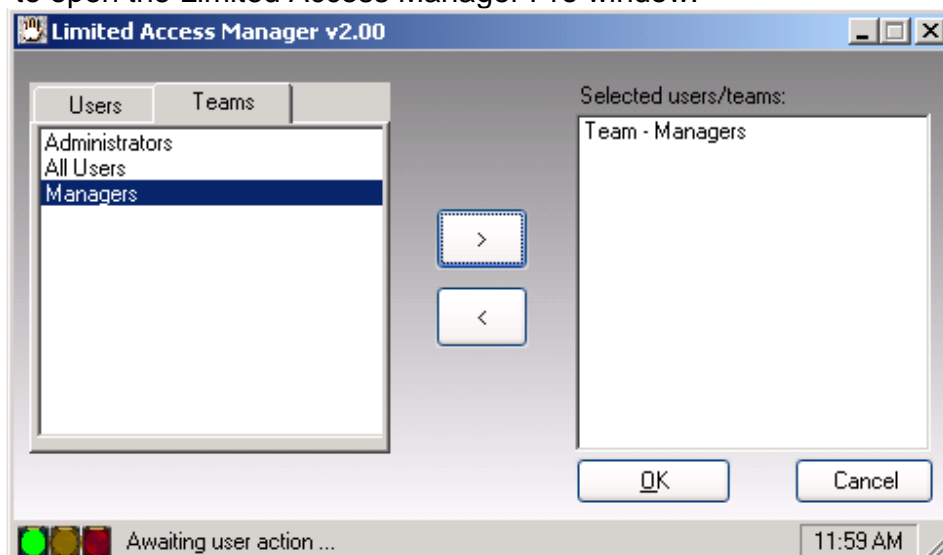
(Limited Access Manager Pro works in the way for Contacts, Companies and Groups. The instructions below refer to Contacts, but they work equally well for Companies or Groups – simply replace any reference to “contact” with “company” or “group” for information on how it works with those items.)

While on the Contact view in an ACT!2005 (or later) 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 Pro 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 Pro records a log of changes it has made in the user's \Application Data\TNHG\LimtedAccessManagerPro\LimitedAccessManagerPro.log file, within the windows "program files" folder (usually c:\program files).

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