Advanced Menu Management

v.4.0

for ACT! 2005

Another efficient and affordable ACT! Add-On by

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Purpose of the add-on

Advanced Menu Management gives you full control over what each user can do in ACT! It allows to define exactly which menu items (and toolbar buttons) are enabled for each user.

Installation procedure

Download the program file from our download page and double-click it to start the installation.

Note that contrarily to versions supporting previous ACT! versions and because of the changes in ACT!, add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation directory during the installation process.

IMPORTANT NOTE:

In the case of *Advanced menu Management***, no icon will be added to the toolbar, since it is only designed to be used very occasionally and not by the user itself. The only way to access the program is from the Tools menu.**

Security

When you first install the product, you are prompted to choose a password. You will be asked for this password whenever you launch, re-install or un-install the add-on. This is a protection against users trying to tamper with or uninstall the add-on.

You may change your password from the main screen by using the *Options > Change Password...* command.

Note that **only users with Administration rights may change the settings of the program**.

How it works

Advanced Menu Management works in conjunction with the ACT! user management features. As you know, depending on the security role (*Browse*, *Standard*, *Manager*, *Administrator*), a user has access to a number of features.

Reducing privileges

Advanced Menu Management allows to limit the features (menu items) that a particular user has access to. Each user of the ACT! database may be assigned a menu scheme, ie. a list of menu items that are disabled when the user is logged on.

Increasing privileges

Once again, *Advanced Menu Management* allows to disable features, not enable them.

This means that if you want to use *Advanced Menu Management* to increase privileges of a user, you will first need to increase its security role within ACT! so that he gains access to the features you want him to have access to then use *Advanced Menu Management* to disable the extra features he gained by increasing his role but really you don't want him to have access to.

Let's take an example.

A user has been assigned a security role of Standard but you want him to have access to the *Import* feature. To allow him to have access to this feature, you would have to give him *Manager* rights, but this means that he would also have access to the *Export* feature (as well as to other features as well, see ACT! user's manual for more on this). What can you do if you don't want him to have access to the Export feature? You are stuck. With ACT! security roles, he can either import and export or neither import nor export.

Advanced Menu Management resolves this issue. First assign the user a role of *Manager* within ACT! then use *Advanced Menu Management* to disable all the *Manager* features that you don't want him to have access to (in this case, at least the *Export* feature).
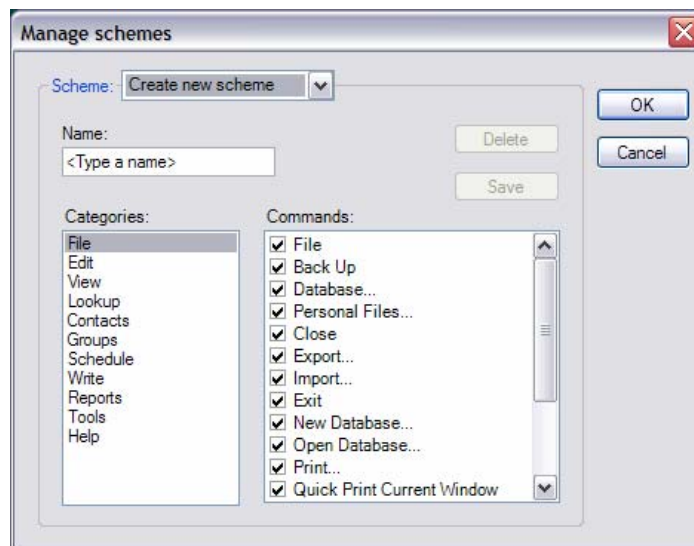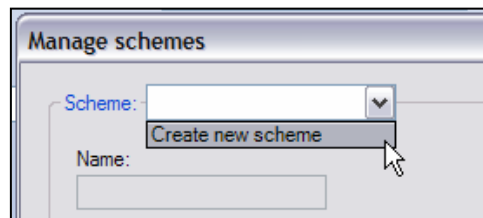
First Step: Creating schemes

Launch the add-on from ACT! Tools menu: *Tools > Advanced Menu Management*.
Once you enter your password, you will get to the main screen.
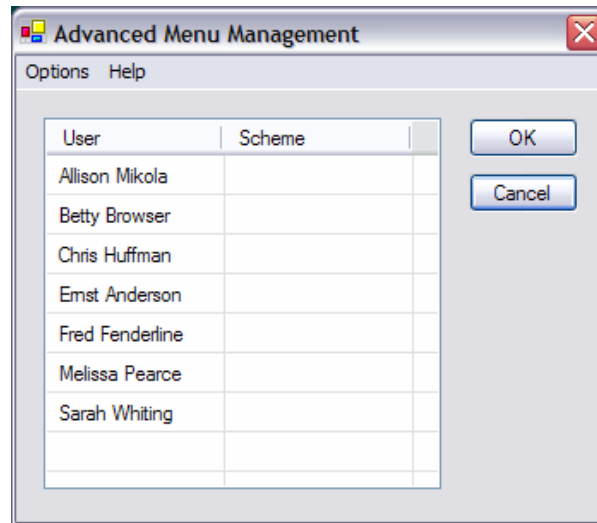
Go to the *Options* menu and choose *Manage Schemes...*

In the *Scheme* dropdown, choose *Create new scheme*.

Type a name in the *Name* textbox. Then <u>uncheck</u> all the commands you don't want the users associated with that scheme to have access to.

Click the *Save* button to save your scheme. You may create as many schemes as you want.

Click *OK* when you are done and you'll be back to the main screen.

NOTE: Since a scheme may be associated with users having different security roles, all commands are listed included those that users may not have access to based on their ACT! security role.

> **Example:** You want to disable the *Import/Export* features for all users. Create a new scheme, uncheck *Import* and *Export* then assign this scheme to all users. None of the users, whether *Administrators* or *Managers* (who normally have access to *Import/Export*) will from now on not have access to *Import/Export*. The rest of the menus will be accessible as usual as per each user's security role.

Second Step: Associating users with schemes

In the main screen, simply click in the *Scheme* column next to the user you want to associate a scheme with. A drop-down list will appear with the available schemes. Select the scheme you want. When done, click OK and the data will be saved.
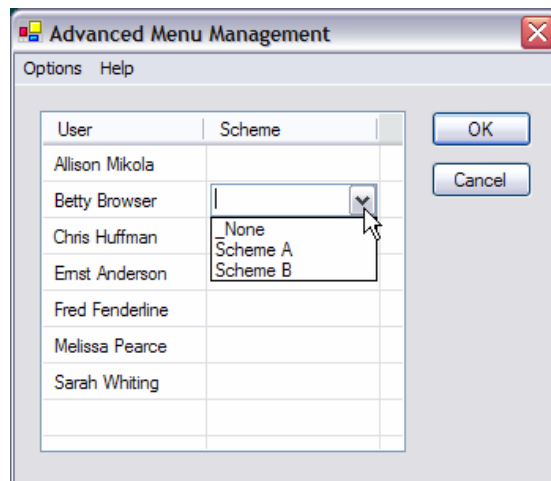
If a user is not associated with a scheme, he will have access to the commands as per his ACT! security role.

NOTE: If you want apply a scheme to yourself or changes to your scheme, you will need to Close ACT! and re-open it for the changes to take effect.

Editing, deleting a scheme

To edit a scheme, go to the *Options > Manage schemes*. In the *Manage schemes* window, select the scheme you want to edit and check/uncheck the commands as necessary. Then press the *Save* button.

To delete a scheme, follow the same steps and press the *Delete* button. Once a scheme is deleted, the users associated with that scheme are automatically reset (ie. not associated with any scheme).

Registering your product

To continue using this product passed the trial period, please buy a license at www.exponenciel.com. Licenses are issued for one ACT! username and will only work for that username.

Once you get a license code, right-click one of the controls of the pack in your layout and select *About.*. Once the *About* screen is open, type the registration code in the appropriate box and click OK. You might need to close and restart ACT! to complete the registration process.

Support

For support, contact support@exponenciel.com.

Rev. April 20, 2005 – v. 4.0