

# AutoLimited Access

CONTROL WHAT YOUR USERS SEE - AUTOMATICALLY

# AutoLimited Access by Keystroke

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Thank you for your purchase of Automatic Limited Access Keystroke. AutoLimited Access (ALA) is used to create Limited Access Rules based on fields you specify in a configuration file and are then automatically processed during data entry, or can be manually run by forcing a "Run Now" from the application directly. These rules can be configured for Contacts, Groups, Companies and Opportunities.

## Purchasing Options

ALA Pro includes the ability to do a Territory Re-alignment or to run via Auto Admin or the Windows Scheduler.

## Installation

Automatic Limited Access Professional is usually installed on the server. Please note that unless ALA is installed on workstations where data entry will be completed, you could run the risk of having public data between the point of data entry and when the data is processed manually on the server using a "Run Now" in the Automatic Limited Access application. If this is critical to your organization, it is recommended to have Automatic Limited Access installed on each workstation where data entry occurs.

### Installing on a Server

- Close ACT!
- Double-Click the "KEYSTROKE.AutoLimitedAccess.exe" to install the application
- Open ACT!
- Go to TOOLS > Auto Limited Access to load the application
- Click ADD to create a configuration file (As shown below) and choose SAVE when finished
- Click RUN NOW to process the new configuration and start the automation of new rules based on your configuration file

### Installing on a Workstation

- Close ACT!
- Double-Click the "KEYSTROKE.AutoLimitedAccess.exe" to install the application
- Open ACT!
- Go to TOOLS > AUTO LIMITED ACCESS to load the application
- Click the browse button to point to where your configuration file is saved (distributed from the server)
- Click CLOSE to save the path chosen above
- Data that is now entered will now have limited access rules applied based on the configuration file

#### **Keystroke Group Inc.**

500 Gordon Baker Road, Toronto, Ontario, M2H 3B4, CANADA

[www.Keystroke.ca](http://www.Keystroke.ca)

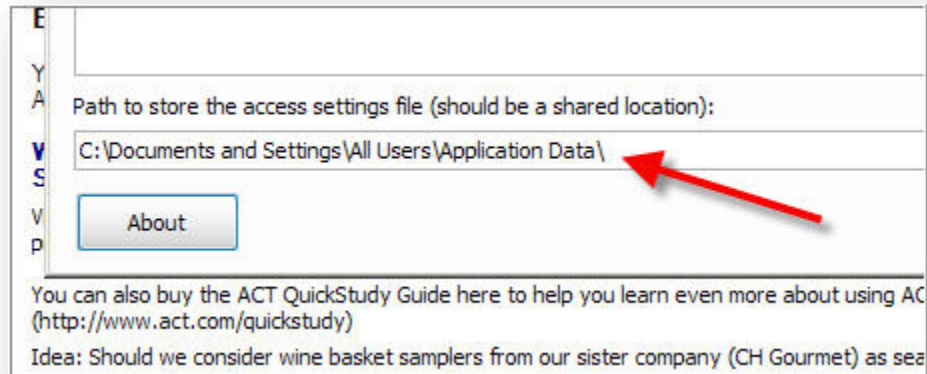
## AutoLimited Access by Keystroke

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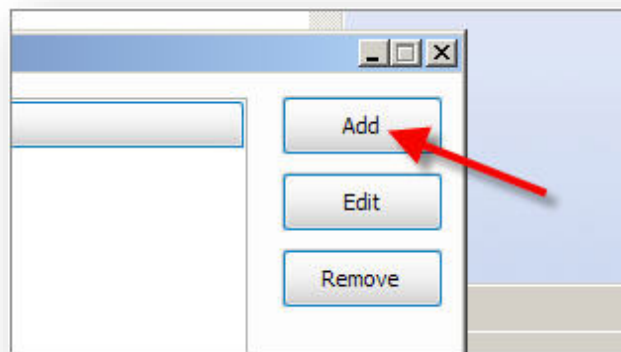
### Configuration Files

Automatic Limited Access will create limited access based on the queries you create in the application interface. You can add as few or as many criteria as you would like for Automatic Limited Access to process and apply your access rules. To get started creating access rules, see the screenshots below.

1. Open ALA from the Tools menu and set the path to store the configuration files.



2. Click the "Add" button to open the configuration screen to choose your criteria



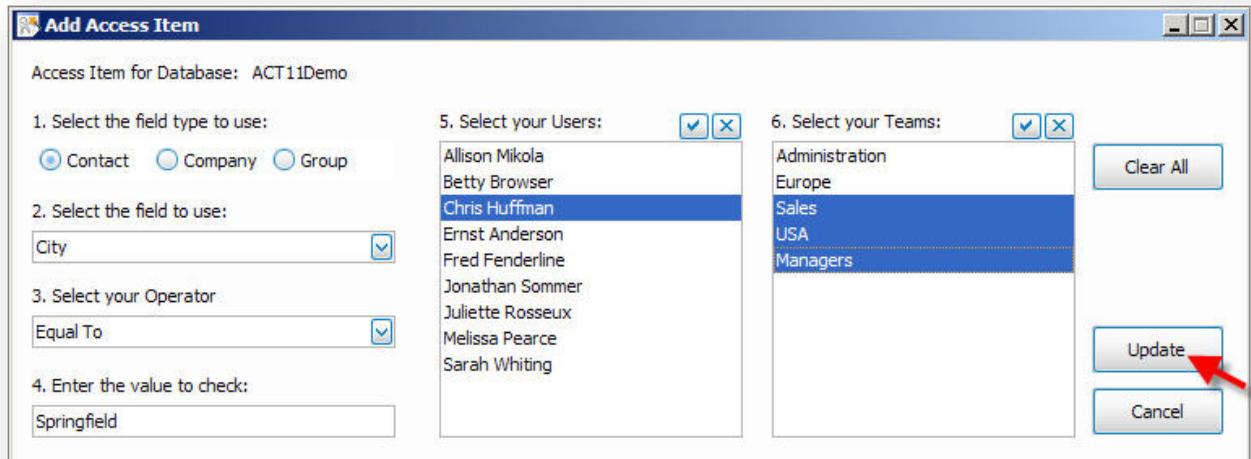
3. Choose the criteria that will be used to process your limited access rule. You have the following options to choose from during this step: (See example screen shot below)
  - a. **Type:** Contact, Company, Group or Opportunity.
  - b. **Field to use:** ACT! Field that will be monitored to trigger the access rules
  - c. **Operators:** Query operators (Contains, Ends With, Starts With and Equal To)
  - d. **Value:** Enter what field value will trigger the access rule to apply
  - e. **Users:** Choose to include which Users will be assigned access
  - f. **Teams:** Choose to include which Teams will be assigned access

### Configuration Files (Continued)

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Here is an example of a configuration that sets access to the User of "Chris Huffman" and the Teams of "Sales", "USA" and "Managers" if the City field is equal to "Springfield" upon data entry:



### Distributing and Sharing Configuration Files

You can distribute your configuration files to other PC's that have Automatic Limited Access installed. This is ideal in a synchronization environment where a remote database is being used. This will ensure that when a workstation enters data, it will have the access rules automatically applied at the time the data is entered. In a networked database environment, you DO NOT have to copy the configuration files separately to the workstation. It can just use the common one that is shared. (See below)

#### Distributing the configuration file manually to another PC

1. Install Automatic Limited Access on both the Server and the Workstation
2. Create all the desired rules on the server or pc that is hosting the ACT! database
3. Browse to where the configuration files are saved (See Above)
4. Copy this file to the target PC (Shared folder, email the file, etc.)
5. Place the file into the folder that is selected for saved configuration files (See Above)
6. Open ACT! and Automatic Limited Access will begin using the rules that were set in the saved file

### Distributing and Sharing Configuration Files (Continued)

#### Sharing a Configuration File in a Networked Database Environment

1. Install Automatic Limited Access on both the Server and the Workstation
2. Create the desired rules while in the target database on the server or the workstation
3. Ensure you have set your folder for saved configurations to point to the Database Supplemental Files folder and placed it in one of the folders. (Queries folder is recommended)
4. On the workstation, open ALA and set the path for the configuration files to the desired folder from step 2 above
5. ALA will now start using the configuration file that is shared, and limited access rules will be applied

#### Distributing and Sharing Configuration Files in a Sync Environment

1. Install Automatic Limited Access on both the Server and the Workstation
2. Create all the desired rules on the server or PC that is hosting the ACT! database
3. Ensure you have set your folder for saved configurations to point to the Database Supplemental Files folder and place it in one of the folders. (Queries folder is recommended)
4. From the workstation where the RDB resides, initiate a sync and the configuration file will be automatically transferred to the queries folder on the workstation.
5. Open ACT! and Auto Limited Access will begin using the limited access rules

**IMPORTANT!** When distributing a configuration file in a sync environment, you **MUST** first open the configuration file manually using a tool such as Excel to add the remote database names to the configuration file before syncing the configuration file out. Failure to do this step will result in the no automatic limited access rules being applied at the Workstation. (See the section below on making these required changes)

**NOTE!** You will need Microsoft Excel to make the necessary changes to the configuration files as noted above.

# AutoLimited Access by Keystroke

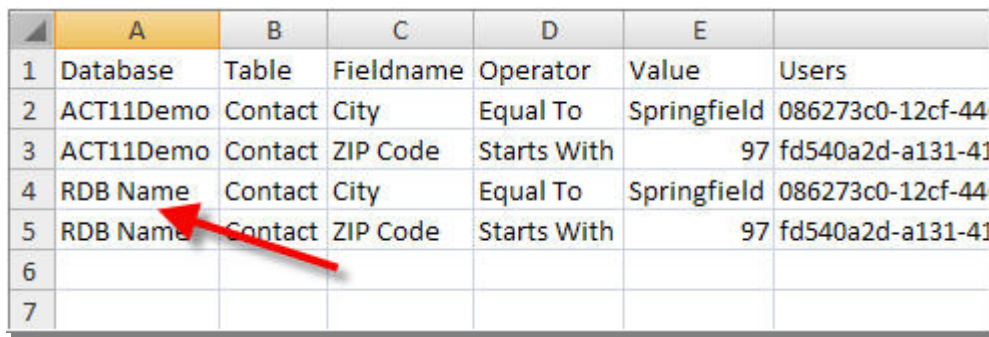
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## Distributing and Sharing Configuration Files in a Sync Environment (Continued)

### Modifying the Configuration File Manually to Include Remote Databases

1. Browse to the location you have chosen to save configuration files to
2. Open the "KEYSTROKE\_ALA" file using Microsoft Excel
3. Select all the rows that have the Parent database name in Column A
4. Right click and choose "Copy" and go to the next empty row and choose "Paste"
5. Change Column A for the pasted rows to represent the RDB database name you used
6. Save the file and exit Excel (Making sure NOT to change the format or type)
7. Distribute the configuration file accordingly using the steps above that meets your situation

Here is an example of the configuration file opened in excel after making the changes mentioned above. In the situation below I have a remote database name of "RDB Name" and you will see where I copied rows 2 and 3 to rows 4 and 5 then renamed the database name as noted above to my remote database name of "RDB Name". You would need to do this for every remote database name your database has. The easiest place to find this is in ACT! under TOOLS > SYNCHRONIZATION PANEL, then choose the "Manage Database" option. Under the "Name" column you will see your RDB's and their respective name being used.



	A	B	C	D	E	
1	Database	Table	Fieldname	Operator	Value	Users
2	ACT11Demo	Contact	City	Equal To	Springfield	086273c0-12cf-44
3	ACT11Demo	Contact	ZIP Code	Starts With	97	fd540a2d-a131-41
4	RDB Name	Contact	City	Equal To	Springfield	086273c0-12cf-44
5	RDB Name	Contact	ZIP Code	Starts With	97	fd540a2d-a131-41
6						
7						

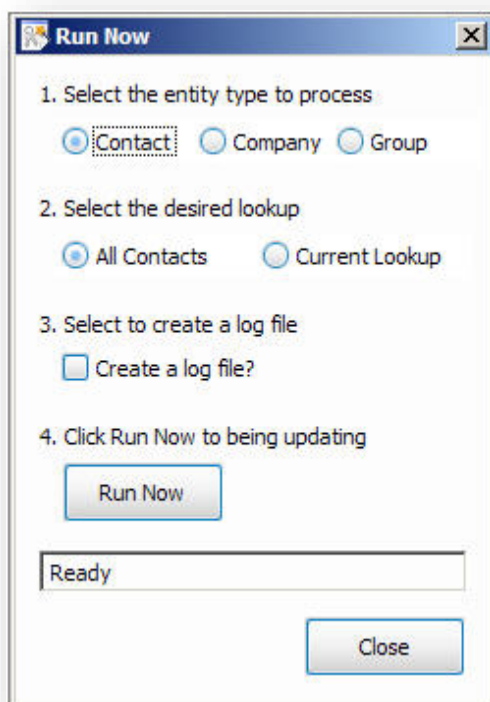
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### Manually Processing Rules Created in Automatic Limited Access

It is required the first time you create a set of rules that you run them using the "Run Now" button to initiate the monitoring of data entry for automatic rules processing. You can also initiate a "Run Now" anytime data has been entered by alternative means such an Import, or by Workstations that may not have Automatic Limited Access installed. To initiate a "Run Now" you can follow these steps:

1. Go to TOOLS > AUTO LIMITED ACCESS to load the application
2. Click the "Run Now" button
3. Select the desired options that will apply to the rules as they are run (Screenshot Below)



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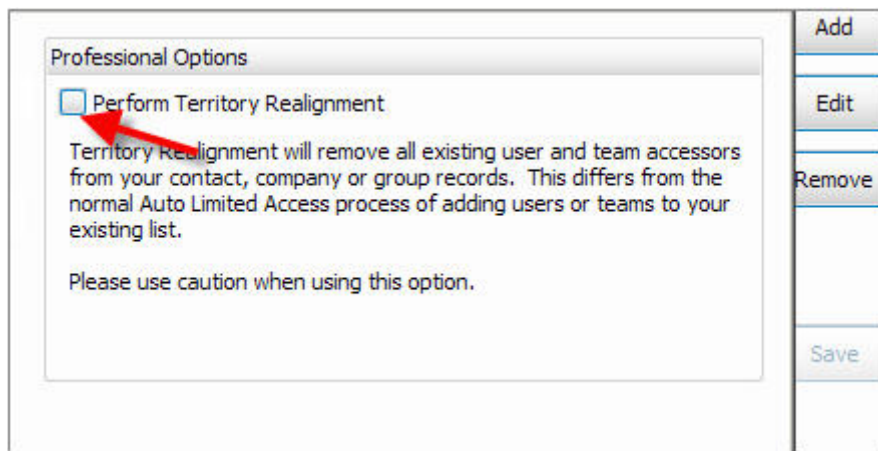
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## Auto Limited Access Professional Features

### Territory Re-alignment

Territory re-alignment will remove all existing users and team accessors from your contact, company or group records. This differs from the normal automatic limited access process of adding users or teams to already existing access lists.

To perform territory re-alignment you must have a Professional license key. Once you have registered with the professional license key you will now have the "Professional Options" box on the "Run Now" screen. See the example below. To process a Territory Re-alignment you simply must check the box prior to running your database rules. NOTE! It is strongly recommended to have an ACT! backup prior to using this option.



The image shows a software interface with a dialog box titled "Professional Options". Inside the dialog, there is a checkbox labeled "Perform Territory Realignment" which is currently unchecked. A red arrow points to this checkbox. Below the checkbox, there is a paragraph of text explaining that territory realignment will remove all existing user and team accessors from contact, company, or group records, and that this differs from the normal auto-limited access process. A warning below the text says "Please use caution when using this option." To the right of the dialog box is a vertical column of buttons: "Add", "Edit", "Remove", and "Save".



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## Auto Limited Access Professional Features (Continued)

### Command Line Processing

Command-line processing allows you to run Auto Limited Access from outside ACT! to process your rules for territory re-alignments or just periodic updates without having to be inside the ACT! application. This also allows you to setup the command line to run unattended using either AutoAdmin or Windows Task Scheduler. For a list of option command-line switches that can be used see the list below.

#### Command Line Parameters

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The standalone executable, AutoLimitedAccess.exe accepts the following command lines:

/D:<database pad file>  
/U:<Username>  
/P:<password>  
/E:<entity type> Contact, Group or Company  
/R:<true/false for Territory Realignment> **IMPORTANT!** Must be licensed for the professional version  
/L:<true/false to create a log>

Here is an example of the way the command line would look to process a database with the switches and shown above:

```
C:\Program Files\KEYSTROKE\AutoLimitedAcces\AutoLimitedAccess.exe /D:"C:\act\my database.pad"  
/U:"Chris Huffman" /P:"my password" /E:Contact /R:true /L:true
```

**NOTE:** You must put quotes around your parameters, as shown above, if your parameter contains a space.

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## Frequently Asked Questions

**Q: Do I need to install Automatic Limited Access on all of my machines or just the server?**

A: When installed on just the server, there is a delay in updating the record from the time of data entry until the time the limited access routine is scheduled to run, if this is acceptable, just running on the server is fine. If immediate updates of records is required, then Automatic Limited Access needs to be installed on any machine where data entry will occur.

**Q: Can I "Run Now" for all three entities at one time?**

A: No, they must be run one entity at a time.

**Q: What happens when ALA applies the rules that I have set up?**

A: ALA is running through all the rules that have been set up for the database. It compares the Accessors List for the record. If list is the same, the record is not touched. If the list is different, the Limited Access is updated.

**Q: What exactly is Territory re-alignment?**

A: Territory re-alignment is when ALA Pro creates a new access list for each and every record.

**Q: Does using ALA ensure that every record is accounted for?**

A: ALA Pro will process all the rules you have set up. If a record does not meet any of the criteria you have set up, that record will not be touched. Best practice: you might consider making fields used in your query mandatory so that no records are ignored.