

ACT! by Sage

Premium for Workgroups 2007 (9.0)

Administrator's Guide to the ACT! Reader Utility

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Administrator's Guide to the ACT! Reader Utility

Introduction to the ACT! Reader Utility

The ACT! Reader Utility lets you establish a read-only connection to the Microsoft® SQL Server™/ACT7 instance. You can use this connection to access a database for:

- ACT! by Sage Premium for Workgroups 2005, 2006, or 2007
- ACT! by Sage Premium for Web 2005, 2006, or 2007

The ACT! Premium for Workgroups or Premium for Web application must be installed on the machine that has the database you want to query.

Note: ACT! by Sage Premium for Workgroups 2005 or 2006 may be referred to as ACT! Professional for Workgroups outside of the United States and Canada.

Once you have set the SQL ACT! Reader login password, you can use this account from any third-party software (e.g., Crystal Reports® or Microsoft Access) to view data, generate reports, and so on.

You can use the ACT! Reader Utility to set or reset the password for the SQL login, ACT! Reader, on the machine where it is installed.

The utility uses a specific serial number that must match the serial number that you used to register your copy of ACT! Premium for Workgroups or Web. If a machine name was also used to create the ACT! Reader Utility, then the utility will only work on that computer.

Note: Contact ACT! Corporate Sales with questions about the serial number or PC restriction.

If you decide to change the password, you can run this utility again.

Caution: After you run this utility, you may want to move the ACT! Reader files to a CD or to a secured location, if, for instance, other users have physical access or a Windows log-on account to your machine.

The ACT! Reader Utility is comprised of these files:

- ActReader.exe
- *Administrator's Guide to the ACT! Reader Utility*
- ACTTablesDocument.rtf
- ACTColumnsDocument.rtf

Requirements

To use the ACT! Reader Utility, you must meet the following requirements:

- You must be a local Windows® Administrator (that is, belong to the Administrator group). Otherwise, you will receive an error message.
- Your new password must be at least six characters (numbers and/or letters).
- When you use the utility to change the password, you must know the current ACT! Reader password.

Note: If you forget the current password or need to uninstall and reinstall ACT!, ACT! Technical Support or Corporate Sales can reset the password.

Setting Up the ACT! Reader Utility

No installation is necessary for this utility. It is internally generated by ACT! Corporate Sales for a specific installation of ACT! Premium for Workgroups or Web, using the serial number (and possibly the machine name) for that installation. The utility is an executable file, ActReader.exe.

ACT! Corporate Sales provides the utility in a zip file. You extract (unzip) the files to a folder that you create on the machine that has the ACT! Premium product installed. You must install the utility on the machine on which the ACT! product was installed using the serial number provided to Corporate Sales.

Note: We suggest you name the folder ACT! Reader Utility.

To create a shortcut to the ACT! Reader Utility on your desktop

1. In Internet Explorer, browse to the ActReader.exe file.
2. Right-click **ActReader.exe**, and then select **Send to > Desktop (create Shortcut)**.

To set the password

Note: You must be a local Windows Administrator on the machine you installed the utility on.

1. Locate the ActReader.exe or desktop shortcut, and then double-click it.

The ACT! Reader dialog box appears.

Note: The first time you run the utility, you will not be required to provide the current password, since it has not yet been set.

2. In the **New Password** box, type the new password, and then press TAB.

Note: The password must be at least six characters, which can be any combination of letters and numbers.

3. In the **Confirm Password** box, type the password again.
4. Click the **Reset** button. A confirmation message displays.

Resetting the Password

To reset the password, follow the procedure under ["To set the password."](#) If you have forgotten the ACT! Reader password, you have two options to reset it:

- You can contact ACT! Technical Support to obtain a key to force a reset.
- Uninstall ACT! and then reinstall it.

Note: If the machine is running Microsoft SQL Server 2005 Standard Edition or Microsoft SQL Server 2005 Express Edition, you must also uninstall and reinstall the SQL Server software. This applies to ACT! Premium for Workgroups or Web 2007, version 9.x only.

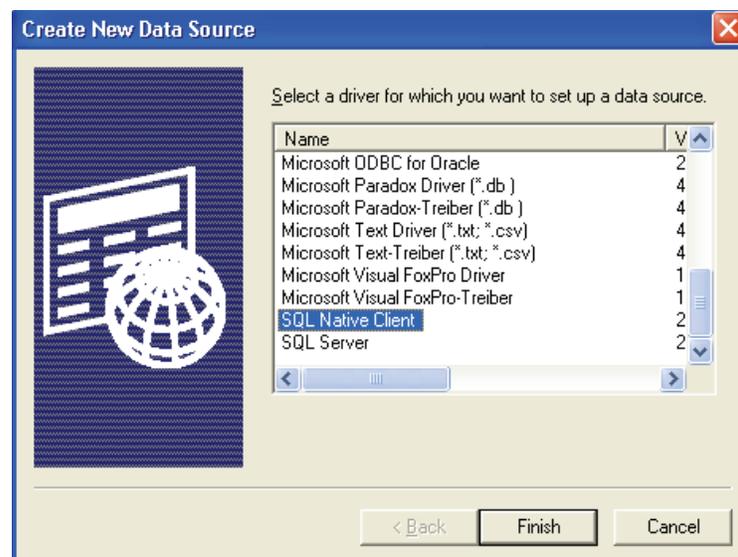
Using the ACT! Reader Utility

Once the password has been set up, as described in ["Setting Up the ACT! Reader Utility,"](#) you can use it from any machine that can connect to the local machine. ACT! Premium for Workgroups or ACT! Premium for Web does not need to be installed on all machines, only on the one that has the database you wish to query. Third-party software connecting to a SQL server instance requires security authentication. The following steps are for connecting to a SQL Server 2005 instance through Control Panel, Administrative Tools, Data Sources (ODBC).

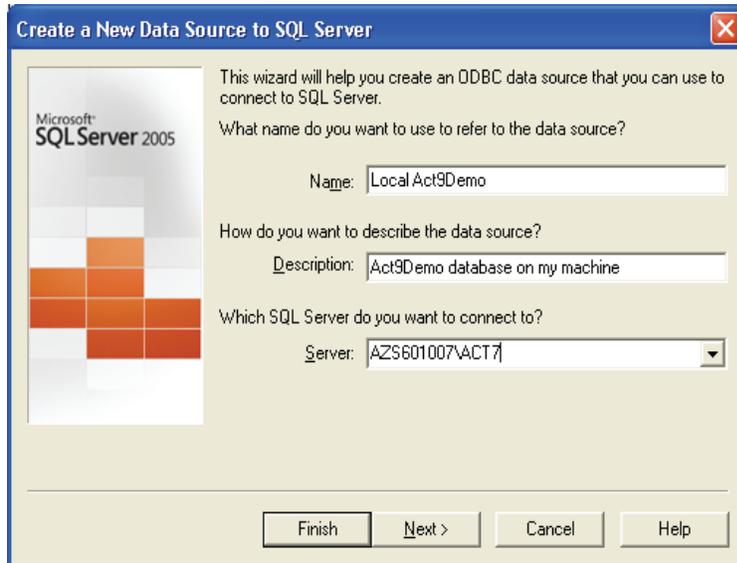
Note: If you are connecting to a SQL Server 2000 instance, such as with ACT! 2005 or 2006, you will need to select the "SQL Server" driver in Step 2 below instead of the "SQL Native Client" driver. Some of the panels may be in a different order, however, the information to supply is the same as in the steps below.

To authenticate third-party software for security

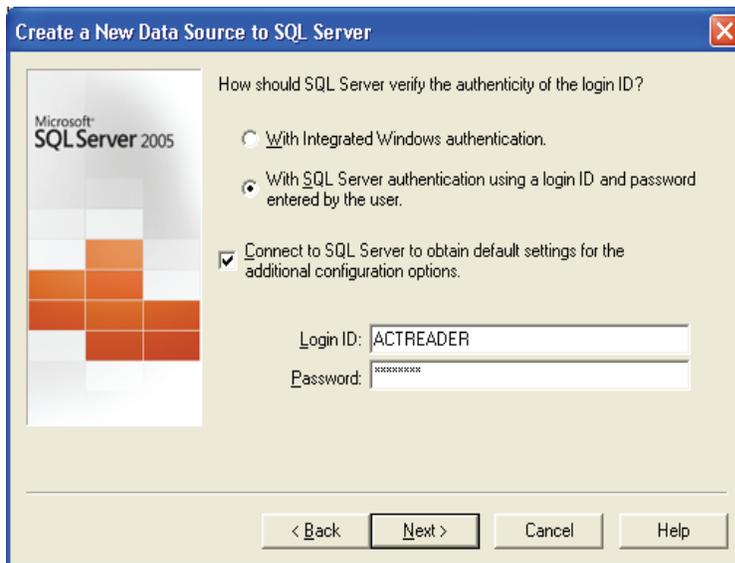
1. In the **ODBC Data Source Administrator** dialog box, click **Add**.
2. In the Create New Data Source dialog box, scroll to the bottom of the **Select a driver for which you want to set up a data source** list, select **SQL Native Client**, and then click **Finish**.



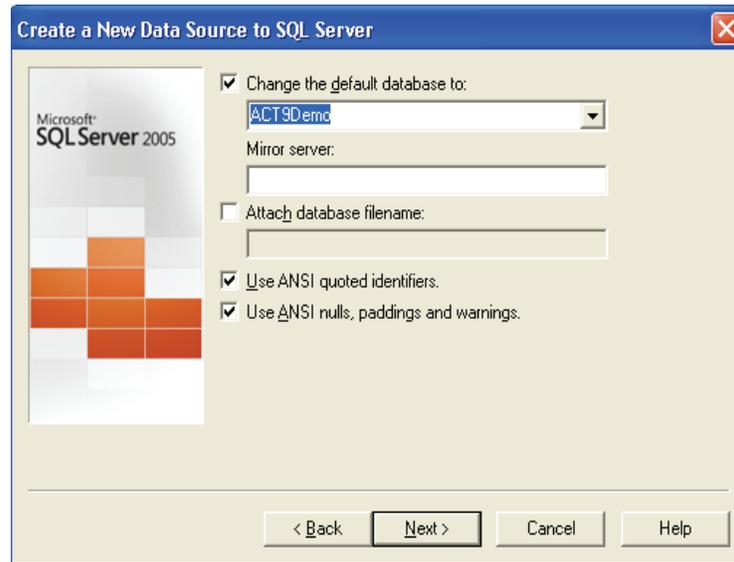
3. On the next panel, provide a descriptive **Name** for the data source connection. In the **Server** field, type or select the machine name (or type "(local)" when the database is on the same machine) - ensure that "\ACT7" (this is the instance name) is included on the end of the server name. Click **Next**.



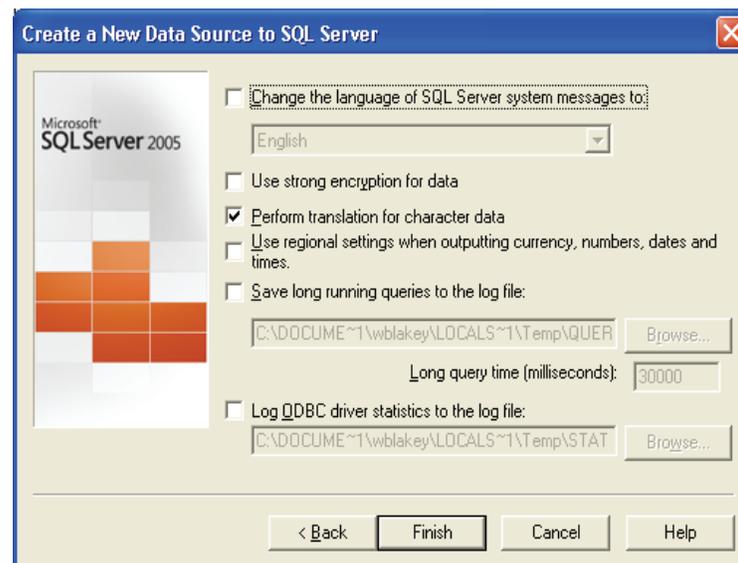
4. On the next panel, select **With SQL Server authentication using a login ID and password entered by the user**, in the **Login ID** field, type **ACTREADER**, and then in the **Password** field, type the password you previously set using the ActReader utility. Click **Next**.



- On the next panel, select the **Change the default database to** check box, and then select the database from the list. Click **Next**.



- On the final panel, click **Finish**.



- (Optional) You can click the **Test Data Source** button on the **ODBC Microsoft SQL Server Setup** dialog box to ensure you have configured the authentication properly. Click **OK**.

Accessing Data

Once you have set up the password for the ACT! Reader Utility and authenticated security for third-party software you are accessing data with, you can generate reports for any Premium database on the machine. You will have access to all data, including data that users have marked Private.

