

Office Connector Administrator

User Guide

Introduction

This document describes the features of the Office Connector Administrator program and how to secure the program against being accessed by unauthorized users. Office Connector Administrator is an optional utility available upon request that allows system administrators to configure Office Connector functionality. Use Office Connector Administrator to control toolbar visibility in Excel, grant or deny access to Query and Write licenses, and to configure software updates for workstations.

Toolbar Visibility

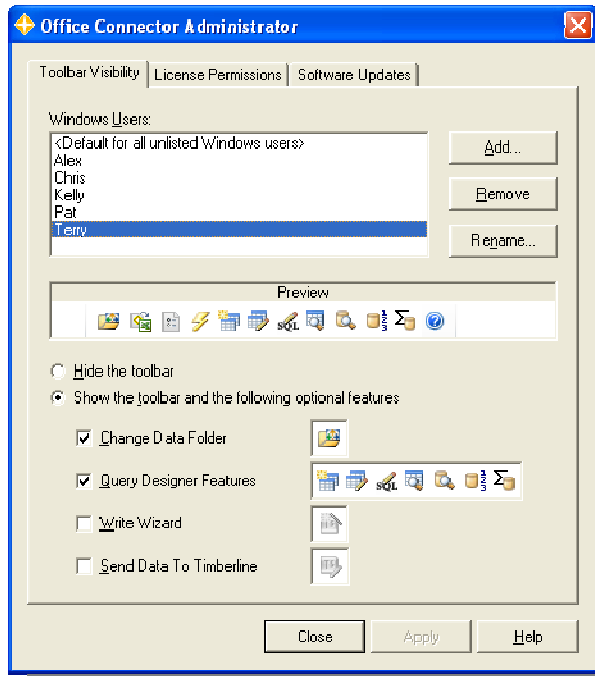
Office Connector Administrator allows you to control which Office Connector toolbar items are visible in Excel. You can customize the view per Windows user name, and there is a default setting that applies to all users not specifically listed.

Note - Windows user groups are not recognized, so toolbar visibility must be set up per Windows user name.

Note - Hiding toolbar items does not prevent them from being called via Excel macros. You can take advantage of this fact to control work processes by adding buttons to your spreadsheets and hiding the toolbar. Use license permissions to prevent users from accessing functionality like reading and writing Timberline data.

Assigning Visibility Settings to Users

Use the **Toolbar Visibility** tab to assign the default appearance and add individual Windows users who are exceptions to the general rule. Use the **Add**, **Remove** and **Rename** buttons to manage the **Windows Users** list. You cannot remove or rename the *<Default for all unlisted Windows users>* entry.



The **Preview** bar shows how your settings will affect the appearance of the Office Connector toolbar in Excel for the selected user. Select **Hide the toolbar** to completely remove it from Excel. Select the **Show** option display the basic toolbar elements plus any of the optional items corresponding to the check boxes below it.

Click **Apply** to save your settings for the selected user. The new configuration will be reflected the next time the user launches Excel.

Tip - The default configuration is used to initialize the settings for new users that you add to the list. If you set up large groups of users who share similar configurations, it is faster to temporarily change the default settings to match, and then change it back when you are done.

License Permissions

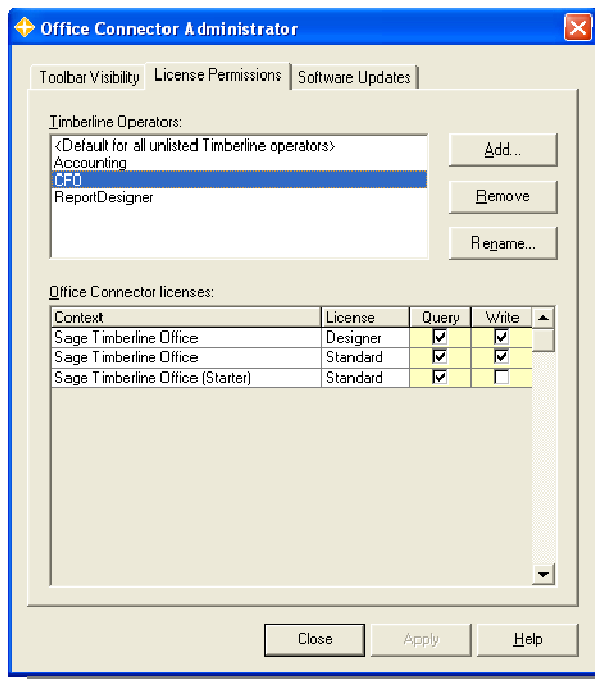
License permissions allow you to control which Timberline operators can use which Office Connector licenses. Independent from and more definitive than toolbar visibility settings, license permissions determine if a Timberline operator is allowed to access live data using Office Connector functionality. Note that a license is not required to operate using [cached data](#).

Keep in mind that license permissions only apply to Office Connector. You must use [Timberline security](#) to prevent technically-savvy users from manually accessing Timberline data using ODBC.

Assigning Permissions to Operators

Use the **License Permissions** tab to assign the default behavior and add individual Timberline operators with different permissions. Use the **Add**, **Remove** and **Rename** buttons to manage the **Timberline Operators** list. You can not remove or rename the *<Default for all unlisted Timberline operators >* entry.

The **Office Connector licenses** grid determines which licenses the selected Timberline operator can use.



The **Context** column indicates the product line; this example shows Office Connector for Sage Timberline Office and the Starter edition. The **License** column indicates if the permissions apply to [the Designer or the Query license](#). Note that the Starter edition does not include the ability to write data or to use Designer features.

The **Query** and **Write** columns indicate the Office Connector module for the specified **License** type. Check the box for each type of license you want the selected Timberline operator to use.

Click **Apply** to save your settings for the selected Timberline operator. A user who logs in with the selected operator ID will see the new permissions reflected the next time he or she launches Excel.

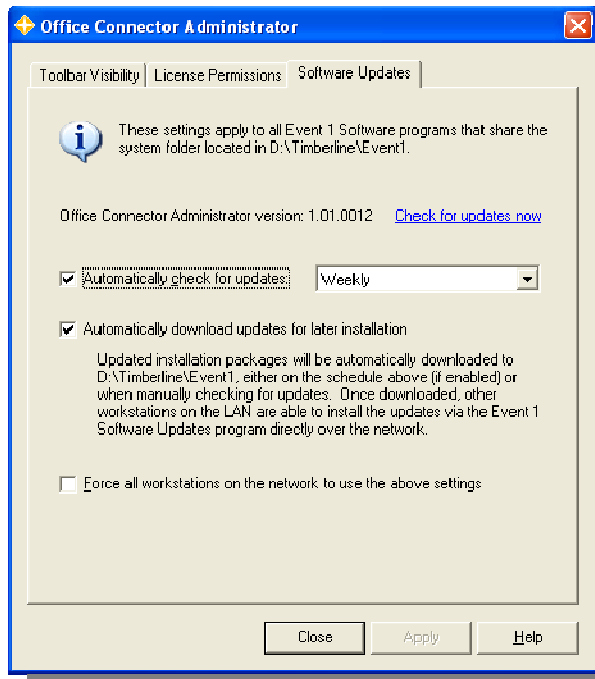
Tip - The default configuration is used to initialize the settings for new Timberline operators that you add to the list. If you set up groups of operators who share similar configurations, it is faster to temporarily change the default settings to match, and then change it back when you are done.

In the example pictured above, the CFO has access to all licenses. When a user has access to both Standard and Query licenses, the software will automatically select the “lowest possible” license. When opening and refreshing a workbook, a Standard license concurrency is acquired (if available). Upon clicking a toolbar button that requires a Designer license, the Standard concurrency is freed for others to use, and a Designer concurrency is acquired in its place.

Software Updates

By default, Event 1 programs check the Internet weekly for updated versions. Specific milestone releases will result in a notification messages, but interim versions will only be displayed if the user specifically checks for updates. Updates can be downloaded automatically or interactively, but will not be installed until the user explicitly chooses to do so. Once an updated version has

been downloaded from one workstation, users at other workstations will be able to skip the download step.



Users at individual workstations can configure their own software updates schedule and behavior. If you configure software updates using the Office Connector Administrator, then the values you choose will be used as the default settings for any new workstations. You also have the ability to override the settings at all workstations and force them to use the settings specified within the Office Connector Administrator program.

Administrator Database

The license permissions and toolbar visibility settings are stored in an encrypted database named `OCOperators.mdb`, which is located in the `OC2` folder under the [Event 1 System Folder](#). The database is automatically created the first time the Office Connector Administrator program is run.

The final step in configuring your environment is to secure the Office Connector Administrator executable (`OCAdmin.exe`) and the administrator database (`OCOperators.mdb`) using Windows file permissions. The Office Connector Administrator program should be locked down to grant access only to the required user or users. Those same users will need Modify rights on the database file; all other users should be granted Read-Only access.

Default Settings

If the `OCOperators.mdb` file is deleted or corrupted, the software will behave as if the Office Connector Administrator program was never run:

- The full toolbar is visible for all users.
- All users have access to all licensed Query features.
- All users are denied access to all Write features.