



# Sage Office Connector Suite

## Office Connector Administrator Installation and Usage

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# Overview

## Purpose

The Sage Office Connector Administrator software (Referred to as OCA from this point on.) is an add on package for the Sage Office Connector Suite for Sage 300 Construction and Real Estate software. (Referred to as OC from this point on.)

OCA adds the following options and security to the OC suite:

- **Enable Writing** - If you own OC Write, you can enable or disable the ability to write data to Sage 300 Construction and Real Estate on a per user basis. By default, the ability to write data is disabled.
- **Control License Access** - You can dictate which users have access to each type of OC license (Query-Designer, Query-Standard, Write-Designer, Write-Standard)
- **Show/Hide the Toolbar** - You can hide or show individual parts of the OC toolbar on a per-user basis.

## Event 1 System Folder (E1SF)

The E1SF is the location where your licenses and various files for the suite are housed on either your local workstation, or your network. It is important to have selected an E1SF prior to the installation of OCA software. This also entails the installation of the OC Suite. If you have not installed the OC Suite, it is necessary to have the software installed for this software add on to be usable.

If you need assistance with installing OC, or would like a copy of the OC Installation and Licensing guide, please schedule a call with one of our skilled technicians here:

<https://calendly.com/event1-support/technical-support>

# Installation

To install the OCA software, it is necessary to download the setup file. It is not included in the OC installer package.

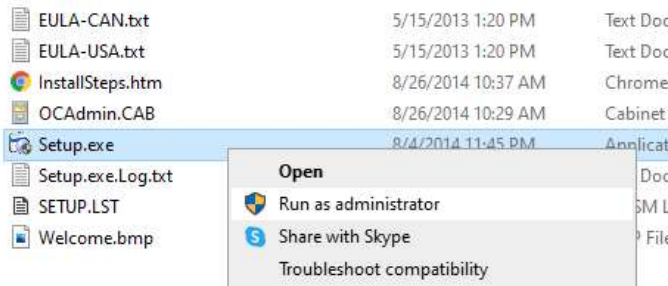
As it is a security package, we do not send the link to download the installation package to anybody. Our company policy is to only send the link to our main contact. If a change of that person is necessary, we recommend that an executive officer of your company send an email to our support department outlining who the new main contact person will be. That email should include the following information:

- Contact Name
- Contact Title
- Contact Phone
- Contact Email

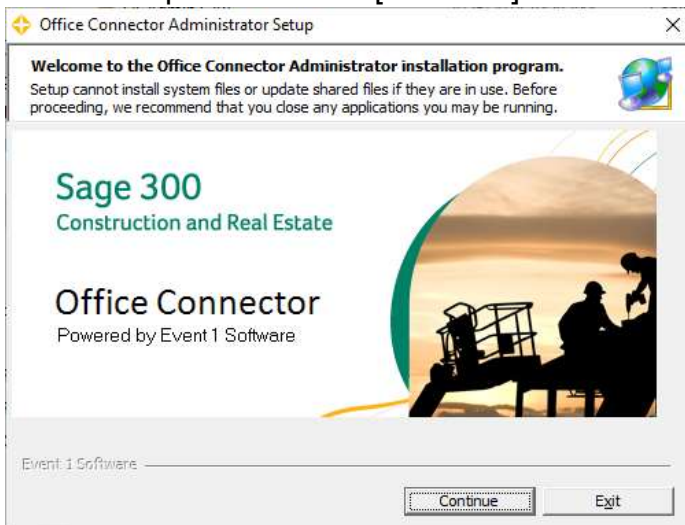
We will send the link to our main contact so that they can download the OCA installer.

As mentioned in the previous section, it is important to have selected the E1SF prior to the installation of the OCA software.

1. Locate the installation files and run **Setup.exe** as an administrator.



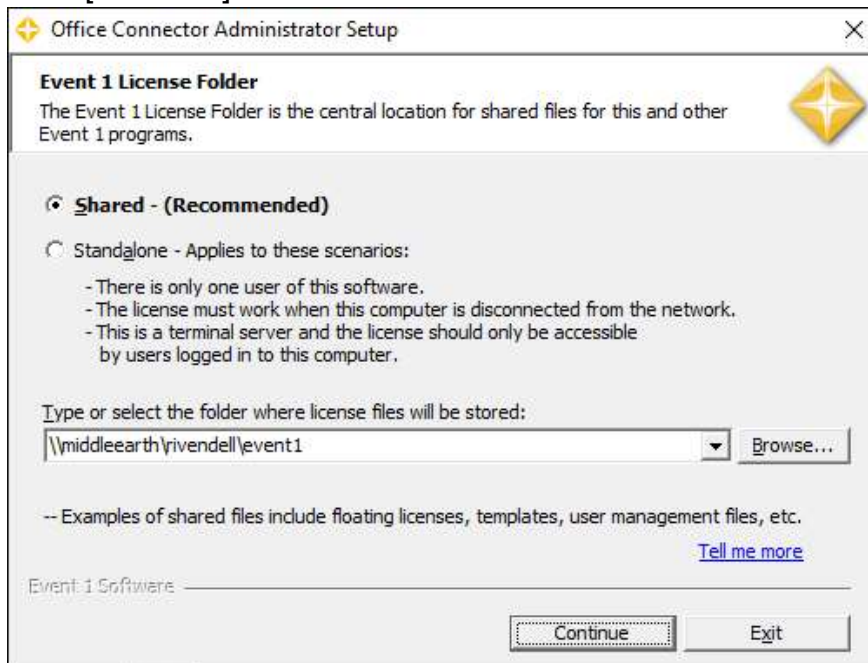
2. This window will open. Just click [Continue].



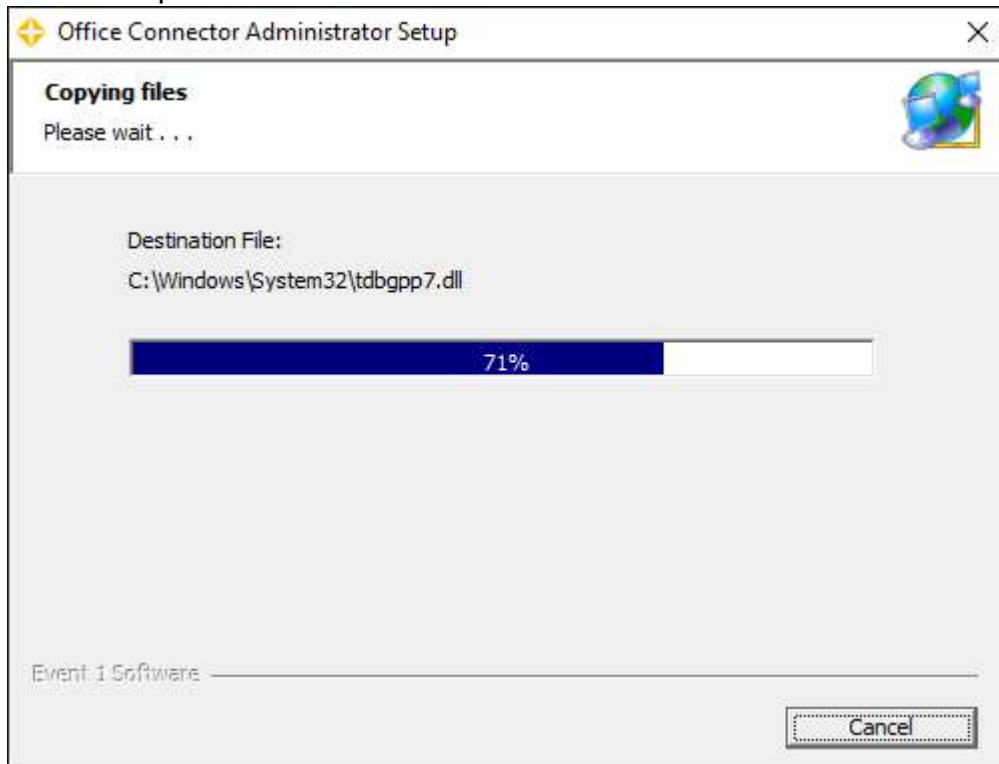
3. You will need to accept the EULA to continue.
  - a. Adjust the country to either Canada or United States.
  - b. Select "I accept the terms in the license agreement"
  - c. Click [Continue].



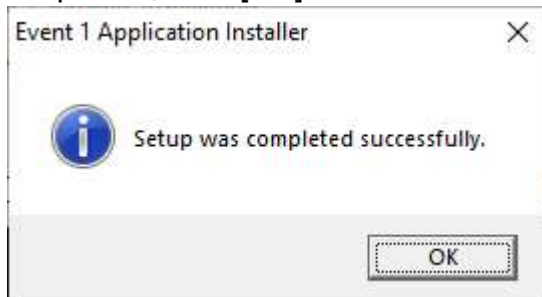
4. Enter your E1SF
  - a. If your E1SF is on your network, select "Shared" from the two options
  - b. If your E1SF is on your location workstation, select "Standalone"
  - c. Enter your E1SF in the field.
  - d. Click [Continue]



5. The software will process the installation.



6. Upon completion, click [OK] to finalize the installation.

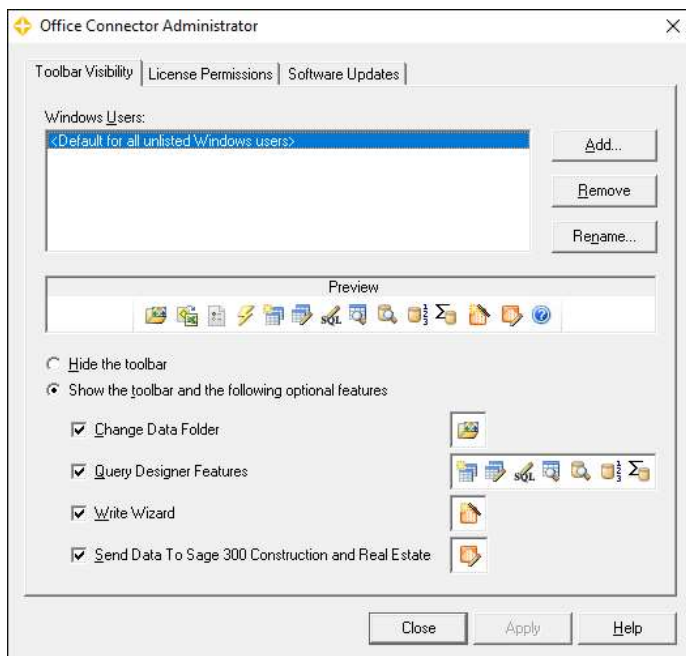


# Using the OCA software

## Toolbar Visibility

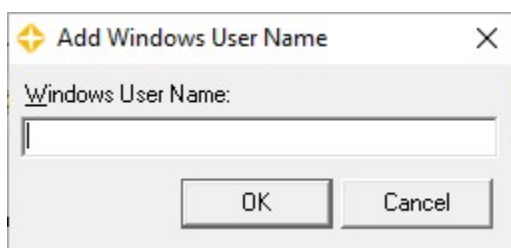
This tab allows you to select what individual users see within Excel.

The top box shows the list of users that have been entered by the OCA administrator. After installation, there is one entry “Default for all unlisted Windows Users” This is basically everybody except for those added to the list. This image shows the default for OCA after installation.

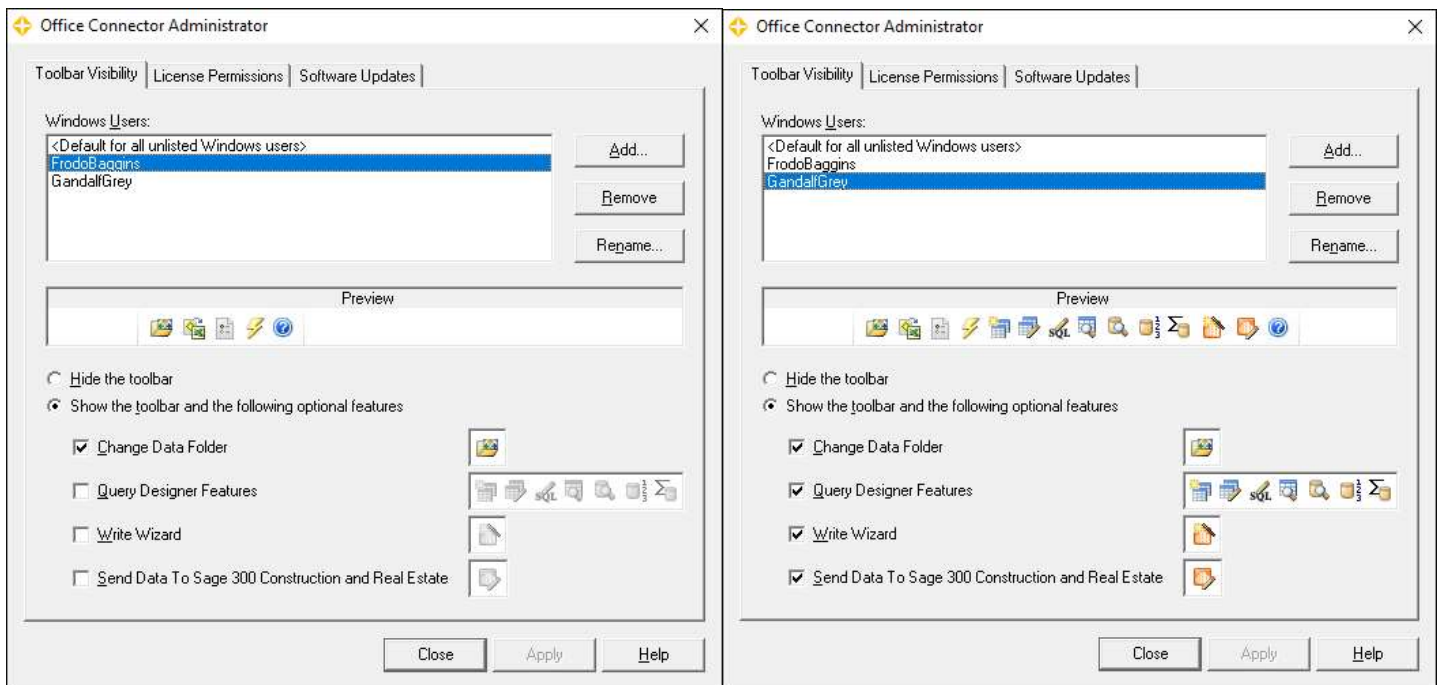


You can add or remove users with the two buttons in the upper right of the window.

To add, click the [Add...] button and this window will appear.



Enter the Windows Username of the individual. This is the username with which they use to log into their system. Please double check the spelling before hitting [OK]. Once satisfied, click the [OK] button and the user will show in the Windows Users list. Here, we've added two users



FrodoBaggins has been given limited access to the icons within Excel. The administrator removed three of the four check marks, allowing FrodoBaggins the base capability to refresh data, but to also change the Sage 300 CRE datafolder with which they can pull data from. They will not see the “Query Designer Features”, “Write Wizard”, and “Send Data...” icons. This is displayed as a preview above all the check boxes. GaldalfGrey on the other hand has been given full access to the icons within Excel. The administrator has decided to allow that user access to the “Query Designer Features”, “Write Wizard”, and “Send Data...” icons. Again, this is displayed as a preview above all the check boxes.

All the OC icons can be removed from either an individual user or the Default for all unlisted Windows users by highlighting the appropriate user and selecting “Hide the toolbar”.

If a user was needing to be removed from the list, it is as easy as selecting the individual to remove and clicking the [Remove] button.

If a username was misspelled, highlight the name and click the [Rename...] button to adjust the spelling.

It is important to click [Apply] to complete any change for all options above that are made.

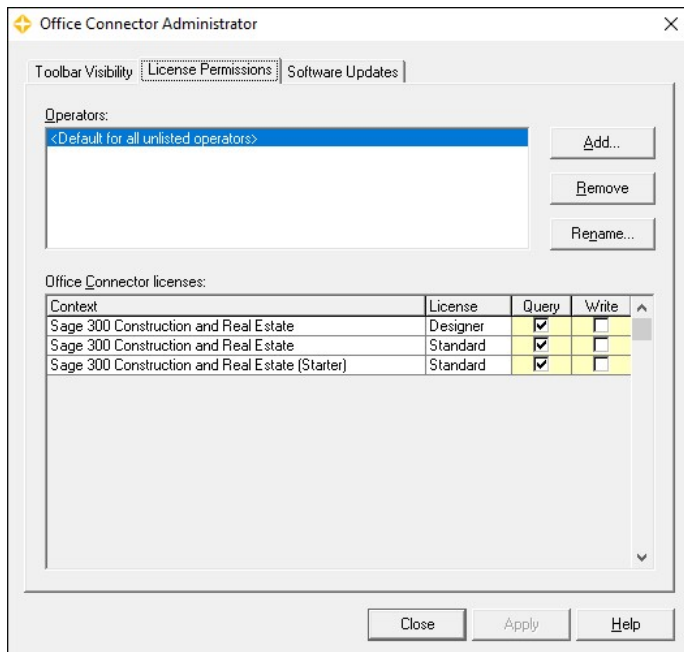


## License Permissions

This tab is used to limit access to specific licenses of the OC Suite.

Similar to the Toolbar Visibility tab, the top box shows the list of Sage Operator ID that have been entered by the OCA administrator. After installation, there is one entry “Default for all unlisted Operators” This is basically everybody except for those added to the list. This image shows the default for OCA after installation.

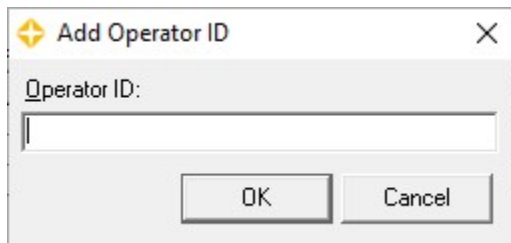
Please make special note that the “Write” Column has no boxes checked by default.



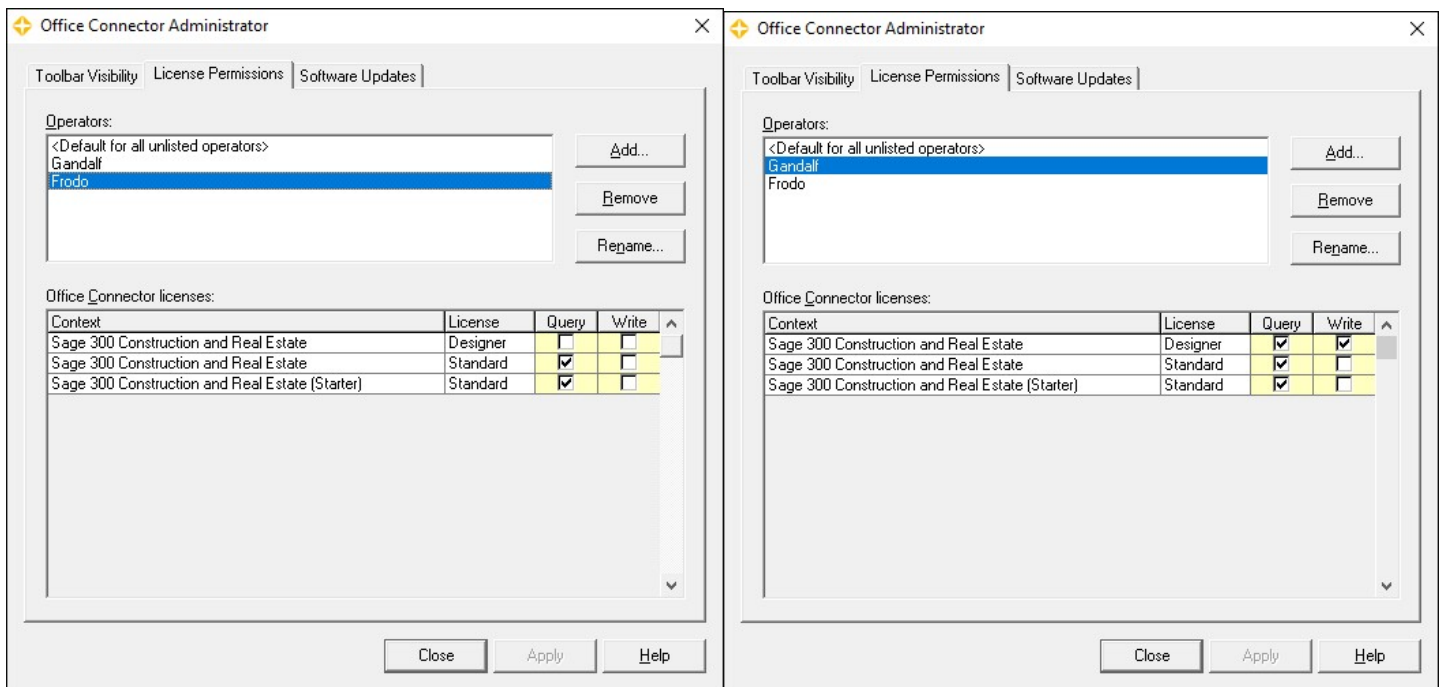
The purpose for having the OC Write license(s) disabled is for security. The OC Write software allows users the ability to write data directly back into Sage 300 CRE. The OCA software was created primarily to allow the OC Administrator to enable the OC Write license for specific individuals while maintaining the security of the Sage 300 CRE database.

You can add or remove users with the two buttons in the upper right of the window.

To add, click the [Add...] button and this window will appear.



Enter the Sage Operator ID of the individual. This is the username with which they use to log into Sage 300 CRE. Please double check the spelling before hitting [OK]. Once satisfied, click the [OK] button and the user will show in the Operators list. Here, we've added two operators.



FrodoBaggins has been given limited access to the OC Licenses. The administrator removed the check from the Query column for the Designer license, allowing FrodoBaggins access to only the OC Query Standard license. The administrator also left the Write column check boxes empty. Thus, the user will not have access to either the Query Designer or the OC Write license(s). GandalfGrey, on the other hand, has been given full access to the OC licenses, both Query and Write.

The license options require that your company has purchased the specific licenses. So, if you only have the OC Query Designer license, the only check box you will need to use or modify is the first check box in the Query column. If you do have the OC Write license, whether Designer or Standard, you will need to use the OCA software to enable the license(s) for users.

If an Operator is needing to be removed from the list, it is as easy as selecting the individual to remove and clicking the [Remove] button.

If an Operator ID was misspelled, highlight the name and click the [Rename...] button to adjust the spelling.

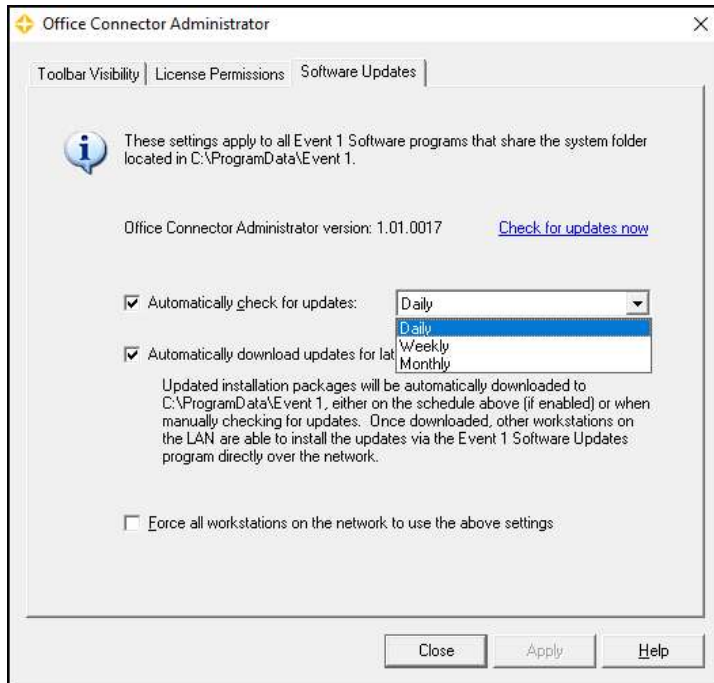
It is important to click [Apply] to complete any change for all options above that are made.

Both tabs should be used by keeping in mind the settings on the other tab when it comes to setting up the options on each tab. Both tabs are used in conjunction with each other when it comes to setting up the options.

For example, there is no reason to have the OC Query designer tool icons showing for users that do not have access to the OC Query Designer license. The same concept works with the OC Write licenses. There are checks for both the Designer and Standard licenses, as well as an icon for the OC Write Wizard, which requires the OC Write Designer license to use, and the other icon which is usable by both the OC Write Designer and OC Write Standard license.

## Software Updates

This tab is used to update or modify specific options for the OCA software.



The first two check boxes are to allow the OC software to check for update and if found to download the update. The first of the two check boxes sets the frequency of checks. You have options of Daily, Weekly, or Monthly. That choice is selected with the menu to the right of the option.

The second check box allows you to set the OC software to automatically download any update that it finds, and places it into the location shown in the paragraph or towards the top of the window.

The last check box is to set all the installations of OC to abide by choices selected with the first two check boxes.

# Conclusion

The Sage Office Connector Administrator software is only a necessary application if you have a Sage OC Write license. The options that it gives you are more control of individual user access and security capabilities.

It is important to note that OCA does not allow use of a license that has not been purchased. It is also important to note that OCA has no affect on the OC Import software.

If you have any questions, or would like assistance with the installation of OCA, please feel free to use this link to schedule a call with one of our skilled technicians.

<https://calendly.com/event1-support/technical-support>

Thank you for being a valued customer and user of the Sage Office Connector Suite of software.