Site Administrator Guide

For the person who runs the Connector machine: setting up staff access to company data, including password-protected companies.

The shape of a DataWise site

One PC runs the Connector and syncs every company file — call it the **Connector machine**. The data folder it syncs into can be shared on your network, and staff reach the data from their own PCs. You, on the Connector machine, are the site administrator.

> **The Connector machine is the trusted machine.** It holds the keys to every password-locked company (so unattended syncs keep working) and your MYOB connection. Its Windows login should be treated like the key to the filing cabinet — because that is what it is. Lock the screen when you step away, and do not share that Windows account.

Who can see what

	Unlocked company	Password-locked company
You, on the Connector machine	Everything — screens, Excel, Claude	Everything. Unlocking is invisible; Windows holds your keys
Staff, from their own PC	Invoice Viewer, Excel, Power BI and Claude all work	Invoice Viewer only, and only with the password. Claude and Excel's standard connections are refused
Anyone who copies the data folder	Can read it — like any business file	Nothing. The file is encrypted and the keys do not travel

Setting up a staff member

1

Decide which companies they need

Companies you have not locked are open to anyone who can reach the data folder — that is right for day-to-day companies. Lock the ones that are not for everyone (**Manage company > Database password** in the Connector, and read Guide 5 first).

2

Give them the data folder

Share the Connector's data folder on your network, read access. Staff PCs need to reach it by a path like **\\server\SQLiteData**. Treat the share with the care you would give any folder of financial records — locked companies protect themselves, unlocked ones do not.

3 Install Invoice Viewer on their PC

Invoice Viewer is where staff view invoices and, for locked companies, where the password is asked for and checked. Without it a staff PC can only reach unlocked companies.

4 Connect their Claude, if they use it

Run **Connect Claude Desktop** on their PC (see Guide 3). Their PC does not run the Connector, so the setup asks one question — where the data folder is. Give it the share path from step 2.

5 Tell them the passwords they are entitled to — in person

For each locked company they may see, tell them the password face to face or by phone. Never email it, and never put it in a Claude conversation. Invoice Viewer asks once per session and does not store it on their PC.

What staff experience

- **Unlocked companies:** everything just works — Invoice Viewer, Excel, Power BI, and Claude answering questions.
- **Locked companies in Invoice Viewer:** the company shows in the list; opening it asks for the password, once per session. Wrong password, no entry — there is nothing to guess against, the file itself is the lock.
- **Locked companies in Claude:** listed as locked, politely refused, on every PC except the Connector machine. This is by design — Claude inherits each user's access and no password ever appears in a conversation.

Managing passwords over time

Situation	What to do
A staff member should no longer see a locked company	Change that company's password in the Connector (Manage company > Database password), then tell the people who *should* still have it the new one. A password cannot be taken back — changing it is how access is withdrawn.
A password is forgotten	No data is lost. On the Connector machine: reset the password and re-sync the company from MYOB — see Guide 5.
A staff member leaves	Change the passwords they held, and remove their access to the network share. Their Windows account going is not enough on its own — they knew the passwords.
You want a company locked so tightly even remembering is banned	Ask us about the per-company "never remember" option — the password must then be typed every session on every PC.

A worked example

An accounting practice syncs five companies: one practice company for common use, four client companies that are private. The administrator locks the four, shares the data folder, installs Invoice Viewer on five staff PCs, and connects each staff member's Claude to the share. Every staff member can now work in the practice company — screens, Excel, Claude. The four private companies open only for staff who have been told their passwords, only in Invoice Viewer, and each staff member's Claude answers questions about exactly the companies that person can open — never more.

> **Need a hand?** Email sales1@datawise.co.nz or ring Mark on 021 296 5298 / Mike on 027 474 5918. You will talk to the people who built it.