



# SOX User Management

## User Guide

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### **Important Notice**

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# SOX User Management Summary

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SOX User Management bridges the gap between Sage 300 and enterprise solutions by providing tools to manage user setup and permissions within and across multiple Sage 300 companies.

Most larger organizations have standard processes for on-boarding new Sage 300 users, new Sage 300 companies, and, perhaps, even for on-boarding new printers that will be used with Sage 300. The SOX User Management module provides “one button” tools for completing these operations in seconds, avoiding tedious and error-prone data entry or import/export mechanisms that may take hours to perform and correct. The remove functions support analogous “off-boarding” processes.

The module also creates user and permissions reports that are very useful for managing multiple user roles and are suitable for compliance audits. You can save the reports as Excel spreadsheets.

Note that SOX User Management requires a LanPak license to access Sage 300. If there are no LanPak licenses available, the program will not run.

## Features and Benefits:

- View a concise users and permissions report suitable for compliance audits and save it to an Excel spreadsheet
- View and save user reports: User Profiles, Locked Out Users, Disabled Users, Expiring Passwords, Advanced Security Settings, Commonly Used Passwords
- Copy user A's setup to user B for all selected companies
- Copy user A's setup to user B for a given company
- Copy user A's setup from company X to company Y
- Copy user A's setup from company X to all selected companies
- Copy all users' setups from company X to company Y
- Remove user A's setup from all selected companies
- Remove user A's setup from a given company
- Remove all users' setups from a given company
- Remove all users' setups from all companies
- Copy Everyone's setup from company X to company Y
- Copy Everyone's setup from company X to all selected companies
- Remove Everyone's setup from a given company
- Remove Everyone's setup from all selected companies
- Copy Security Groups from one system database to another (see Appendix B)
- List user desktop customizations for one or all companies and for one or all users.

The meaning of “setup” is illustrated below. The meaning of “Everyone's setup” is described more fully in Appendix A of this guide.

“Setup” includes user permissions and profile attributes	
<input type="checkbox"/> Copy Security Permissions	Administrators select the setup options they want to copy (or remove) from the checkboxes shown here. Any combination of settings can be copied.
<input type="checkbox"/> Copy UI Profiles	
<input type="checkbox"/> Copy Customization Directories	Printer settings include the print destination, page size and driver name.
<input type="checkbox"/> Copy Printer Settings	
<input type="checkbox"/> Copy Desktop Folders, Macros, Reports, and Programs	
<input type="checkbox"/> Copy Process Flows	

SOX User Management can only be run by the Sage 300 ADMIN user. For strict SOX environments where there is a separation of duties between user management and full admin access, the ADMIN user can designate special Authenticated Users (“proxies” for ADMIN) who will be able to run SOX User Management. Windows authentication is also provided for users on a domain.

## The Permissions Report Tab

SOX User Management provides a concise users and permissions report suitable for compliance audits.

### SOX User Management users report:

- A User Management report that includes all Sage 300 modules is about 10 pages long.  
User Management assembles information from the system database, company database, from proprietary files, and from language resource files.  
Not all of this information is accessible from a Crystal report. The result is a concise report of the permissions for a given company and for a range of users and applications. The information is shown in a Sage 300 style grid and can be saved in an Excel spreadsheet.  
In a compliance audit situation, the report may have to be forwarded or physically printed and signed. The spreadsheet is designed to print the maximum amount of information per page.

### Sage 300 users report:

- Sage 300 Security Groups and User Authorization reports may total 50 to 100 pages in length.  
Reports use IDs rather than descriptions for the permissions. Sage 300 uses “Crystal Reports” that only connect to the system and company databases.

## The User Management Tab

The SOX User Management tab provides a rich set of functions, which are described in more detail on the following pages. A complete understanding of what is going on “under the covers” should be clear to an experienced Sage 300 implementer who has had to perform processes manually.

**Important Note:** SOX User Management copies data across companies. Make sure that you have activated Administrative Services and Common Services in new target companies before copying users.

If copying setup from a source user to a target user and that target user does not exist, SOX User Management will launch the Sage 300 window that creates users before continuing its operation.

A log is displayed as the operation proceeds. This log is also placed in a log file, recording the changes.

## The User Reports Tab

SOX User Management reports can be viewed quickly on screen and saved to Excel files for printing. (Sage 300 user reporting is limited for implementations with a large number of users, and the data is stored in proprietary files.)

The program provides the following reports: User Profiles, Locked Out Users, Disabled Users, Expiring Passwords, Advanced Security Settings, Commonly Used Passwords, Passwords That Never Expire, and User Groups.

**Note:** The “Copy Printer Settings” function copies “Properties” – the default properties being printer settings. The properties actually in use by an installation are controlled by settings in an INI file. A description of the INI properties and their effects are beyond the scope of this document.

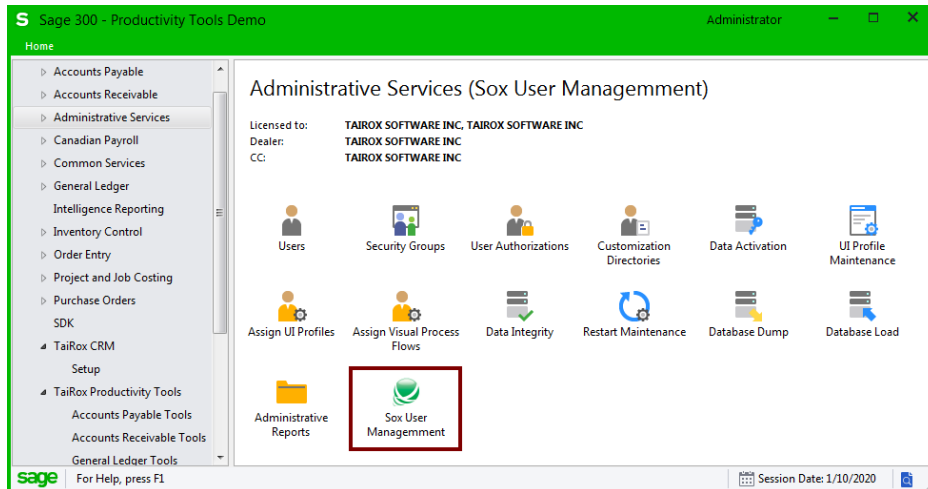
## The User Desktop Customizations Tab

The User Desktop Customizations tab lists all custom folders, macros, programs, and reports that have been added to the Sage 300 Desktop for one or all companies and for one or all users.

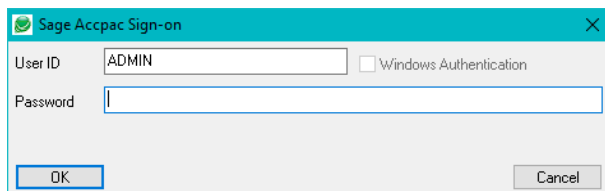
# Running SOX User Management

SOX User Management can be run as a stand-alone Windows program or launched from the Start menu.

You can also create a shortcut on the Sage 300 desktop, as shown below. To do this, right click on the desktop, select “New > Program” from the pop-up menu, and point to “SOXUserManagement.exe” in the installation folder.



SOX User Management will prompt for a Sage 300 sign-on.

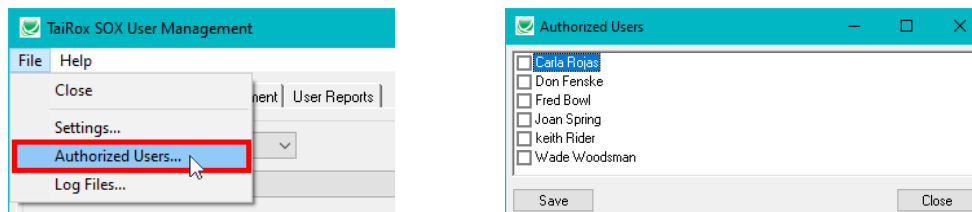


Note that any Sage 300 user can sign on to SOX User Management, but only the ADMIN user has the necessary rights to access and change the various tables that store users and permissions.

SOX User Management lets the ADMIN user set up Authorized Users (ADMIN proxies) so additional users can operate the program.

## To add Authorized Users:

- Choose Authorized Users from the Sox User Management File menu.
- Select Authorized users from the list of users, and click the Save button.

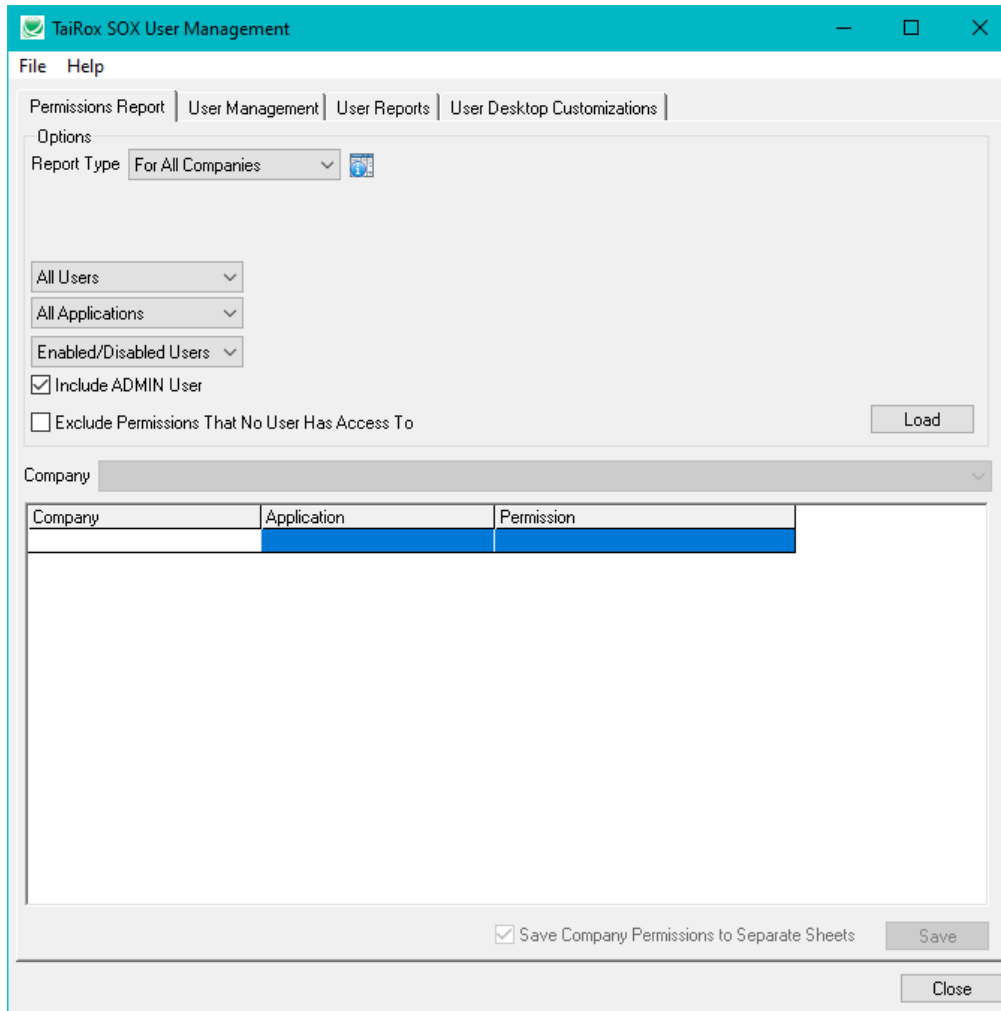


Authorized Users must be reauthorized whenever the ADMIN password changes. (The ADMIN password should be changed very infrequently.)

## Permissions Report Tab

The Permissions Report tab lets you create a report showing user permissions for Sage 300 modules and other compatible programs – such as TaiRox CRM – and save the report to an Excel workbook.

This screen lets you choose the company databases, the users, and the programs to include in the report, as well as whether to create the report for enabled and/or disabled users.

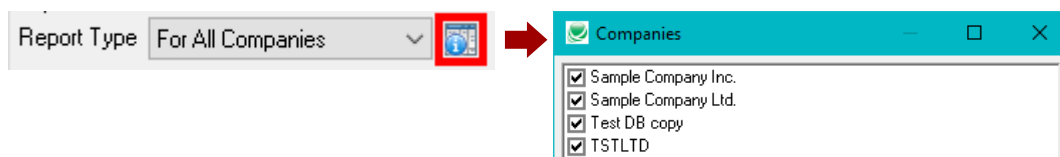


### Complete the fields on the Permissions Report tab as follows:

**Report Type** – You can print the report for a single Sage 300 company database or select from a list of associated companies.

**For One Company** – If you choose *One Company*, choose the company that you want to report on from the Company dropdown.

**For All Companies** – If you choose *For All Companies*, click the button that appears beside the For All Companies choice, select the companies to include in the report, and then click the OK button.



**All Users / Range of Users / Specific User** – Choose who will be included in the report.

**All Users** – All users in all selected companies will be included in the report.

**Range of Users** – Choose the From and To users for the range that you want reported.

**Specific User** – Choose the specific user from the Finder.

**All Applications / Range of Applications / Specific Application** – Choose the modules that will be included in the report.

**All Applications** – All applications that have been activated in the Sage 300 companies that you selected will be included in the report (such as TaiRox Productivity Tools or TaiRox CRM).

**Range of Applications** – Choose the From and To applications for the range that you want reported.

**Specific Application** – Choose the specific application from the Finder.

**Enabled/Disabled Users / Enabled Users / Disabled Users** – Choose whether the report will include enabled or disabled users. (Users can be disabled with the Sage 300 Users form in Administrative Services.)

**Enabled/Disabled Users** – Include all users that have been added to the Sage 300 companies that you selected.

**Enabled Users** – Include only users with enabled user accounts.

**Disabled Users** – Include only users whose accounts have been disabled.

**Include ADMIN User** – You can choose to include or exclude the ADMIN user.

**Exclude Permissions that No User Has Access To** – You can also choose to include or exclude permissions that are not assigned to any users in the report.

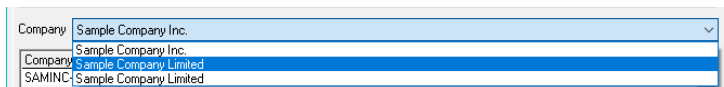
**All Users / Range of Users / Specific User** – Choose who will be included in the report.

### ***Click the Load button to create the report:***

Once all criteria are selected, click the Load button to display items matching the criteria and options.

### ***Click the Company Dropdown to select a company:***

If you chose more than one company, use the Company dropdown list to select companies. The permissions are listed separately for each company.



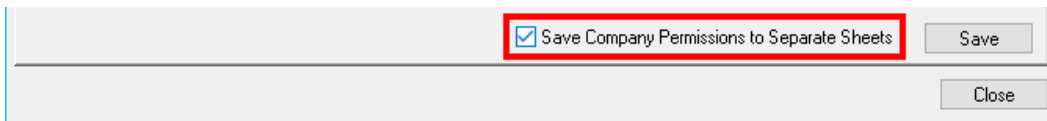
### ***Click the Save button to save the report to an Excel Workbook (\*.xlsx):***

Once saved in a workbook the information has a similar layout and is formatted automatically with gridlines and vertically-oriented labels.

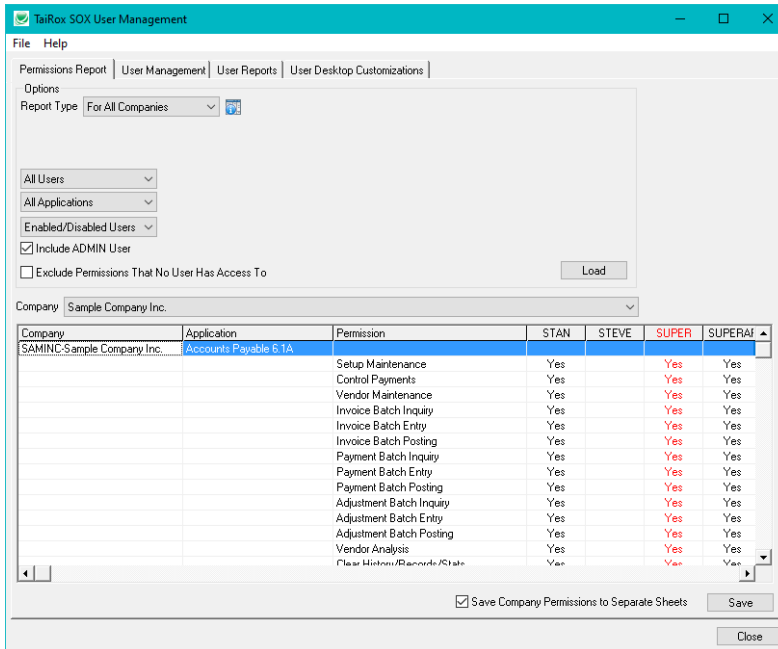
**Save as Excel Workbook (\*.xlsx):** Save the Worksheet as a .xlsx file – not as “Excel 97 – 2003.” Older Excel workbooks do not handle more than 256 columns, so the Worksheet will not be saved properly if you have a large number of users.

Disabled Users’ rights are displayed in red.

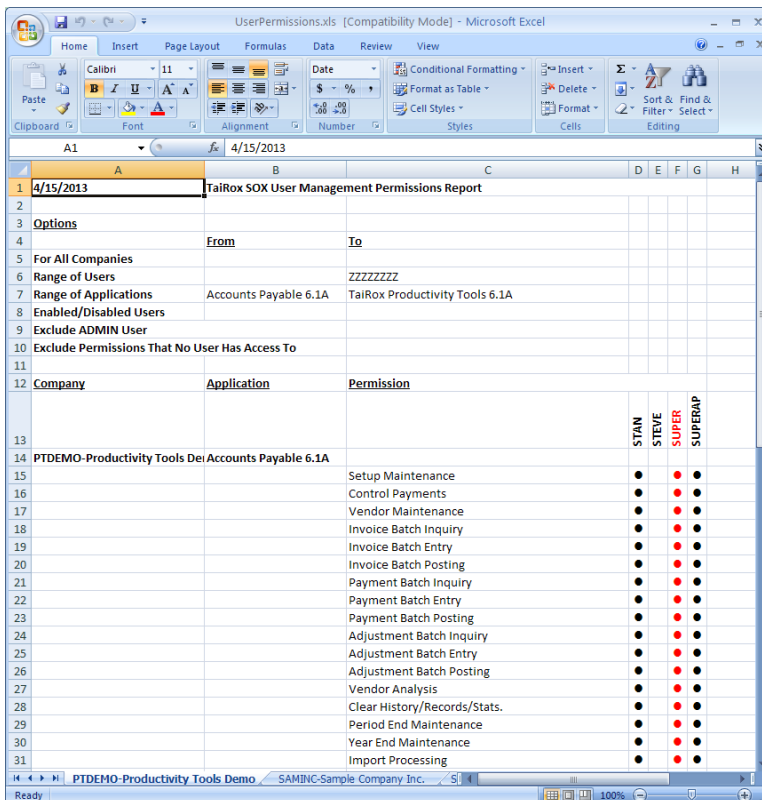
Note also that when multiple companies are selected you can choose to save each company on a separate worksheet tab in the Excel spreadsheet.



### Report on the SOX User Management Screen



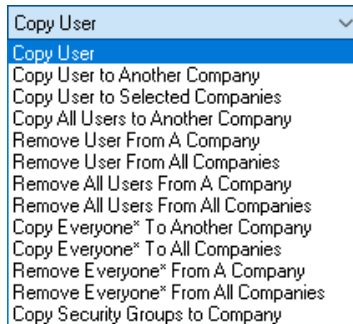
### Report in an Excel Workbook



## User Management Tab

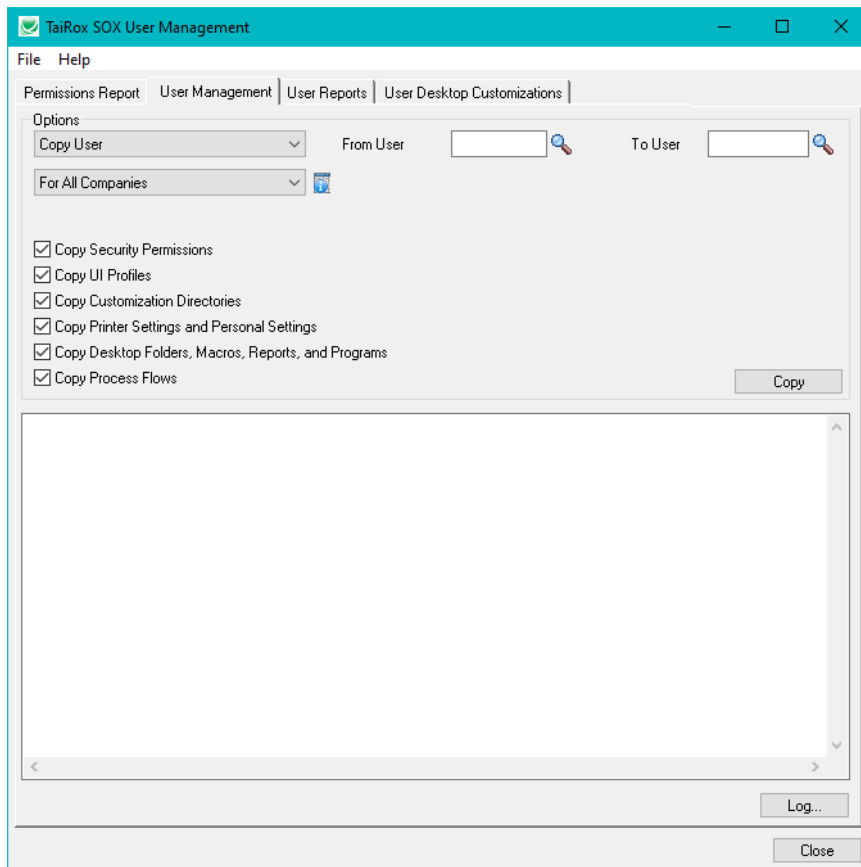
**Important Note:** SOX User Management copies data across companies. Make sure that you have activated Administrative Services and Common Services in new target companies before copying users.

This screen changes dynamically depending on the Option that you choose. SOX User Management provides the following operations.



The User Management tab initially appears as below – with the “Copy User” option selected to copy the properties for one user account in the current company to another user account in one or more Sage 300 companies.

[See Appendix A for a complete set of screen variations.](#)





**Select Options and proceed on the User Management tab as follows:**

Select the Operation – Copy User in this example

[See Appendix A for a summary of most user operations.](#)

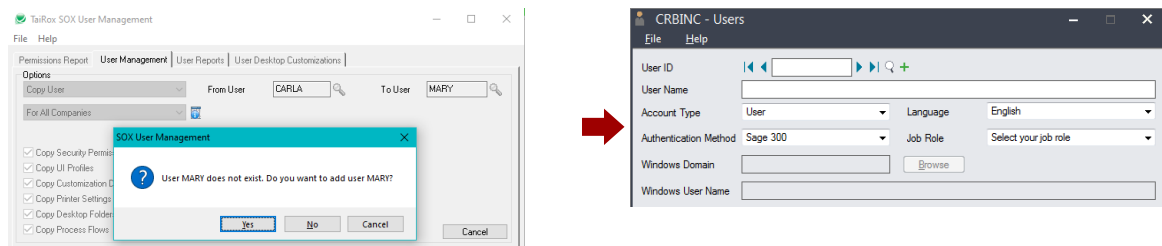
Select the From and To User Accounts

Select the From and To Companies

If Copying or Removing, select (check) the user properties that you want to copy or remove

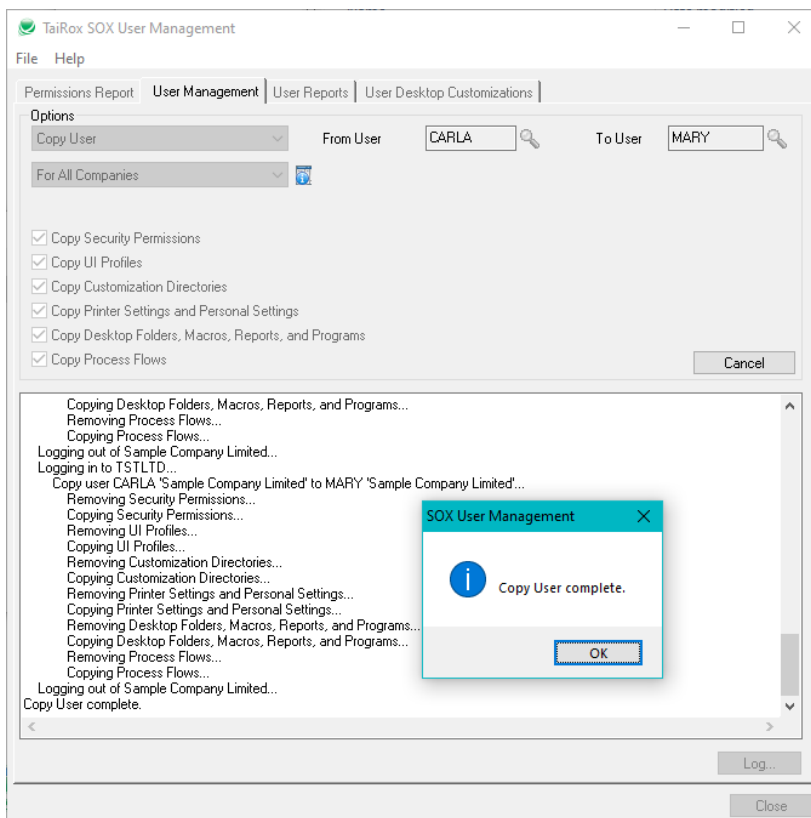
Click the Copy / Remove button to proceed with the operation

If the “To User” does not exist, a dialog will appear asking if you want to create the user account. Choose Yes to add the new user account.



Log shows the results

The program displays a log as the operation proceeds. This log is also stored in a file, which can be launched by clicking on the Log button:



## Copying between Multiple System Databases

A company-to-company operation can involve multiple system databases.

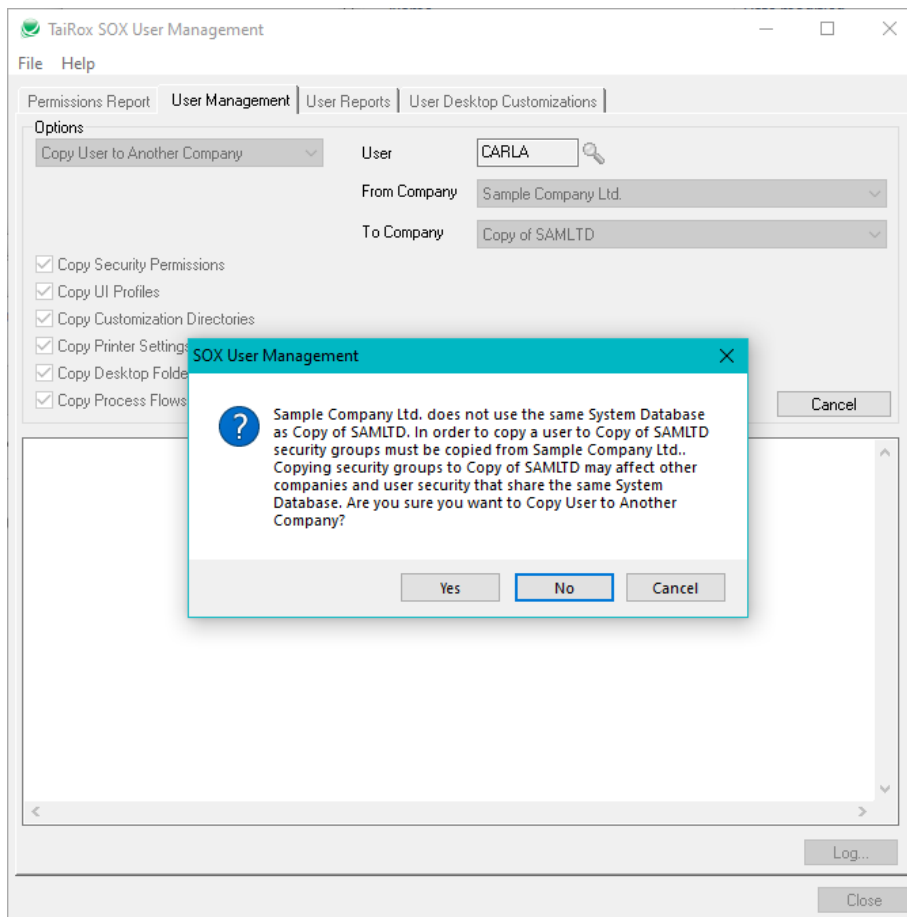
If you want to duplicate rights from company X to company Y, AND these companies have different system databases (say SX and SY), you must first modify SY's security groups.

- First – Remove the security group from SY.
- Second – Copy the security rights from SX to SY.

**Important Note:** This change will affect all companies that have SY as their system database.

To help protect against unintended results, the program will display a warning message when copying between system databases. See message below.

It may be advisable to eliminate multiple system databases in an installation. SOX User Management can greatly assist with this process.



## User Reports Tab

The User Reports tab provides the following administrative reports:

- User Profiles
- Locked Out Users
- Disabled Users
- Expiring Passwords
- Advanced Security Settings
- Commonly Used Passwords
- Passwords That Never Expire
- User Groups

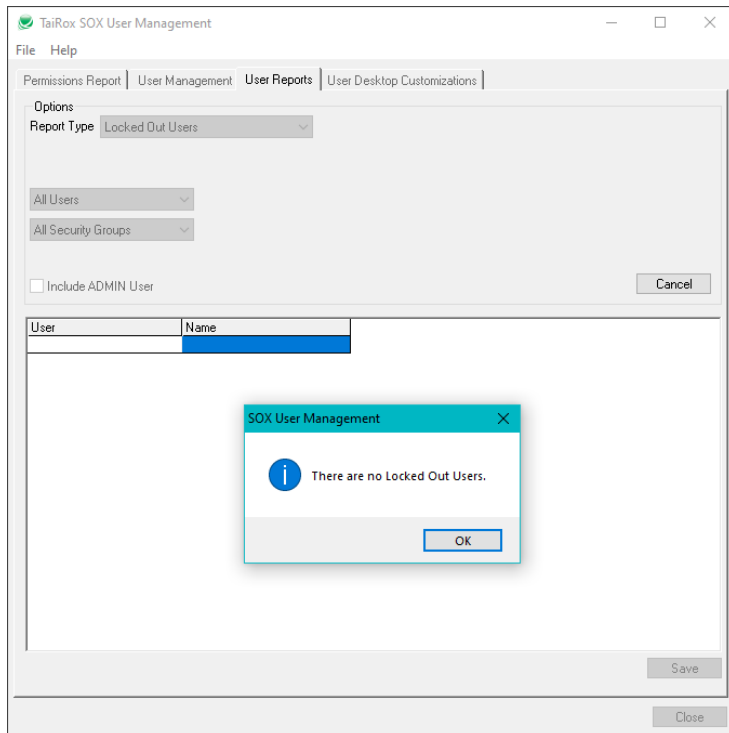
### User Profiles Report sample

The screenshot shows the 'User Profiles' report in the TaiRox SOX User Management application. The 'Report Type' is set to 'User Profiles'. The table below shows the details for two users: DON and FRED.

User	Value	Information
DON	Don Fenske	
	Account Type	User
	Language	English
	Authentication Method	Sage 300
	Job Role	Director/Senior Manager
	User must change password at next logon	No
	Password never Expires	Yes
	User cannot change password	No
	User cannot change password	No
	Account Disabled	No
	Account is locked out	No
	Account is restricted	No
	Phone	7785556843
	Email1	don.fenske@tairox.com
	Email2	
	User receives e-mail from Sage with information relevant to job role	Yes
FRED	Fred Bowl	

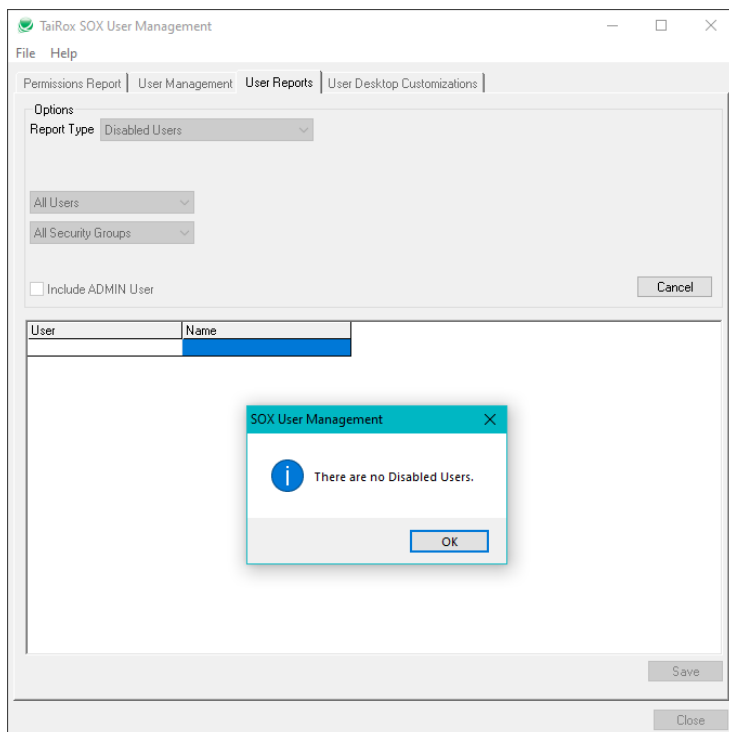
## Locked Out Users report

Displays the User and Name. If there are no locked-out users, the program will display a message.



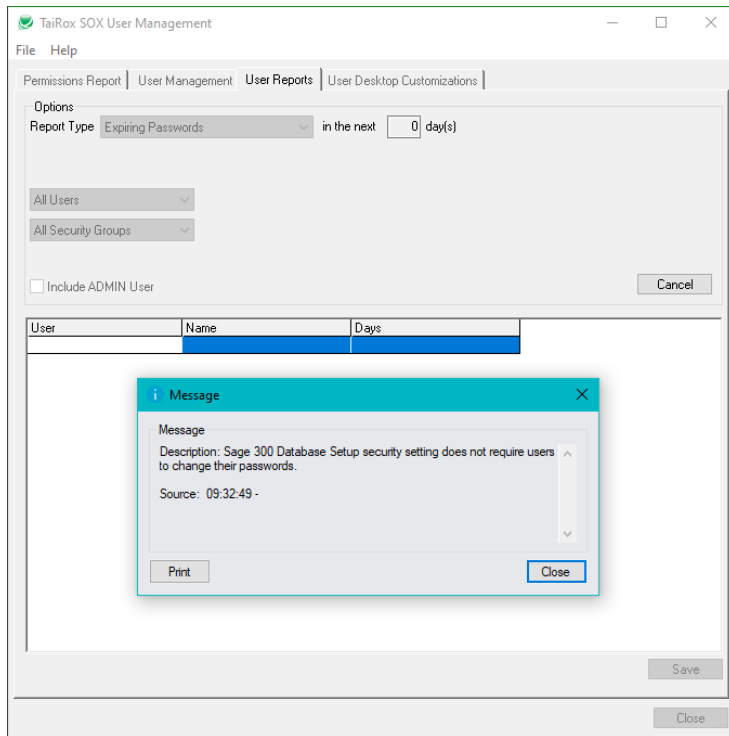
## Disabled Users report

Displays the User and Name. If there are no disabled users, the program will display a message.



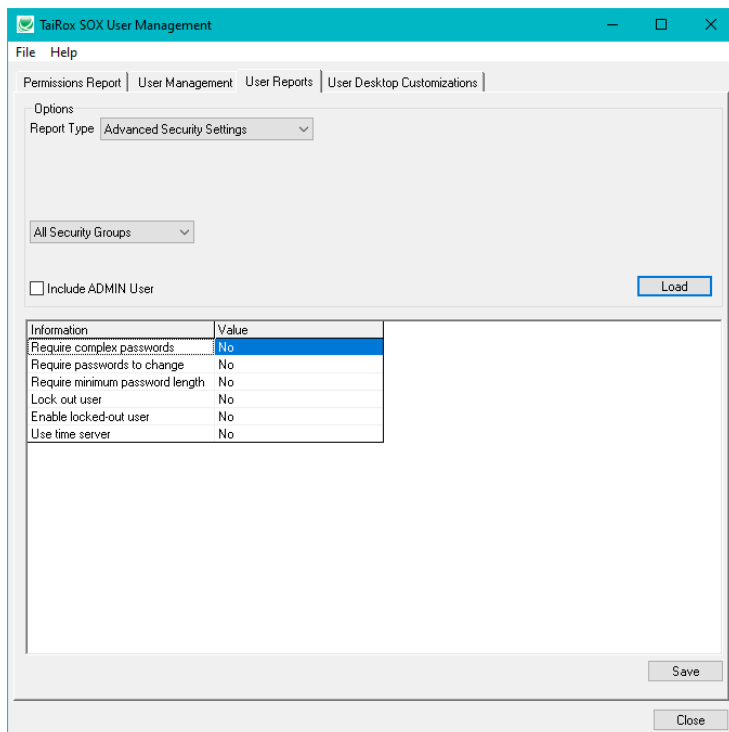
## Expiring Passwords report

Displays the User, Name, and Days until expiry. If the security settings do not require password expiry, the program will display a message.



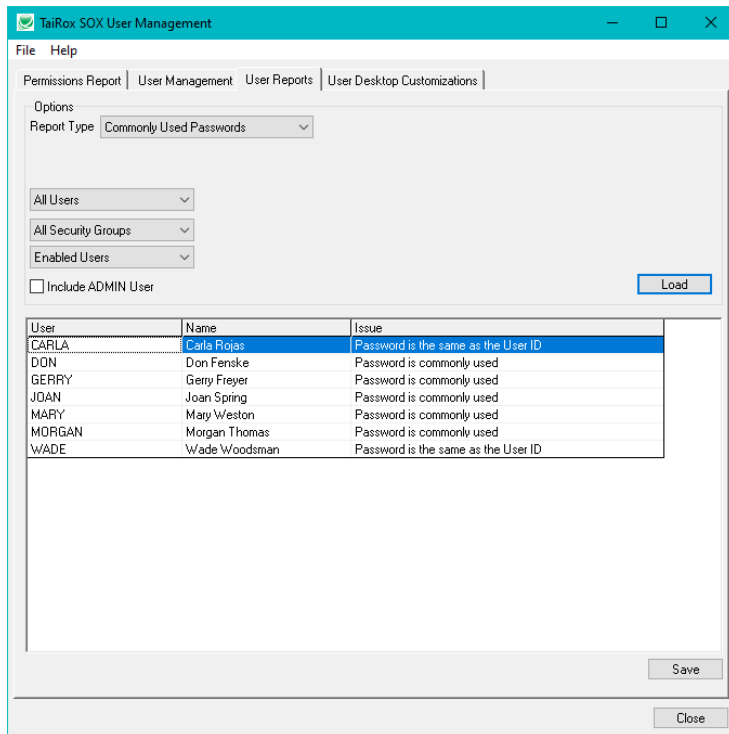
## Advanced Security Settings report

The following information will be displayed:



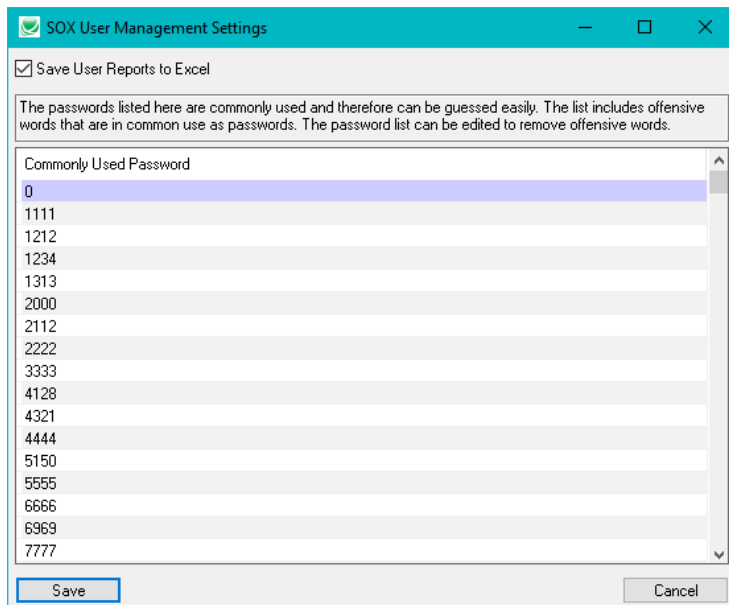
## Commonly Used Passwords report

Displays the User, Name and Issue. In this example the user name and password are the same (CARLA, WADE) or the password is in common use.

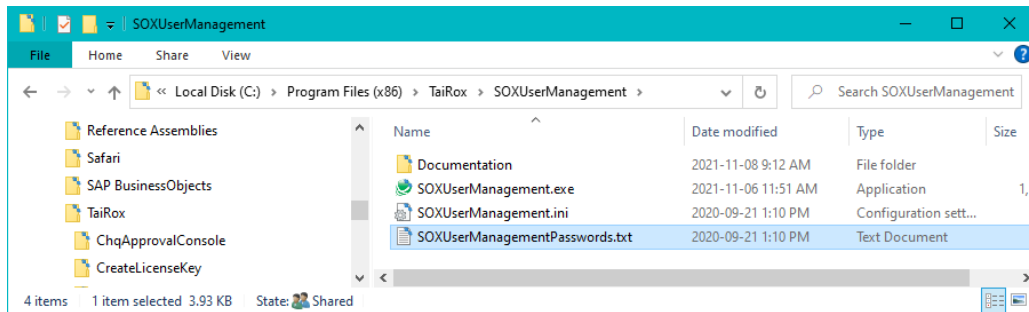


## Commonly Used Passwords on the settings screen

You can view and edit the commonly used password list by choosing **File > Settings** from the SOX User Management window. The list includes passwords that would not normally be in a "Top 10 Bad Password List", such as ACCPAC, SAGE and ACCOUNTS.

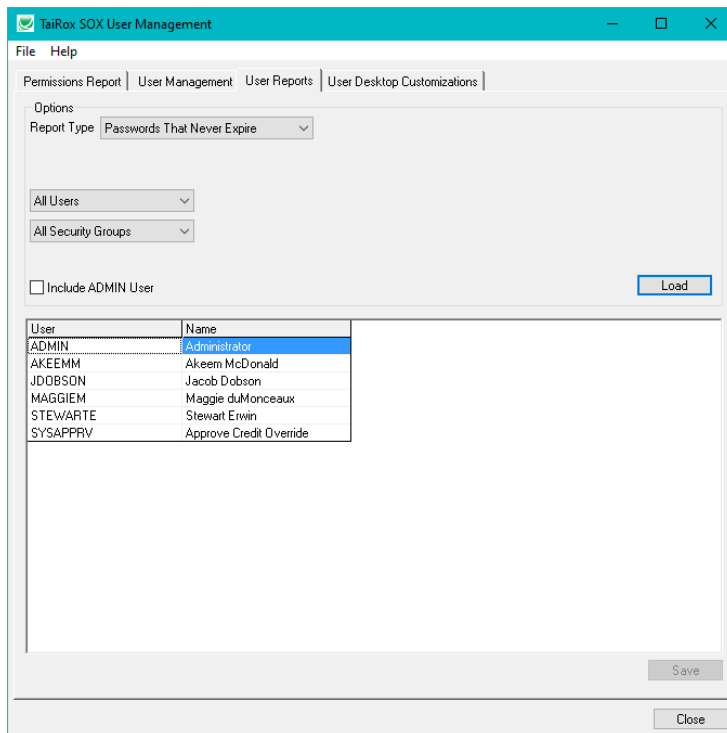


The Commonly Used Passwords list includes many vulgar words because people commonly use them in passwords. You may add to the list or delete offensive entries in the Settings window, or you can edit the text file (SOXUserManagementPasswords.txt) in the folder where SOX User Management is installed.

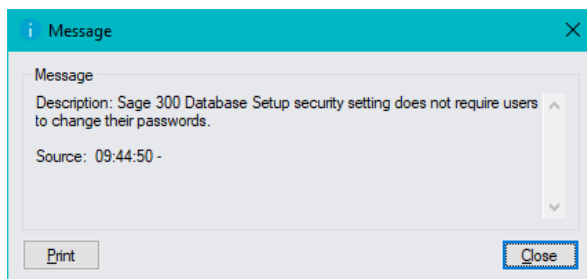


## Passwords That Never Expire report

Displays the User and User Name.

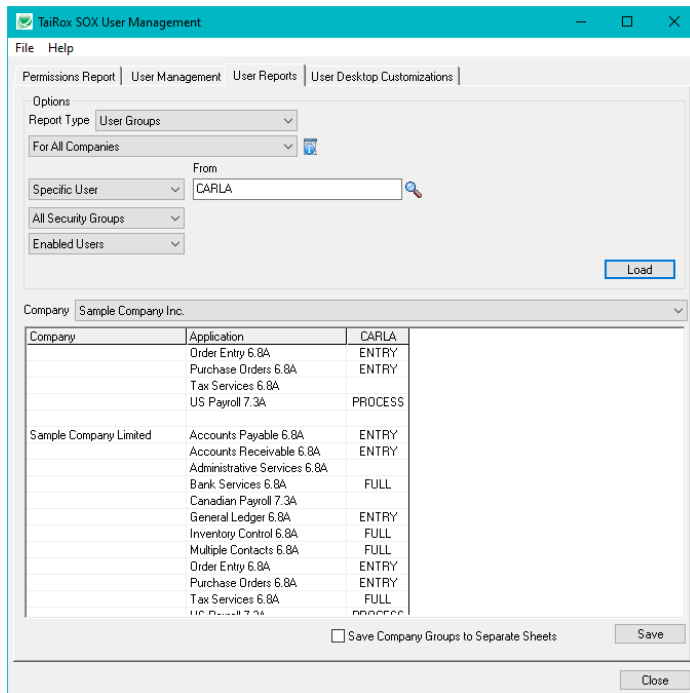


If Sage 300 security does not require users to change their passwords, this report will be empty and the following message will be displayed:



## User Groups

Displays the user groups for one or more users for specified companies and applications.

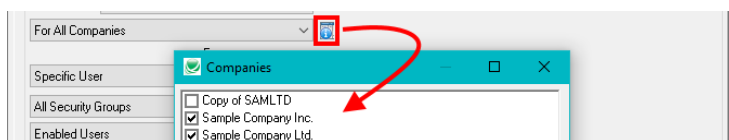


If you include the ADMIN user in your report, the report will list all security groups in the range of groups. If you do not include the ADMIN user, the report will only list groups to which the specified users belong.

For example, the above report lists only the groups to which CARLA belongs.

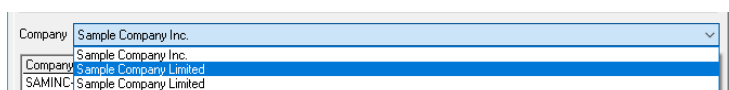
- If you run the report for a single user that does not appear in any user groups, the report will be blank.
- If you specify a range of users, the report will list all groups within the specified group range to which any of the included users belong.

### To select a set of companies:



- Choose For All Companies
- Click the button beside the dropdown.
- Select the companies you want from the list.

### Click the Company Dropdown to view the groups for each company:



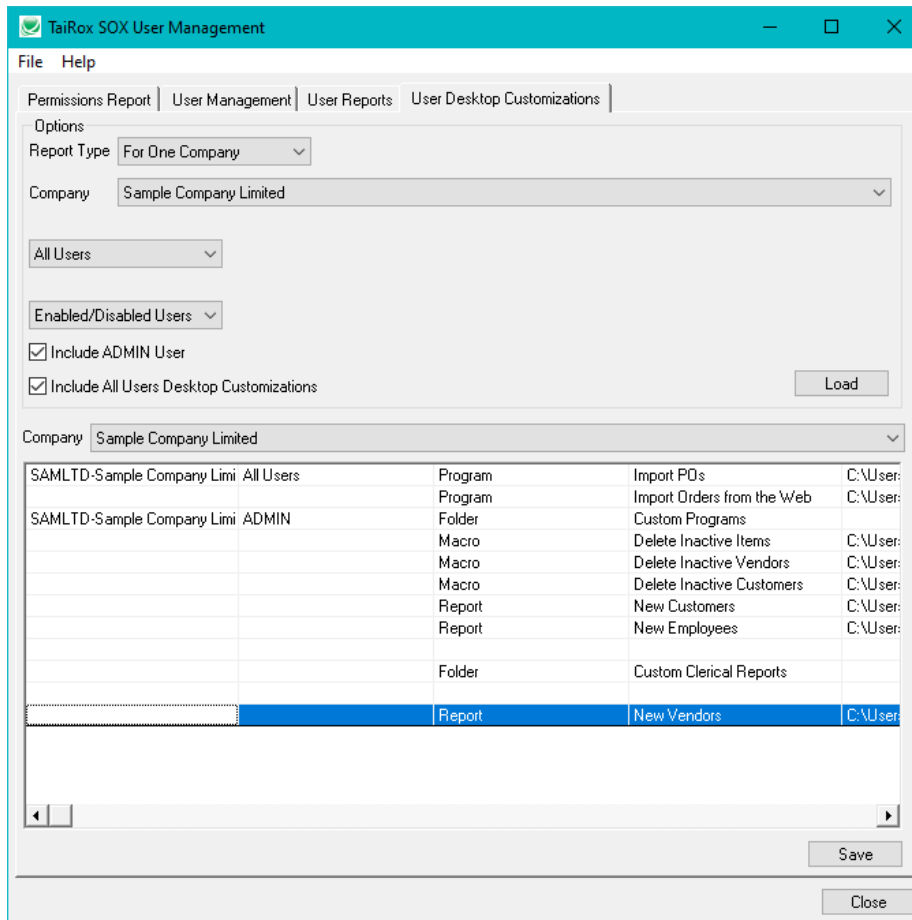
Use the Company dropdown list to view the groups for each company if you chose more than one company. The user groups for each company are listed separately.



## User Desktop Customizations Tab

The User Desktop Customizations tab lists all custom folders, macros, programs, and reports that have been added to the Sage 300 Desktop for one company or all companies and for one or all users.

This screen lets you choose the company databases, the users, whether to create the report for enabled and/or disabled users, whether to include the ADMIN user, and whether to include “All Users” customizations. (You can explicitly make customizations available to All Users when you add new items to the Sage 300 desktop.)

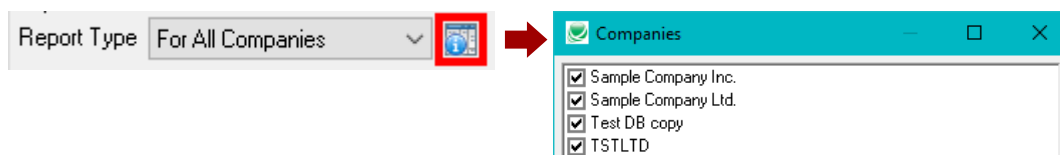


### Complete the fields on the User Desktop Customization tab as follows:

**Report Type** – You can print the report for a single Sage 300 company database or select from a list of associated companies.

**For One Company** – If you choose *One Company*, choose the company that you want to report on from the Company dropdown.

**For All Companies** – If you choose *For All Companies*, click the button that appears beside the For All Companies choice, select the companies to include in the report, and then click the OK button.



**All Users / Range of Users / Specific User** – Choose who will be included in the report.

**All Users** – All users in all selected companies will be included in the report.

**Range of Users** – Choose the From and To users for the range that you want reported.

**Specific User** – Choose the specific user from the Finder.

**All Applications / Range of Applications / Specific Application** – Choose the modules that will be included in the report.

**All Applications** – All applications that have been activated in the Sage 300 companies that you selected will be included in the report (such as TaiRox Productivity Tools or TaiRox CRM and Collections).

**Range of Applications** – Choose the From and To applications for the range that you want reported.

**Specific Application** – Choose the specific application from the Finder.

**Enabled/Disabled Users / Enabled Users / Disabled Users** – Choose whether the report will include enabled or disabled users. (Users can be disabled with the Sage 300 Users form in Administrative Services.)

**Enabled/Disabled Users** – Include all users that have been added to the Sage 300 companies that you selected.

**Enabled Users** – Include only users with enabled user accounts.

**Disabled Users** – Include only users whose accounts have been disabled.

**Include ADMIN User** – You can choose to include or exclude the ADMIN user.

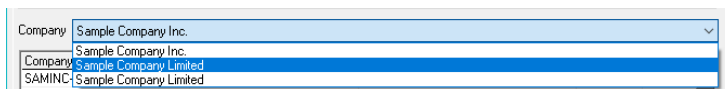
**Include All Users Desktop Customizations** – You can also choose to include or exclude the user group “All Users”, to which you can assign new customizations when you add them to the desktop.

### ***Click the Load button to create the report:***

Once all criteria are selected, click the Load button to display items matching the criteria and options.

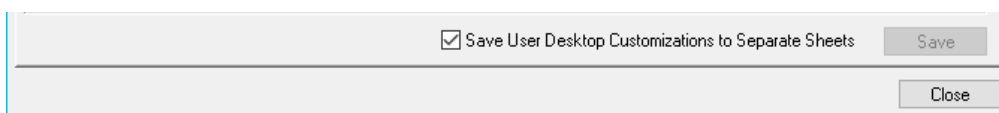
### ***Click the Company Dropdown to select a company:***

If you chose more than one company, use the Company dropdown list to select the company data that you want to review. The customizations are listed separately for each company.



### ***Click the Save button to save the report to an Excel Workbook (\*.xlsx):***

Once saved in a workbook the information has a similar layout and is formatted automatically with gridlines and vertically-oriented labels. You can save user customizations to separate worksheets.



**Save as Excel Workbook (\*.xlsx):** Save the Worksheet as a .xlsx file. Older Excel workbooks do not handle more than 256 columns, so the Worksheet will not be saved properly if you have a large number of customizations.

## Appendix A – User Management Tab Variations

This appendix provides screen settings for various user management operations.

### Copying user A's setup to user B for all selected companies

The screenshot shows a dialog box titled 'Options' with the following settings:

- Options: Copy User
- From User: [Empty field with search icon]
- To User: [Empty field with search icon]
- For All Companies: [Dropdown menu]
- Copy Security Permissions:
- Copy UI Profiles:
- Copy Customization Directories:
- Copy Printer Settings and Personal Settings:
- Copy Desktop Folders, Macros, Reports, and Programs:
- Copy Process Flows:

A 'Copy' button is located at the bottom right.

### Copying user A's setup to user B for a given company

The screenshot shows a dialog box titled 'Options' with the following settings:

- Options: Copy User
- From User: [Empty field with search icon]
- To User: [Empty field with search icon]
- For One Company: [Dropdown menu]
- Company: Check Approval Vancouver
- Copy Security Permissions:
- Copy UI Profiles:
- Copy Customization Directories:
- Copy Printer Settings and Personal Settings:
- Copy Desktop Folders, Macros, Reports, and Programs:
- Copy Process Flows:

A 'Copy' button is located at the bottom right.

### Copying user A's setup from company X to company Y

The screenshot shows a dialog box titled 'Options' with the following settings:

- Options: Copy User to Another Company
- User: [Empty field with search icon]
- From Company: Sample Company Limited
- To Company: CNSDAT
- Copy Security Permissions:
- Copy UI Profiles:
- Copy Customization Directories:
- Copy Printer Settings and Personal Settings:
- Copy Desktop Folders, Macros, Reports, and Programs:
- Copy Process Flows:

A 'Copy' button is located at the bottom right.

### Copying user A's setup from company X to all selected companies

The screenshot shows a dialog box titled 'Options' with the following settings:

- Options: Copy User to Selected Companies
- User: [Empty field with search icon]
- From Company: Sample Company Limited
- To Companies: [List icon]
- Copy Security Permissions:
- Copy UI Profiles:
- Copy Customization Directories:
- Copy Printer Settings and Personal Settings:
- Copy Desktop Folders, Macros, Reports, and Programs:
- Copy Process Flows:

A 'Companies' window is open in the foreground, showing a list of companies with checkboxes:

- Check Approval Vancouver
- CNSDAT
- CPYINC
- CPYLTD
- Download Rates Demo

A 'Copy' button is located at the bottom right of the dialog box.

### Copying all users' setups from company X to company Y

Options  
 Copy All Users to Another Company

From Company: Sample Company Inc

To Company: CNSDAT

- Copy Security Permissions
- Copy UI Profiles
- Copy Customization Directories
- Copy Printer Settings and Personal Settings
- Copy Desktop Folders, Macros, Reports, and Programs
- Copy Process Flows

Copy

### Removing user A's setup from all selected companies

Options  
 Remove User From All Companies

User: [ ]

- Remove Security Permissions
- Remove UI Profiles
- Remove Customization Directories
- Remove Printer Settings and Personal Settings
- Remove Desktop Folders, Macros, Reports, and Programs
- Remove Process Flows

Remove

### Removing user A's setup from a given company

Options  
 Remove User From A Company

User: [ ]

Company: Sample Company Inc

- Remove Security Permissions
- Remove UI Profiles
- Remove Customization Directories
- Remove Printer Settings and Personal Settings
- Remove Desktop Folders, Macros, Reports, and Programs
- Remove Process Flows

Remove

### Removing all users' setups from a given company

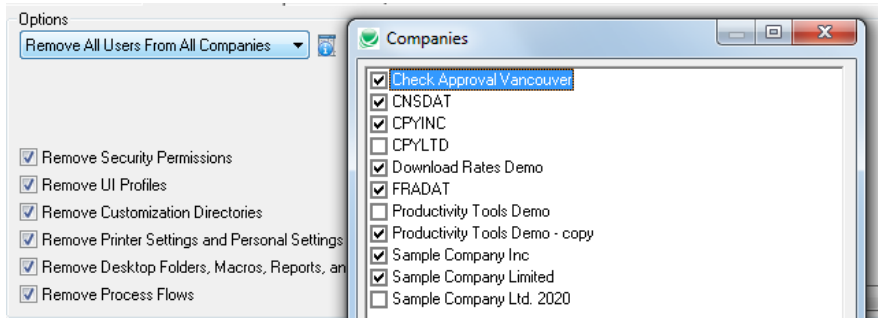
Options  
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Remove

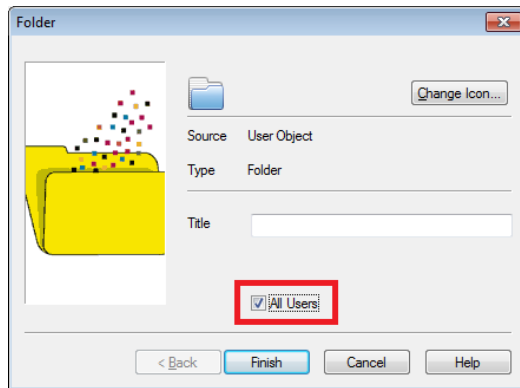
### Removing all users' setups from all selected companies



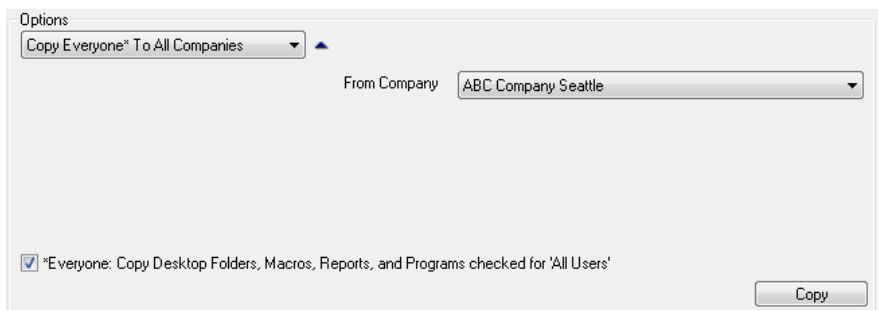
### Copying Everyone's setup from company X to company Y



**Note:** Everyone's setup means the desktop folders, macros, reports and programs that have the checkbox All Users selected as illustrated below. Implementation consultants may know that these are stored in a pseudo user folder `_EVERYONE`.



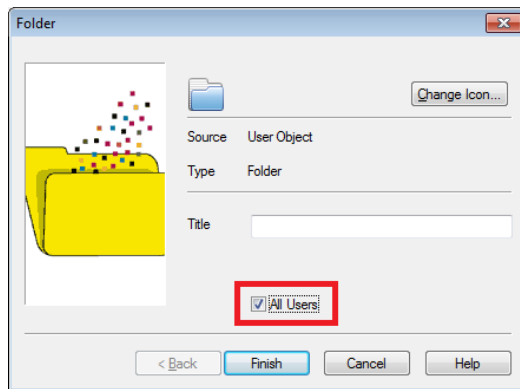
### Copying Everyone's setup from company X to all selected companies



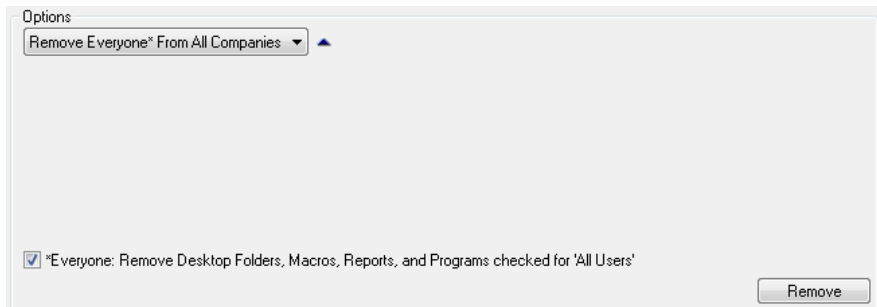
### Removing Everyone's setup from a given company



**Note:** *Everyone's* setup means the desktop folders, macros, reports and programs that have the checkbox All Users selected as illustrated below. Implementation consultants may know that these are stored in a pseudo user folder `_EVERYONE`.



### Removing Everyone's setup from all selected companies

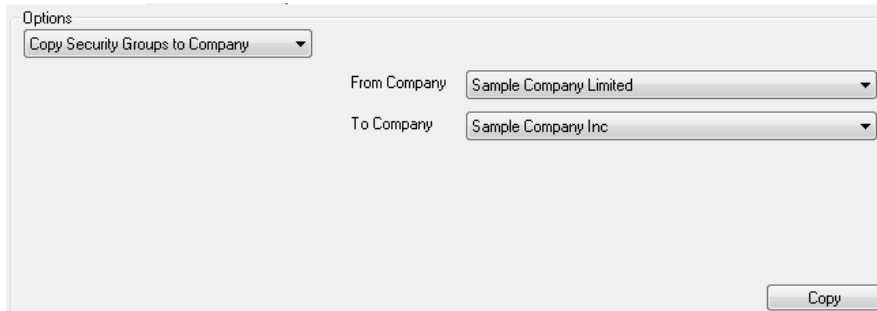


## Appendix B – Copying Security Groups

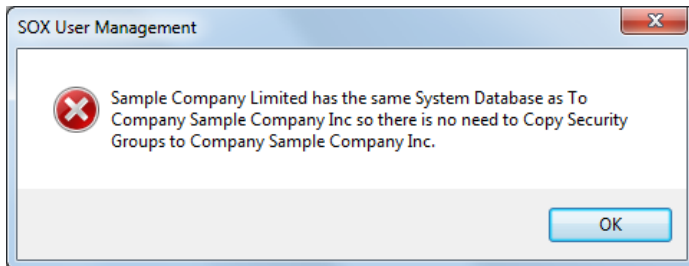
SOX User Management will copy security groups from one company's system database to another's.

If the source company system database is different than the target company system database then the security groups are copied from source to target by first removing the security groups from the target company, and then inserting those security groups from the source company system database into the target company system database.

Any security groups that exist in the target company system database, but do not exist in the source company system database, are not changed in the target company system database, and the result is a super set of both.



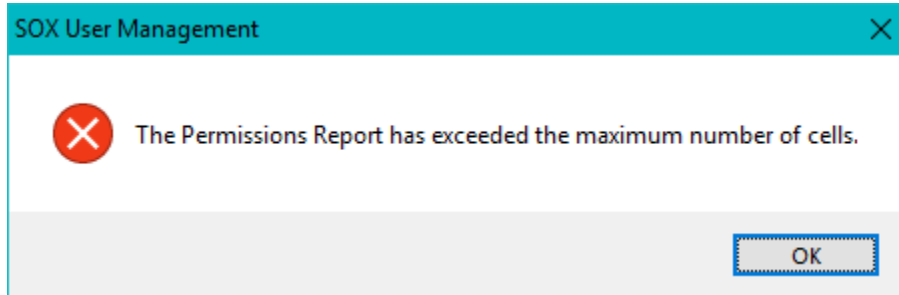
If the source company has the same system database as the target company system, then it does not make sense to copy the security groups and an error message is displayed:



## Appendix C – Permissions Report Exceeded Maximum Size

The Permissions Report uses the Microsoft FlexGrid Control, which is limited to 350,000 total cells. This message means that the report has exceeded the limit and will only display the information for companies that it fully processed before hitting the cell maximum.

If a Permissions report has exceeded 350,000 cells, the program will display the following message:



Although 350,000 cells may sound like a very large number, you can exceed this limit if you are running the report for a very large number of enabled and disabled users.

We suggest that you reduce the number of cells required to run the report in one or more of the following ways:

- Print the report for a specific user or range of users.

- Print the report for a specific application or range of applications.

- Print the report for enabled users only.

- Do not include the ADMIN user – they have all permissions – **and** exclude permissions that no user has access to (excluding the ADMIN user).