

## SOX User Management for Sage 300

Available for \$1195 + \$300 per year, SOX User Management manages users across multiple companies and creates key permission and security reports suitable for compliance audits.

Watch overview: <https://vimeo.com/610237327>

"SOX User Management - LOVE! ... Just wanted to let you know how much I am appreciating having this add-on! With 17 entities and over 50 users to manage it has made my life of managing users and permissions a whole lot easier! Requests for new users, departed employees or user permissions changes no longer make me cringe."  
**Kimberly Kyle, Traffic Tech Inc.**

### Permissions & Setup

Permissions and setup can be copied or removed in many different ways with the goal of making the Sage 300 desktop experience be the same for different users and in different companies. Operations include:

- Copy user A's setup to user B for selected companies
- Copy user A's setup from company X to selected companies
- Copy all users' setup from company X to company Y
- Remove user A's setup from selected companies
- Remove all users' setup from selected companies

Options

Copy User  From User  To User

For One Company  Company

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

Options

Copy User to Selected Companies  User

From Company

To Companies

Copy Security Permissions

Copy UI Profiles

Copy Customization Directories

Copy Printer Settings and Personal Settings

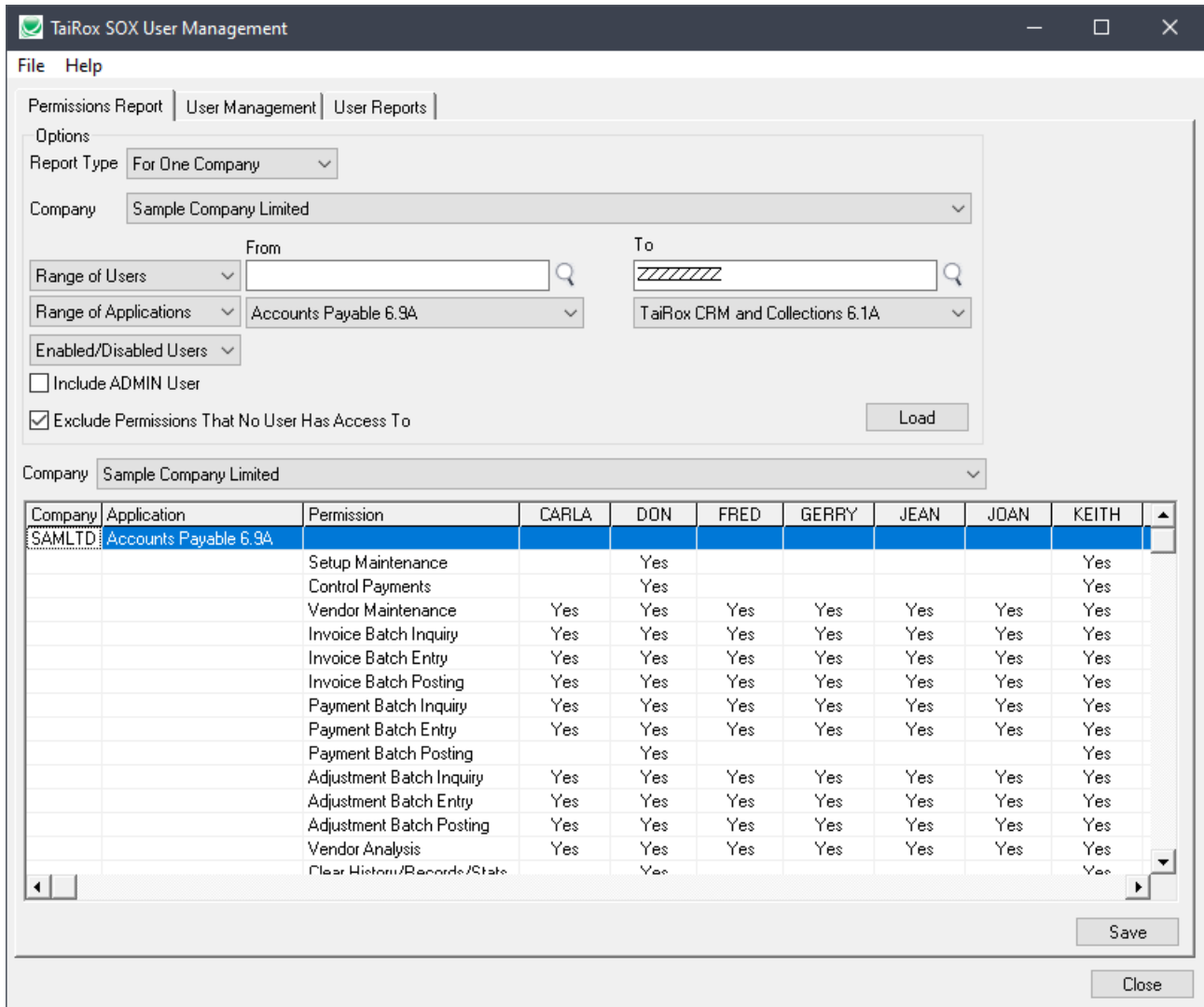
Copy Desktop Folders, Macros, Reports, and Programs

Copy Process Flows

Copy

# SOX User Management for Sage 300

**Permissions Report:** Create a concise display and spreadsheet-based report showing Sage 300 users and permissions for a selected set of companies. Eliminate manual assembly from scattered information.



The screenshot shows the 'Permissions Report' configuration window in the TaiRox SOX User Management application. The window title is 'TaiRox SOX User Management'. It has a menu bar with 'File' and 'Help'. Below the menu bar are tabs for 'Permissions Report', 'User Management', and 'User Reports'. The 'Options' section includes a 'Report Type' dropdown set to 'For One Company', a 'Company' dropdown set to 'Sample Company Limited', and search fields for 'From' and 'To' users. There are also dropdowns for 'Range of Users', 'Range of Applications' (set to 'Accounts Payable 6.9A'), and 'Enabled/Disabled Users'. Checkboxes for 'Include ADMIN User' and 'Exclude Permissions That No User Has Access To' are present, with the latter checked. A 'Load' button is at the bottom right of the options section. Below the options is another 'Company' dropdown set to 'Sample Company Limited'. The main area is a table with columns for 'Company', 'Application', 'Permission', and users: CARLA, DON, FRED, GERRY, JEAN, JOAN, KEITH. The first row is highlighted in blue.

Company	Application	Permission	CARLA	DON	FRED	GERRY	JEAN	JOAN	KEITH
SAMLTDE	Accounts Payable 6.9A								
		Setup Maintenance		Yes					Yes
		Control Payments		Yes					Yes
		Vendor Maintenance	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Invoice Batch Inquiry	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Invoice Batch Entry	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Invoice Batch Posting	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Payment Batch Inquiry	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Payment Batch Entry	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Payment Batch Posting		Yes					Yes
		Adjustment Batch Inquiry	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Adjustment Batch Entry	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Adjustment Batch Posting	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Vendor Analysis	Yes	Yes	Yes	Yes	Yes	Yes	Yes
		Clear History/Records/State		Yes					Yes

**Administrative Reports** identify issues requiring attention related to users and passwords:

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