

SOX User Management

User Guide

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Important Notice

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SOX User Management Summary

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 are 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								
Copy Security Permissions Copy UI Profiles Copy Customization Directories	Administrators select the setup options they want to copy (or remove) from the checkboxes shown here. Any combination of settings can be copied.							
Copy Printer Settings Copy Desktop Folders, Macros, Reports, and Programs Copy Process Flows	Printer settings include the print destination, page size and driver name.							

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.

2

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.

S Sage 300 - Productivity Tools D	emo				Administrator	– 🗆 🗙
Home						
 ▷ Accounts Payable △ Accounts Receivable 	Administr	ative Services	(Sox User N	lanagemmen	t)	
Administrative Services Canadian Payroll Common Services General Ledger	Licensed to: Dealer: CC:	TAIROX SOFTWARE INC, TAIROX SOFTWARE INC TAIROX SOFTWARE INC	TAIROX SOFTWARE IN	с		
Intelligence Reporting Inventory Control Order Entry Project and Job Costing	Users	Security Groups	User Authorizations	Customization Directories	Data Activation	UI Profile Maintenance
Purchase Orders SDK TaiRox CRM	Assign UI Profiles	Assign Visual Process Flows	Data Integrity	Restart Maintenance	Database Dump	Database Load
Setup TaiRox Productivity Tools Accounts Payable Tools Accounts Receivable Tools General Ledger Tools Sage For Help, press F1	Administrative Reports	Sox User Managemment			111 Session D	vate: 1/10/2020

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

慶 Sage Ac	cpac Sign-on	×
User ID	ADMIN Windows Authentication	
Password		
OK	Car	ncel

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.

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nent User Reports Fried Bowl	nent User Reports Fred Bowl Joan Spring keith Rider	Fred Bowl Joan Spring keith Rider Wade Woodsman			
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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.

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Permissions Report User Man Options Report Type For All Companies		Desktop Customizations			
All Users All Applications Enabled/Disabled Users Include ADMIN User Exclude Permissions That No) User Has Access To			Load	
Company					\sim
Company	Application	Permission			
		Save Company Permissions to Separate	Sheets	Save	
				Clo	se

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.

Report Type	For All Companies	~ 🛐	•	💌 Companies	—	×
				Sample Company Inc. Sample Company Ltd. Test DB copy TSTLTD		

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.

Company	Sample Company Inc. 🗸 🗸 🗸
	Sample Company Inc.
Company	Sample Company Limited
SAMINC	Sample Company Limited

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.

Save Company Permissions to Separate Sheets	Save
	Close

Report on the SOX User Management Screen

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Options						
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				STEVE		
		Setup Maintenance	Yes	STEVE	Yes	Yes
		Setup Maintenance Control Payments	Yes Yes	STEVE	Yes Yes	Yes Yes
		Setup Maintenance Control Payments Vendor Maintenance	Yes Yes Yes	STEVE	Yes Yes Yes	Yes Yes Yes
		Setup Maintenance Control Payments Vendor Maintenance Invoice Batch Inquiry	Yes Yes Yes Yes	STEVE	Yes Yes Yes Yes	Yes Yes Yes Yes
		Setup Maintenance Control Payments Vendor Maintenance Invoice Batch Inquiry Invoice Batch Entry	Yes Yes Yes Yes Yes	STEVE	Yes Yes Yes Yes Yes	Yes Yes Yes Yes Yes
		Setup Maintenance Control Payments Veridot Maintenance Invoice Batch Inquity Invoice Batch Posting	Yes Yes Yes Yes Yes Yes Yes	STEVE	Yes Yes Yes Yes Yes Yes	Yes Yes Yes Yes Yes Yes
		Setup Maintenance Control Payments Vendor Maintenance Invoice Batch Inquiy Invoice Batch Entry Invoice Batch Entry Payment Batch Inquiy	Yes Yes Yes Yes Yes Yes Yes	STEVE	Yes Yes Yes Yes Yes Yes Yes	Yes Yes Yes Yes Yes Yes Yes
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		Setup Maintenance Control Payments Vendor Maintenance Invoice Batch Inquity Invoice Batch Posting Payment Batch Posting Payment Batch Forting Adjustment Batch Entry Adjustment Batch Entry	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	STEVE	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes
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		Setup Maintenance Control Payments Vendor Maintenance Invoice Batch Inquiy Invoice Batch Inquiy Invoice Batch Posting Payment Batch Inquity Payment Batch Posting Adjustment Batch Inquity Adjustment Batch Posting Vendor Analysis	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	STEVE	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes
SAMINČ-Sample Comp		Setup Maintenance Control Payments Vendor Maintenance Invoice Batch Inquiry Invoice Batch Inquiry Payment Batch Inquiry Payment Batch Inquiry Payment Batch Inquiry Adjustment Batch Inquiry Adjustment Batch Posting	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	STEVE	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes
SAMINČ-Sample Comp		Setup Maintenance Control Payments Vendor Maintenance Invoice Batch Inquiy Invoice Batch Inquiy Invoice Batch Posting Payment Batch Inquity Payment Batch Posting Adjustment Batch Inquity Adjustment Batch Posting Vendor Analysis	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	STEVE	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes
Company SAMINC Sample Comp		Setup Maintenance Control Payments Vendor Maintenance Invoice Batch Inquiy Invoice Batch Inquiy Payment Batch Inquiy Payment Batch Inquiy Payment Batch Inquiy Adjustment Batch Inquiy Adjustment Batch Posting Vendor Analysis Class History/Records/State	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes		Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes

Report in an Excel Workbook

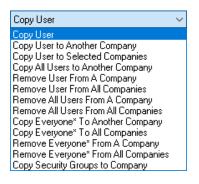
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2										
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6	Range of Users			222222						
7	Range of Applications	Accounts Payable 6.1	A Ta	iRox Productivity Tools 6.1A						
8	Enabled/Disabled Users									
9	Exclude ADMIN User									
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16				ntrol Payments						
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8				voice Batch Inquiry		•		•	•	
9				voice Batch Entry		•		•	•	
20				voice Batch Posting		•		٠	•	
21				yment Batch Inquiry		•		٠	•	
22				yment Batch Entry		•		٠	•	
23			Pa	yment Batch Posting		•		٠	•	
24			Ac	justment Batch Inquiry		•		٠	•	
25			Ac	ljustment Batch Entry		•		٠	•	
26			Ac	ljustment Batch Posting		•		٠	•	
27				endor Analysis		•		٠	•	
28				ear History/Records/Stats.		•		٠	•	
29				riod End Maintenance		•		٠	•	
30				ar End Maintenance		•		٠	•	
31			Im	port Processing		•		٠	•	

6

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	Appe	endix .	A for	a	com	<u>plete</u>	set	of	screen	variatio	<u>ns</u> .

💌 TaiRox SOX User Management	-	
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Permissions Report User Management User Reports User Desktop Customizations		
Options		
Copy User 🗸 From User 🔍 To User		Q
For All 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		Сору
		\sim
<		>
	[Log
		Close

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.

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File Help		<u>F</u> ile <u>H</u> elp				
Permissions Report User Management User Reports User Desktop Customizations Copy User Copy User Prom User CARLA Q To User	er MARY	User ID User Name		२+		
For All Companies 🗸 🔯		Account Type	User -	Language	English	•
SOX User Management	<	Authentication Method	Sage 300 -	Job Role	Select your job role	•
Copy Security Permis Copy UI Profiles Copy Customization C User MARY does not exist. Do you want to add user MARY?		Windows Domain Windows User Name		Browse		
Copy Printer Settings		windows User Name				
Copy Process Flows Yes No Cancel	Cancel					

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:

TaiRox SOX User Management File Help					-		\times
			. 1				
Permissions Report User Management Use	r Reports User D	esktop Customi:	ations				
Options Copy User 🗸	From User	CARLA	0	To User	MARY	(2
For All Companies 🗸 🗸	T						
Copy Security Permissions							
Copy UI Profiles							
Copy Customization Directories							
Copy Printer Settings and Personal Setting	s						
Copy Desktop Folders, Macros, Reports, a	nd Programs						
Copy Process Flows						Cancel	
Removing Process Flows Copying Process Flows Logging out of Sample Company Limited Logging in to TSTLTD Copy user CARLA Sample Company Limit Removing Security Permissions Copying Security Permissions Removing UI Profiles Removing Customization Directories Removing Customization Directories Removing Process Flows Logging out of Sample Company Limited Copy Leer complete.	Settings ettings ports, and Programs	SOX User N	ed' <mark>Aanagement</mark> Copy User co	mplete.			~
<						2	
						Log	
						Clo)se

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.

🕏 TaiRox SOX User Management			_		×
File Help					
Permissions Report User Management	User Reports 🛛 User Des	ktop Customizations			
Options					
Copy User to Another Company	 ✓ User 	CARLA			
	From Company	Sample Company Ltd.			\sim
	To Company	Copy of SAMLTD			\sim
Copy Security Permissions					
🗹 Copy UI Profiles					
Copy Customization Directories					
Copy Printer Setting: SOX User Manag	gement		×		
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as Co secur Copy Data	opy of SAMLTD. In order rity groups must be cop ring security groups to panies and user security	No Cancel		Cancel	^
<				2	>
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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

💈 TaiRox	SOX User Management		– 🗆 X
le Help			
Permission	s Report User Management User Reports User Desktop Custor	mizatione	
	is hepoint User Management User Desktop Custor	hizadoris	
Options			
Report T	ype User Profiles 🗸 🗸		
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All Users	s •		
All Secu	rity Groups 🗸 🗸		
Enabled	llana		
chabled	02612 4		
🗌 Includ	le ADMIN User		Load
User	Value	Information	
DON	Don Fenske		1 –
	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 Account is restricted	No	-
	Account is restricted Phone	No 7785556843	-
	Email1	7780006843 don.fenske@tairox.com	-
	Email2	don.tenske@dailox.com	-
	User receives e-mail from Sage with information relevant to job role	Yes	-
	osci receives e mainten siege with information relevant to job role	100	-
FRED	Fred Bowl		•
			· · · · · · · · · · · · · · · · · · ·
			Save
			Close
			0.036

Locked Out Users report

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

🕏 TaiRox SOX User Management	_		×
File Help			
Permissions Report User Management User Reports User Desktop Customizations			
Options Report Type Locked Dut Users			
All Users All Security Groups			
Include ADMIN User	[Cancel	
User Name			
SOX User Management X There are no Locked Out Users.			
		Save	
		Clos	e

Disabled Users report

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

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File Help			
Permissions Report User Management User Reports User Desktop Customizations			
Options Report Type Disabled Users			
All Users V All Security Groups V			
Include ADMIN User		Cance	1
User Name			
SOX User Management			
There are no Disabled Users.			
ОК			
		Sav	'e
		Clo	ise

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.

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e Help					
ermissions Hepor	t User Management User H	eports User Desktop Customizations			
	piring Passwords	in the next 0 day(s)			
All Users	~				
All Security Grou	ids 🗸				
Include ADM	Nillser			Cance	ł
Thorado Abini	11 0301				
User	Name	Days			_
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	Message				
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	Description: Sage 300 E to change their passwor	Database Setup security setting does not require use rds.	rs 🔨		
	Description: Sage 300 I to change their passwor Source: 09:32:49 -	rds.	~		
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	Description: Sage 300 I to change their passwor Source: 09:32:49 -	rds.	~	Sa	ve

Advanced Security Settings report

The following information will be displayed:

TaiRox SOX User Management	: 		-		×
e Help					
ermissions Report User Manager	ment User Reports User Deski	top Customizations			
Options Report Type Advanced Security S	Settings V				
All Security Groups V				Load	
Information	Value				
Require complex passwords	No				
Require passwords to change	No				
Require minimum password length					
Lock out user	No				
Enable locked-out user	No				
Use time server	No				
				C	ve

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.

e Help				
ermissions Report l	Jser Management User Reports	User Deskton Customizations		
Options				
Report Type Commo	nly Used Passwords 🛛 🗸 🗸			
All Users	~			
All Security Groups	\sim			
Enabled Users	\sim			
Include ADMIN Us			Lo	and a
_ Include ADMIN Us	ser			au
User CARLA	Name Carla Rojas	Password is the same as the User ID		
LAHLA DON	Don Fenske	Password is the same as the User ID Password is commonly used		
GERRY	Gerry Freyer	Password is commonly used Password is commonly used		
uenni	Joan Spring	Password is commonly used		
IOAN.	voan opning			
	Maru Weston			
MARY	Mary Weston Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN				
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
JOAN MARY MORGAN WADE	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		
MARY MORGAN	Morgan Thomas	Password is commonly used		Gave

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 passwords listed here are commonly used and therefore can be gue words that are in common use as passwords. The password list can be t	essed easily. The list includes offi edited to remove offensive words	ensive
Commonly Used Password		
0		
1111		_
1212		
1234		
1313		
2000		
2112		
2222		
3333		
4128		
4321		
4444		
5150		
5555		
6666		
6969		
7777		

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.

File Home Share View				~ (
← → × ↑ 📑 « Local Disk (C:) > Progra	m Files (x86) > TaiRox > SOXUserManagement >	ب ق	Search SOXUserManag	ement
Reference Assemblies	^ Name	Date modified	Туре	Size
📑 Safari	Documentation	2021-11-08 9:12 AM	File folder	
SAP BusinessObjects	SOXUserManagement.exe	2021-11-06 11:51 AM	Application	1
TaiRox	SOXUserManagement.ini	2020-09-21 1:10 PM	Configuration sett	
ChqApprovalConsole	SOXUserManagementPasswords.txt	2020-09-21 1:10 PM	Text Document	
CreateLicenseKey	~ <			
4 items 1 item selected 3.93 KB State: 🎎 Sh	ared			[== b

Passwords That Never Expire report

Displays the User and User Name.

	Management					×
e Help						
ermissions Report	User Management Us	ser Reports User	Desktop Customizations			
Options						
	ords That Never Expire	~				
All Users	\sim					
All Security Groups	\sim					
_						_
Include ADMIN U	ser				Load	
Jser ADMIN	Name Administrator					
	Administrator Akeem McDo	u al d				
JDOBSON	Jacob Dobsor					
MAGGIEM	Maggie duMo					
	Stewart Erwin					
STEWARTE						
SYSAPPRV	Approve Cred	it Uverride				
					0	
					Sav	e

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

i Message	×
Message Description: Sage 300 Database Setup security setting does not require users to change their passwords. Source: 09:44:50 -	^
Print	v se

User Groups

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

e Help	ement					
ormissions Report Llear M:	anagement User Reports User	Deakton Custo	minational			
	angement courreporte osci	Desktop edisto				
Options						
Report Type User Groups	~					
For All Companies	~					
	From					
Specific User	V CABLA		•			
			•			
All Security Groups	~					
Enabled Users	~					
Endblod 03613						
					Load	
ompany Sample Company I	nc.					
		CARLA				_
Company	Application Order Entry 6.8A	ENTRY				
	Purchase Orders 6.8A	ENTRY				
	Tax Services 6.84	ENIBI				
	US Payroll 7.3A	PROCESS				
	0.5 Payloir 7.5K	PHOCESS				
Sample Company Limited	Accounts Payable 6.8A	ENTRY				
Sample Company Elinicea	Accounts Receivable 6.8A	ENTRY				
	Administrative Services 6.8A	Entrin				
	Bank Services 6.8A	FULL				
	Canadian Payroll 7.3A					
	General Ledger 6.8A	ENTRY				
	Inventory Control 6.8A	FULL				
		FULL				
	Multiple Contacts 6.8A	FULL				
	Multiple Contacts 6.8A Order Entry 6.8A	ENTRY				
	Multiple Contacts 6.8A Order Entry 6.8A Purchase Orders 6.8A	ENTRY				
	Multiple Contacts 6.8A Order Entry 6.8A Purchase Orders 6.8A Tax Services 6.8A	ENTRY ENTRY FULL	ny Groups to Separate Shi	eets	Sa	ve

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:

Company	Sample Company Inc.	~
	Sample Company Inc.	
Company	Sample Company Limited	
SAMINC	Sample Company Limited	

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.)

le Help	ment		—	
Permissions Report User Mar Options	nagement User Reports	User Desktop Customizations		
Report Type For One Compar	ıy ~			
Company Sample Company	y Limited			~
All Users 🗸 🗸				
Enabled/Disabled Users \vee				
Include ADMIN User				
🗹 Include All Users Desktop C	lustomizations			Load
ompany Sample Company Lin	nited			```
SAMLTD-Sample Company Lim	ni All Users	Program	Import POs	C:\Use
		Program	Import Orders from the Web	C:\Use
SAMLTD-Sample Company Lim	ni ADMIN	Folder	Custom Programs	
		Macro	Delete Inactive Items	C:\Use
		Macro	Delete Inactive Vendors	C:\Use
		Macro	D 1 4 1 4 D 4	
			Delete Inactive Customers	
			New Customers	C:\Use
		Report Report		C:\Use C:\Use
		Report	New Customers	C:\Use C:\Use C:\Use

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.

Report Type	For All Companies	~ 🛐	•	💹 Companies	—	×
				Sample Company Inc. Sample Company Ltd. Test DB copy TSTLTD		

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.

Company	Sample Company Inc.		~	
	- Sample Company Inc.			
Company	Sample Company Limited			
SAMINC	Sample Company Limited			
		0.1.11.1.1		4 H H

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 User Desktop Customizations to Separate Sheets	Save
	Close

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

Options	
Copy User 🔹 From User 🔍 To User	9
For All 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	Сору

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

Options Copy User	From User	٩	To User	٩,
For One Company 🔻	Company	Check Approval Vancouv	/er	•
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				Сору

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

Options			
Copy User to Another Company 👻	User	۹,	
	From Company	Sample Company Limited	•
	To Company	CNSDAT	•
Copy Security Permissions			
🔽 Copy UI Profiles			
Copy Customization Directories			
Copy Printer Settings and Personal Settings			
V Copy Desktop Folders, Macros, Reports, and	Programs		
Copy Process Flows		(Сору

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

Options Copy User to Selected Companies	User	9
(From Company	Sample Company Limited
	To Companies	1
Copy Security Permissions	Companie:	
Copy UI Profiles	Companie	
Copy Customization Directories		roval Vancouver
Copy Printer Settings and Personal Settings	CNSDAT	
Copy Desktop Folders, Macros, Reports, and		
Copy Process Flows	CPYLTD Download	Rates Demo

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			Сору

Removing user A's setup from all selected companies

Options Remove User From All Companies 🔹 📆 User	 Q	
✓ 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

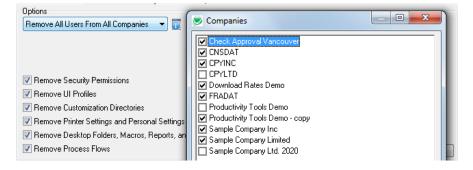
Removing user A's setup from a given company

Options Remove User From A Company	User	Q			
	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	
Remove All Users From A Company 🔹	
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 all selected companies



Copying Everyone's setup from company X to company Y

Options			
Copy Everyone* To Another Company 🔹			
	From Company	ABC Company Seattle	
		Abe company coard	
	To Company	ABC Company Vancouver	•
📝 *Everyone: Copy Desktop Folders, Macros, R	eports, and Prograr	ms checked for 'All Users'	
			Сору

Note: <u>Everyone's</u> 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.

Folder		×
	Source Type Title	Qhange Icon User Object Folder
	ack	Image: Walk Users Finish Cancel Help

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

From Company ABC Company Seattle	•
✓ *Everyone: Copy Desktop Folders, Macros, Reports, and Programs checked for 'All Users'	

Removing Everyone's setup from a given company

Options Remove Everyone* From A Company			
Compa	iny (ABC Company Seattle	•
✓ *Everyone: Remove Desktop Folders, Macros, Reports	s, and Progr	rams checked for 'All Users'	
			Remove

Note: <u>Everyone's</u> 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.

Folder		X
	Source Type Title	Change Icon User Object Folder
	ack	Finish Cancel Help

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.

Options Copy Security Groups to Company		
	From Company	Sample Company Limited 🔹
	To Company	Sample Company Inc 🔹
		Сору

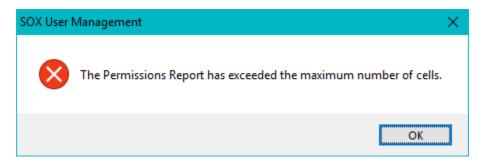
If the source company has the same system database as the target company system, then it does not make sense to copy the security groups and an error message is displayed:

SOX User N	Management X
8	Sample Company Limited has the same System Database as To Company Sample Company Inc so there is no need to Copy Security Groups to Company Sample Company Inc.
	ОК

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.

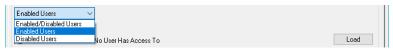
	From		То	
Range of Users 🗸 🗸 🗸	CARLA	6	77777777	۹, ۱
All Users	Accounts Payable 6.9A	~	TaiRox Extended Processing 6.84	~
Range of Users Specific User	Accounts r dyable clash	-	Taintox Excellada Hoddssing olda	-
Shedilic Osel	1			

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

	From	T	0	
Range of Users 🗸 🗸	CARLA	Z	7777777	Q
All Users	Accounts Payable 6.9A	T	aiRox Extended Processing 6.8A	~
Range of Users	Accounts r ayable 0.3A *		all tox Extended Frocessing 0.04	Ť
Specific User				

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).

l	Include ADMIN User	
	Exclude Permissions That No User Has Access To	Load