User Management

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 User Management program provides "one button" mechanisms 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.

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

- Sage 300 Security Groups and User Authorization reports may total 50 to 100 pages in length and use IDs rather than descriptions for the permissions. These are "Crystal Reports" that connect to a database.

- The TaiRox User Management report that includes all Sage 300 modules is about 10 pages long.

  The User Management program 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.

The User Management program is a TaiRox Productivity Tools *Enterprise* solution that lets you efficiently manage user setup and permissions within a single Sage 300 company database. TaiRox also has a more extensive product, SOX User Management, that lets you perform additional user management functions across multiple Sage 300 companies.
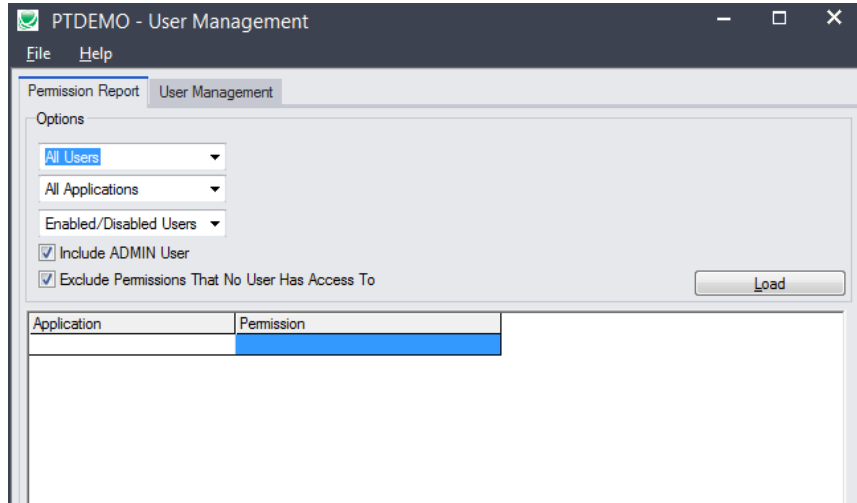
User Management lets you:

- View a concise users and permissions report on the screen and save the report to an Excel spreadsheet.
  User and permissions reports are typically requested during compliance audits and are generally useful when managing more than a few user roles.
  A User Management report that includes all Sage 300 modules is about 10 pages long.
- Copy some or all of one user's permissions to another user profile.
- Remove some or all of the permissions for a single user.
- Remove some or all of the permissions from all users in one operation.

The User Management icon appears in **TaiRox Productivity Tools > Administrative Services Tools**.
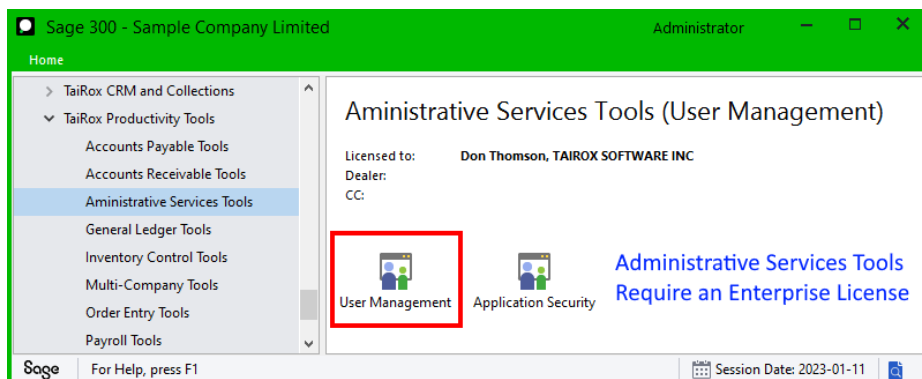
The Administrative Services Folder appears only if you have an Enterprise license from TaiRox Software.

- The User Management appears as shown below.

Note:

- User Management and Application Security and are Enterprise Productivity Tools. They will not appear on the Desktop unless you have an Enterprise license for TaiRox Productivity Tools.

- The Sage 300 ADMIN user and non-ADMIN users with permissions for XL – User Management, AS – Maintain Users, and AS – Security Groups and User Authorizations can run User Management.

Printing the Permission Report

User Management assembles information from a system database, a company database, from proprietary files, and from language resource files.

Not all of this information is accessible from a Crystal report. The goal is to concisely show the permissions for a given company, for a range of users. 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.
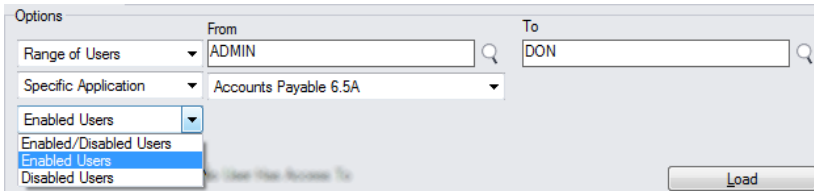
Specify the users to include in the report
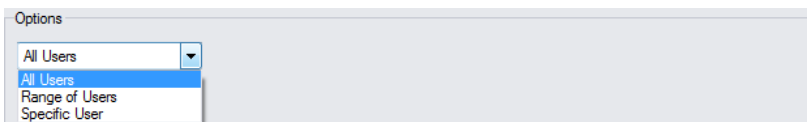
- Choose to print the report for all users, a range of user IDs, or for a specific user.

Specify the applications whose permissions you want to include
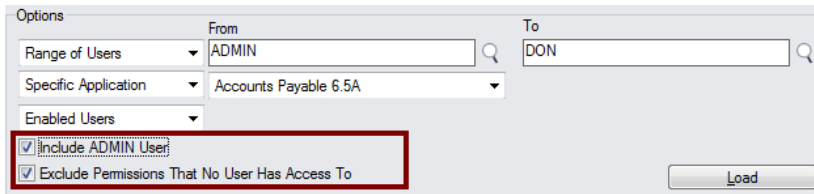

- Choose to print the report for all applications, a range of applications, or for a specific application.
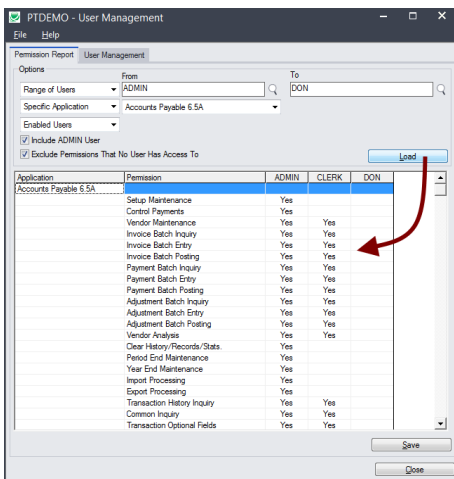
Select enabled or disabled users

- You might choose disabled users to see which user permissions need to be removed.

Include ADMIN user and/or exclude permissions no one can access
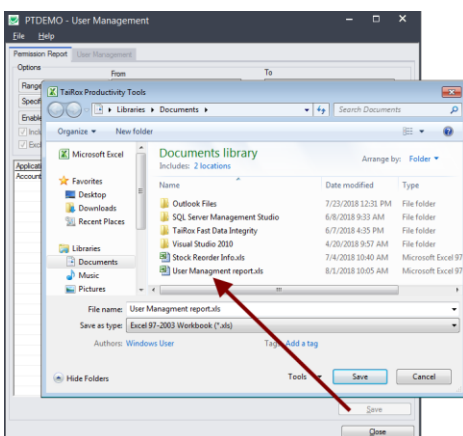

Click the Load button to view the report

- Click the Load button to view the report.

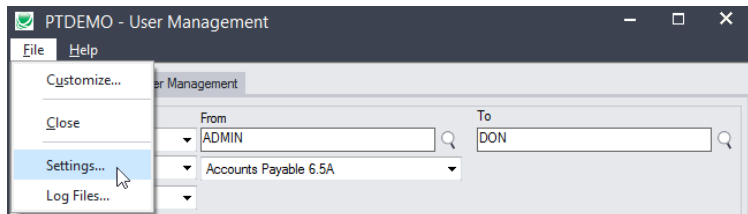### Click the Save button to save the report to an Excel spreadsheet
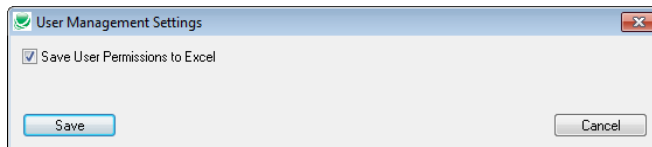
Sample Excel Permission Report

Display or Remove the "Save Report to Excel" button

You can control whether the Save button appears on the Permission Report tab.

- Select **File > Settings** from the User Management menu.

- Check "Save User Permission to Excel" to display the Save button on the report tab.

Copying user permissions, profiles, and other settings

The User Management tab provides a rich set of functions for setting up new users based on the permissions and settings of an existing user.

This section provides some general information about permissions and user settings; however, an experienced implementer who has performed these processes manually should have a clear understanding of what is going on "under the covers".

The User Management tab provides the following options

– for copying user settings:
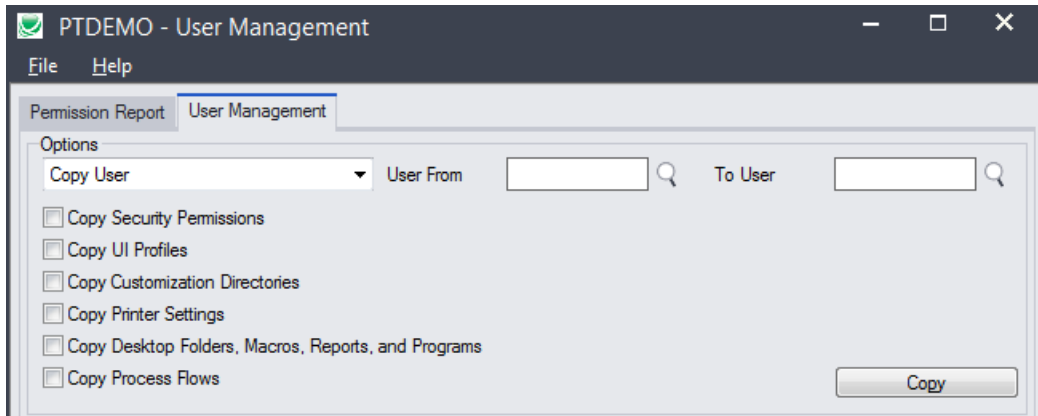
> **Note:** If you copy settings from a source user to a target user and the target user does not exist in Sage 300, User Management will open the Sage 300 Users window (in Administrative Services) so you can create the new user before continuing.

– for removing user settings:
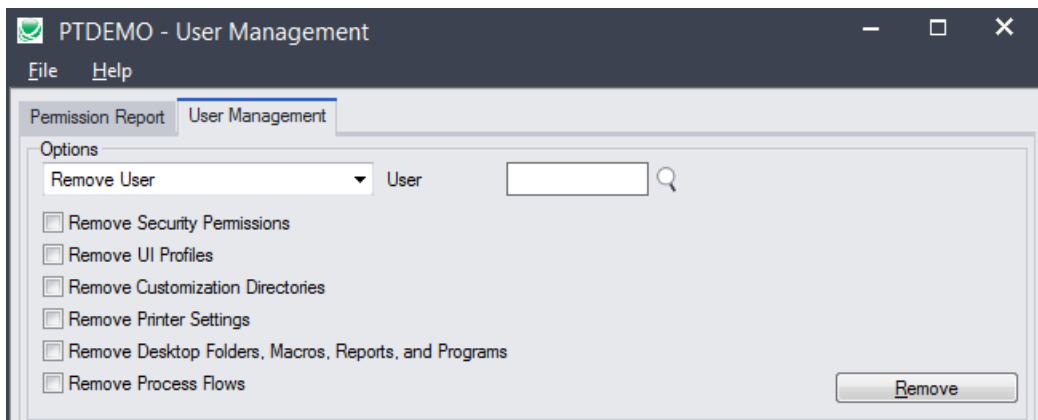
- You can copy or remove any combination of user settings.

- Printer settings include destination, page size and driver name.

  The "Copy Printer Settings" function more exactly copies "Properties", the default properties being printer settings.

  The properties 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.

- Copy/remove process flows applies to Sage 300 2012, 2014 and 2016.

- User Management displays an on-screen log of its progress. This log is also added to a log file, recording the changes and allowing you to display or print it when finished.

To Copy user settings

- Open the Sage 300 company with the permissions that you want to review or change.

- Click the User Management icon in the General Ledger Tools folder to open the User Management form.

- Select the User Management tab, shown below.
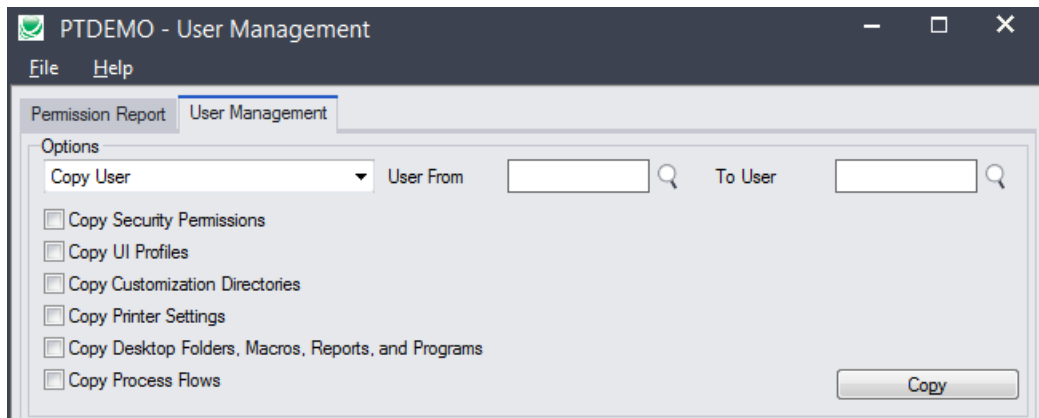
- The User Management tab initially looks like this:

  o The Options are set by default to copy one user's settings to another user.

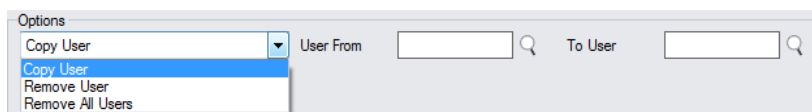   This screen changes dynamically depending on the Option chosen. See the end of this guide for a complete set of screen variations.

Select the operation you want to perform – either copy or remove user settings

- Choose Copy User to copy user settings, then specify the user ID that you are copying from and the ID of the new user.

- Choose Remove User to remove settings for an existing user.

Choose the settings that you want to copy or remove
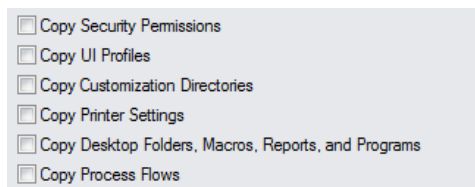
Select all of the settings that you want to copy.

Note: The program makes the settings for the target user the same as the settings for the soure user. All current settings for the target will first be deleted, then the new settings will be copied.

The following notes provide some background on these settings.

Security Permissions: Users are added to security groups in the **Administrative Services > User Authorizations** window.

In Sage 300, you first create security groups for each application, and then assign permissions to each security group. Users are then added to a security group for each application to provide them access. For example, a user might be in a MANAGER group for Order Entry and be in a CLERK group for General Ledger.

UI Profiles: Users are added to UI profiles in the **Administrative Services > Assign UI Profiles** window.

UI profiles let administrators hide fields from specific users. When you assign a UI profile to a user, that user will not see the fields that have been hidden in the UI profile.

For example, a profile might hide the Delete button on a screen to prevent users from deleting records, or it might hide confidential information from viewers.

Customization Directories: Can be added for users in the **Administrative Services > Customization Directories** window.

Customization directories are mainly used for reports that have been customized for your business. When a user prints a report, the system checks for a customization directory that contains a custom version of the report for the current company and user. If a custom report exists, the program prints the custom report instead of the standard one.

Printer Settings: The "Copy Printer Settings" function copies the printer properties for one user to another. The properties include the print destination, printer selection, and paper size.

The properties in use by an installation are controlled by settings in an INI file

Desktop Folders, Macros, Reports and Programs: Added by choosing **Home > object > New** from the Sage 300 Home menu, or by Right-Clicking on the Sage 300 desktop and choosing New.

Process Flows: Customized by Right-Clicking the process flow name on the Sage 300 desktop and choosing Edit.
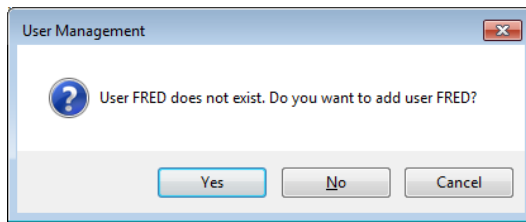
This choice copies the process flows from one user to another.

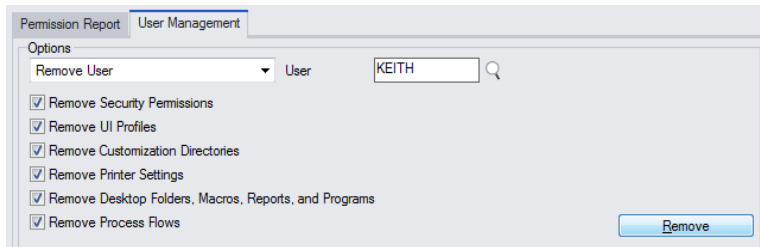## Click the Copy/Remove button to copy or remove the user settings

Copy User
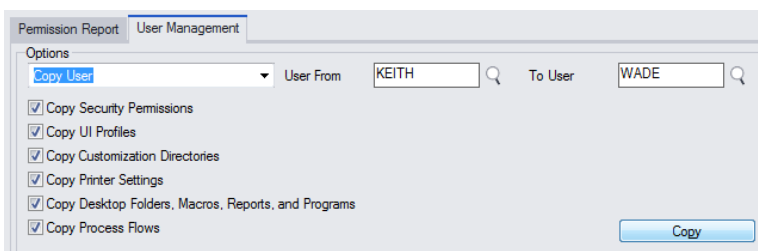
- Click the Copy button to copy user settings from the source user to the target.

- If the "To User" does not exist, a dialog will appear asking if you want to create the user.

Remove User

- Click the Remove button to remove the user settings.

- You can also Disable or Delete users using **Administrative Services > Users**.

Viewing the log file

User Management displays a log when it performs the operation. This log is also stored in a file, which can be launched by clicking the Log button.

Onscreen log
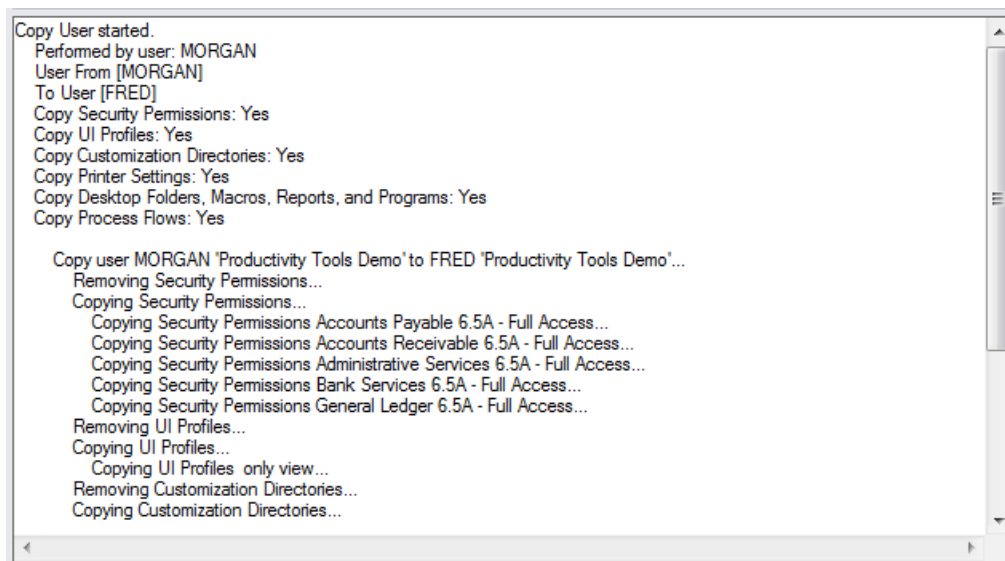
Log file

```
8/7/2020 9:33:37 AM Copy User started.
8/7/2020 9:33:37 AM     Performed by user: MORGAN
8/7/2020 9:33:37 AM     User From [MORGAN]
8/7/2020 9:33:37 AM     To User [FRED]
8/7/2020 9:33:37 AM     Copy Security Permissions: Yes
8/7/2020 9:33:37 AM     Copy UI Profiles: Yes
8/7/2020 9:33:37 AM     Copy Customization Directories: Yes
8/7/2020 9:33:37 AM     Copy Printer Settings: Yes
```

```
8/7/2020 9:33:37 AM       Copy Desktop Folders, Macros, Reports, and Programs: Yes
8/7/2020 9:33:37 AM       Copy Process Flows: Yes
8/7/2020 9:33:37 AM
8/7/2020 9:33:37 AM            Copy user MORGAN 'Productivity Tools Demo' to FRED 'Productivity
Tools Demo'...
8/7/2020 9:34:03 AM              Removing Security Permissions...
8/7/2020 9:34:03 AM              Copying Security Permissions...
8/7/2020 9:34:03 AM                 Copying Security Permissions Accounts Payable 6.5A - Full
Access...
8/7/2020 9:34:03 AM                 Copying Security Permissions Accounts Receivable 6.5A -
Full Access...
8/7/2020 9:34:03 AM                 Copying Security Permissions Administrative Services 6.5A
- Full Access...
8/7/2020 9:34:03 AM                 Copying Security Permissions Bank Services 6.5A - Full
Access...
8/7/2020 9:34:03 AM                 Copying Security Permissions General Ledger 6.5A - Full
Access...
8/7/2020 9:34:03 AM              Removing UI Profiles...
8/7/2020 9:34:03 AM              Copying UI Profiles...
8/7/2020 9:34:03 AM                 Copying UI Profiles only view...
8/7/2020 9:34:03 AM              Removing Customization Directories...
8/7/2020 9:34:03 AM              Copying Customization Directories...
8/7/2020 9:34:03 AM                 Copying Customization Directories Morgan's reports...
8/7/2020 9:34:03 AM              Removing Printer Settings...
8/7/2020 9:34:03 AM              Copying Printer Settings...
8/7/2020 9:34:03 AM                 Copying Printer Settings DEFAULT_RPT_SIZE for AS...
8/7/2020 9:34:03 AM                 Copying Printer Settings PRDEST for AS...
8/7/2020 9:34:03 AM              Removing Desktop Folders, Macros, Reports, and Programs...
8/7/2020 9:34:03 AM              Copying Desktop Folders, Macros, Reports, and Programs...
8/7/2020 9:34:03 AM              Removing Process Flows...
8/7/2020 9:34:03 AM              Copying Process Flows...
8/7/2020 9:34:03 AM                 Copying Process Flows GLTransactions.pft...
8/7/2020 9:34:03 AM                 Copying Process Flows ICTransactions.pft...
8/7/2020 9:34:03 AM Copy User complete.
8/7/2020 9:34:03 AM
=============================================================================
```
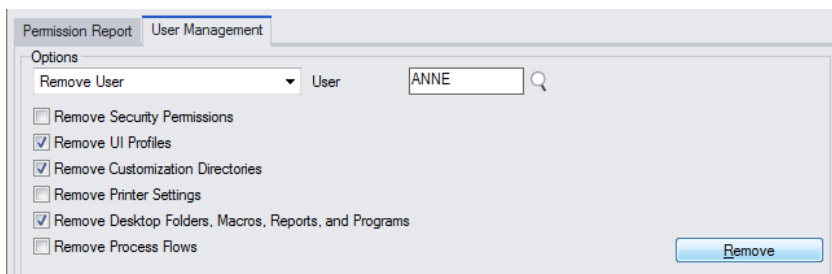
User Management Tab Variations

Removing some or all of user A's setup from a company

Removing some or all of all users' setup from a given company