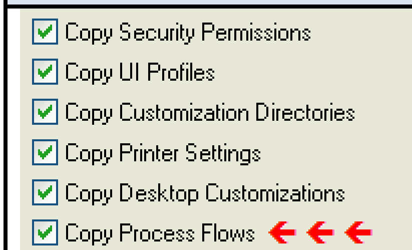
TaiRox Productivity Tools User Guide

Summary

User Management provides mechanisms to manage user setup and permissions. The following functions are provided (the meaning of “setup” is illustrated below):

- Viewing a concise users and permissions display on screen
- Saving a concise user and permissions report to an Excel spreadsheet
- Copying some or all of user A’s setup to user B
- Removing some or all of user A’s setup
- Removing some or all of all users' setup

Setup



Which setup options to copy (or remove) is a selection from the checkboxes shown here – any combination of settings can be copied.

Printer settings include destination, page size and driver name.
🡐 For Sage 300 2012, 2014 and 2016

TaiRox has a more extensive product, SOX User Management, which will perform additional user management functions across multiple Sage 300 companies.

Larger organizations will have processes to on-board a Sage 300 user, on-board a new Sage 300 company and perhaps even to on-board a new printer for use with Sage 300. User Management provides “one button” mechanisms to complete those 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.

A concise report showing users and permissions is typically requested during a compliance audit and is generally useful when managing more than a few user roles. User Management creates such reports and will save the report as an Excel spreadsheet. The report is formatted to print on 2 or 3 pages for a typical large Sage 300 customer.

User Management can only be run by the Sage 300 ADMIN user.

Overview – The Permissions Report Tab

Sage 300 will produce Security Groups and User Authorization reports that are 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. 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.

Overview – The User Management Tab

The 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 implementer who has had to perform processes manually. Some general facts are set out in this section.

When copying setup from a source user to a target user and that target user does not exist, 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.

Important Note

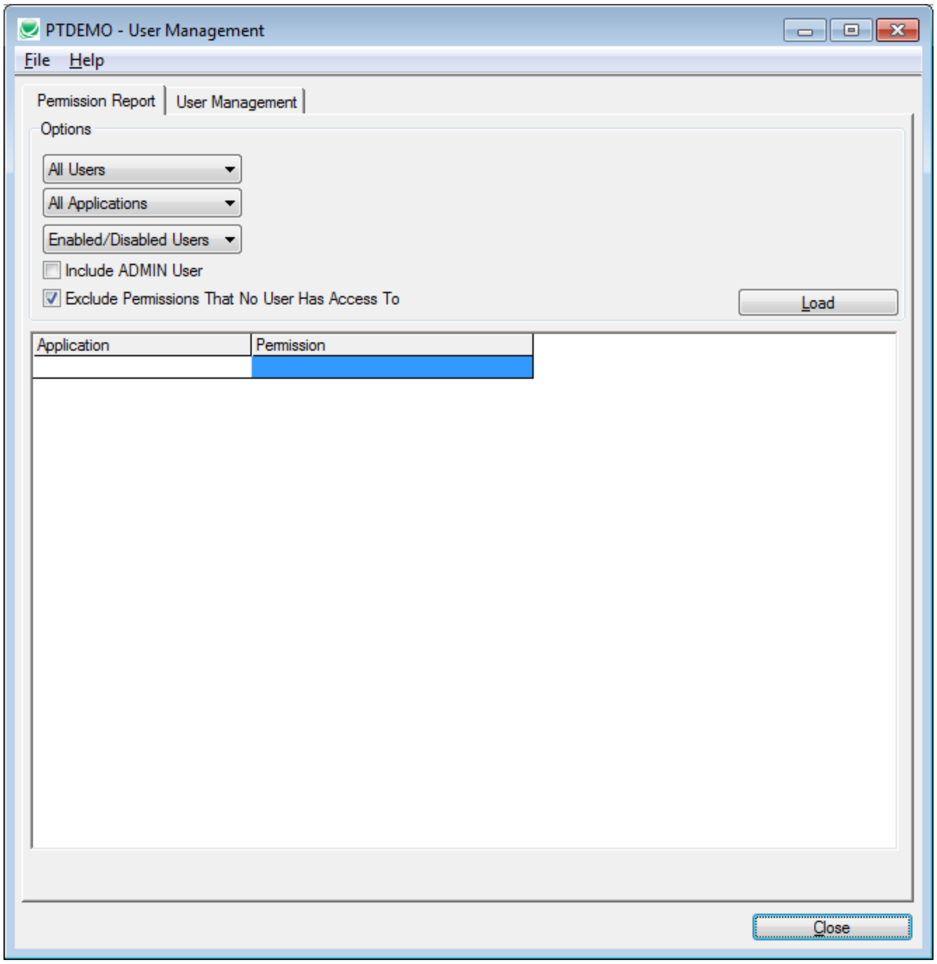
The “Copy Printer Settings” function more exactly copies “Properties”, the default properties being printer settings. The properties actually in use by an installation are controlled by settings in an INI file. A description of the INI properties and their effects are beyond the scope of this document.

Running User Management

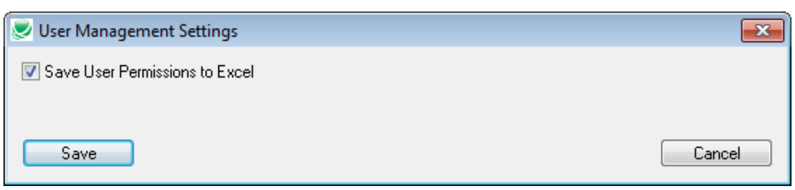
Once the TaiRox Productivity Tools are installed and activated, the User Management icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).

Running User Management – Permissions Report Tab

When User Management starts, a window will be displayed so that user and application criteria can be selected using the same style as in the core modules. The Load button is then pressed.

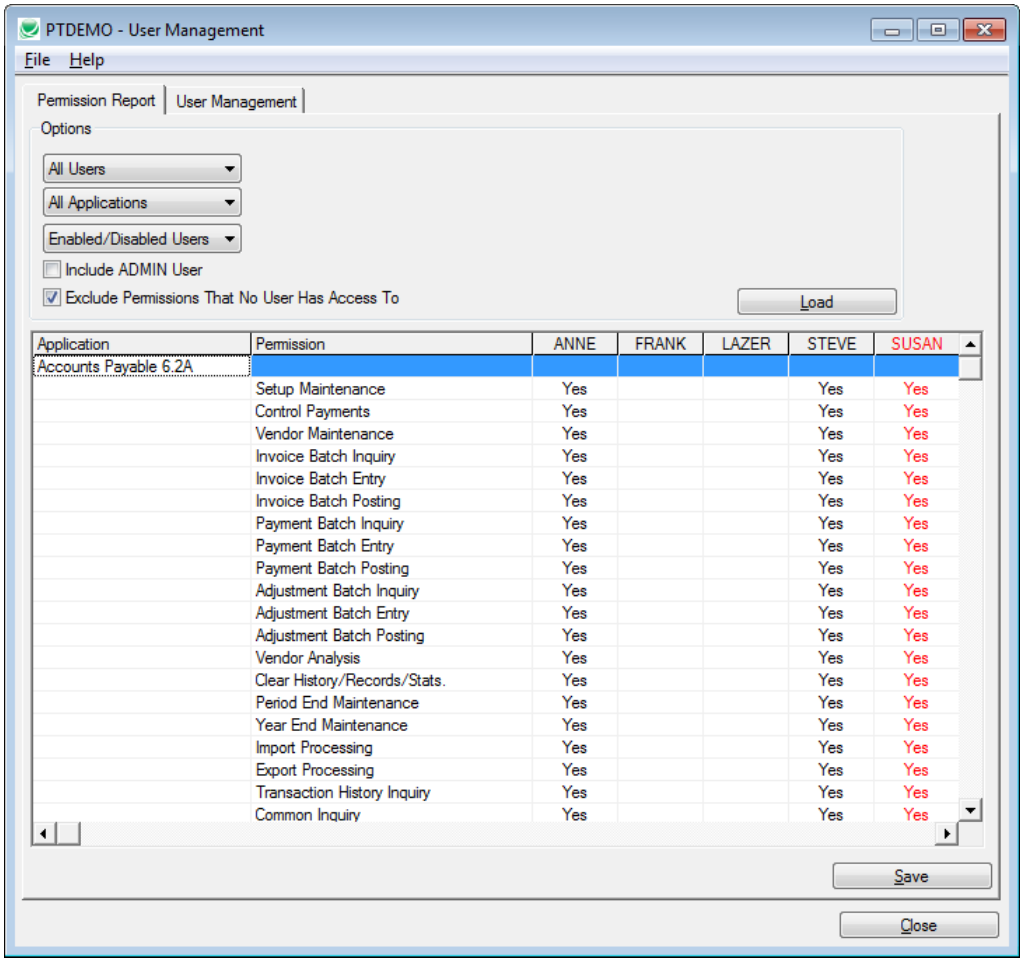


The File menu allows you to control grid options and to save the grid into an Excel spreadsheet.



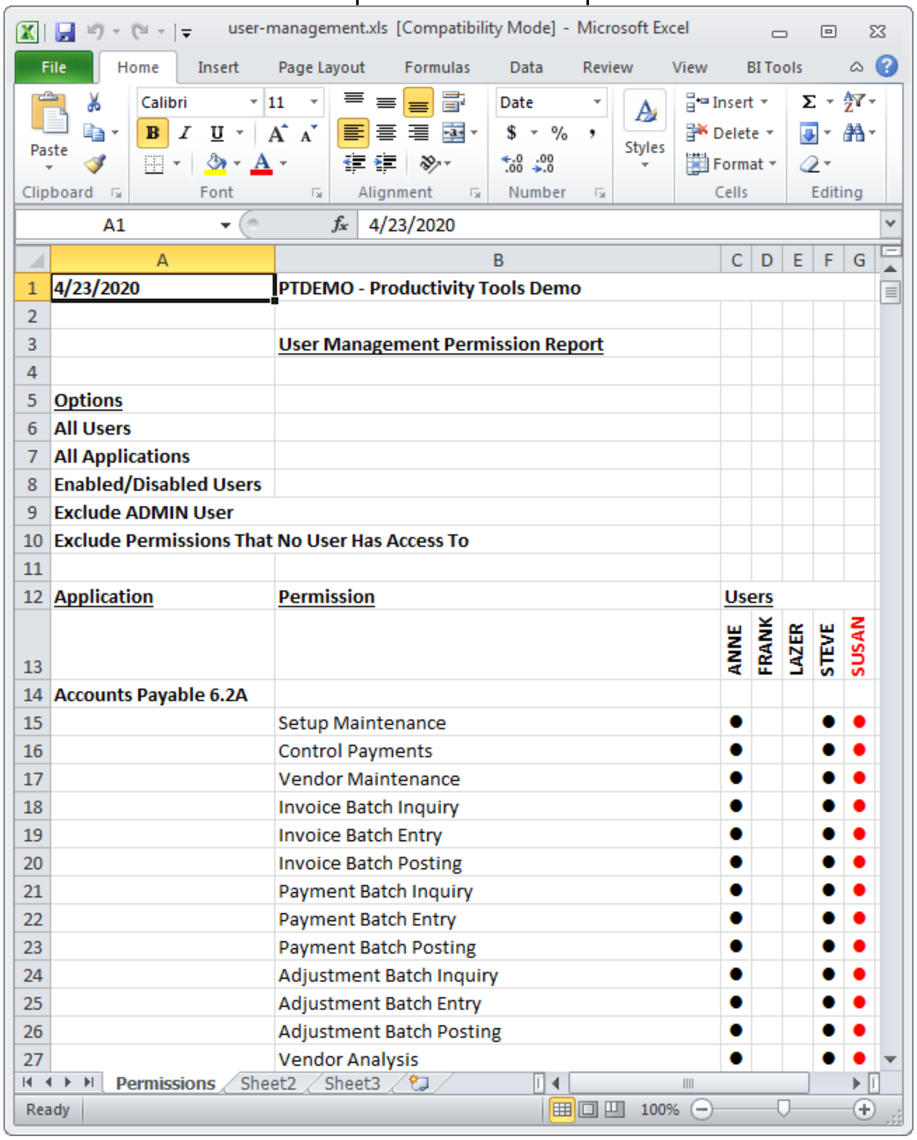
Running User Management – Permissions Report Tab (continued)

When the Load button is pressed items matching the criteria and options will be displayed. Once saved in a spreadsheet the information has a similar layout and is formatted automatically with gridlines and vertically-oriented labels. Disabled Users' rights are displayed in red.



Running User Management – Permissions Report Tab (continued)

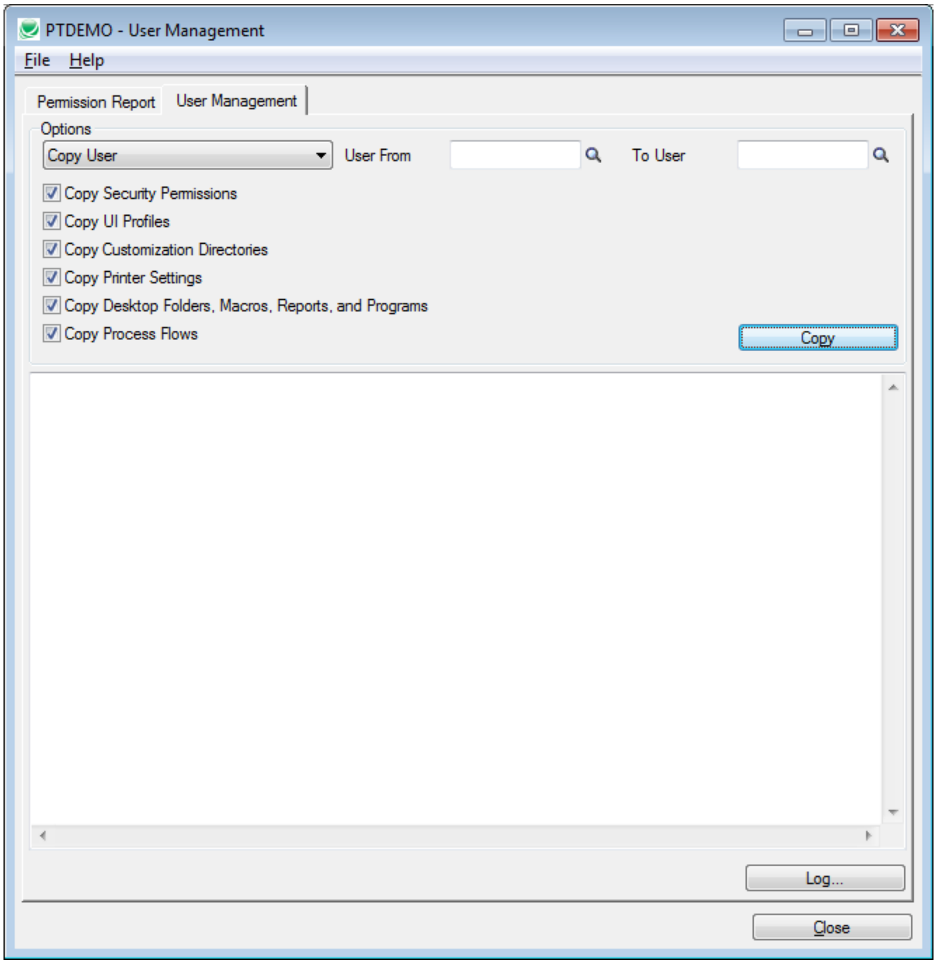
When saved as an Excel Spreadsheet the report can be formatted as desired:



	A	B	C	D	E	F	G
1	4/23/2020	PTDEMO - Productivity Tools Demo					
2							
3		User Management Permission Report					
4							
5	Options						
6	All Users						
7	All Applications						
8	Enabled/Disabled Users						
9	Exclude ADMIN User						
10	Exclude Permissions That No User Has Access To						
11							
12	Application	Permission	Users				
13			ANNE	FRANK	LAZER	STEVE	SUSAN
14	Accounts Payable 6.2A						
15		Setup Maintenance	●			●	●
16		Control Payments	●			●	●
17		Vendor Maintenance	●			●	●
18		Invoice Batch Inquiry	●			●	●
19		Invoice Batch Entry	●			●	●
20		Invoice Batch Posting	●			●	●
21		Payment Batch Inquiry	●			●	●
22		Payment Batch Entry	●			●	●
23		Payment Batch Posting	●			●	●
24		Adjustment Batch Inquiry	●			●	●
25		Adjustment Batch Entry	●			●	●
26		Adjustment Batch Posting	●			●	●
27		Vendor Analysis	●			●	●

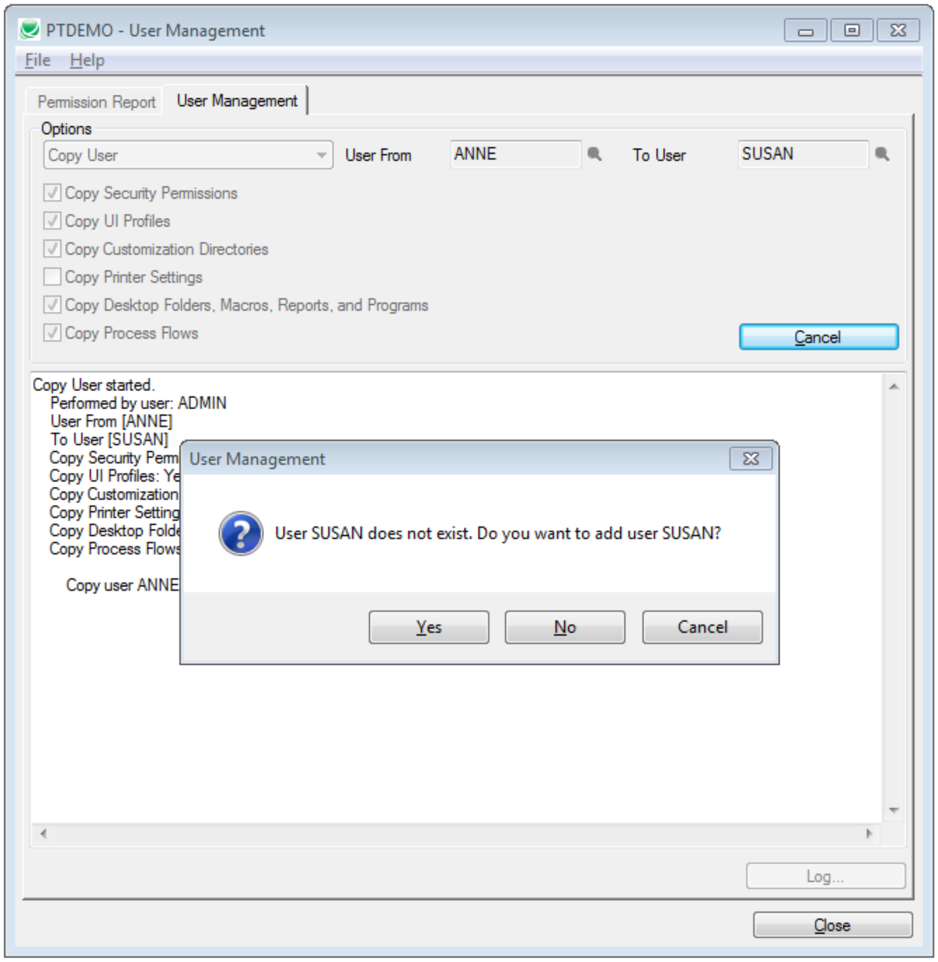
Running User Management – User Management Tab

The User Management tab initially looks like this – with the operation ("Option") set to copy one user's setup to another user. This screen changes dynamically depending on the Option chosen and a button is pressed to proceed (for this function the button is labeled "Copy"). A complete set of screen variations is set out in Appendix A.



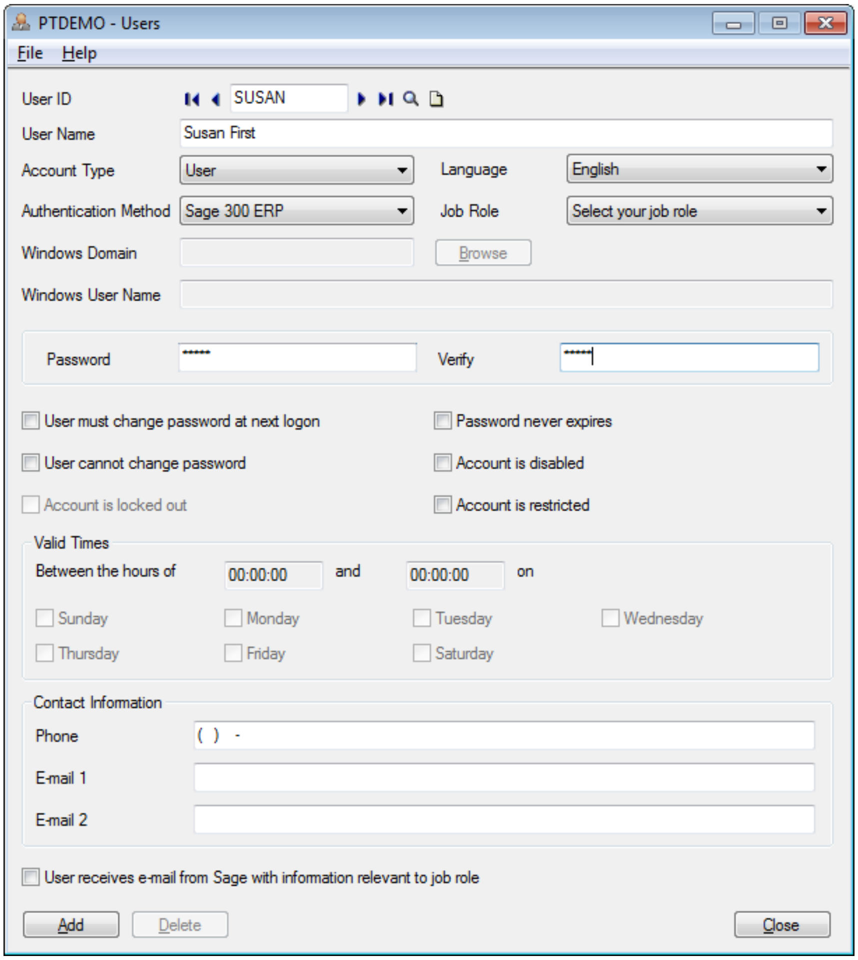
Running User Management – User Management Tab (continued)

If the “From User” does not exist, a dialog will appear asking if that user is to be created:



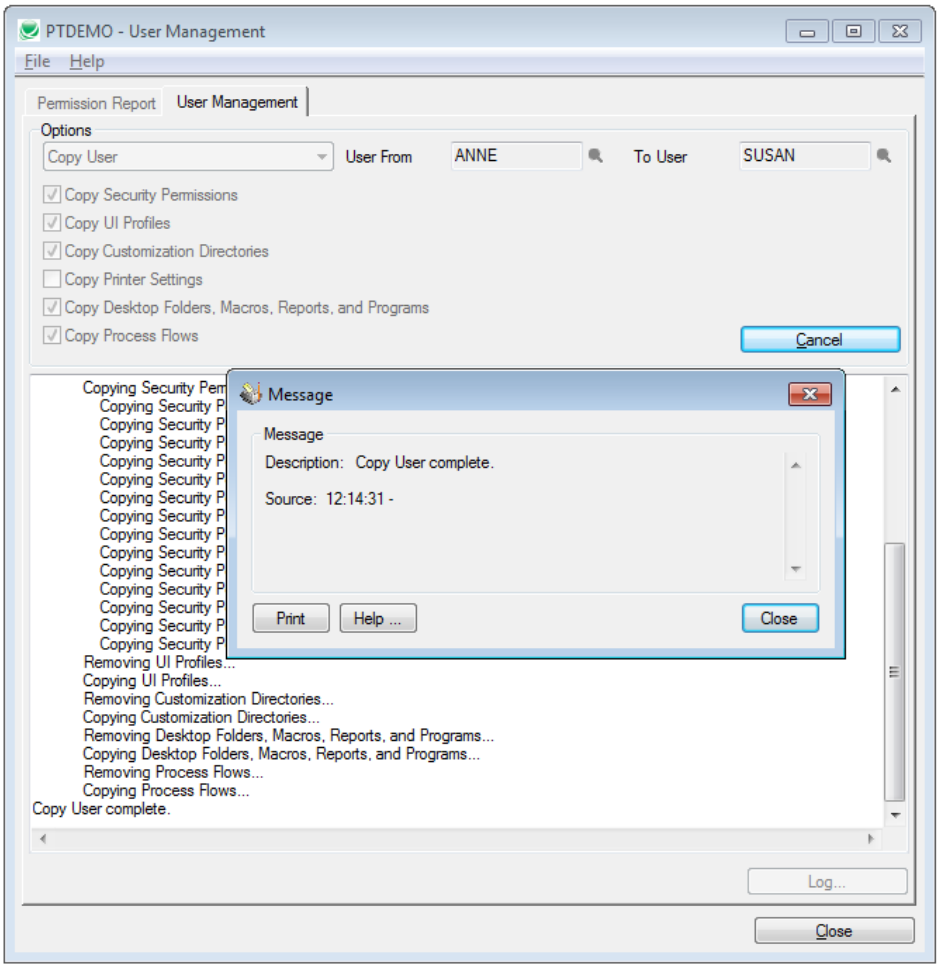
Running User Management – User Management Tab (continued)

The Sage 300 dialog will be invoked, so that the user can be created:



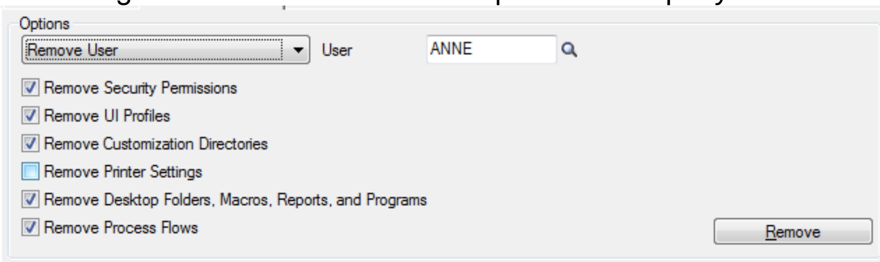
Running User Management – User Management Tab (continued)

As the operation proceeds a log will be displayed. This log is also stored in a file, which can be launched by clicking on the Log button:



Appendix A – 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