

SOX User Management for Sage 300

Available for \$1195 + \$300 per year, SOX User Management manages users across many companies and creates key reports, including permission reports for SOX Audits.

- **Permissions & Setup** can be copied from user to user or from company to company.
- **A Permissions Report** is produced as an Excel in a form typically required by a compliance auditor.
- **Administrative Reports** identify issues requiring attention related to users and passwords.

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

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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 three tabs: 'Permissions Report', 'User Management', and 'User Reports'. The 'Permissions Report' tab is active.

The configuration area includes the following options:

- Report Type: For One Company (dropdown)
- Company: Sample Company Limited (dropdown)
- From: Range of Users (dropdown), Range of Applications: Accounts Payable 6.9A (dropdown)
- To: Range of Applications: TaiRox CRM and Collections 6.1A (dropdown)
- Enabled/Disabled Users (dropdown)
- Include ADMIN User
- Exclude Permissions That No User Has Access To
- Load button

Below the configuration area, the 'Company' dropdown is set to 'Sample Company Limited'. A table displays the permissions for this company across various applications and users.

Company	Application	Permission	CARLA	DON	FRED	GERRY	JEAN	JOAN	KEITH
SAMLTD	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

The window also features a 'Save' button and a 'Close' button at the bottom right.

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