

Dynamics GP Security

***Modifying, Managing, and Auditing
Dynamics GP Security***

Tools for Improving Security

GP Security Model

Roles

Tasks

Operations

GP Security The Hard Way

Security Task Setup

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Save Clear Delete Copy

Task ID: TRX_FIN_001* Category: Financial

Task Name: Enter journal entries

Task Description: Does not include posting. Also includes the General Ledger Batches list, preview, and customization

Product: Microsoft Dynamics GP

Type: Windows

Series: Financial

Access List: Display Selected Items

Operations:

- Analysis Posting Detail
- Clearing Entry
- Correct Journal Entry
- Intercompany Exchange Rate Entry
- Quick Journal Entry
- Tax Entry
- Transaction Entry

Security Role Setup

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Role ID: ACCOUNTING MANAGER*

Role Name: Accounting Manager

Role Description: Tasks include reviewing and approving accounts payables, accounts

Display: All

Display Selected Tasks

| Security Task ID | Name |
|--------------------------------------------------------|-------------------------------------------|
| <input checked="" type="checkbox"/> ADMIN_COMPANY_001* | Set up company |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_002* | Set up taxes |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_003* | Set up payment terms and shipping methods |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_004* | Set up bank accounts |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_005* | Set up credit cards |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_006* | Set up customer/vendor consolidation |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_007* | Set up posting |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_008* | General company administration |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_009* | Modify period-end routines |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_010* | Modify VAT tax returns |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_011* | Master posting and batch recovery |
| <input checked="" type="checkbox"/> ADMIN_COMPANY_012* | Company tables |

Screen Output - Security Operation Access Report

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Print Send To Modify 100% Completed 1 Page Page 1

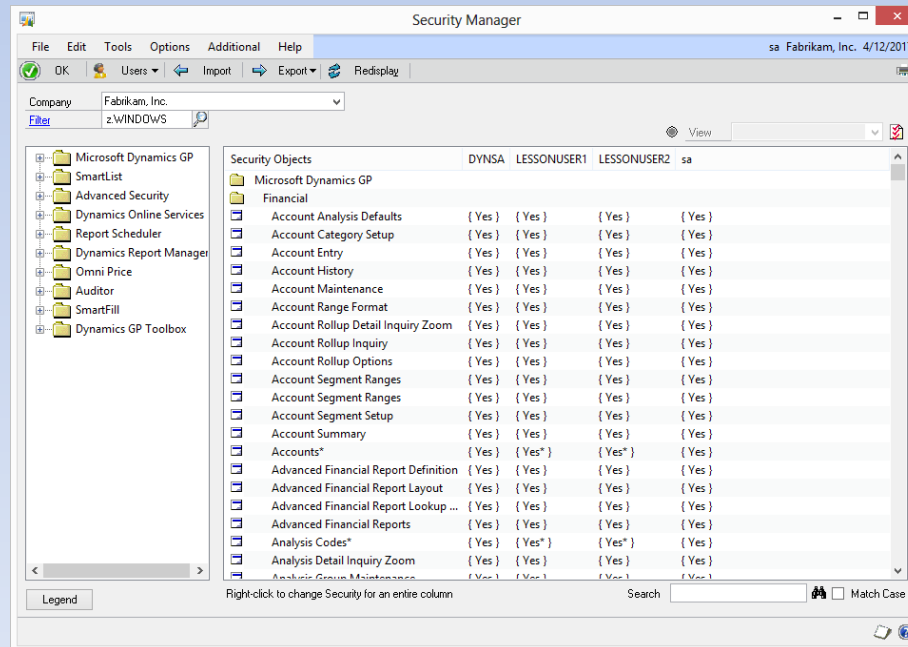
System: 5/7/2014 5:59:01 PM
User Date: 4/12/2017

Security Operation Access System Manager

* denotes POWERUSER Role

| Security Operation: | Analysis Posting Detail | Microsoft Dynamics GP | Security Type: | Windows |
|---------------------|-------------------------|-----------------------|----------------|-----------|
| User ID | User Name | Status | Series: | Financial |
| | | Company Name | | |
| DYN5A* | DYN5A | Active | Fabrikam, Inc. | |
| LESSONUSER1 | LESSONUSER1 | Lesson User | Fabrikam, Inc. | |
| LESSONUSER2 | LESSONUSER2 | Lesson User | Fabrikam, Inc. | |
| sa* | sa | Active | Fabrikam, Inc. | |

GP Security The Easy Way



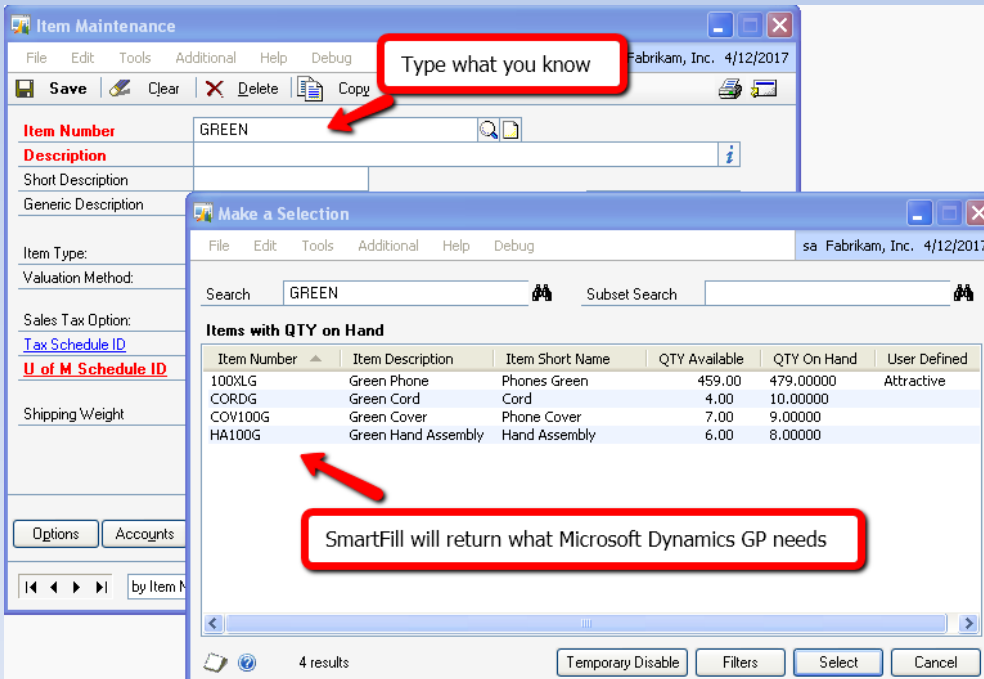
Are you ready to work simpler & easier?

Rockton Software is a creative company that develops products that make Microsoft Dynamics GP more intuitive and user-friendly to improve customers' lives by making their *work simpler & easier*®.

Established: 1999

Installation base: 3000 Sites; 75,000 Users

SmartFill The Google-style data entry search tool.



Item Maintenance

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Save Clear Delete Copy

Type what you know

Item Number GREEN

Description

Short Description

Generic Description

Item Type:

Valuation Method:

Sales Tax Option:

Tax Schedule ID

U of M Schedule ID

Shipping Weight

Options Accounts

by Item N

Make a Selection

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Search GREEN Subset Search

Items with QTY on Hand

| Item Number | Item Description | Item Short Name | QTY Available | QTY On Hand | User Defined |
|-------------|---------------------|-----------------|---------------|-------------|--------------|
| 100XLG | Green Phone | Phones Green | 459.00 | 479.00000 | Attractive |
| CORDG | Green Cord | Cord | 4.00 | 10.00000 | |
| COV100G | Green Cover | Phone Cover | 7.00 | 9.00000 | |
| HA100G | Green Hand Assembly | Hand Assembly | 6.00 | 8.00000 | |

SmartFill will return what Microsoft Dynamics GP needs

4 results Temporary Disable Filters Select Cancel

- ❖ **SmartFill** increases data lookup speed and reduces duplicate data.
- ❖ Is fully customizable and easy to use.
- ❖ Can be used in most fields in Microsoft Dynamics GP and other Dexterity-based 3rd party products.
- ❖ Comes with dozens of pre-defined objects, so once installed, you can hit the ground running.

SmartFill can save you time and money...

Average Microsoft Dynamics GP lookup = 17 seconds

Average SmartFill lookup = 2 seconds

Average savings = 15 seconds per lookup

| Lookups | | | If user make \$15/hour | | |
|-----------------|--------------------|--------------------|------------------------|------------------------|------------------------|
| Lookups Per Day | Savings in Seconds | Savings in Minutes | Savings in \$ Per Day | Savings in \$ Per Week | Savings in \$ Per Year |
| 100 | 1500 | 25 | \$6.30 | \$31.25 | \$1,638.00 |
| 300 | 4500 | 75 | \$18.75 | \$93.75 | \$4,875.00 |
| 500 | 7500 | 125 | \$31.25 | \$156.25 | \$8,125.00 |
| 1000 | 15000 | 250 | \$62.50 | \$312.50 | \$16,250.00 |

Dynamics GP Toolbox

A collection of tools that improve the Microsoft Dynamics GP experience.

- Less deadbeats hogging your Microsoft Dynamics GP licenses
- Better control over security
- Easily find windows in Microsoft Dynamics GP
- Find the data that hides behind those window fields

Dynamics GP Toolbox

❖ System Administrators enjoy:

- ❖ Saving user licenses with *Inactivity Timeout*
- ❖ Simplifying security with our advanced single-screen *Security Manager*
- ❖ Maintaining Microsoft Dynamics GP with *System Maintenance Lockout*
- ❖ Preventing unauthorized use with *User Lockout*

❖ Accountants rave about:

- ❖ The cross-company *Period Open/Close*
- ❖ Heightened AP management with *Payment Approvals*

❖ Power Users love:

- ❖ Find data behind screens for easy report writing with *Inspector*
- ❖ New and experienced users alike feel empowered navigating Microsoft Dynamics GP instantly using *Mentor*

Auditor

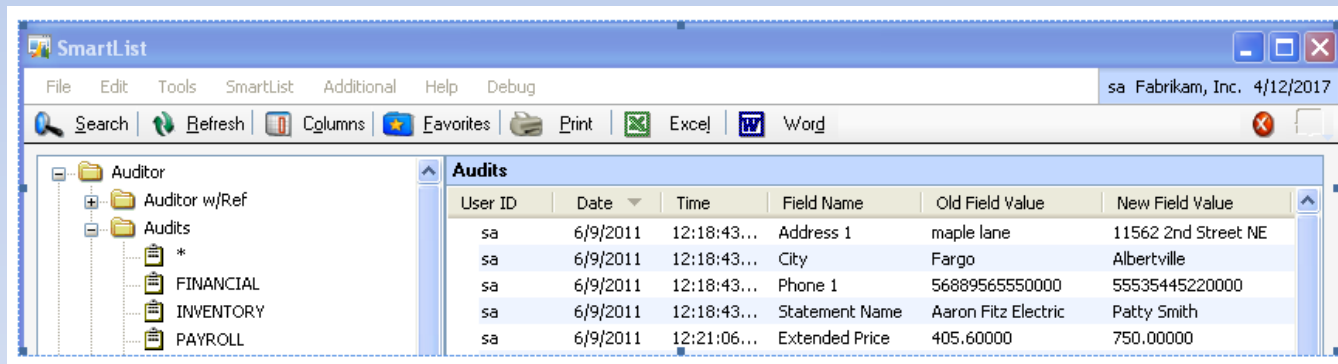
Track data changes in Microsoft Dynamics GP, including at the SQL database level.

Why auditing is important:

- SOX Compliance
- Fraud Prevention
- Procedural Clarification
- Performance Evaluation
- Troubleshooting

Auditor

- With Auditor, you have the flexibility of tracking data changes for many reasons: compliance, data integrity, and SOX legislation.
- Audit log records are available to view in SmartList, where you can sort, filter, and report on your audits.



- Auditor allows you to define and identify when users are in conflict with your Segregation of Duties.
- E-sign, an electronic signature feature, allows you to build supervisory groups to authorize specific changes, forcing users to obtain immediate authorization before changing data.

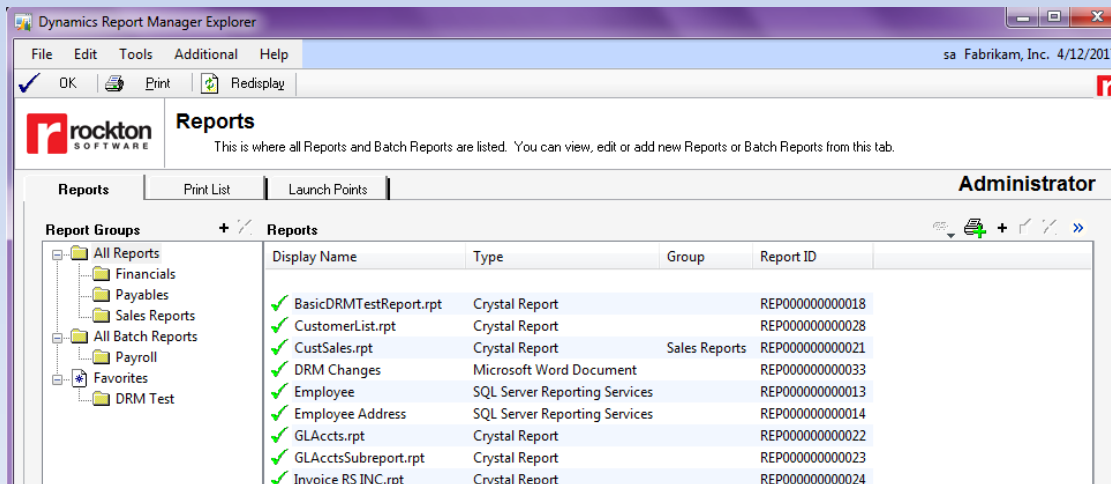
Dynamics Report Manager (DRM)

Any report, any time, any where, any device.

- E-mail invoices
- Skip licensing and training on additional technology
- More discretion and efficiency when distributing reports

Launch your reports

- Any report (SRS, Crystal, Management Reporter, Report Writer, Word)
- Any way (screen, printer, field, PDF, email, batch email)
- Any time (on-demand or scheduled)
- Any device (web, desktop, mobile)



Product Statistics

| Installs as of May 15, 2013 | Sites | Users |
|--------------------------------------|--------------|--------------|
| <i>Dynamics GP Toolbox</i> | 354 | 12,130 |
| <i>SmartFill</i> | 1,405 | 24,873 |
| <i>Auditor</i> | 601 | 17,043 |
| <i>Omni Price</i> | 200 | 5,078 |
| <i>Dynamics Report Manager (DRM)</i> | 521 | 13,437 |



Demos

Demos can be viewed with a quick click of a mouse!

<http://www.youtube.com/user/rocktonsoftware/featured>



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