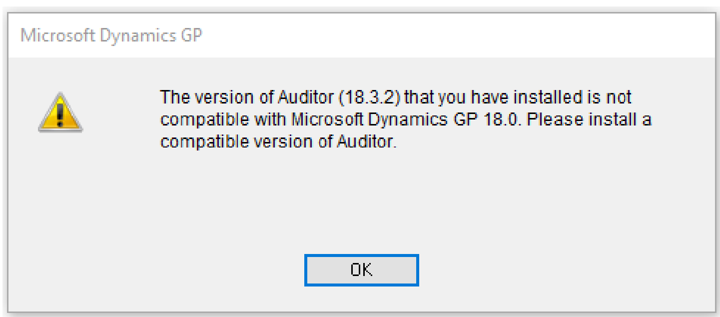
Dynamics GP Auditor

What's New/October 2021

GP Dictionary Notification

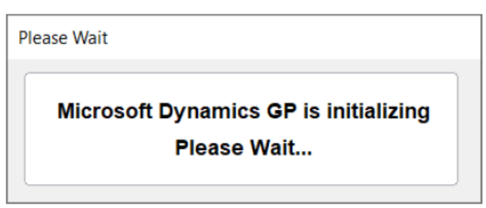
With Dynamics GP using a similar build number, such as 18.2 and 18.3, it is now easier to make sure you installed the correct build of Auditor. If you load an incorrect Auditor dictionary, you receive a message letting you know.



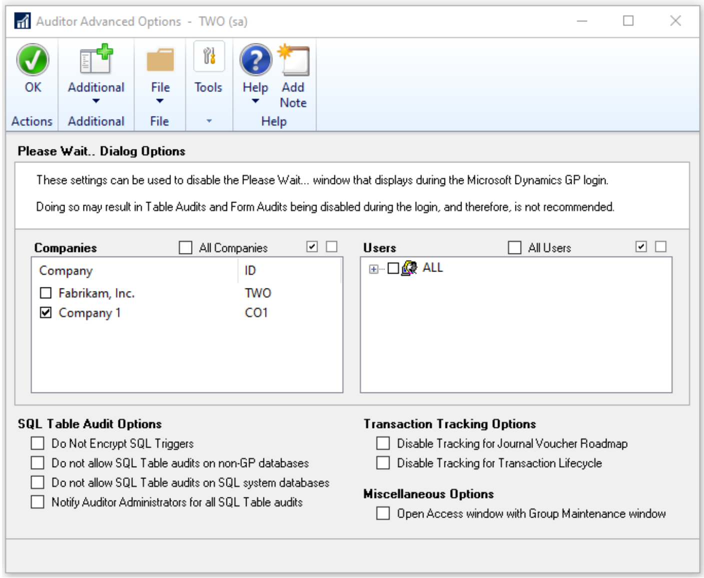
Simply, install the correct version from the download page to resolve the message.

Please Wait…Option

When you log into Microsoft Dynamics GP, the Please Wait…dialog appears. This is to prevent users from performing any actions that may be audited prior to Auditor being fully initialized. This is particularly important if you have 3rd party products.



While the log in time is the same, it appears to take longer since you are prevented from doing anything. This new option allows you to turn off the message based on User and Company. It is important the users know to wait until the log in is complete though. If the option is turned off, a message is displayed to the user letting them know the log in is complete.

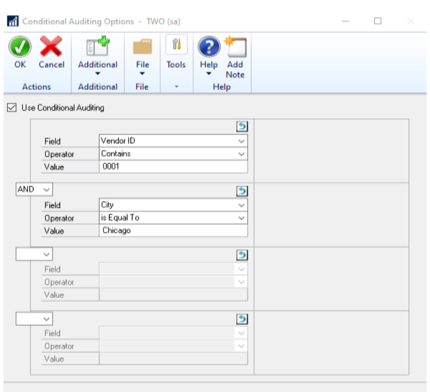


When the option is turned off, you receive a warning verifying this is what you want to do. Keep in mind, if a user starts working before Dynamics GP is fully initialized you could potentially miss some audits. Use this feature with caution.

Audit Multiple Conditions

When creating audits, you used the Field Options window to create Conditional Auditing Options. Previously, you were limited to one condition per option. With the latest release, you may now have up to four conditions. This offers greater flexibility when it comes to auditing specific records.

To add conditional audits, open the Field Options window and click Conditions. This opens the Conditional Auditing Options window.

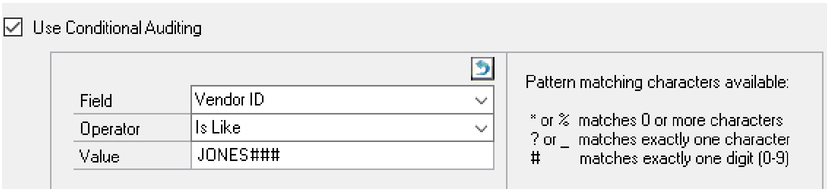


Select the Field for which the condition should apply and select one of the many operators available. New operators have been added with this new version as well.

You may join the conditions by And or Or to determine if the audit should be captured.

Conditional Auditing Wildcards

When creating conditions for Conditional Audits, you now have the ability to use a wildcard character in the conditional Value to work with the new Operators, such as “Is Like” and “Is Not Like”. The following character are available to create the wildcard pattern: *, %, ?, _, or #.

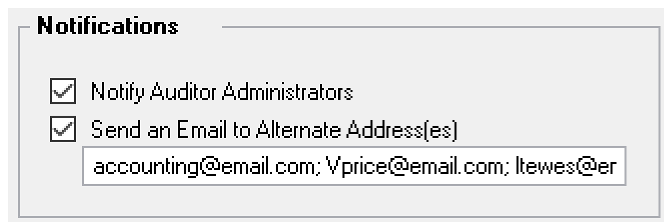


In this example, JONES002 is a match but JONES0002 is not a match. The number of digits in the record must match the mask.

Multiple Alternate Addresses

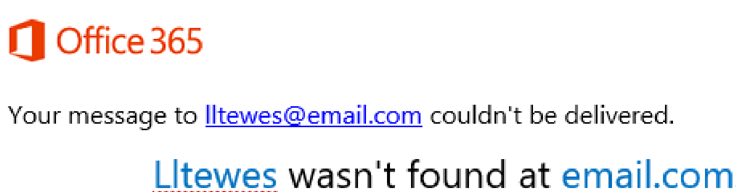
Auditor has the ability to notify System Administrators when audits occur. You may also notify an Alternate Address, but only one additional email address was allowed. Now you may enter additional email addresses.

Open the Field Options window and mark the Send an Email to Alternate Address(es). Enter the email addresses separated by a semi-colon to include more than one.



User Name in Notification Email

When an email is sent by Auditor or E-Sign as a notification, the recipient’s name is either Auditor Administrator or E-Sign Approver. If there is an issue when sending the email, those names are not particularly helpful in troubleshooting why it failed. Instead of a generic recipient, it now uses the User Name associated with the Administrator or Approver.



Disable Editing of SmartList

Smartlist allows you to assign security access to the favorites. However, a user can edit that favorite to allow them to look at Audits that they shouldn't be allowed to see, such as Payroll audits that show salary information.

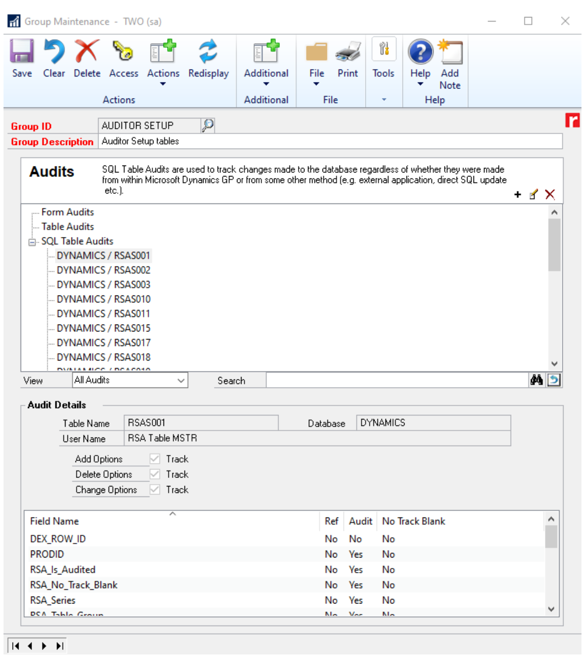
This new feature prevents users who are not assigned the AUDITOR ADMIN security role from making some changes to the Auditor favorites in SmartList. They cannot see any data other than what is allowed based on the favorite and how it was set up.

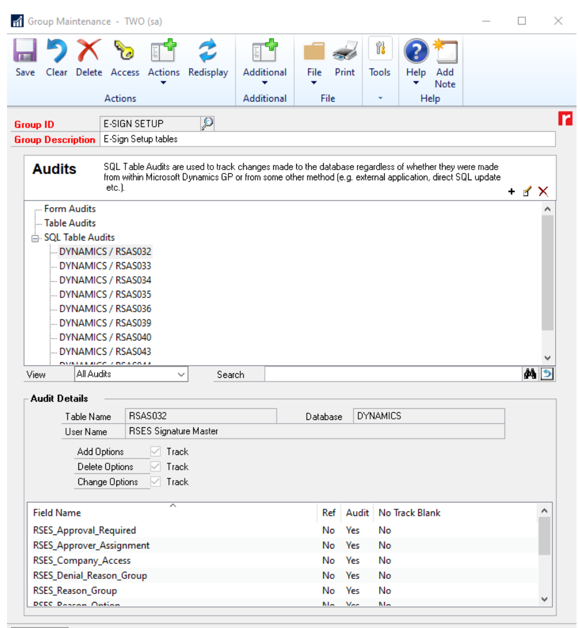
- They cannot make changes to existing Search criteria; they can add new searches for anything already in the favorite, but they cannot save the change.
- They cannot add Columns to Search other than those already listed from the Columns button.
- They cannot choose Clear All to clear existing criteria.

Audit Auditor Setup and E-Sign Setup

Two new Audit Groups are included in the Auditor build download. They are the AUDITOR SETUP.auditor and E-SIGN SETUP.auditor files. They can be found in the Resource folder of the Auditor install or in the Dynamics GP code folder after the Auditor install is run. These Audit Groups may be imported and used as starting points so you can audit your Auditor tables. This allows you to capture who created, edited, or deleted an Audit Group or audit.

The Audit Groups have SQL Table Audits created for all necessary tables. You can remove any tables you do not need and edit the Audits to track any additional information or remove anything being audited that you don't want.

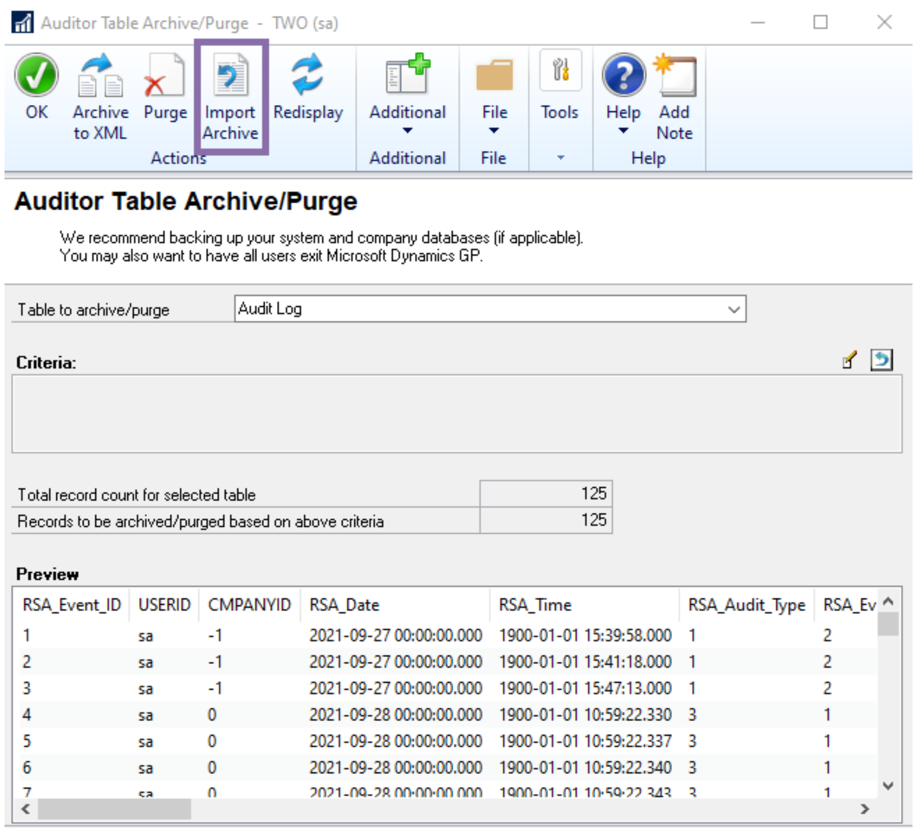




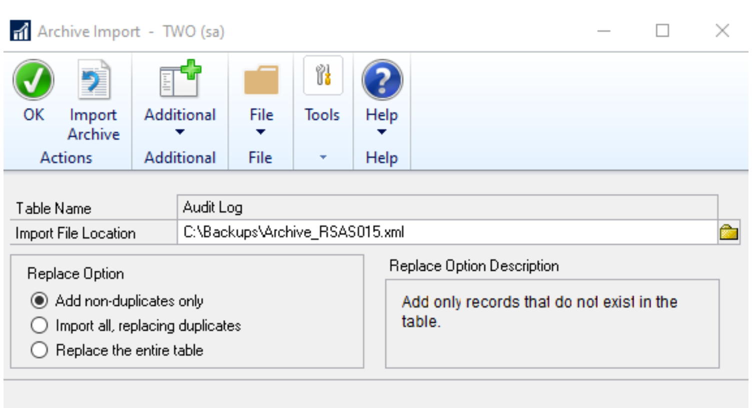
Import archived XML Files

The Auditor Table Archive/Purge window is used to archive and purge records from tables when those tables have grown over time. During the Archive process, an XML file is created for the records. It's helpful to have those records saved should you ever need to refer back to them, but it wasn't always easy to do. Now, it's super easy to bring those records back into Dynamics GP.

A new button has been added to the Auditor Table Archive/Purge window called Import Archive.



Browse to the location where the XML file is saved. After the file is selected, you may choose to import only records that do not currently exist in the table, import all records, or replace the existing table.



Select the Replace Option and then click Import Archive to import the records.

You may do this in a test environment so as not to alter your existing live data.

Audit Log Record for Purge and Import

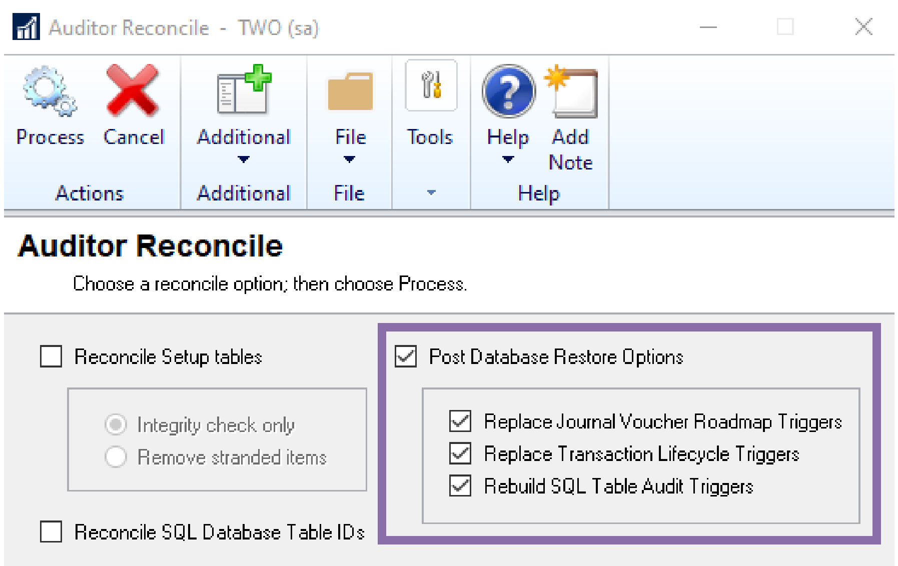
When Auditor records have been purged or imported, a record is now written to the Audit Log table (RSAS015) to capture the process. This only occurs for the Audit Log and Approval Log tables only since the others do not contain sensitive data.

Results | Messages

	RSA_Record_Key_String	RSA_Field_Note	RSA_Event_ID	USERID	CMPANYID	RSA_Date	RSA_Time	RSA_Audit_Type	RSA_Event_Type
1	RSA_Date = '2021-09-28 00:00:00.000'	Table Purge event	126	sa	-1	2021-09-29 00:00:00.000	1900-01-01 08:58:00.000	1	3
2	All records	Table Import Archive event	127	sa	-1	2021-09-29 00:00:00.000	1900-01-01 09:09:38.000	1	1

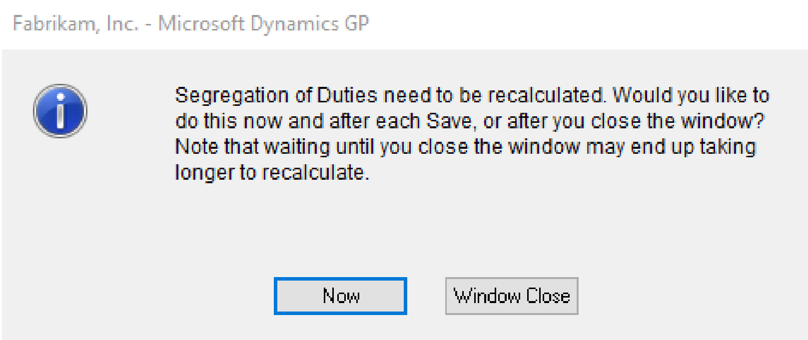
Reconcile Post Database Restore Options

The Auditor Reconcile process has a new option for when you restore a company database from a backup. Previously, when you restored a company database you needed to run reconcile and then rebuild to recreate triggers. Now, you can accomplish both steps in one process from the Auditor Reconcile window.



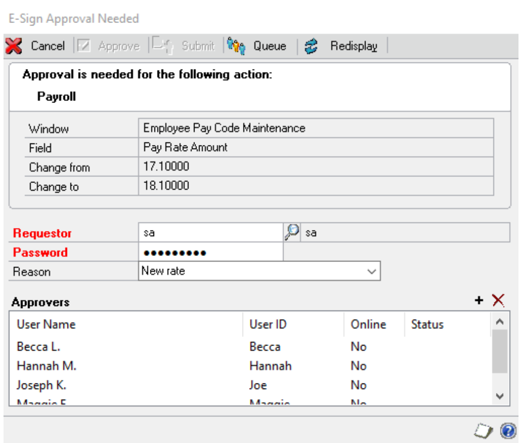
Segregation of Duties Process

The Segregation of Duties (SOD) Process may be run after closing the User Security window rather than when you click Save. Previously, the process ran when you clicked Save and you waited until the process was complete to move on. Now, you are prompted to decide when you want to recalculate SODs from that window. This is helpful if you are going to be making a lot of changes to User Security.



Select Multiple E-Sign Approvers

Previously in E-Sign, users could select one Approver to send their change to for approval. Now, users may select more than one user at the same time. This way, the Approver who is available first can approve the change.



Only one user needs to approve the change and after it is approved, it no longer appears for the other Approvers.