

**DYNAMICSCON PRESENTATION**



**DYNAMICSCON**

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[Live.DynamicsCon.com](https://Live.DynamicsCon.com)

# 40 Security Tips for Dynamics GP

Mark Polino, CPA.CFF.CITP, CGMA

Director of Customer Success

Fastpath

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# Program Agenda

- Security Settings
- Security Setup
- Security Processes
- Mitigations
- Principles

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# Security Settings

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# 1. Ensure Company Security is on

Setup > Company > Company

The screenshot shows the 'Company Setup - TWO (sa)' window in Microsoft Dynamics GP. The window has a menu bar with 'OK', 'Additional', 'File', 'Print', 'Tools', 'Help', and 'Add Note'. Below the menu bar, the 'Company Name' is 'Fabrikam, Inc.' and the 'Company ID' is 'TWO'. The 'Address ID' is 'Primary'. The 'Name' is 'Fabrikam, Inc.', 'Contact' is 'Taylor Stewart', and 'Address' is '4277 West O'. The 'City' is 'Chicago', 'State' is 'IL', 'ZIP Code' is '60601-4277', and 'Country' is 'United States'. The 'Phone 1' is '(312) 436-2896 Ext. 0000', 'Phone 2' is '(000) 000-0000 Ext. 0000', 'Phone 3' is '(000) 000-0000 Ext. 0000', and 'Fax' is '(312) 436-2896 Ext. 0000'. A message box titled 'Microsoft Dynamics GP' is overlaid on the window, displaying 'User security is activated.' and an 'OK' button. The bottom of the window has tabs for 'Human Resources', 'Extra Fields', 'Options', 'Internet User Defined', and 'Address'.

Field	Value
Company Name	Fabrikam, Inc.
Company ID	TWO
Address ID	Primary
Name	Fabrikam, Inc.
Contact	Taylor Stewart
Address	4277 West O
City	Chicago
State	IL
ZIP Code	60601-4277
Country	United States
Phone 1	(312) 436-2896 Ext. 0000
Phone 2	(000) 000-0000 Ext. 0000
Phone 3	(000) 000-0000 Ext. 0000
Fax	(312) 436-2896 Ext. 0000

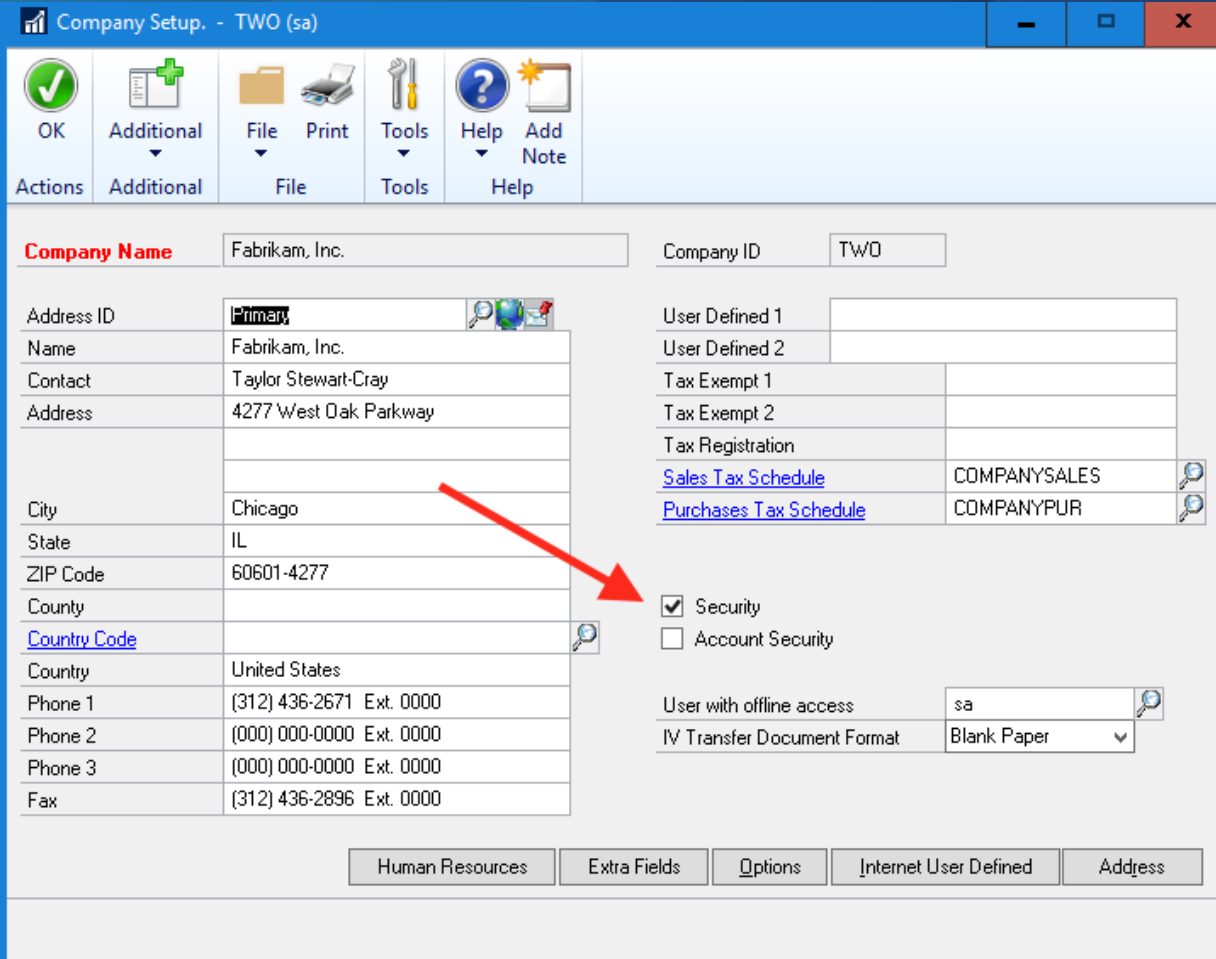
Microsoft Dynamics GP

User security is activated.

OK

## 2. Restrict access to Company Setup window

Keep users from deactivating security



Company Setup - TWO (sa)

OK Additional File Print Tools Help Add Note

Actions Additional File Tools Help

**Company Name** Fabrikam, Inc. **Company ID** TWO

Address ID Primary  
Name Fabrikam, Inc.  
Contact Taylor Stewart-Cray  
Address 4277 West Oak Parkway  
City Chicago  
State IL  
ZIP Code 60601-4277  
Country United States  
Country Code  
Phone 1 (312) 436-2671 Ext. 0000  
Phone 2 (000) 000-0000 Ext. 0000  
Phone 3 (000) 000-0000 Ext. 0000  
Fax (312) 436-2896 Ext. 0000

User Defined 1  
User Defined 2  
Tax Exempt 1  
Tax Exempt 2  
Tax Registration  
[Sales Tax Schedule](#) COMPANYSALES  
[Purchases Tax Schedule](#) COMPANYPUR

☒ Security  
☐ Account Security

User with offline access sa  
IV Transfer Document Format Blank Paper

Human Resources Extra Fields Options Internet User Defined Address

# 3. Only set Account Security with Organizational Structure

Without Organizational Structure setup, all accounts appear missing

Organizational Structure Setup - TWO (sa)

OK File Print Tools Help Add Note

Actions File Tools Help

Organizational Labels

Level 1	Corporate	Corporate
Level 2	East	East
Level 3	West	West
Level 4	Support	Support

Organization Definition

Level:

Entity ID	Description

# 4. Eliminate multiple access options

3 ways to do a JE

3 ways to process an AP invoice

Slim this down to 1 for most users

Security Task Setup - TWO (sa)

Save Clear Delete Copy File Print Tools Help Add Note

Actions File Tools Help

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

User Type: Full

Access List:

☒ Display Selected Items

Mark All Unmark All

Operations

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



# 5. Restrict Journal Entry posting

The screenshot shows the 'Security Task Setup' window for user 'TWO (sa)'. The window has a menu bar with 'Save', 'Clear', 'Delete', 'Copy', 'File', 'Print', 'Tools', 'Help', and 'Add Note'. Below the menu bar, there are fields for 'Task ID' (TRX\_FIN\_003\*), 'Task Name' (Post Financial series), and 'Task Description' (Includes all posting of the financial series.). The 'Category' is set to 'Financial'. Below these fields, there are dropdown menus for 'Product' (Microsoft Dynamics GP), 'Type' (Series Posting Permissions), 'Series' (financial), and 'User Type' (Full). At the bottom, there is an 'Access List' section with a checkbox for 'Display Selected Items' and buttons for 'Mark All' and 'Unmark All'. The 'Operations' list includes: Bank Deposit Entry, Bank Transaction Entry, Bank Transfer Entry, Budget Transaction Entry, Clearing Entry, Currency Revaluation, Euro Conversion, General Entry, Quick Entry, and Reconcile Bank Statement. A 'Print Operation Access' button is located at the bottom left of the window.

Task ID	Task Name	Task Description	Category
TRX_FIN_003*	Post Financial series	Includes all posting of the financial series.	Financial

Product: Microsoft Dynamics GP  
Type: Series Posting Permissions  
Series: financial  
User Type: Full

Access List: ☒ Display Selected Items Mark All Unmark All

Operations

- ☒ Bank Deposit Entry
- ☒ Bank Transaction Entry
- ☒ Bank Transfer Entry
- ☒ Budget Transaction Entry
- ☒ Clearing Entry
- ☒ Currency Revaluation
- ☒ Euro Conversion
- ☒ General Entry
- ☒ Quick Entry
- ☒ Reconcile Bank Statement

Print Operation Access

- Allow JE access without posting
- Review for posting via report

# Security Setup

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## 6. Minimize SA user

<https://www.gofastpath.com/minimizing-the-use-of-sa-in-microsoft-dynamics-gp-white-paper>

- SA has power beyond GP
- SA is effectively anonymous
- SA isn't technically required for GP
- 3<sup>rd</sup> parties might require SA
- It does make install consistent

### Options

1. Log in to Microsoft Dynamics GP as the system administrator ("sa") and create the users as required (no change from previous releases). Microsoft Dynamics GP administrator accounts can be any user account within the application.
2. Assign the specific Microsoft Dynamics GP administrator SQL login accounts to the SysAdmin fixed server role. The current user must be a member of the DYNGRP in the DYNAMICS database to execute stored procedures. With this option, the Microsoft Dynamics GP administrator can be any user account within the Microsoft Dynamics GP application.
3. Assign the DYNAMICS database owner login (DYNSA) to the SecurityAdmin Fixed Server Role, and log into the client using the DYNSA user.
4. Assign the specific Microsoft Dynamics GP Administrator(s) SQL Login account to the SecurityAdmin Fixed Server Role and also within the Db\_Owner Database Role that exists within the DYNAMICS database. With this option, the Microsoft Dynamics GP administrator can be any user account within the Microsoft Dynamics GP application; however, DYNSA must be the database owner of ALL Microsoft Dynamics GP databases.
5. Assign the specific Microsoft Dynamics GP administrator(s) SQL login account to the SecurityAdmin fixed server role and within the Db\_AccessAdmin and Db\_SecurityAdmin database roles that exists to the DYNAMICS database. With this option, the Microsoft Dynamics GP administrator can be any user account within the Microsoft Dynamics GP application; however, DYNSA must be the database owner of ALL Microsoft Dynamics GP databases.

# 7. Remove SA used for connections



Difficult to trace



Change SA password



Identify what breaks



Reset to previous SA password



Fix connections



## 8. Lockout the Dynsa user

- Dynsa is only required to be present as the owner of every GP DB
- It is NOT required to be power user
- It is NOT required to add users
- Set a password and lose it

- The database owner is set to DYNOSA for every Microsoft Dynamics GP database. It is essential that DYNOSA continue to be the owner of every Microsoft Dynamics GP database. If a different owner is assigned, complications can arise when deleting user accounts and granting access to companies.

Microsoft Dynamics GP, Planning for Security, p. 30

## 9. Assign GP users to add/remove users/security

<https://www.gofastpath.com/blog/add-gp-users-without-sa>

Add users without being SA

**“With this option, the Microsoft Dynamics GP administrator can be any user account within the Microsoft Dynamics GP application.”**

Microsoft Dynamics GP, Planning for Security, p. 35

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# 10. Don't rely on included roles

Included roles don't support segregation of duties

They have inherent security issues, sometimes a lot of them

System: 9/21/2021 6:47:49 PM Security Role Setup Page: 1

User Date: 4/12/2027 System Manager User ID: sa

From:	BOOKKEEPER*		To:	BOOKKEEPER*		
Role ID:						
Role Name:	Bookkeeper					
Description:	Tasks include creating and paying vendor invoices, creating sales invoices, billing customers, receiving payments, reconciling bank statements, printing financial					
Workflow status:	Not Activated					
Task ID	Name	Description				
CARD_0101*	Maintain accounts	The ability to create all types of accounts and to mass modify accounts. Also includes				
CARD_0102*	Maintain account analysis					
CARD_0103*	Maintain budgets					
CARD_0104*	Maintain checkbooks					
CARD_0105*	Maintain financial currencies					
CARD_0201*	Maintain customers and addresses	Also includes the Customer list, preview and customization.				
CARD_0202*	Maintain customer financial summary					
CARD_0203*	Maintain customer/vendor relationships					
CARD_0204*	Maintain customer items					
CARD_0205*	Maintain customer lockbox					
CARD_0206*	Maintain national accounts	Maintain lockbox and lockbox bank details.				
CARD_0207*	Maintain picking instructions					
CARD_0208*	Maintain process instructions					
CARD_0209*	Maintain prospects					
CARD_0210*	Maintain salespeople and territories					
CARD_0301*	Maintain vendors and addresses	Also includes the Salespeople list, preview and customization.				
CARD_0302*	Maintain vendors financial summary					
CARD_0304*	Maintain customer/vendor relationships					
DEFAULTUSER	Default User					
INQ_FIN_001*	View GL account financial information					
INQ_FIN_002*	View account analysis	Default User				
INQ_FIN_003*	View account rolup					
INQ_FIN_004*	View GL journal entries					
INQ_FIN_005*	View General Ledger history					
INQ_FIN_006*	View budget information					
INQ_FIN_007*	View GL account financial information	View net change, currency summary and checkbook information. Also includes the Ch				
INQ_FIN_008*	View checkbook financial information					
INQ_FIN_009*	View transaction matching					
INQ_PURCH_001*	View vendors					
INQ_PURCH_002*	View Payables Management transactions					
INQ_PURCH_003*	View vendor financial information	Also includes the Vendor list and preview.				
INQ_SALES_001*	View customers					
INQ_SALES_002*	View customer financial information					
INQ_SALES_003*	View receivables financial information					
INQ_SALES_004*	View receivables transactions					
INQ_SALES_005*	View SOP transactions	View net change, currency summary and checkbook information. Also includes the Receiv				
LIST_PURCH_001*	All Purchasing Transactions list					
LIST_SALES_001*	All Sales Transactions list					
RPT_FIN_001*	Financial statements					
RPT_FIN_002*	AFA reports					
RPT_FIN_003*	FRX reports	Financial statements				
RPT_FIN_004*	General Ledger reports					
RPT_FIN_005*	Budget reports					
RPT_FIN_006*	Checkbook and Banking reports					
RPT_PURCH_001*	Purchasing reports					
RPT_PURCH_002*	Setup reports	Checkbook and Banking reports				
RPT_PURCH_003*	Payables Management check information					
RPT_PURCH_005*	Vendor letters					
RPT_PURCH_CAM01*	Control Account Mgmt reports					
RPT_SALES_001*	Sales reports					
RPT_SALES_004*	Posting journals	Used in the Letter Writing Assistant				
RPT_SALES_005*	Customer letters					
RPT_SALES_006*	Collection letters					
TRX_FIN_001*	Enter journal entries					
TRX_FIN_002*	Enter/edit General Ledger batches					
TRX_FIN_003*	Post Financial series	Does not include posting. Also includes the General Ledger Batches list, preview, and c				
TRX_FIN_004*	Enter bank deposits					
TRX_FIN_005*	Enter bank transactions					

# 11. Build new roles with existing tasks

<https://www.gofastpath.com/whitepapers/gp-security-matrix>

	A	B	C	D	E	F	G	H	I	J	K	L
		Accounts Payable										
									Purchasing Admin			
		Set up Payables Management	Set up vendor classes	Set up purchase order information	Reconcile Purchasing	Remove Purchasing information	Post scheduled vendor payments	Print 1099's	Period-end Purchasing routines	Receive tax invoice	Update 1099 information	Purcha tables
Accounting Dept												
AP Manager												
AP Staff												
AR Manager												
AR Staff												
Controller												
Assistant Controller												
Financial Analyst												
CFO, CEO												
Warehouse Dept												
Warehouse Manager												
Warehouse Staff - Shipping												
Warehouse Staff - Receiving												
Sales Dept												
Inside Sales												
Outside Sales												
Sales Support - Proj Mgr												
IT Dept												
GP Support												
Service												
IT Manager												
Development												



## 12. Leverage limited/self-serve licenses

These have inherent security controls

The screenshot shows the 'User Setup - TWO (sa)' window. The title bar indicates the user is 'sa'. The window has a menu bar with 'File', 'Print', 'Tools', 'Help', and 'Add Note'. Below the menu bar is a toolbar with icons for Save, Clear, Delete, Copy Settings, Summary, File, Print, Tools, Help, and Add Note. The main area contains fields for 'User ID' (cbeasley), 'User Name' (Cole Beasley), and 'Class ID'. To the right, there are dropdown menus for 'Status' (Active), 'User Type' (Full), 'Home Page Role' (Full), and 'Payroll View for Human Resources' (Self Service). Below these are checkboxes for 'Web Client user only (no SQL Server Account)' and 'Payroll View for Human Resources'. The 'SQL Server Account' tab is selected, showing fields for 'SQL Server Account' (cbeasley), 'Password', and 'Confirm Password'. There are also checkboxes for 'Enforce Password Policy', 'Enforce Password Expiration', and 'Change Password Next Login'. A note on the right states: 'A SQL Server login account is not required for a user that will only access Microsoft Dynamics GP Web Client. To create or modify a SQL Server login account, you must have elevated SQL Server permissions, such as a system administrator.'

User Setup - TWO (sa)

Save Clear Delete Copy Settings Summary File Print Tools Help Add Note

Actions File Tools Help

User ID: cbeasley  
User Name: Cole Beasley  
Class ID: [Search]

Status: Active  
User Type: Full  
Home Page Role: Full  
Payroll View for Human Resources: Self Service

☐ Web Client user only (no SQL Server Account) ☐ Payroll View for Human Resources

SQL Server Account | Directory Account

SQL Server Account: cbeasley  
Password: [Masked]  
Confirm Password: [Masked]

Advanced SQL Server options

- ☒ Enforce Password Policy
- ☒ Enforce Password Expiration
- ☐ Change Password Next Login

A SQL Server login account is not required for a user that will only access Microsoft Dynamics GP Web Client. To create or modify a SQL Server login account, you must have elevated SQL Server permissions, such as a system administrator.

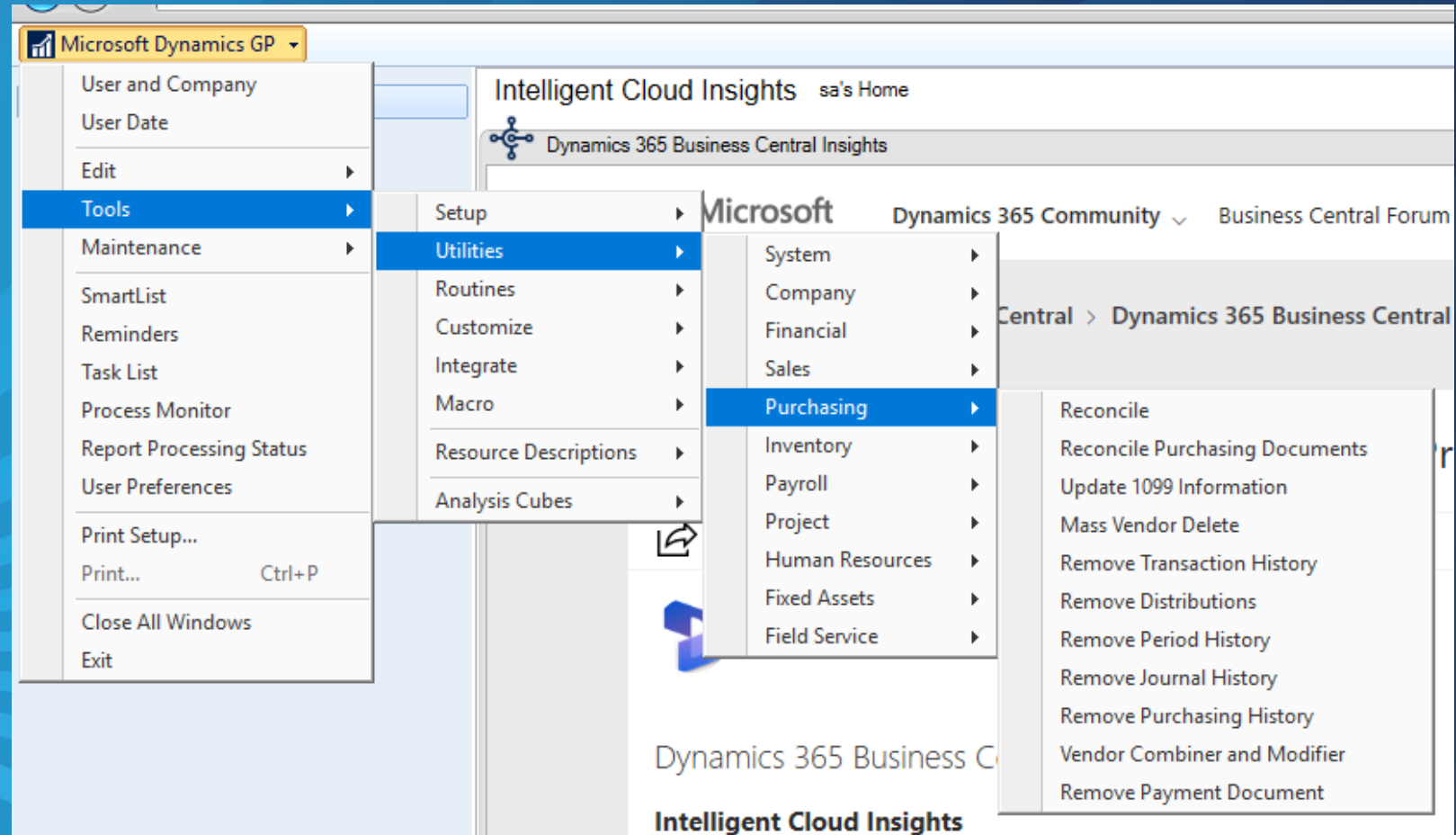
## 13. Eliminate POWERUSER role

- **POWERUSER is an override**
- **POWERUSER doesn't grant explicit permission**
- **POWERUSER permissions don't appear in security reports**
- **POWERUSER is not required**

"The DYNOSA and sa users automatically are assigned to the POWERUSER security role. Any user who is assigned to the POWERUSER security role will have access to everything in Microsoft Dynamics GP, with the exception of private lists."

# 14. Restrict Tools

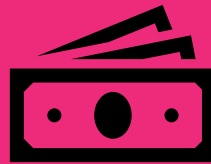
PSTL, combiners, modifiers, etc. are non-obvious ways to manipulate data



# 15. Separate master records from transactions



VENDORS FROM  
INVOICES AND PAYMENTS



CUSTOMERS FROM  
INVOICES



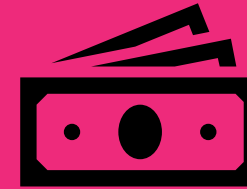
FISCAL PERIODS FROM  
JOURNAL ENTRIES



# 16. Separate multipart transactions



VENDOR INVOICES  
FROM PAYMENTS



CUSTOMER RECEIPTS  
FROM WRITE OFFS

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# 17. Don't overprovision for inquiry



USE INQUIRY  
WINDOWS



USE SMARTLISTS

# 18. Provision backups only as needed

Don't provision users all year for 2 weeks of backup

# 19. Let users login with Active Directory



Single sign  
on



Reduced IT  
maintenance

Active Directory User "mark.little" - Fastpath Config AD

File Setup Reports Help

User ID: mark.little Class: <None>

**Dynamics GP**

- User Information
- Company Access
- Roles
- Reporting Services

**User Options**

Windows ID: mark.little

User ID: mark.little

User Name: Mark Little

Class:

Login Type: Single Sign-On

☐ Payroll View for Human Resources

Status: Active

User Type: Full

Dynamics GP

Connected to AZC-DC1 (SQL1\GP)



# 20. Remove unnecessary roles

The screenshot shows the Dynamics CRM Role Manager interface. At the top is a ribbon with tabs: Actions, File, Tools, and Help. The 'Actions' tab is active, showing icons for Save, Clear, Delete, Copy, File, Print, Tools, Help, and Add Note. Below the ribbon, the role details are displayed:

<b>Role ID:</b>	AA MANAGER*
<b>Role Name:</b>	Analytical Accounting manager
<b>Role Description:</b>	Responsible for module setup

Below the details, there is a 'Display:' dropdown menu set to 'All'. To the right of the dropdown are 'Mark All' and 'Unmark All' buttons. Below these is a checkbox labeled 'Display Selected Tasks'. The main area is a table of security tasks:

Security Task ID	Name
<input checked="" type="checkbox"/> AADEFAULTUSER*	Analytical Accounting Reports
<input checked="" type="checkbox"/> ADMIN_AA_001*	Set up and administer AA
<input checked="" type="checkbox"/> ADMIN_AA_002*	Analytical Accounting tables
<input type="checkbox"/> ADMIN_ADV_HR*	Set up Advanced Human Resources
<input type="checkbox"/> ADMIN_ADV_PR*	Set up Advanced Payroll
<input type="checkbox"/> ADMIN_BSS_01*	Setup Benefits Self Service
<input type="checkbox"/> ADMIN_BSS_02*	Administer Benefits Self Service
<input type="checkbox"/> ADMIN_COMPANY_001*	Set up company
<input type="checkbox"/> ADMIN_COMPANY_002*	Set up taxes
<input type="checkbox"/> ADMIN_COMPANY_003*	Set up payment terms and shipping methods
<input type="checkbox"/> ADMIN_COMPANY_004*	Set up bank accounts
<input type="checkbox"/> ADMIN_COMPANY_005*	Set up credit cards

At the bottom of the window, there are navigation buttons: '<< < > >>'.

Prevent accidental assignment

# 21. Find and control related windows

- Example: Vendor > Vendor Address > Electronic Address

The image displays two overlapping software windows from a financial or procurement system. The background window is titled "Vendor Maintenance - TWO (sa)" and the foreground window is titled "Vendor Address Maintenance - TWO (sa)".

**Vendor Maintenance - TWO (sa) Window:**

- Actions:** Save, Clear, Delete, Write Letters, Attach, Submit, View History, Options, All-in-One View, File, Tools, Help.
- Workflow:** Vendor Approve [Workflow Not Activated]
- Fields:**
  - Vendor ID: ACETRAVE0001
  - Name: A Travel Company
  - Short Name: Ace
  - Check Name: A Travel Company
  - Status: Active
  - Class ID: AUS-NSW-M
  - Primary Address ID: PRIMARY
  - Contact: John Hardy
  - Address: 567 Dixon Street
  - City: Sydney
  - State: NSW
  - ZIP Code: 2086
  - Country Code: Australia
  - Phone 1: (298) 555-0101 Ext. 0000
  - Phone 2: (000) 000-0000 Ext. 0000
  - Phone 3: (294) 555-0101 Ext. 0000
  - Fax: (294) 555-0101 Ext. 0000
  - Tax Schedule: COMPANYPUR
  - Shipping Method: PICKUP
  - UPS Zone:
  - Address IDs: REMIT TO, REMIT TO, Ship From, 1099
  - Vendor Account:
  - Comment 1:
  - Comment 2:
- Buttons:** Options, Address, Accounts, E-mail, Project.

**Vendor Address Maintenance - TWO (sa) Window:**

- Actions:** Save, Clear, Delete, Additional, File, Print, Tools, Help, Add Note.
- Fields:**
  - Vendor ID: ACETRAVE0001
  - Name: A Travel Company
  - Address ID: PRIMARY
  - Contact: John Hardy
  - Address: 567 Dixon Street
  - City: Sydney
  - State: NSW
  - ZIP Code: 2086
  - Country Code: Australia
  - Phone 1: (298) 555-0101 Ext. 0000
  - Phone 2: (000) 000-0000 Ext. 0000
  - Phone 3: (000) 000-0000 Ext. 0000
  - Fax: (294) 555-0101 Ext. 0000
  - Tax Schedule: COMPANYPUR
  - Shipping Method: PICKUP
  - UPS Zone:
  - EFT Bank:
- Buttons:** Options, Address, Accounts, E-mail, Project.

# Security Processes

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## 22. Don't make increased access persistent

Have a plan to take away access

- Make a task in GP
- Set an appointment in Outlook

Task - TWO (sa)

Save Clear Delete Recurrence File Tools Help Add Note

Actions File Tools Help

Task:

Due Date: 4/12/2027 Task Assigned To: sa

Status: Pending

Link To: No Link

Name:



## 23. Don't rely on system password

Encrypted, but easily broken  
Encryption mechanism is  
easily available

The screenshot shows the 'Company Setup' window for 'TWO (sa)'. The window contains various fields for company information, including name, address, and contact details. A 'Password' dialog box is overlaid on the bottom right, displaying the system password.

**Company Setup - TWO (sa)**

**Actions:** OK, Additional, File, Print, Tools, Help, Add Note

**Company Name:** Fabrikam, Inc. **Company ID:** TWO

**Address ID:** Primary **Name:** Fabrikam, Inc. **Contact:** Taylor Stewart-Cray **Address:** 4277 West Oak Parkway

**City:** Chicago **State:** IL **ZIP Code:** 60601-4277 **Country:** United States

**Country Code:** [Country Code](#)

**Phone 1:** (312) 436-2671 Ext. 0000 **Phone 2:** (000) 000-0000 Ext. 0000 **Phone 3:** (000) 000-0000 Ext. 0000 **Fax:** (312) 436-2896 Ext. 0000

**User Defined 1:** **User Defined 2:** **Tax Exempt 1:** **Tax Exempt 2:** **Tax Registration:** **Sales Tax Schedule:** COMPANYSALES **Purchases Tax Schedule:** COMPANYPUR

☒ Security ☐ Account Security

**User with offline access:** sa **IV Transfer Document Format:** Blank Paper

**Buttons:** Human Resources, Extra Fields, Options, Internet User Defined

**Password Dialog:** System password is: access

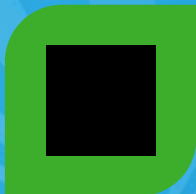
# 24. Be careful with functional passwords



STORED IN  
PLAIN TEXT



EASILY  
ACCESS



MAY BE  
NECESSARY

Receivables Management Setup - TWO (sa)

OK Cancel File Print Tools Help Add Note

Actions File Tools Help

Aging Periods	<input type="radio"/> Due Date	<input checked="" type="radio"/> Document Date
Current	From: 0	To: 30
31 - 60 Days		31 60
61 - 90 Days		61 90
91 - 120 Days		91 999
		0

Passwords	
Exceed Credit Limit	ACCESS
Remove Customer Hold	
Exceed Maximum Writeoffs	ACCESS
Waive Finance Charge	ACCESS

## 25. Regularly reset functional passwords



SHARED



EASILY ACCESS

## 26. Have a process to provision users

- Details, Roles, Approvals
- Email is often insufficient
- Don't copy access



## 27. Redesign processes

- Process can often fix lack of personnel
- AP enters Customers
- AR enters Vendors
- Dedicated person for accounting master changes like chart, fiscal periods, etc.

# 28. Always report on Power Users

**POWERUSER access doesn't show up in object level access reports**

**You need a list of users with POWERUSER**

- Security Role Assignment can generate a list
- You can build a SmartList

Screen Output - Security Role Assignment Report

File Edit Tools Find Help sa Fabrikam, Inc. 4/12/2027

Print Send To Modify 100% Completed 1 Page Page 1

System: 9/22/2021 8:51:42 AM  
User Date: 4/12/2027

**Security Role Assignment System Manager**

Ranges: From: To:  
Role ID: POWERUSER Role Name: POWERUSER

Role ID:	Description:	Role Name:
POWERUSER	POWERUSER	POWERUSER

User ID	Name	Company
DYNSA	DYNSA	Fabrikam, Inc.
sa	sa	Fabrikam, Inc.

SmartList Designer - TWO (sa)

OK Execute Query Delete Create Go To File Tools Help

List Name: User Role Security Product: Microsoft Dynamics GP Series: Company

**Database View**

- ☐ Reporting Tools XMLData
- ☐ Resource Activity
- ☐ Resource Exclusions
- ☐ Routines Template
- ☐ Scheduled Backup Master
- ☐ Security Alternate/Modified Group
- ☐ Security Assignment Alternate/Mo
- ☐ Security Assignment Role Task
- ☐ Security Assignment Role Task Stag
- ☐ Security Assignment Task Operatio
- ☐ Security Assignment User Alternate
- ☒ Security Assignment User Role
- ☒ User ID
- ☒ Company ID
- ☒ Security Role ID
- ☐ Security Assignment User Role Stag
- ☐ Security Resource Descriptions
- ☐ Security Roles Master
- ☐ Security Task Assign Operations Sta

**Selected Fields**

- Security Assignment User Role.User ID
- Security Assignment User Role.Company ID
- Security Assignment User Role.Security Role ID

**Relationship**

TableName	FieldName	TableName2	FieldName2

**Filter**

Field Name	Condition	Value
Security Assignment User Role.Security	Like	POWERUSER

**Result's Preview** T-SQL Query

User ID	Company ID	Security Role ID
DYNSA	-1	POWERUSER
sa	-1	POWERUSER

## 29. Secure more than just GP

- SSRS
- Management Reporter
- SQL Server
- Integration Tools

## 30. Phase security changes

- You don't have to fix everything at once
- Start with the riskiest area (Cash, GL, AP, etc.) work to least risky
- Small wins, easier support, reduced risk at each phase





# 31. Find segregation of duties conflicts

- Find security settings that should not be assigned together because of the risk they produce
- Vendor/Payment, Fiscal Periods/GL, Accounts/GL, PO/Approval, etc.
- Hard to do without a tool

# Mitigating Controls

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# What is a mitigating control?

## Reduce Risk outside of system security

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## 32. Leverage workflows

- Great mitigation tool
- Ensure that reviews are completed



# 33. Leverage Field Level Security

- Mitigation tool
- Needs to be built
- Needs testing

Field Level Security - TWO (sa)

OK Cancel Apply File Print Tools Help

Actions File Tools Help

View: Users only

ID	Description	Class
gglock	Gaston Glock	
IUser	Ima User	
jsmith	John "Hannibal" Smith	
LESSONUSER1	LESSONUSER1	
LESSONUSER2	LESSONUSER2	
mark	mark	
Mickey	Mickey Mouse	
mpolino	Mark Polino	
sa	sa	
tbocutti	Trish Bocutti	
tromo	Tony Romo	

Company Name	Company ID
Fabrikam, Inc.	TWO

Field Security ID	Description	Product ID	Product Name	Form Name
<input checked="" type="checkbox"/> COPY USER	Copy User	0	Microsoft Dynamics GP	sySecurityUserAssignment
<input checked="" type="checkbox"/> COPY USER SETUP	Copy User Security	0	Microsoft Dynamics GP	Enter_User_Names
<input checked="" type="checkbox"/> SEC MASTR PASS	Security Master Password Lock	0	Microsoft Dynamics GP	SY_Company_Options

## 34. Buy a real audit trail tool

- Who changed what, when did it change, via what tool?
- Old value, new value

## 35. Perform regular access reviews

- Review users and their access
- At least annually, including:
  - Users who have left the organization
  - Users who should no longer have access to GP



Nearly **1 in 4 employees** said they still had access to accounts from past jobs.

Password Sharing at Work, Beyond Identity Blog, June 11, 2021  
<https://www.beyondidentity.com/blog/password-sharing-work>

## 36. Use approvals

Built in **approvals** can be clunky but they work

Remember these are shared passwords too

Posting Setup - TWO (sa)

OK Save File Print Tools Help Add Note

Series: Financial Origin: General Entry

☒ Post to General Ledger  
☐ Post Through General Ledger Files

☒ Allow Transaction Posting  
☐ Post Through General Ledger Files  
☐ Include Multicurrency Info

☐ Verify Number of Trx  
☐ Verify Batch Amounts

Create a Journal Entry Per:  
☒ Transaction  
☐ Batch ☐ Use Account Settings

Posting Date From: ☒ Batch ☐ Transaction  
If Existing Batch: ☐ Append ☒ Create New

☐ Require Batch Approval  
Approval Password:

Mark All Unmark All

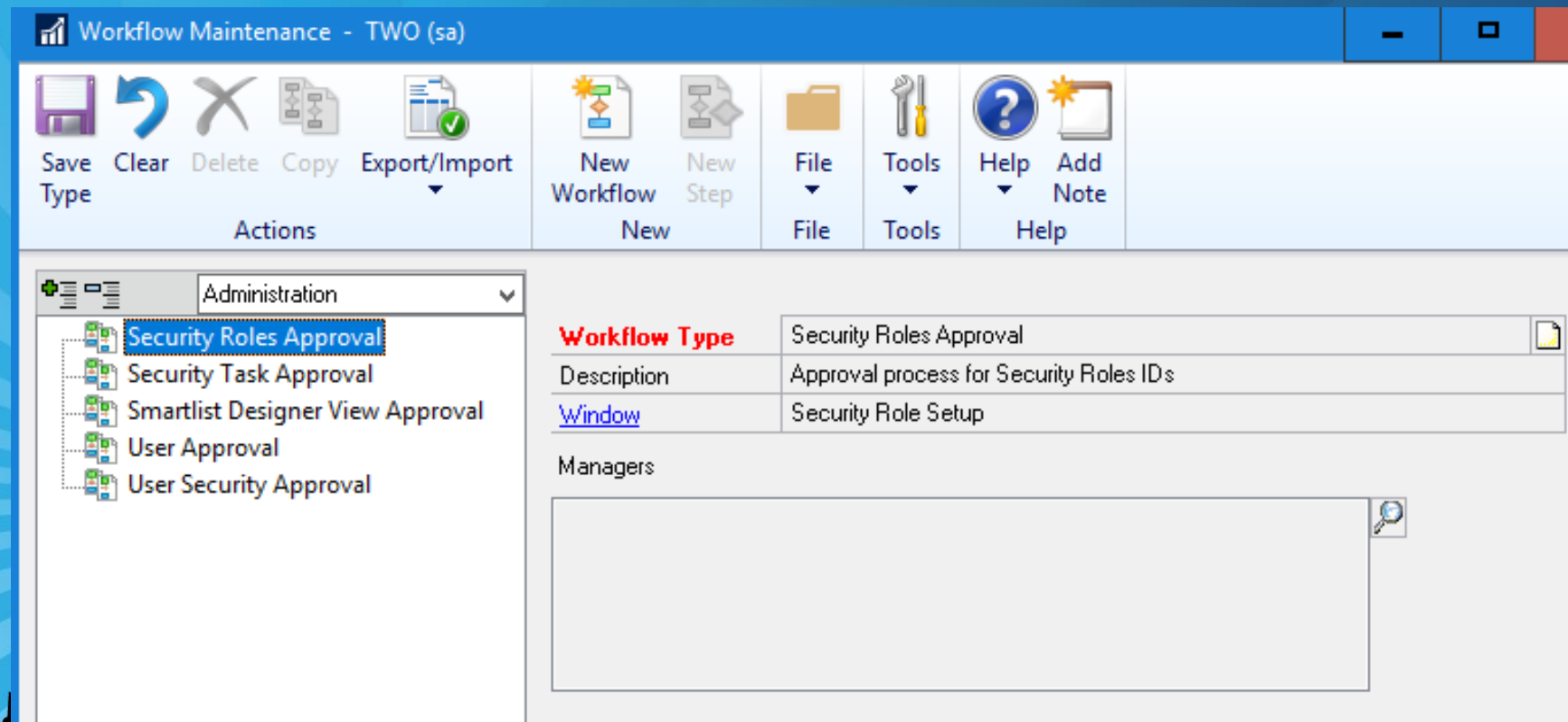
Reports: Send To: File

Print	Report	?	Type	Append/Replace
<input checked="" type="checkbox"/>	General Posting Journal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



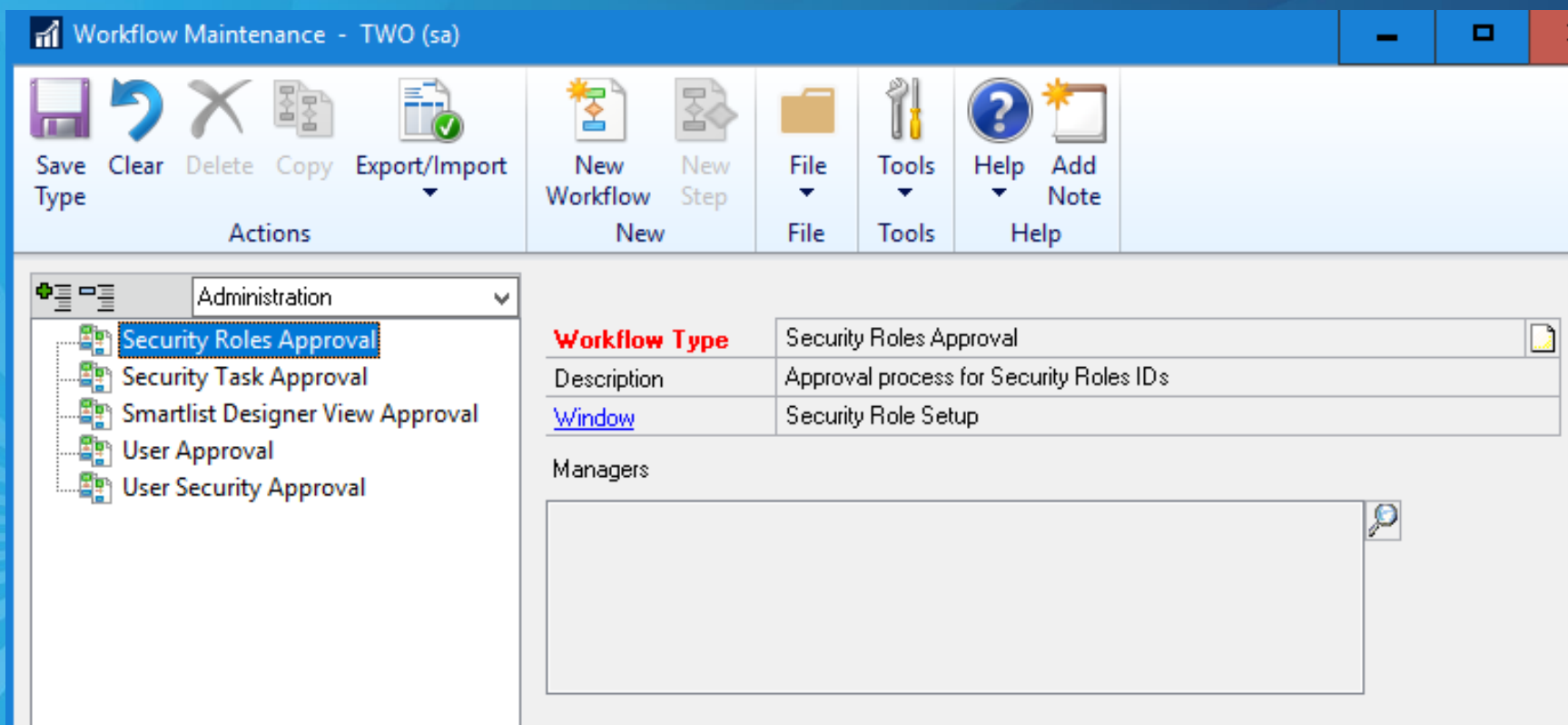
# 37. Leverage User Approval Workflow

Not full user provisioning, but useful.



# 38. Leverage Role Workflow

Protect role changes



# Principles

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# 39. Take a risk-based approach

Consider where the organization's risks are and start there

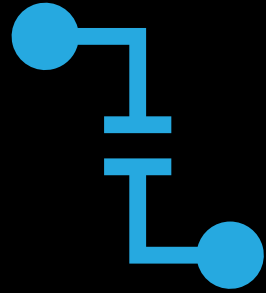
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## 40. More responsibility equals less access



Counterintuitive



CEO & CFO positions are  
not transactional jobs

## **Fastpath** **Security and Compliance Products**

### **Assure**

- Risk based security access review and SOD analysis platform

### **Audit Trail**

- Continuous monitoring solution that tracks all changes to critical data

### **Identity Manager**

- Request, review and approve Dynamics security without IT intervention

### **Config AD**

- Maintain user provisioning in Active Directory instead of the target system

# Mark's Books



# Questions?

**Mark.Polino@gofastpath.com**  
**info@gofastpath.com**

**Twitter: @gofastpath**







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