



Help Achieve Compliance Objectives with Microsoft Dynamics GP

Presented by:
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Introduction – Charles Allen

Microsoft
GOLD CERTIFIED
Partner



- Managing Consultant
- More than 20 years experience
- Microsoft MVP

Agenda

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- ◆ Introduction
- ◆ Workflow
- ◆ Electronic Signatures
- ◆ Audit Trails
- ◆ Other Options
- ◆ Q & A

Introduction

- ◆ What you will learn in this webcast
 - How you can use Dynamics to manage compliance
- ◆ What you won't learn in this webcast
 - Why you should comply with the rules.

How GP Can Help You Manage Compliance

- ◆ Workflow
- ◆ Electronic Signatures
- ◆ Audit Trails

Workflow

- ◆ Provides a way to use automated communications, like e-mail, to request and approve changes or new records
- ◆ Can be used to authorize documents (sales orders), master record (vendors) and batches (GL)
- ◆ Available for GP 10 and 2010

Workflows Provided by Microsoft

◆ Documents

- Purchase Orders
- Sales Quotes
- Credit Limit Overrides in SOP

◆ Master Records

- Vendors (2010 only)
- Employee Onboarding (2010 only)
- Personnel Changes (2010 only)

Workflows Provided by Microsoft

◆ Batches

- General Ledger
- Receivables Management
- Payables Management

◆ Electronic Signatures

◆ Microsoft Office SharePoint Server can be used to create additional workflows

How to Interact with Workflow

- ◆ A user can interact with the workflow system in three ways
 - By logging into Dynamics GP
 - SharePoint Workflow Website
 - Outlook E-mail

System Requirements

- ◆ Windows SharePoint Services (2010) or Office SharePoint Server (10 and 2010)
- ◆ Windows Server 2003 or 2008
- ◆ SQL Server 2005 or 2008
- ◆ Internet Information Services
- ◆ Web Services for Dynamics GP
- ◆ Domain Environment

Workflow Demo



Electronic Signatures

◆ What it is for

- Used to manage changes to fields and windows in GP
- Cannot be used in scrolling windows

Electronic Signatures

- ◆ How to decide when to use Electronic Signatures
 - Identify the points within Microsoft Dynamics GP that require preventive control.
 - Decide who within the organization should be authorized to release the control.
 - Decide what information should be captured at the point of the control, and what rules should apply to capturing this information.

Electronic Signatures

- ◆ Part of the Risk Management Suite
- ◆ Available for GP 9, 10, and 2010
- ◆ Available for Advanced Management or Professional licenses

Electronic Signatures Demo



Audit Trails

- ◆ Used to track changes to data
- ◆ Tracks data made by users in GP
- ◆ Can also track changes made outside of GP, like SQL Server queries
- ◆ Best used for tracking changes to master records and setup records
- ◆ Transactions have their own columns for tracking users who created the records

Audit Trails

- ◆ Part of the Risk Management Suite
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Audit Trails Demo



Other Solutions

◆ Rockton Software

- Auditor
- Security Auditor

◆ FastPath

- Assure
- Audit Trail
- Audit View
- Config AD

BKD Technologies Support Center



- ◆ Monday - Friday, 8 a.m. - 5 p.m., call our Support Center toll free at:
- ◆ **Dynamics GP - 877.253.7778**
GPsupport@bkd.com



Where to Get More Information



- ◆ BKD Technologies - 877.253.7778 or gpsupport@bkd.com.
- ◆ Workflow Installation/Administration Guides
- ◆ Electronic Signatures User Guide
- ◆ Audit Trails User Guide
- ◆ Help Achieve Compliance Objectives with Microsoft Dynamics GP White Paper
- ◆ eLearning through CustomerSource

Q&A

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Next Webinar



◆ **Topic:** Professional Service Tools Library

◆ **Date:** March 24, 2010

◆ **Register at:**

www.bkdtechnologies.com/attend



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Thank You For Attending Our Webcast.

