



Microsoft Dynamics™ GP
Electronic Signatures

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Introduction

Electronic Signatures for Microsoft Dynamics™ GP enables companies to increase control over their system changes. Electronic Signatures supports one or more electronic signature authorizations for system changes, as well as the ability to attach electronic signature reason codes and comments to change history. Electronic Signatures provides controls to help companies meet the requirements of data compliance regulations such as FDA 21 CFR Part 11 and the Sarbanes-Oxley Act.

Electronic Signatures includes the following features:

- Allows you to set up electronic signatures to approve important system changes.
- Works with any Microsoft Dynamics GP modules or Dexterity®-based, third-party developed modules.
- Supports one or more password authorizations and the capture of electronic signature reason codes and comments on specified system changes.
- Provides control of individual electronic signature assignments and passwords.

This introduction includes the following topics:

- [*What's in this manual?*](#)
- [*Symbols and conventions*](#)
- [*Resources available from the Help menu*](#)
- [*Send us your documentation comments*](#)

What's in this manual?

This manual contains step-by-step instructions that guide you through the installation and set up of Electronic Signatures, as well as instructions for using the product.

This manual assumes that you are familiar with navigation principles in Microsoft Dynamics GP and that you know how to operate the Microsoft Dynamics GP business system. It also assumes that the latest release of Microsoft Dynamics GP has been installed and configured on your computer.

To make the best use of Electronic Signatures, you should have a working knowledge of each Microsoft Dynamics GP module that you use with Electronic Signatures. Electronic Signatures integrates with every Microsoft Dynamics GP module, the Microsoft Dynamics GP system database, and Dexterity-based, third-party developed modules.



This manual contains the following chapters:

- [*Chapter 1, "Electronic Signatures Overview,"*](#) includes an explanation of how electronic signatures work and a perspective on deciding where to apply electronic signatures.
- [*Chapter 2, "Setup,"*](#) explains how to set up electronic signatures for a company.
- [*Chapter 3, "Working with Electronic Signatures,"*](#) explains how to:

- Approve system changes with electronic signatures
- Access change history information associated with electronic signatures
- Define e-mail addresses used to request remote approval
- Respond to remote notifications

Symbols and conventions

For definitions of unfamiliar terms, see the glossary in the manual or refer to the glossary in Help.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks.

This manual uses the following conventions to refer to sections, navigation, and other information.

Convention	Description
<i>Creating a batch</i>	Italicized type indicates the name of a section or procedure.
File >> Print or File > Print	The (>>) or (>) symbol indicates a sequence of actions, such as selecting items from a menu or toolbar, or pressing buttons in a window. This example directs you to go to the File menu and choose Print.
TAB or ENTER	All capital letters indicate a key or a key sequence.

Resources available from the Help menu

The Microsoft Dynamics GP Help menu gives you access to user assistance resources on your computer, as well as on the Web.

Contents

Opens the Help file for the active Microsoft Dynamics GP component, and displays the main “contents” topic. To browse a more detailed table of contents, click the Contents tab above the Help navigation pane. Items in the contents topic and tab are arranged by module. If the contents for the active component includes an “Additional Help files” topic, click the links to view separate Help files that describe additional components.

To find information in Help by using the index or full-text search, click the appropriate tab above the navigation pane, and type the keyword to find.

To save the link to a topic in the Help, select a topic and then select the Favorites tab. Click Add.

Index

Opens the Help file for the active Microsoft Dynamics GP component, with the Index tab active. To find information about a window that’s not currently displayed, type the name of the window, and click Display.

About this window

Displays overview information about the current window. To view related topics and descriptions of the fields, buttons, and menus for the window, choose the appropriate link in the topic. You also can press F1 to display Help about the current window.

Lookup

Opens a lookup window, if a window that you are viewing has a lookup window. For example, if the Checkbook Maintenance window is open, you can choose this item to open the Checkbooks lookup window.

Show Required Fields

Highlights fields that are required to have entries. Required fields must contain information before you can save the record and close the window. You can change the font color and style used to highlight required fields. On the Microsoft Dynamics GP menu, choose User Preferences and then choose Display.

Printable Manuals

Displays a list of manuals in Adobe Acrobat .pdf format, which you can print or view.

Orientation Training

Accesses online tutorials that show you how to complete basic procedures within Microsoft Dynamics GP. Additional tutorials are available through the CustomerSource Web site.

What's New

Provides information about enhancements that were added to Microsoft Dynamics GP since the last major release.

Microsoft Dynamics GP Online

Opens a Web page that provides links to a variety of Web-based user assistance resources. Access to some items requires registration for a paid support plan.

Customer Feedback Options

Provides information about how you can join the Customer Experience Improvement Program to improve the quality, reliability, and performance of Microsoft® software and services.

Send us your documentation comments

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

To send comments about specific topics from within Help, click the Documentation Feedback link, which is located at the bottom of each Help topic.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Chapter 1: Electronic Signatures Overview

This part of the documentation presents an overview of Electronic Signatures. This information is divided into the following sections:

- [How the Electronic Signatures feature works](#)
- [Deciding where to apply electronic signatures](#)
- [Terminology used in Electronic Signatures documentation](#)

How the Electronic Signatures feature works

Electronic Signatures applies preventive controls on changes to fields or windows within Microsoft Dynamics GP. When a user attempts to complete a system change that is controlled by an electronic signature, a window is displayed that requires one or more authorized passwords to be entered before the system change can be completed.

Electronic signatures can be applied to most windows and fields within Microsoft Dynamics GP. Electronic signatures can't be used to restrict changes within scrolling windows.

Deciding where to apply electronic signatures

Electronic signatures are typically applied to the fields and windows in Microsoft Dynamics GP that require preventative controls according to your business processes and the needs of your organization. To decide where you should set up 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.



You can hide the Reason Code and Comment fields, or provide them as options or as requirements.

Creating electronic signatures requires an understanding of the Microsoft Dynamics GP windows and field names. We recommend using Electronic Signatures in a test environment before activating it in your business routines.

Terminology used in Electronic Signatures documentation

The term “electronic signature” is used in two ways. First it refers to the application of a process hold on changes to a Microsoft Dynamics GP window, which requires the change to be reviewed and approved before it's saved. It also refers to the password that's entered when a change requires approval.

In addition, the following terms are used throughout the Electronic Signatures documentation.

Approver The person that enters an electronic signature (password) to authorize a system change.

Authorize The process of entering an electronic signature (password) to approve a system change.

Remote user A user that's not in proximity to the requestor. The approver does not have to be using Microsoft Dynamics GP to be notified that an electronic signature is required.

Requestor A user that enters a change to a record that requires authorization from an approver.

Chapter 2: Setup

This chapter covers the process of setting up Electronic Signatures. Information is divided into the following sections:

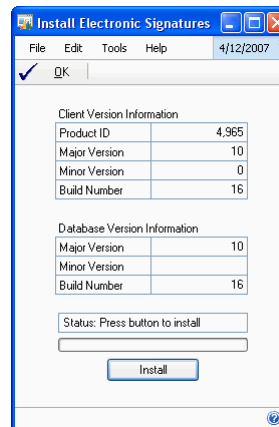
- [Installing Electronic Signatures](#)
- [Granting access to Electronic Signatures](#)
- [Creating electronic signatures](#)
- [Adding an electronic signature to the Item Maintenance window](#)
- [Creating an electronic signature reason code](#)
- [Setting up electronic signature authorizations](#)

Installing Electronic Signatures

After you install Microsoft Dynamics GP, you must complete an additional installation step to prepare Electronic Signatures for use.

To install Electronic Signatures:

1. Open the Electronic Signatures Install window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Install Electronic Signatures)



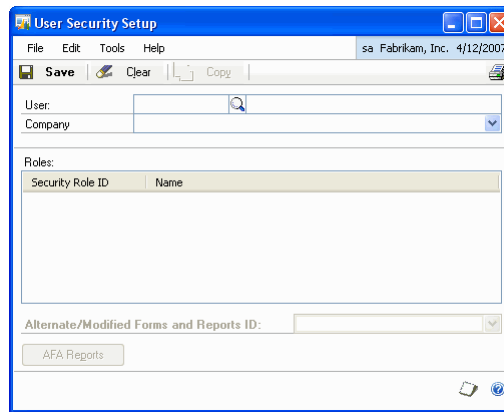
2. Click Install to complete the installation. The installation process creates tables and stored procedures for Electronic Signatures.
3. When the installation finishes, click OK to close the Install Electronic Signatures window.

Granting access to Electronic Signatures

During installation, the ESRROLE security role was created with the ESMANTENANCE security task assigned to it. To provide access to Electronic Signatures windows, you must add the users that will be working with Electronic Signatures to ESRROLE security role.

To grant access to Electronic Signatures:

1. Open the User Security Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> User Security)



2. Enter or select a user that works with Electronic Signatures.
3. Select a company in which the selected user should have access to Electronic Signatures.
4. Select the ESROLE security role.
5. Click save.

Creating electronic signatures

Electronic signatures are set up in windows associated with the records, or electronic documents that you want to control. For example, you might want to require an electronic signature password when a change is made to an inventory item, which is contained in the Item Master table and changed in the Item Maintenance window.

Before creating an electronic signature, determine the following information for each place it is to be assigned:

- Product
- Series
- Form name
- Window name
- Attachment resources (for example, the button that saves the document or closes the window)
- Record keys (only editable, non-blank fields can be used for record keys)

The following data types can be used for Attachment Resources: string, text, integer, tiny integer, long integer, currency, vcurrency, real, checkbox and date. No other data types are currently supported.



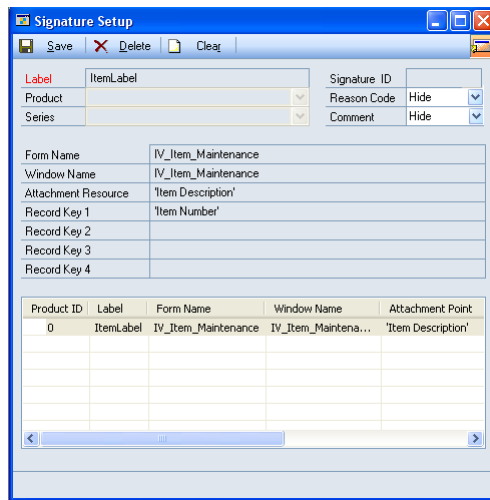
If you're not familiar with Dexterity technical names for forms, fields, and windows, use the Resource Descriptions utility to find this information (Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >> Windows). The window name can also be found by opening up the window for which you want to set up an electronic signature. The Window Name is found at the top of the window in the title bar.

Adding an electronic signature to the Item Maintenance window

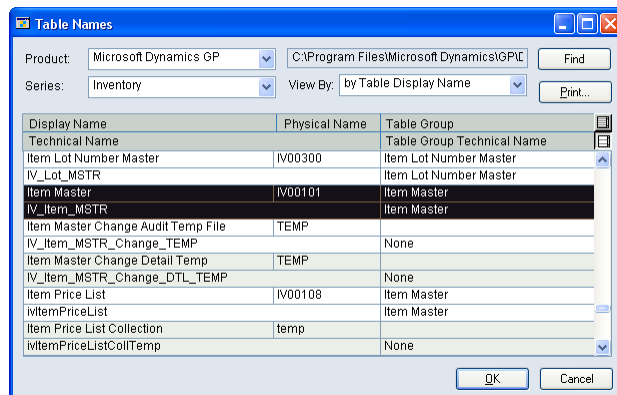
Use the Signature Setup window to add electronic signature passwords for master records. The following procedure lists the steps for adding an electronic signature to an item record. The process is similar for adding electronic signatures to other master records.

To add an electronic signature to the Item Maintenance window:

1. Open the Signature Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Electronic Signatures >> Signature Setup).



2. Select the Record Key or Record Keys for the Signature as follows:
 - Open the Table Descriptions window
(Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >> Tables) to find the key fields for the Microsoft Dynamics GP tables.
 - Choose the ellipses button to open the Table Names window. Select Item Master.



Select the information that's collected when an electronic signature is used. You can enter and save electronic signature reason codes, comments or both when an electronic signature is entered. See [Creating an electronic signature reason code](#) on page 10 for more information about reason codes.

Fill in the Label field for the electronic signature and from the drop-down lists select Product, Series, Form Name, Window Name, Attachment Resource and Record Key for which an electronic signature will be attached.

3. Indicate the capture options that will be applied to the information you collect. There are three capture options for electronic signature reason codes and comments:

Hide Excludes this field from the Signature Entry window. The user will not be able to see or use this field.

Provide Allows—but does not require—users to enter information in this field.

Require Requires the user to enter information into the field for the electronic signature to be valid.

The icons in the following tables indicate the status of reason codes and comments.

Symbol or color	Description
R	Indicates a reason code
Black	Reason codes are available
Red	Reason codes are required when an electronic signature is entered
Yellow	Reason codes haven't been set up for the selected signature
C	Indicates a comment
Black	Comments can be entered when the electronic signature is entered
Red	Comments must be entered when the electronic signature is entered

4. Choose Save. You must log out of Microsoft Dynamics GP and log in again for changes to take effect.

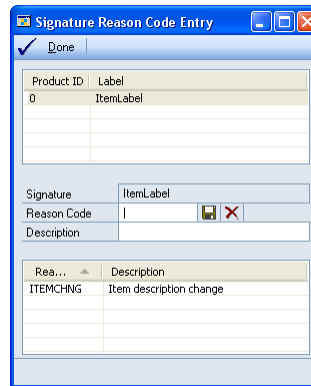
Creating an electronic signature reason code

Electronic signature reason codes are user-defined codes that a user can (or must) select before entering an electronic signature. Each electronic signature can have its own set of reason codes. An unlimited number of reason codes can be created for each electronic signature.

To create an electronic signature reason code:

1. Open the Signature Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Electronic Signatures >> Signature Setup).

2. Choose the GoTo button and select Reason Codes to open the Signature Reason Code Entry window.



3. Select an electronic signature to enter a reason code for. Existing electronic signatures are displayed in the upper part of the window. The Signature name appears in the Signature field.
4. Enter a reason code and description.
5. Choose the disk icon button to save the reason code. The reason code is displayed in the detail section at the bottom of the window.

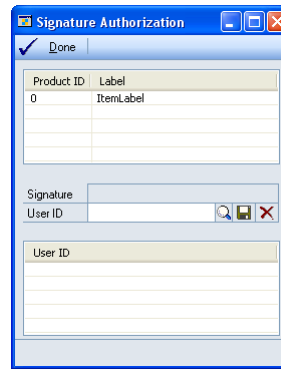
Setting up electronic signature authorizations

Use the Signature Authorization window to specify the users that can approve system changes. When a user attempts to change a field or window that is controlled by an electronic signature, a window opens that requires a password (electronic signature) to be entered before the change is saved. More than one user can be authorized to use an electronic signature password to approve a system change.

To set up an electronic signature authorization:

1. Open the Signature Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Electronic Signatures >> Signature Setup).

2. Choose the GoTo button and select Signature Authorization to open the Signature Authorization window.



3. Select an electronic signature to assign users to. Existing electronic signatures appear in the upper section of the window. The signature label appears in the Signature field.
4. Choose the user ID lookup button and select the user that's authorized to approve a system change using the selected electronic signature.
5. Choose the disk icon button to save the authorized user ID. The authorized user ID is displayed in the detail section at the bottom of the window.
6. Choose Done.

Chapter 3: Working with Electronic Signatures

This chapter provides information for the routine use of electronic signatures. The information is divided into the following sections:

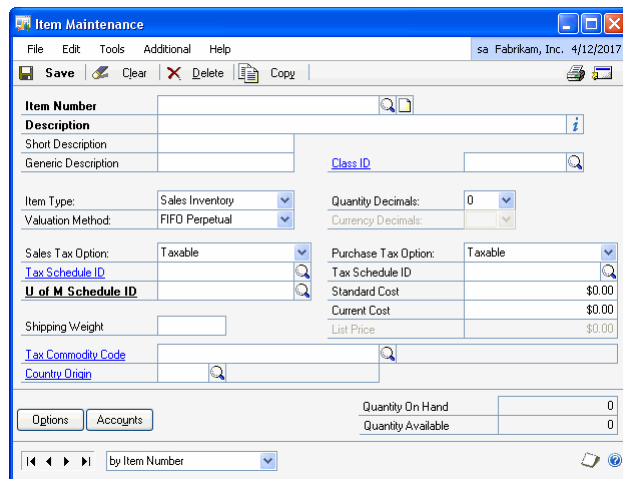
- [Approving a change with a password](#)
- [Viewing change history within electronic signatures](#)
- [Entering e-mail addresses for automatic notification](#)
- [Selecting a remote notification recipient](#)
- [Responding to remote notification](#)

Approving a change with a password

When Electronic Signatures is enabled for a window, changes must be approved with authorized passwords. In the following procedure, a change to the Item Maintenance window is approved by entering the required password(s) in the Signature Entry window. Similar steps are used to approve changes to other windows for which Electronic Signatures has been enabled.

To approve a change with a password:

1. Open the Item Maintenance window.
(Cards >> Inventory >> Item)



2. Using the Item Number lookup button, select 100XLG.
3. Change the Description field to "xxxx."
4. Press the TAB key to attempt to leave the Description field. The Signature Entry window opens. Enter your password, and if required, select a reason code and description. The Signature Entry window may also require the user name and password from a second authorized signer.

If you don't currently have the correct information, choose Cancel. Obtain the needed information and complete these steps again.

5. The Signature Entry window closes and returns you to the original window (in this example, the Item Maintenance window).

Viewing change history within electronic signatures

Electronic Signatures data is captured and viewed in the View menu associated with each electronic signature, and in the Microsoft Dynamics GP Audit Trails module, if activated. (To view electronic signature history information in Microsoft Dynamics GP Audit Trails, refer to the Microsoft Dynamics GP Audit Trails documentation.)

To view change history within electronic signatures:

1. Open the window to which an electronic signature has been attached and select a record that has been changed.

Item Number	100-LG
Description	xxxx
Short Description	Phone
Generic Description	Phone
Item Type	Sales Inventory
Valuation Method	LIFO Periodic
Sales Tax Option	Taxable
Purchase Tax Option	Nontaxable
Tax Schedule ID	ALL DETAILS
U of M Schedule ID	PHONE 1-10
Shipping Weight	5.00
Standard Cost	\$55.50
Current Cost	\$28.46
List Price	\$0.00
Quantity On Hand	30
Quantity Available	26

2. Select the electronic signature (Additional >> View Signature).
3. The Signature View window opens, displaying information about the most recent changes to the record.

Document Number	100-LG
Signed By	harry
Date	10/4/2006
Time	8:08:06 AM
Document Version	1
Reason Code	
Description	
Comment	

If the field or window selected does not have an electronic signature assigned, a message appears.

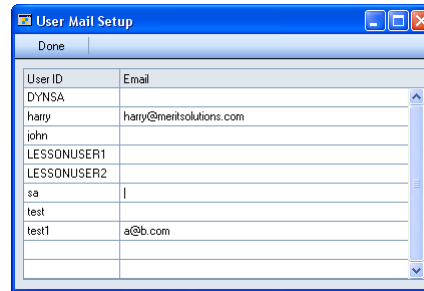
4. Choose Save to save your changes and close the window.

Entering e-mail addresses for automatic notification

Use the User Mail Setup window to enter e-mail addresses for users who are assigned electronic signature passwords. E-mail addresses are used to automatically notify password holders of changes requiring approval. This window displays a list of password holders and their corresponding e-mail addresses.

To enter e-mail addresses for automatic notification:

1. Open the User Mail Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Electronic Signatures >> User Mail Setup)



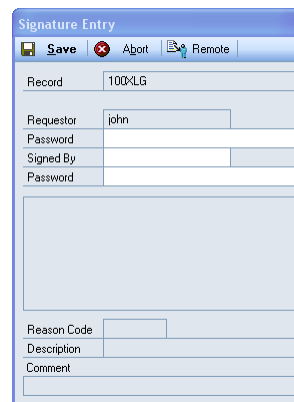
2. Select a user.
3. Enter the user's e-mail address.
4. Choose Done; the User Mail Setup window will close.

Selecting a remote notification recipient

When an electronic signature is assigned to a window, an approver must enter a password before system changes can be saved. This section includes an example of authorizing a change to the Item Maintenance window using remote notification.

To select a remote notification recipient:

1. Open the Item Maintenance window.
(Cards >> Inventory >> Item)
2. Using the Item Number lookup button, select 100XLG.
3. Change the Short Description field to "xxxx":
4. Press the tab key to leave the Description field. The Signature Entry window opens.



5. Choose the Remote button.

6. A list of users who are authorized to approve changes appears. Marked checkboxes indicate those who are currently logged into Microsoft Dynamics GP.
7. Select an authorized user to approve the change, enter a description, and choose Select. If an e-mail address has not been entered for the selected user, you will be prompted to enter one. You also can enter e-mail addresses using the User Mail Setup window.
8. Select a Microsoft Outlook[®] profile to notify the authorized user. The User IDs in the Requestor and Signed by fields cannot be the same.
9. The authorized user receives a remote view notification and then accepts or declines the change. See [Selecting a remote notification recipient](#) on page 15 for more information.
10. After the authorized user responds, another message confirms their response.

Responding to remote notification

Remote Notification prompts electronic signature password holders to review and accept or decline change requests from remote Microsoft Dynamics GP users. This functionality enables the approval process across multiple sites.

After an approval request is sent, the Remote View Notification window opens automatically on the approver's computer. If the approver rejects the change, the Remote Notification window closes and the requestor is informed that the change is rejected. If the approver accepts the requested change, the Remote View Notification window opens.

To respond to a remote notification:

1. When the Remote View Notification window opens, double-click the received record. Default entries are made to all the fields except the password field.

Signature Label	Description	User ID	Status
ItemLabel	Item description changed	john	Tentative

2. Choose the Expansion button and review the change requiring authorization. When you finish reviewing, close the document.
3. Change the status of the document. The available statuses are Tentative, Approved or Rejected.
4. Enter the password.
5. Choose Sign. The response is sent to the requestor.
6. Choose OK to close the window.

