By Invitation Only®
Composing an airtight
guest list for BPCS / ERP LX

In a nutshell: By Invitation Only software

By Invitation Only software makes due diligence management of BPCS/ERP LX user profiles intuitive. This software greatly simplifies the definition, maintenance, removal, and documentation of user authorization information. It makes it easy for a Security Administrator to welcome users into only those parts of software that are "right" for them.

Current state assessment: vanilla BPCS/ERP LX

Vanilla user profile maintenance is clunky; there's no argument about that. The Security Administrator must plow through every user definition .... one–profile–at–a–time .... just to figure out who has authority to some part of the software. That's on the mind-numbing side of clunky. Hence our net assessment of BPCS/ERP LX vanilla functionality:

"security by obscurity"

In our experience, keeping security profiles tightly defined is an unhappy chore often found on the bottom of things-to-do lists. It's not unusual to find evidence of shortcuts that were taken:

> For example, it's tempting to grant a user access to all INV programs
> instead of investing the time to grant access to only those INV programs
> that are consistent with the user's job responsibilities.
> Likewise, it's easier to grant user access to all transaction types by entering just
> a single "*****" than it is to figure out which transactions are consistent with strong
> internal control discipline.

If your Security Administrator has all the software attributes memorized or has great crib notes, it is possible to do a decent security job with vanilla BPCS or ERP LX. But the software has never inspired the diligent/painstaking level of attention needed to do the security job well.

For information about how vanilla BPCS/ERP LX security works, click **here**.

At the v8.3.5 level, "Role" functionality and some other changes were introduced. Click **here** for more information about that.

[For the balance of this document, we'll use "BPCS" to refer to both BPCS and ERP LX.]

Security maintenance is not something that should get relegated to the bottom of a list nor is it something that should inspire shortcut treatment. The consequences range from separation-of-duty nightmares to "oh no, you've-got-to-be-kidding" accidents like this:

A user who should have had access to only a few INV programs ends up on the INV menu and runs the end-of-year fiscal with one of those *"Gee, wonder what this does?"* experiments.

Product overview: By Invitation Only software

The product is intuitive. Once your Security Administrator discovers how easy, intuitive, and functional the software is to use, security maintenance won't be viewed as a clunky chore anymore. The security work will be addressed more promptly and thoroughly, making a constructive difference in your enterprise's internal control regimen. Every user who has tried the **free demo** ends up buying the product.

The software has ingenious, easy-to-use features that encourage Security Administrators to upgrade user profile definitions. It makes the task of correcting years of accumulated user profile "shortcuts" seem achievable. The product opens the door to using the full granularity available for BPCS definitions.

⊞ Defining security authorizations for a new user

With By Invitation Only, the Security Administrator no longer needs to have either a world-class memory or an outstanding set of crib notes. The product displays a complete list of all valid selections for each of these dimensions:

☒ Products	☒ Companies	☒ Security Group IDs
☒ Programs	☒ Warehouses	☒ Transaction types
☒ Menus	☒ Facilities (only for ERP LX)	

Furthermore, the software juxtaposes the pertinent code for each selection together with a description of what that code means. The administrator now can immediately see that:

> ▷ warehouse code **15** is Wisconsin and warehouse code **51** is Texas
> ▷ program **ACR900** is A/R Period Close and program **ACR910** is A/R Year Close

Net benefit: no more memorization work for the Security Administrator.

⊞ Maintaining security authorizations across an entire dimension

By Invitation Only enables the Security Administrator to escape vanilla BPCS' one-user-at-a-time processing constraint; the administrator can now address all user security definitions for a given dimension in one step.

To illustrate, if a new warehouse code is added, vanilla BPCS would force the administrator to define access to that new warehouse one user at a time. With By Invitation Only, the administrator can directly specify a set of authorized user names to that new warehouse.

The same approach can be used to maintain all users to a product, program, menu, company, warehouse, transaction type, or facility (for ERP LX) dimension.

⊞ Define multiple templates assignable to specific users

By Invitation Only enables a single BPCS user to perform one job function in Warehouse XX and an entirely different job function in Warehouse ZZ. This same flexibility can also be set up across different companies and across different facilities. Users are authorized by the BPCS Security Officer to any number of pre-defined **templates**. Users can then execute swaps from one pre-authorized template to another so as to do their jobs efficiently without compromising internal control.

Click **here** for a very thorough side-by-side comparison between the functionality of LX v8.3.5 Roles and By Invitation Only Templates.

Product overview, *continued ...*

⊞ **Displaying security authorizations across an entire dimension**

Let's say that the Security Administrator wanted to determine which specific users currently have access to the Item Master Maintenance program. With By Invitation Only, he/she could simply select the menu option to work with authorizations ***by program***.

By Invitation Only would then display a list of all the valid BPCS programs.

Once the administrator selects the pertinent program (INV100 in this example), a display appears listing all users who have authority to access that program. Users are included on the list whether that authorization exists because:

1. a given BPCS user is a "super user," or ...
2. a given BPCS user has been granted authority to all products, or ...
3. a given BPCS user has been granted authority to the entire Inventory product, or ...
4. a given BPCS user has been granted authority to that specific program.

The administrator could them remove authority to the program for specific users or toggle to a list of the users that are not authorized to the program and grant authority to specific users.

⊞ **Audit trail functionality**

By Invitation Only maintains a log file for all user authority changes ... including new users, updates, deletions, and user profile copies. Auditors will be able to request a comprehensive listing for each security change: the nature of the change, who used By Invitation Only software to make the change, and the date/time the change became effective.

⊞ **By Invitation Only technical details**

Click on the links below to see information composed for a technical audience.

◈ **Table of Contents** from the User's Manual

◈ Sample **screen shots** illustrate the extremely deep sophistication of the product. For example, the Security Administrator can easily and immediately see the precise reason(s) why any given user has authority to any attribute/dimension in BPCS.

◈ Several **subtle technical topics**

✧ Version compatibility
✧ Permanent deletion of obsolete users
✧ Invalid or redundant security settings
✧ BPCS vulnerability to "S" type users

Separation of duties – internal control compliance

One external audit examination category is invariably separation of duties. If Sarbanes–Oxley compliance is a requirement for your enterprise, By Invitation Only software would be a natural fit; it will make your next SOX audit more efficient.

True story: A BPCS user located in Texas told us each time their auditor asked a question about which users had access to program X, it was a 6+ hour project to develop a competent response. After acquiring By Invitation Only, the time to prepare a written report was cut down to minutes per auditor request.

Preparing well: Auditor complaints about BPCS separation of duties (SOD) issues can be anticipated by running **Due Diligence**™ **software**. The product automatically identifies SOD issues hiding in BPCS user authority definitions. Once Due Diligence prints out the full list of problems, you can use By Invitation Only to efficiently resolve issues long before the auditors darken your doorway.

SOD integration: By Invitation Only is integrated with Due Diligence intellectual property. It works like this. Just when the Security Administrator is ready to post a new authority profile (for a user/template) By Invitation Only taps into the Due Diligence database to determine if that newly designed authority profile would create a SOD conflict. If a conflict is discovered, By Invitation Only reports that in a pop-up giving the Security Administrator an opportunity to re-think things. Due Diligence must be licensed to enable the integration. This SOD integration is available in BPCS versions 6.x and higher.

up a notch™ internal control compliance services

It would be a privilege to help your enterprise prepare for the next external audit. The links below explain and illustrate how Unbeaten Path can contribute to your enterprise:

- ◈ Compliance vulnerability **assessment and mitigation services**
- ◈ Sample **vulnerability assessment report** deliverable
- ◈ Detailed information about **Sarbanes-Oxley requirements.**

Getting ready for an INFOR user audit

By Invitation Only can also be used to help enterprises prepare for an INFOR user audit. The software displays a count of user profiles in the BPCS security files. It also identifies whether the user profile is a valid OS/400 profile and whether that profile is active or inactive.

Unlike vanilla BPCS security programs, By Invitation Only provides a way to delete BPCS/ERP LX users even if those users no longer have a valid operating system profile. Technical details about obsolete user management are available in the **interesting technical details** document.

Solving an interesting BPCS/ERP LX security vulnerability

Once they learn about it, internal auditors and external auditors take strong issue with this vulnerability in vanilla BPCS security administration:

> In order to access the BPCS security maintenance programs, the Security Administrator must be defined as a "super user." By definition, a super user has authority to *everything* within BPCS/ERP LX, not just user profile information. That creates a separation of duties vulnerability connected with the individual who has "BPCS Security Administrator" duties.

By Invitation Only software has solved that vulnerability. The Security Administrator can be given access to By Invitation Only programs without making that person into a super user. Therefore, he/she can perform their security administration duties without having authority to the myriad of other functions and data in BPCS.

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Click **here** to learn about another interesting security vulnerability in AS/SET-based versions of BPCS which is entirely solved by Unbeaten Path's **Batten Down the Hatches**™ service.

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Questions ?

It would be a privilege to answer any questions about **By Invitation Only** software. Here's Unbeaten Path International's contact information:

> **Toll free North America: (888) 874-8008**
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> **Send us an email** (click **here**)

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