2. Select an Alternate/Modified Forms and Reports ID and enter the following values in the fields:

   Product: Mekorma MICR

   Type: Windows

3. In the Alternate /Modified Forms and Reports List, open the folders (by clicking the + sign) and verify that Mekorma MICR is selected.

4. Repeat Step #3 for each Alternate/Modified Forms and Reports ID you wish to grant access to.

TIP

You can also use the Dynamics GP Security features to *limit* user access to Mekorma MICR screens.

Setting Up a Security Role in Dynamics GP

A new user does not have access to any 3rd party windows and reports in GP unless they are assigned for that security role. This means that Mekorma MICR is not accessible for a newly created user.

For a non- administrator user to have access to Mekorma MICR windows and reports, a Security Task containing access to Mekorma MICR windows must be created and eventually assigned to the user. To create a Security Task, complete the following steps:

1. Log on as a system administrator.

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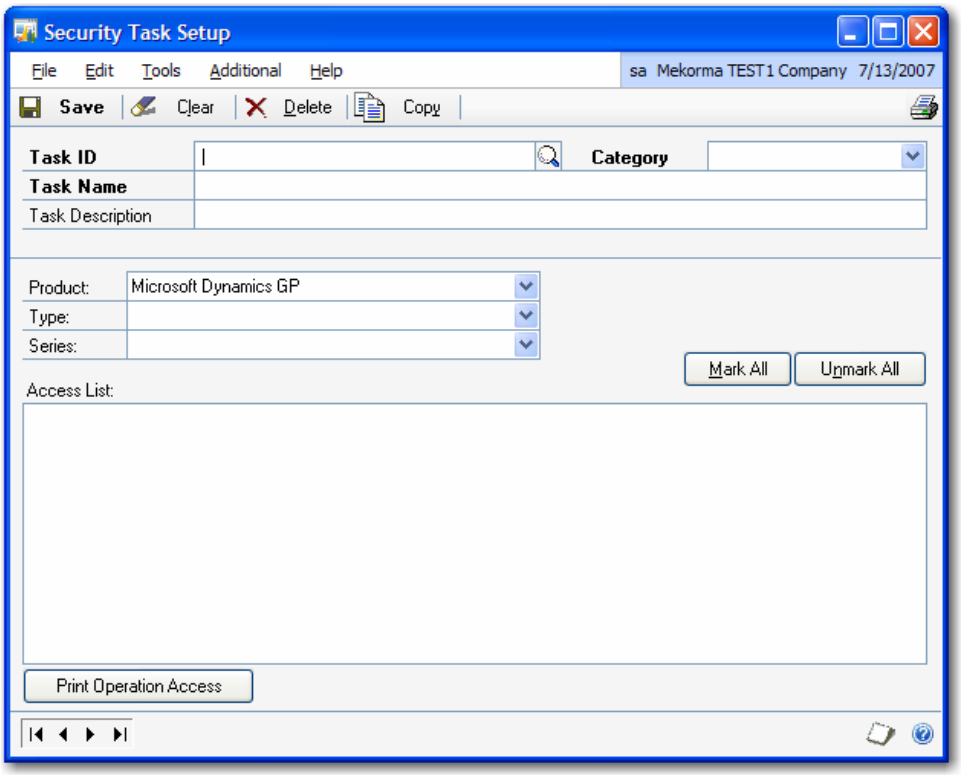
2. Select **Microsoft Dynamics GP ☞ Tools ☞ Setup ☞ System ☞ Security Tasks** to open the Security Task Setup dialog box.



3. Enter information in the Security Task Setup fields:

   Task ID: Enter an ID to identify the task, such as "ADMIN_MEK".

   Category: Other

   Task Name: Enter a name for the task, such as "ALL MEKORMA WINDOW ACCESS".

   Task Description: Enter a description for the task, such as "Access to Mekorma MICR window for non-sa user".

   Product: Mekorma MICR

   Type: Windows

   Series: Company, Payroll, Purchasing and System (you must select each of these series individually to grant access to all of the Mekorma MICR windows).

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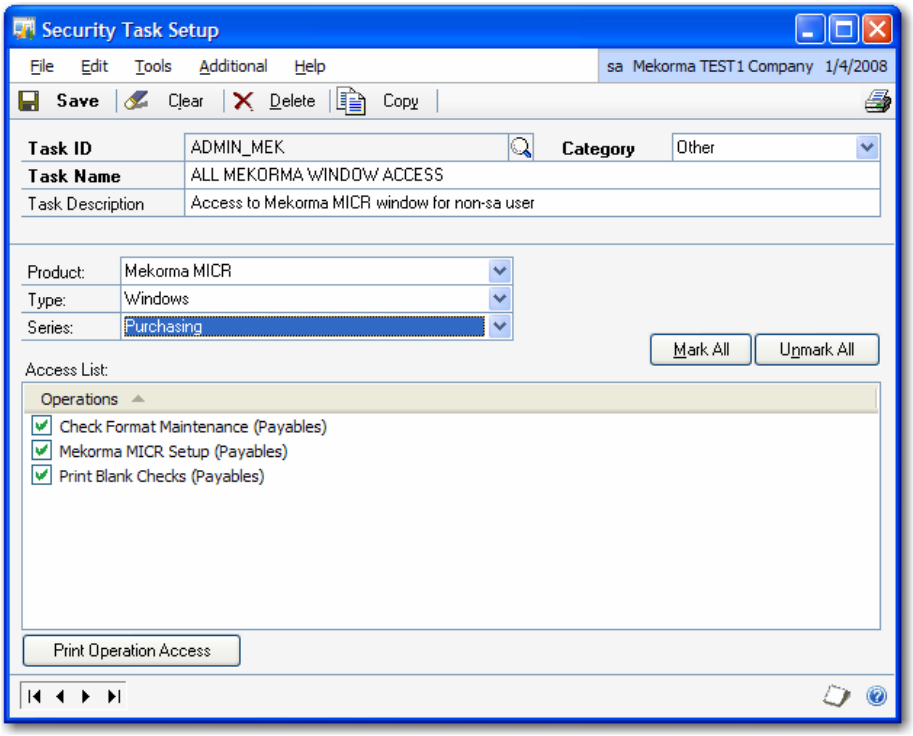
NOTE

*The **Task ID**, **Task Name**, and **Task Description** values shown above are just examples of values that you can enter in these fields. The final decision of what to enter is up to you.*

4. If you select "Purchasing" for the **Series**, your screen should look similar to the following:



5. Click **Mark All** to grant access to all of the windows listed. Repeat this step for all of the applicable Mekorma MICR Series: **Purchasing**, **Payroll**, **Company** and **System**.

NOTE

*Under the "System" **Series**, the **Mekorma MICR Global Configurator Setup** operation is unchecked by default. In order to use this feature, a user must be granted access to this window. See The Configurator Global Setup Dialog Box for more information on using this feature.*

6. Change the **Type** to "Reports" and repeat Step #5 for all the applicable Mekorma MICR Reports: **Payroll**, **Purchasing** and **System**.

7. Click **Save** when you are finished.

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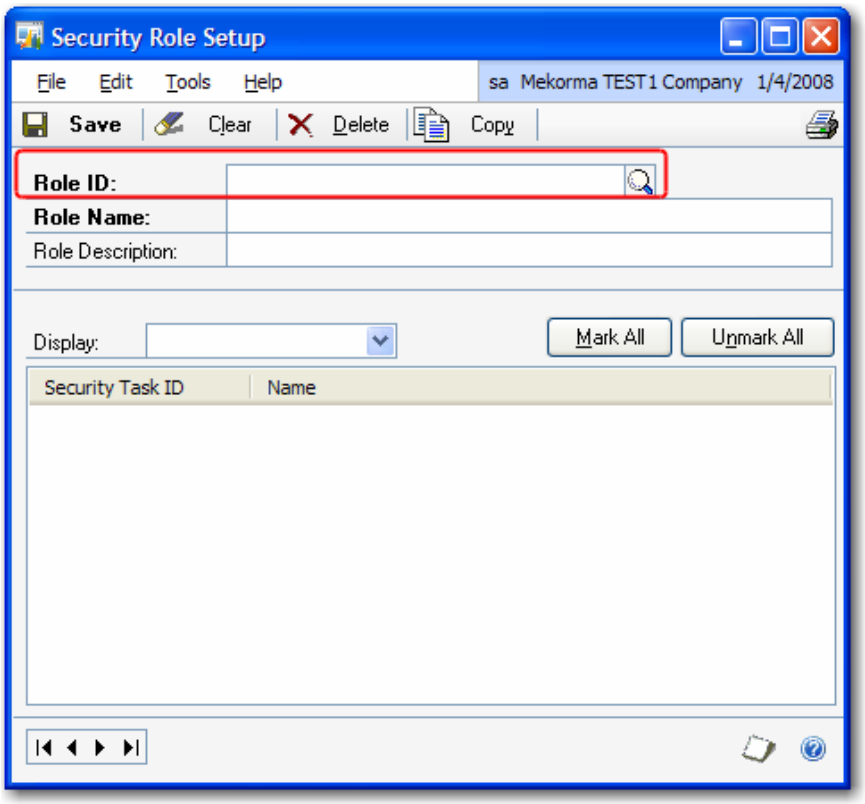
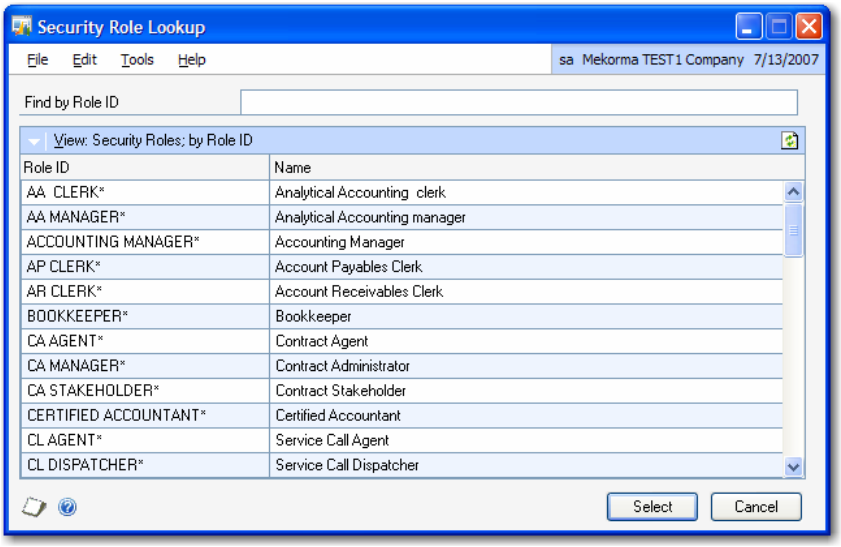
Adding the Security Task to a Security Role

After you have created a Security Task, you must add the task to a Security Role.

1. Log on as a system administrator and select **Microsoft Dynamics GP ☞ Tools ☞ Setup ☞ System ☞ Security Roles** to open the Security Role Setup dialog box.



2. Use the **Role ID** field lookup to select from a list of security roles.



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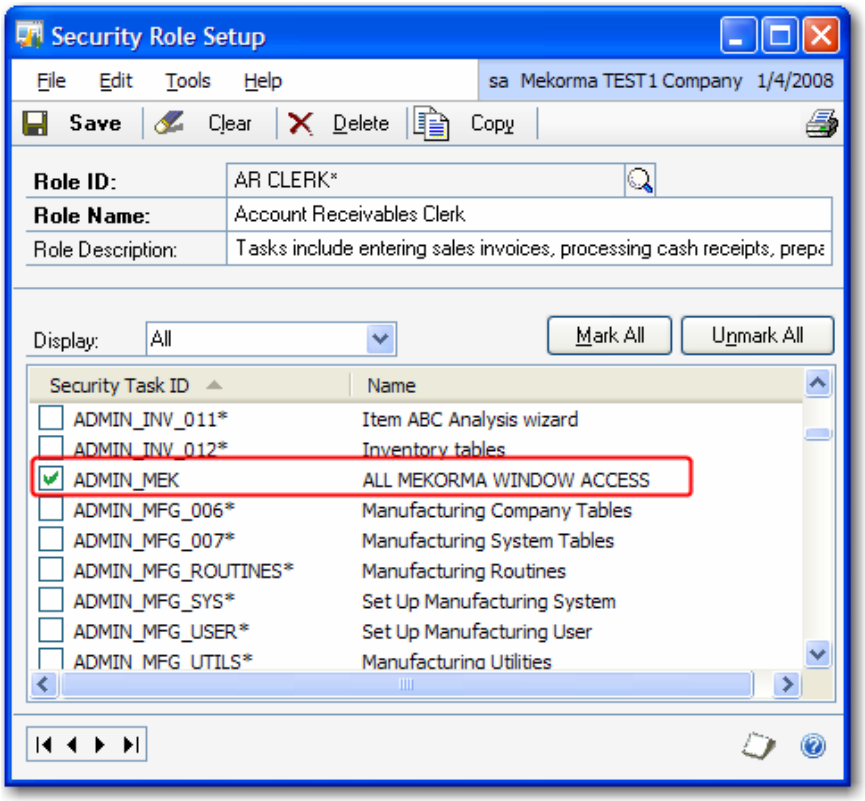
3. Click **Select** to return to the Security Role Setup screen.

4. Use the scroll bar below the **Security Task ID** section to select the task that you just configured, for example, ADMIN_MEK (this was the sample ID used in the Setting Up a Security Role in Dynamics GP section.)



5. Check the box next to the security task and click **Save**.

Assigning the Role to a User

The next step is to assign the Role to a User.

1. Log on as a system administrator. Select **Microsoft Dynamics GP ☞ Tools ☞ Setup ☞ System ☞ User Security**.

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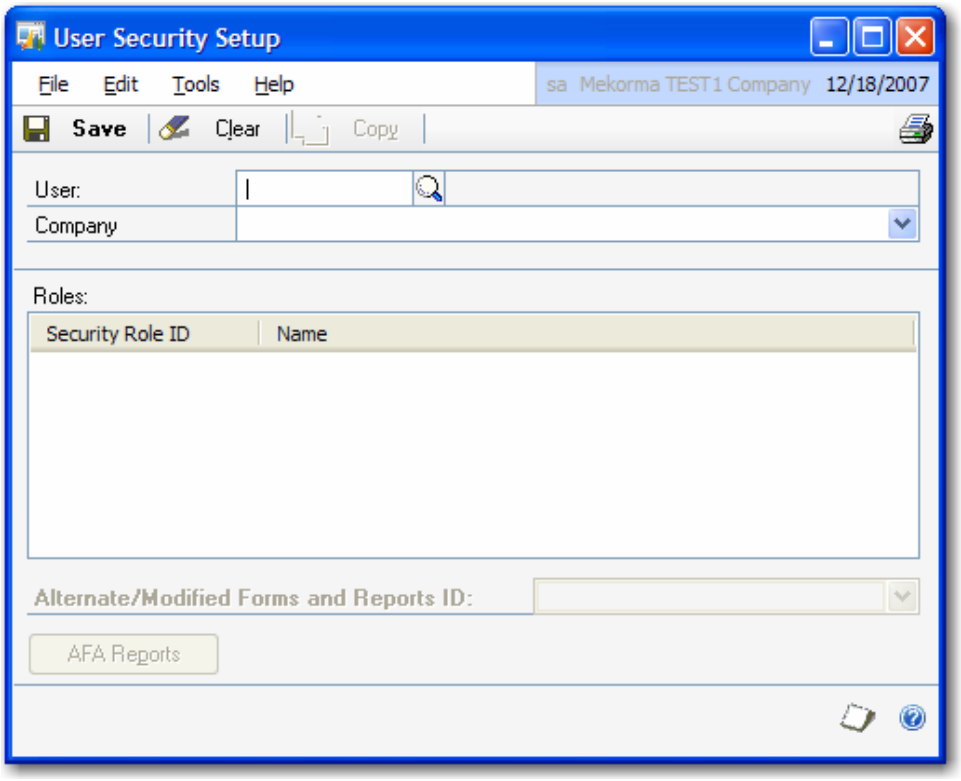
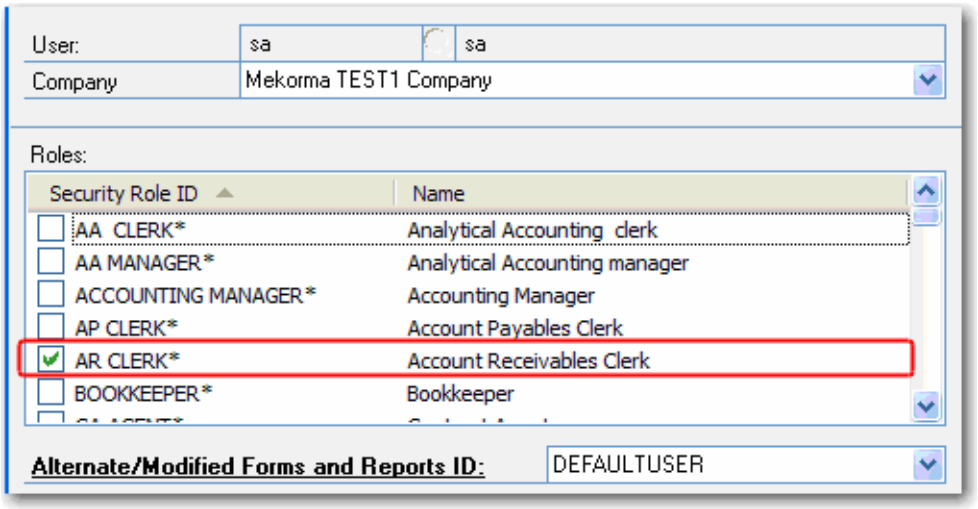
2. You see the User Security Setup dialog box:



3. Select the **User** and **Company** you want to assign the Role to. Under **Roles**, select the role you edited or created in the Security Role Setup screen.



4. Select the **Alternate/Modified Forms and Reports ID** granting access to both the Mekorma MICR Windows and Reports the click **Save**.

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Mekorma MICR uses its own windows to print blank checks and test checks. The standard Dynamics GP window is used to print Miscellaneous checks. The following table lists the Alternate Window and the applicable Series it applies to.

Alternate Window Name	Series
Print Mekorma MICR Payables Checks	Purchasing
Print Mekorma MICR Transaction Check	Purchasing
Print Mekorma MICR Payroll Checks	Payroll

IMPORTANT

You must grant access to the standard Dynamics GP window before access can be granted to the alternate version of the window. Alternate windows will not appear in the access list until security has been granted to the standard windows they replace.

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