# Periodic Review

Every business should be looking to cut down on fraud and increase control of access to their ERP system. Periodic Access Reviews are becoming an increasing part of this push to ensure that employees have access rights that are appropriate for their jobs.

Business managers need to be able to review and approve or reject changes that affect their areas of responsibility. The process should be documented to provide auditors with evidence that the review has taken place.

But performing Periodic Access Reviews in JD Edwards and producing the evidence of sign-off is problematic and can be very time-consuming.

> ### *Simplify and Streamline Periodic Reviews*

Our Periodic Review module simplifies the process. It allows you to:

Q Produce a "snapshot" of your live F00950 and F00950W security tables, identifying net changes in security records since the previous snapshot. The snapshot is stored as a Custom Table within the JD Edwards system.

Q Give business managers (Role Owners) the ability to review, approve and reject changes for which they are responsible.

Q Produce documentary evidence that access has been reviewed and signed off by the business.

**BENEFITS:**

Q **Complete Periodic Reviews with a fraction of the time and effort.**

Q **Business managers can review, approve or reject their changes directly into the JD Edwards system.**

Q **Easily produce documented evidence of review and sign-off.**

Q **Works on the F00950 and F00950W live security tables, so however you manage your security, Periodic Review will report on the net changes.**

Q **Automated Reviews yield reliable results**

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**ORACLE** JD Edwards

**Work With Periodic Review Snapshots**

Records 1 - 2

Customize Grid

| | Snapshot ID | Snapshot Status | Snapshot Status Description | Number of Net Changes | Number of Std Sec Net Changes | Number of UDO Sec Net Changes | Created By User ID | Date Created | Time Created | Closed By User ID |
|---|---|---|---|---|---|---|---|---|---|---|
| ⦿ | 67 UR | | Under Review | 35 | 4 | 31 | NEALS | 03/16/2017 | 101151 | |
| ○ | 66 CL | | Closed | 868 | 855 | 13 | NEALS | 01/23/2017 | 154952 | NEALS |

# MAIN FEATURES

## You decide the review period to suit your organization:

- Produce a new snapshot of your F00950 and F00950W tables at any time (as long as the review of the previous snapshot has been completed – see below).
- Keep as many snapshots as required (default is 5).

## Identify Net Changes to security records:

- The snapshot identifies all additions, deletions and changes to the most prominent JD Edwards security record types, including the new User Defined Object (UDO) security.
- There are plans to keep expanding the number of security types in the future.

## Review Net Changes

Allows users to view a list of security changes, drill down to see the details of individual changes and mark them as Approved or Rejected directly onto the JD Edwards system.

- Work with Net Changes showing records Added, Changed, or Deleted since the previous snapshot.
- Work with Net Changes to Standard Security or User Defined Object (UDO) Security.
- Filter records, for example by Role, to pinpoint changes of interest to individual managers.
- Drill down to examine the details of individual changes, showing the values at the time of the previous and current snapshots.

- Mark the change record as Approved or Rejected, adding comments where appropriate. If more investigation is needed, records can be left as 'Under Review.'
- Changes can also be approved or rejected in bulk from the list screen.
- Produce a report of Rejected changes to identify remediation work needed. This Rejected list can also be used during the next review to check that the changes have been made.
- To ensure that all changes have been properly reviewed, all Net Change records MUST be marked as either Approved or Rejected and the snapshot closed before a new snapshot can be produced.
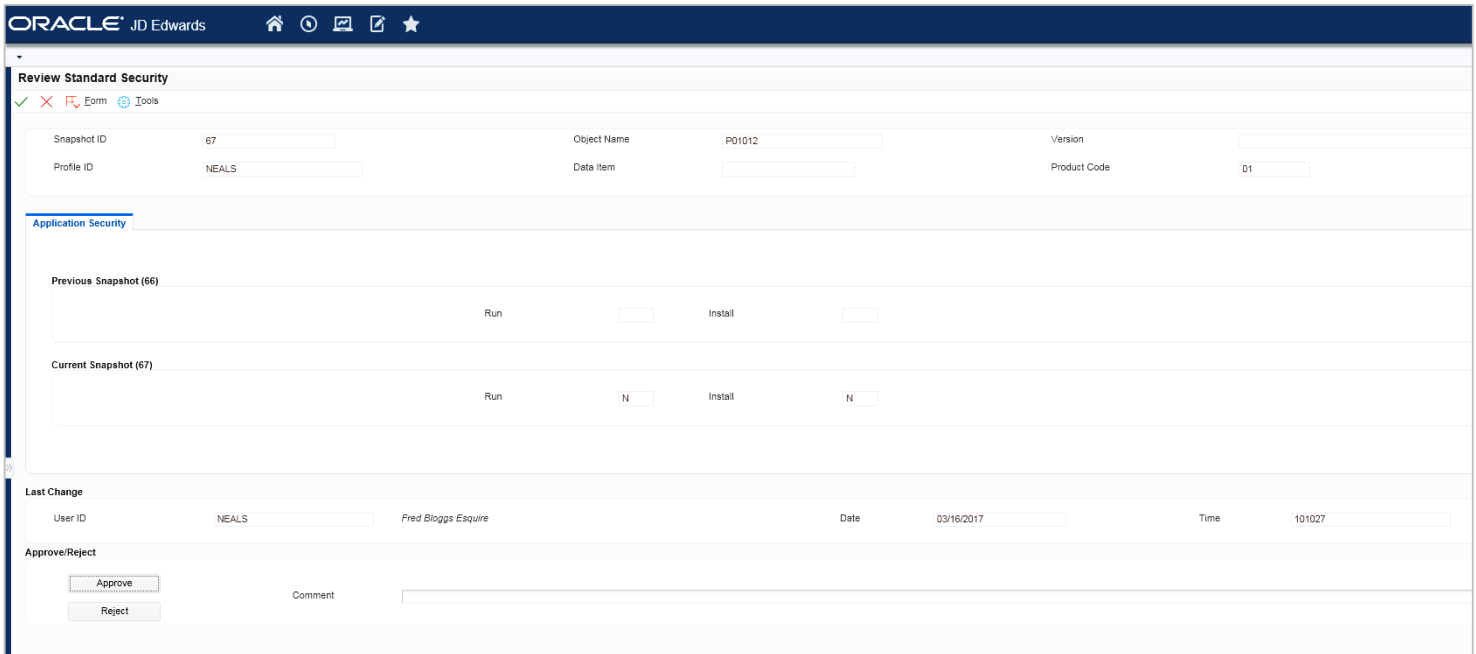
## Net Change Report

Where required, you can produce reports of changes as pdf files and email them to Role Owners for manual review and sign-off.

- Filter Net Change records, for example by Role or by whether they were Added, Changed or Deleted, to report on changes of interest to individual managers.

## Display Full Snapshot Security Details

This option allows you to view all records (ie not just **changed** records) in F00950 or F00950W snapshots in a grid.

- Records can be filtered, for example by security type.
- Results can be exported to a spreadsheet.