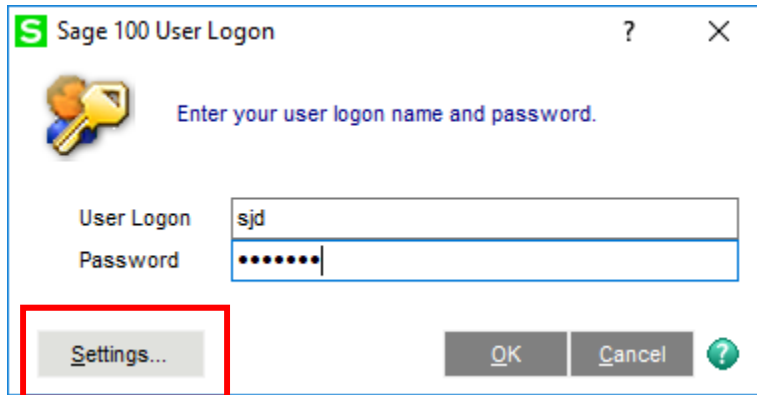


Back to Basics – Library Master

User Preferences can be accessed from several places which include the Logon screen, the Change User Settings or User Maintenance from the Library Master menu. The user must be given security rights to access the settings.

Note - Users should be restricted from User Maintenance menu access.

There are multiple ways of accessing the User Settings. When logging in, click on the Settings button.



From the Home menu, click the Change User Settings icon.



From the User Logon Menu, click the Settings button. From the Home menu, click Change User Settings.

User Settings (ABC) 3/4/2019

User Logon sjd
Name Sue

E-mail

Job Title <Select Job Title>

Settings

Prompt for Company Code

Retain Module on Company Change

Implied Decimal Point

[ENTER] Key Like [TAB] Key for Grid

Display Reduction Amounts in Red

Lookup Limit for Initial Display

Partial Lookup Default Greater than

Default Report Preview Zoom 100%

Desktop Standard

Theme Code CLASSIC

Prompt for Company Code – the system will prompt for the company code when the user when logging in. This is helpful in a multi-company environment.

Retain Module on Company Change – the system will remain in the module that the user has open when changing companies. If this is not checked, the module will revert to Library Master.

Implied Decimal Point – the system will automatically add the decimal point when this is checked, 123 will be 1.23. If the box is cleared, 123 will be 123.00.

Partial Lookup Default – use “Begins With” to list only records that begin with the criteria entered. Use “Greater Than” to list records that start with the entered criteria.

Default Report Preview Zoom – used to set a zoom setting between 25 and 400 when previewing reports, forms and listings.

Desktop - Choose Standard or Classic. The Standard version has the new modernized menu layout.

Theme Code - Select Classic, Standard or Standard-Green. A custom Theme can also be created.

From Library Master\Main\User Maintenance, click on the Preferences tab.

User Maintenance (ABC) 3/5/2019

User Logon: Bob
First Name: Bob, Last Name: Smith, User Code: BJM
Password: [Redacted], Confirm Password: [Redacted], Customization Group: [Redacted], Expires: [Redacted]
E-mail: [Redacted], Job Title: <Select Job Title>

1. Maintenance | **2. Preferences** | 3. Auto-Complete

Automatic Logoff	<input type="checkbox"/>	Automatic Logoff Delay in Minutes	[Redacted]
Implied Decimal Point	<input checked="" type="checkbox"/>	Use Graphic Report Format	<input checked="" type="checkbox"/>
Low Speed Connection	<input type="checkbox"/>	Partial Lookup Default	Begins with
Lookup Limit for Initial Display	[Redacted]	Prompt for Company Code	<input type="checkbox"/>
[ENTER] Key Like [TAB] Key for Grid	<input checked="" type="checkbox"/>	Default Report Preview Zoom	100%
Display Reduction Amounts in Red	<input checked="" type="checkbox"/>	Retain Module on Company Change	<input type="checkbox"/>
Enable Web Services	<input type="checkbox"/>		

Theme Code: [Redacted] Preview...

Automatic Logoff – automatically logoff the user after the number of minutes specified of inactivity. If the user is in a Data Entry window the system will prompt to Save unposted entry.

Automatic Logoff Delay in Minutes – enter the number of minutes to wait before the user is automatically logged off.

Auto-Complete Tab

User Maintenance (ABC) 5/30/2019

User Logon: Bob
First Name: Bob, Last Name: Martin, User Code: BJM
Password: [Redacted], Confirm Password: [Redacted], Customization Group: [Redacted], Expires: 5/31/2019
E-mail: [Redacted], Job Title: <Select Job Title>

1. Maintenance | 2. Preferences | **3. Auto-Complete**

	Record Type	Description	Enable
1	Customer	Customer	<input checked="" type="checkbox"/>
2	Item	Item	<input checked="" type="checkbox"/>
3	Vendor	Vendor	<input checked="" type="checkbox"/>

Enable Auto-Complete - If this check box is selected, when you start typing a customer name, vendor name, or item description in a customer number, vendor number, or item code field, a list of records matching your entry appears, and you can select a record from the list.

*Note – Auto Complete must be turned on in System Configuration in order for this feature to function.

Theme Maintenance

To design a custom theme, from Library Master Main menu, select Theme Maintenance. Enter a new Theme code and Description.

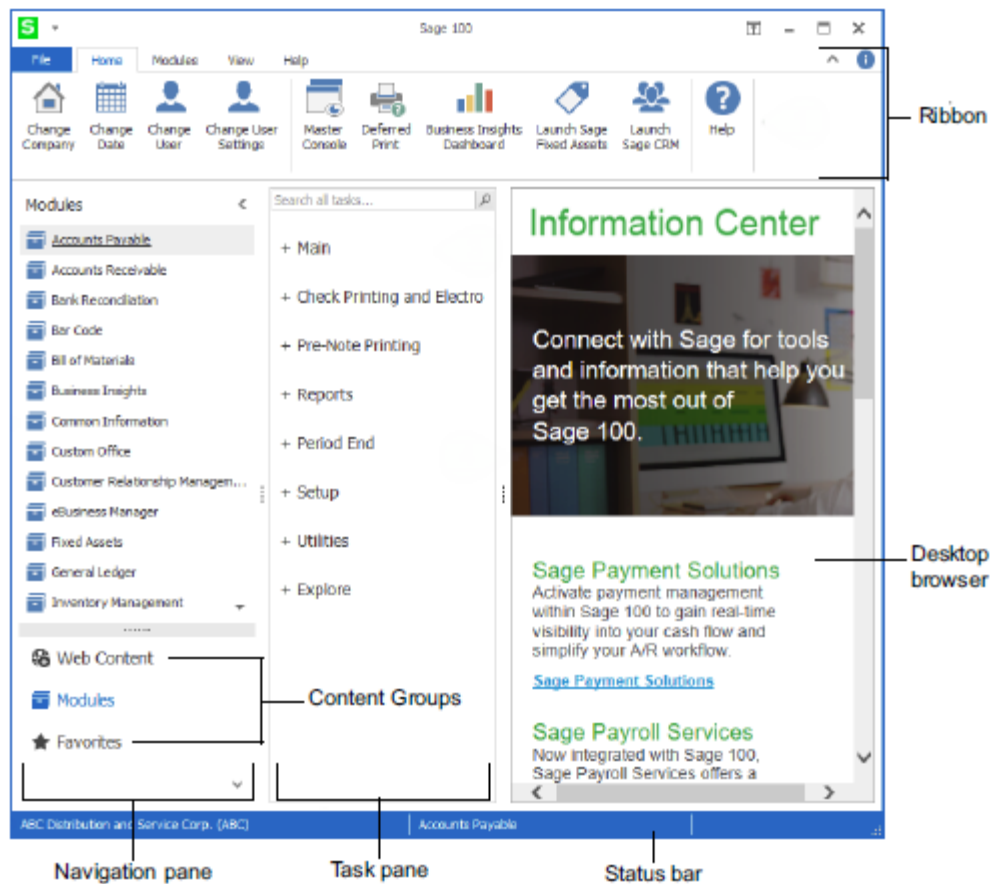
You can customize the Font size, colors and row height. Themes can be assigned to each Company and to each User. Click on the color pallet next to the field to select the color for buttons and tabs. Select the drop down next to Row Height to adjust the height of the grid row.

The screenshot shows the 'Theme Maintenance' application window with the following configuration options:

- Theme Code:** DEFAULT
- Description:** Default
- Default Font:** Arial
- Icon Set:** Classic
- Window Color:**
 - Background: Sample (light blue)
 - Frame: Sample (light grey)
- Tabs:**
 - Font Color: Sample (blue)
- Primary Buttons:**
 - Button Color: Sample (yellow)
 - Font Color: Sample (black)
- Secondary Buttons:**
 - Button Color: Sample (light green)
 - Font Color: Sample (black)
- Grid:**
 - Row Height: Expanded
 - Alternate Line Color: Sample (light grey)

At the bottom of the window, there are buttons for 'Preview...', 'Accept', 'Cancel', 'Delete', and a help icon.

Standard Desktop



Ribbon – allows the user to change company, date and user. You can access other integrated products and customize the appearance of the program.

Navigation Pane – allows switching between modules, web content and Favorites.

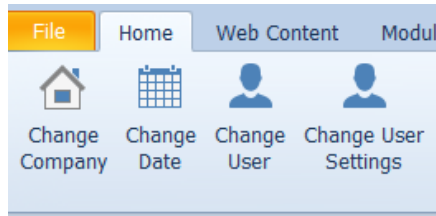
Task Pane – allows access to the selected module.

Status Bar – displays the current company, module, user and accounting date for the current module.

Desktop Browser – Displays web pages to access links to information and guides for the program.

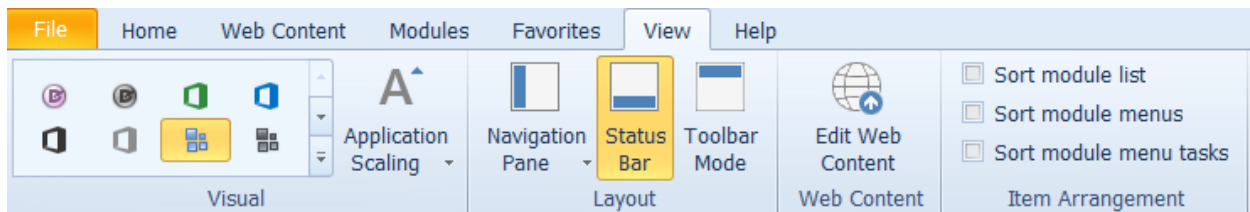
Ribbon

Home Menu - Quick access buttons to change Company, Users or User Settings.



- Change Company – select the company code that you would like to access.
- Change Date – allow you to change the date for the module currently selected. Note – the Library Master date defaults to the computer date and cannot be changed.
- Change User – quickly change from one user logon to another without exiting the system
- Change User Setting – provides access to the users default settings. Note - The user must be given security rights to this menu item in order to access it.
- Master Console – shows all users that are currently logged in and what modules that they have open.

View Menu – Change font settings, colors and menu sort order.



- Application Scaling - allows you to select the screen font text size. Choose between Default, Medium, Large or Extra Large.
- Item Arrangement – allows you to set the sort order of your module lists or menus.

Module List – sorts all modules in alphabetical order

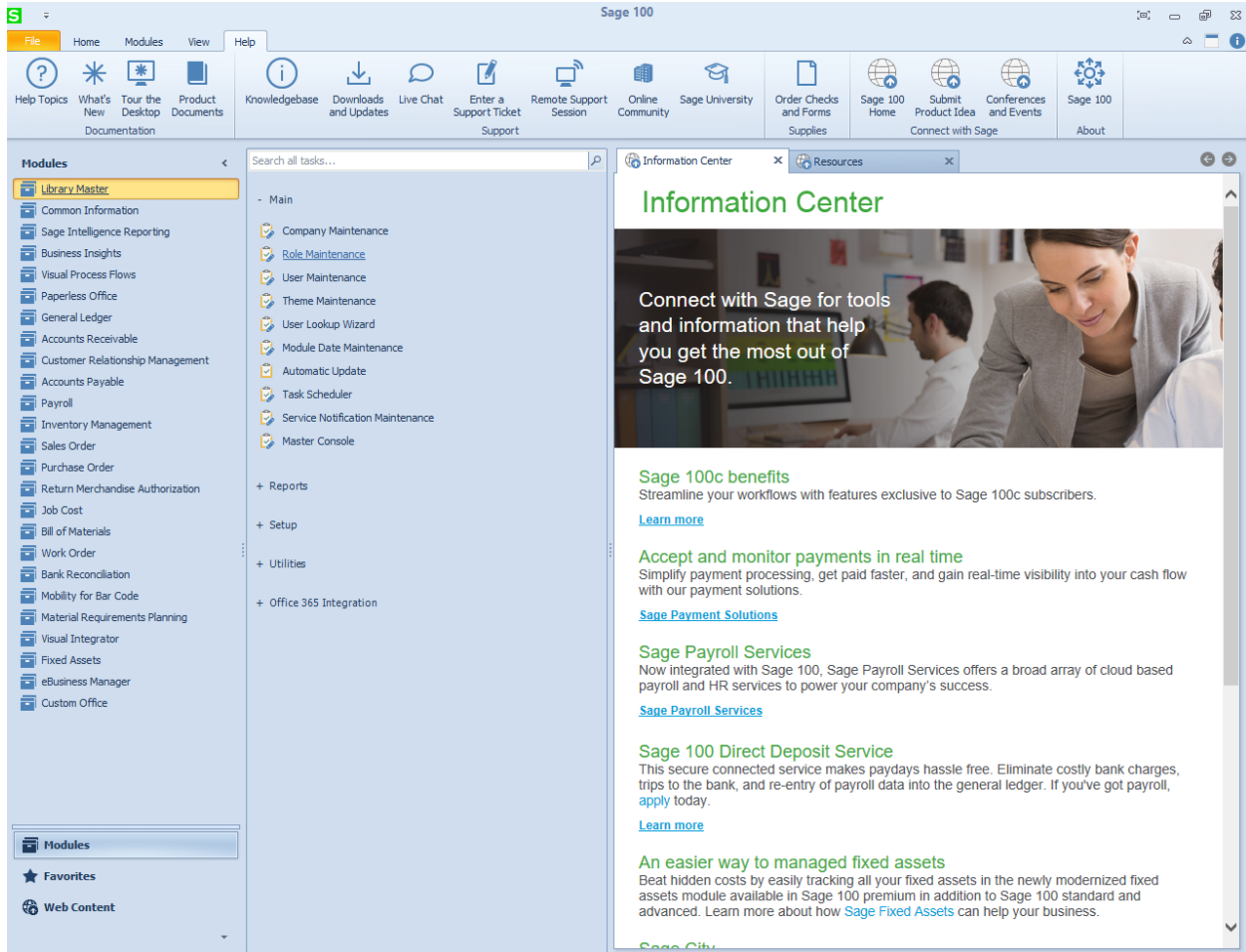
Module menus – sorts the menu items within a module in alphabetical order

Module menu tasks – sorts the task items within a menu item in alphabetical order

- Desktop Default Themes – select a theme from the list to change the color of your desktop

Navigation pane

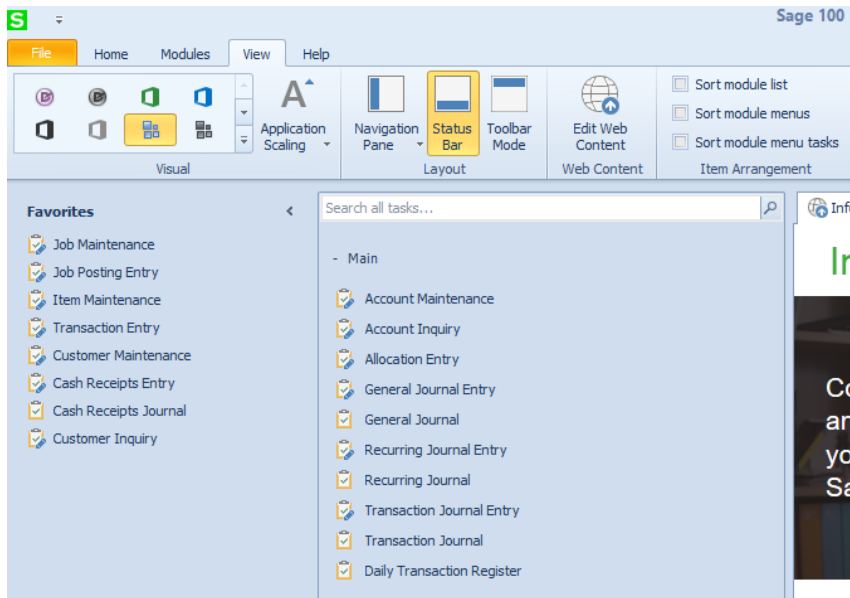
Provides quick access to Modules, Favorites and Web Content menus.



- Modules – displays modules that the user has security rights to. Click on a module to display the menu items in the Task pane.
- Favorites – allows user to add shortcuts to tasks, files and folders and websites.
- Web Content – contains hyper links that open in the embedded browser.

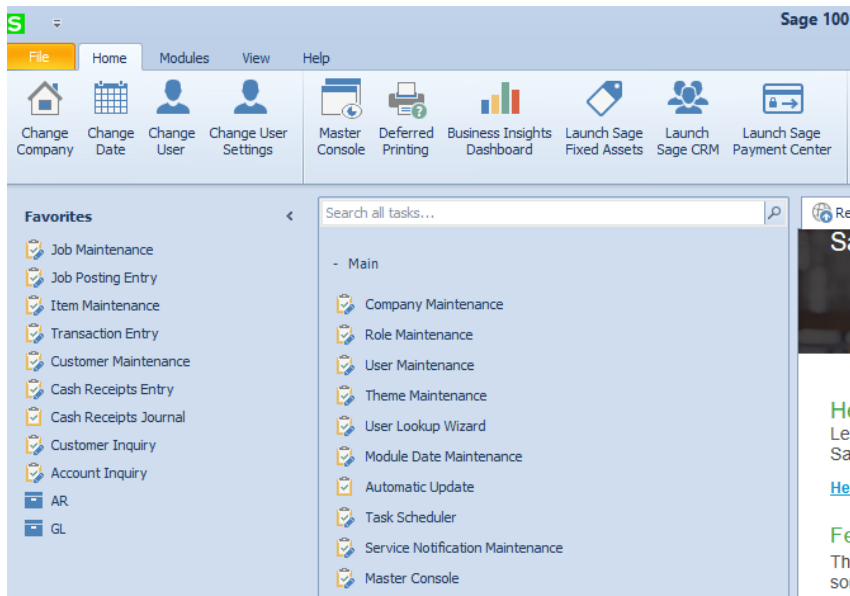
Favorites

To add menu item to Favorites



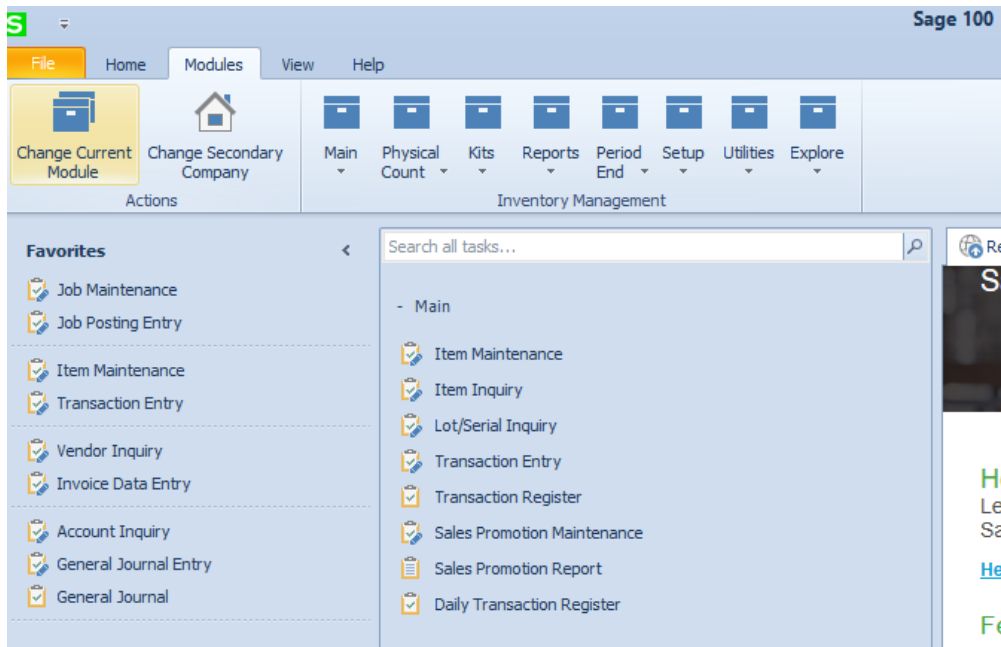
Click on Modules on the Navigation pane. Select a Module, the menu options for this module will appear on the Task pane. Locate the task that you would like to add to the Favorites menu, right click and select Add to Favorites.

To add a Folder to Favorites



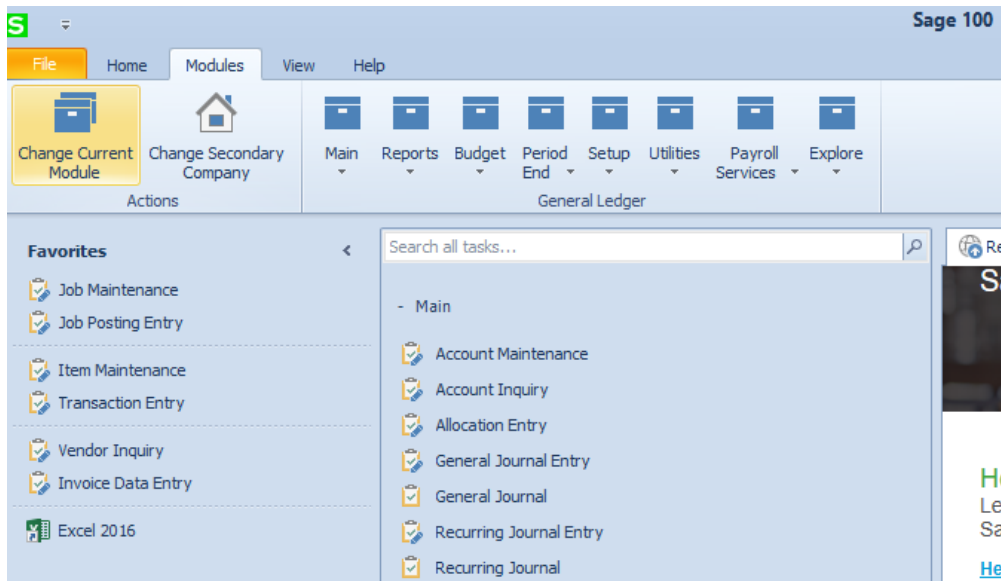
Right click in Favorites pane and select Insert Folder. Enter a Name for the folder. Double click on the folder to open it. Then click the Change Current Module button from the Ribbon. Right click the task that you want to add to the folder and select Add to Favorites.

To insert a separator



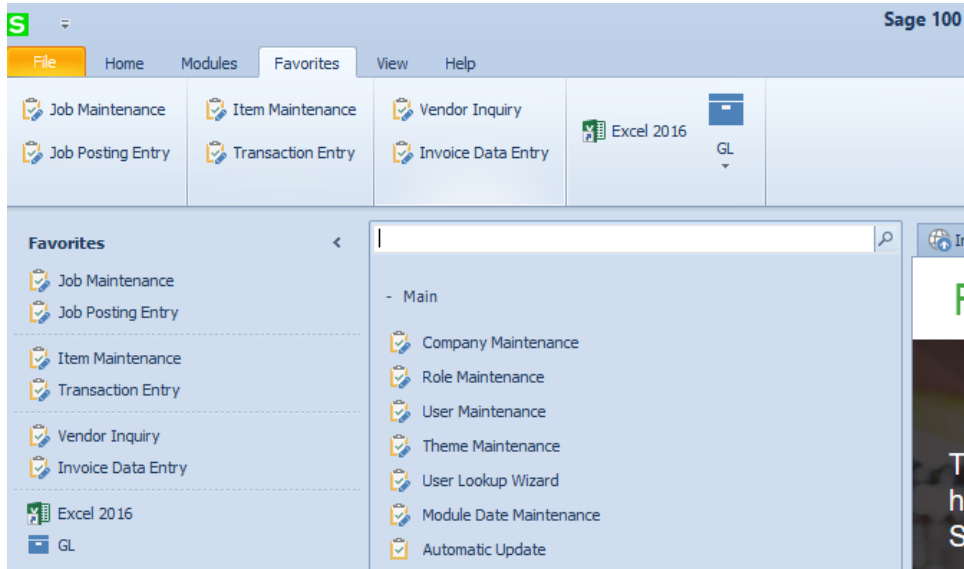
On the Favorites panel, position your mouse directly below the menu item that you would like the separator. Right click and select Insert Separator.

To add an external program to Favorites



Click on the shortcut icon for the External program you would like to add and drag it to the Favorites pane.

To add Favorites to the Ribbon



Right click on the Ribbon and select Show Favorites on the Ribbon.

Company Maintenance

Preferences

The screenshot shows the 'Company Maintenance (ABC) 4/19/2019' window with the 'Preferences' tab selected. The window title bar includes a green 'S' icon and standard window controls. The main area is divided into sections: 'Miscellaneous', 'Date Settings', and 'Web Services'. The 'Miscellaneous' section contains several checkboxes and text boxes. The 'Date Settings' section contains three checkboxes. The 'Web Services' section contains one checkbox. At the bottom, there is a checkbox for 'Use as Default Company for Server Settings' and buttons for 'Accept', 'Cancel', 'Delete', a printer icon, and a help icon.

Section	Setting	Value
Miscellaneous	Print User Logon on Reports	<input type="checkbox"/>
	Use Workstation Default Printer for STANDARD Report Setting	<input checked="" type="checkbox"/>
	Use Workstation Default Printer for STANDARD Form Code	<input checked="" type="checkbox"/>
	Allow External Access	<input checked="" type="checkbox"/>
	Return City Names in All Caps	<input type="checkbox"/>
	Data Location	C:\ACCT\Sage_2018\MAS90\MAS_ABC\
	Payroll Data Location	C:\ACCT\Sage_2018\MAS90\MAS_ABC\
Date Settings	Prompt for Accounting Date	<input checked="" type="checkbox"/>
	Auto Set Accounting Date from System Date	<input type="checkbox"/>
	Restrict Accounting Date to Current and One Future Period	<input type="checkbox"/>
Web Services	Enable Web Services	<input type="checkbox"/>

- Print user Login on Reports – select this box to print the user Logon information on reports and lists.
- Allow External Access - select this check box to allow the company to be accessed externally through the company's objects, such as VBScript, JavaScript, or other programs that are not based on Sage 100.
- Display Inactive Customers in ALE Lookups – select this box to display Customers in the lookup lists that are marked inactive.
- Display Inactive Vendors in ALE Lookups – select this box to display Vendors in the lookup lists that are marked inactive.
- Display Inactive/Restricted Warehouses in ALE Lookups - select this box to display Warehouses in the lookup lists that are marked inactive or restricted.
- Prompt for Accounting Date – prompts users for the accounting date when they access a module in a session.
- Restrict Accounting Date to Current and One Future Period – this feature restricts users to current and one future period. A warning message will appear if they select a date outside the criteria. Under Role Maintenance, Security Events, a security privilege can be granted to bypass this restriction. The restriction does not apply to General Ledger.

Company Maintenance

Themes

Company Maintenance (ABC) 4/19/2019

Company Code: ABC

Company Name: ABC Distribution and Service Corp.

1. Main | 2. Preferences | 3. Payment | 4. E-mail | 5. Fax | 6. Theme

Theme Code: CLASSIC Classic Theme

Enable Company Specific Background Color: No

Color: [Color Pallet Icon] Sample

Use as Default Company for Server Settings

Accept Cancel Delete [Print Icon] [Help Icon]

- Theme Code – select from the default themes. Classic, Standard or Standard-Green or select a custom designed theme code. If Classic is selected, then company background and frame colors can be modified.
- Enable Company Specific Background Color – select No, Background, Frame or Both. Then click the color pallet to select the background color.

How to Create a Copy Company

Select Company Maintenance from the Library Master Main menu. Enter the company code you want to Create or Copy To.

Click the Copy button. A integration warning will prompt, click Ok.

If this is a new company code the system will prompt to Save the company. Click Yes.

Enter the Source Company to copy **From**. Select all the modules you want to copy. Click Proceed.

Note – Common Information and General Ledger will automatically be selected when you choose any module. They cannot be unchecked.

Options	Modules	Data	Forms
1	C/I Common Information	<input checked="" type="checkbox"/>	N/A
2	G/L General Ledger	<input checked="" type="checkbox"/>	N/A
3	A/R Accounts Receivable	<input checked="" type="checkbox"/>	N/A
4	A/P Accounts Payable	<input checked="" type="checkbox"/>	N/A
5	P/R Payroll	<input checked="" type="checkbox"/>	N/A
6	I/M Inventory Management	<input checked="" type="checkbox"/>	N/A
7	S/O Sales Order	<input checked="" type="checkbox"/>	N/A
8	P/O Purchase Order	<input checked="" type="checkbox"/>	N/A
9	R/A Return Merchandise Authorization	<input checked="" type="checkbox"/>	N/A
10	B/R Bank Reconciliation	<input checked="" type="checkbox"/>	N/A
11	I/T eBusiness Manager	<input checked="" type="checkbox"/>	N/A

Buttons: Proceed, Cancel, ?