

USER MAINTENANCE

Library Master -> Main -> User Maintenance Tab

The screenshot shows the Sage User Maintenance (ABC) 3/30/2015 window. The form includes the following fields:

- User Logon: Bob
- First Name: Bob
- Last Name: Builder
- User Code: BOB
- Password: \$\$\$\$\$\$\$\$\$\$
- Confirm Password: [Empty]
- Customization Group: [Empty]
- Expires: [Empty]
- E-mail: rklotho@connerash.com
- Job Title: Accounting Manager/Controller

Navigation buttons: Copy..., Rename...

Tabbed interface: 1. Maintenance (selected), 2. Preferences, 3. Auto-Complete

	Company	Role	Start Date	Expiration Date
1	All Companies	Level1		
2				

Bottom controls: User Account Locked, Accept, Cancel, Delete, Print, Help

User Code: Three character User Code that is used to identify the person who entered various transactions.

Password: The use of a password is optional but highly recommended. **The password is Case Sensitive**, the User Logon is not.

Customization Group: The customization code is used by the Customizer module and user lookups for group customizations.

Expires: Enter the date that you want the user's account to expire.

Email Address: Enter the Users email address - Optional

Job Title: Enter the Users job title from list - Optional

Company/Role: Select the role to assign to the user for the company selected. If you assign multiple roles to a user, the least restrictive security permissions prevail.

Start/Expiration Date: Enter the Start date that a user can access the system. Enter the Expiration date to terminate the users' login as of a specific date. This feature is Optional and only used to restrict access.

User Account Locked: The user's account will be locked automatically if too many incorrect logon attempts are made by the user or if the date in the user's Expiration Date field has passed. Password Attempt Lockout is set up in the System Configuration menu on the Security Tab.

Library Master -> Main -> User Preferences Tab

The screenshot shows the 'User Maintenance (ABC) 3/30/2015' window with the 'Preferences' tab selected. The user information is as follows:

User Logon	Bob	First Name	Bob	Last Name	Builder	User Code	BOB
Password	\$\$\$\$\$\$\$\$\$\$\$\$	Confirm Password		Customization Group		Expires	
E-mail	rklutho@connerash.com	Job Title	<Select Job Title>				

The Preferences section contains the following settings:

Automatic Logoff	<input type="checkbox"/>	Automatic Logoff Delay in Minutes	
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	0	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"/>		
Enable Web Services	<input type="checkbox"/>		

At the bottom left, there is a checkbox for 'User Account Locked' which is currently unchecked. At the bottom right, there are buttons for 'Accept', 'Cancel', 'Delete', a printer icon, and a help icon.

Automatic Logoff: Select this check box to log off a user automatically after the number of minutes entered in the Automatic Logoff Delay in Minutes field has elapsed with no activity. Clear this check box if you do not want to log off a user automatically.

Implied Decimal Point: Select this check box to use an implied decimal point when entering numeric values. The system adds the decimal point automatically when you enter numeric values (for example, 123 = 1.23). Clear this check box if you do not want to use an implied decimal point (for example, 123 = 123.00).

[ENTER] Key Like [TAB] Key for Grid: Select this check box to allow the ENTER key to function like the TAB key within grids. If this check box is selected, the ENTER key advances to the next field in the grid. Clear this check box if you want the ENTER key to advance to the next line within the grid.

Display Reduction Amounts in Red: Select this check box to display amounts that reduce the balance in red text. Clear this check box if you do not want to display amounts that reduce the balance in red text.

Use Graphic Report Format: Select this check box to print graphical reports. This setting applies only to standard reports in the Job Cost, Material Requirements Planning, Payroll, Time Card, and Work Order modules.

Partial Lookup Default: Select the method to display data when performing a partial lookup at a field.

- Select Begins with to display only records with matching criteria. For example, if "B" is entered as the partial lookup, only records that start with "B" appear.
- Select Greater than to display all records that start with the selected criteria. For example, if "B" is entered as the partial lookup, all records that start with "B" and greater than "B" appear.

Prompt for Company Code: Select this check box to prompt the user for a company code when logging on to the system. Clear this check box if you do not want to prompt the user for a company code when logging on to the system.

Default Report Preview Zoom: Enter the default zoom setting to preview reports, forms, and listings. You can type a value between 25 and 400 percent, or select a zoom setting from the list.

- Select Page Width to display the entire width of the report page in the Report Preview window.
- Select Whole Page to display the whole page of the report in the Report Preview window.
- **Note: Reports, forms, and listings will preview at the zoom setting for the selected user in all modules except Job Cost, Material Requirements Planning, Payroll, TimeCard and Work Order.**

Library Master -> Main ->Auto-Complete Tab

User Maintenance (ABC) 3/30/2015

User Logon: Bob
 First Name: Bob, Last Name: Builder, User Code: BOB
 Password: \$\$\$\$\$\$\$\$\$\$, Confirm Password:
 E-mail: rkluho@connerash.com, Job Title: <Select Job Title>

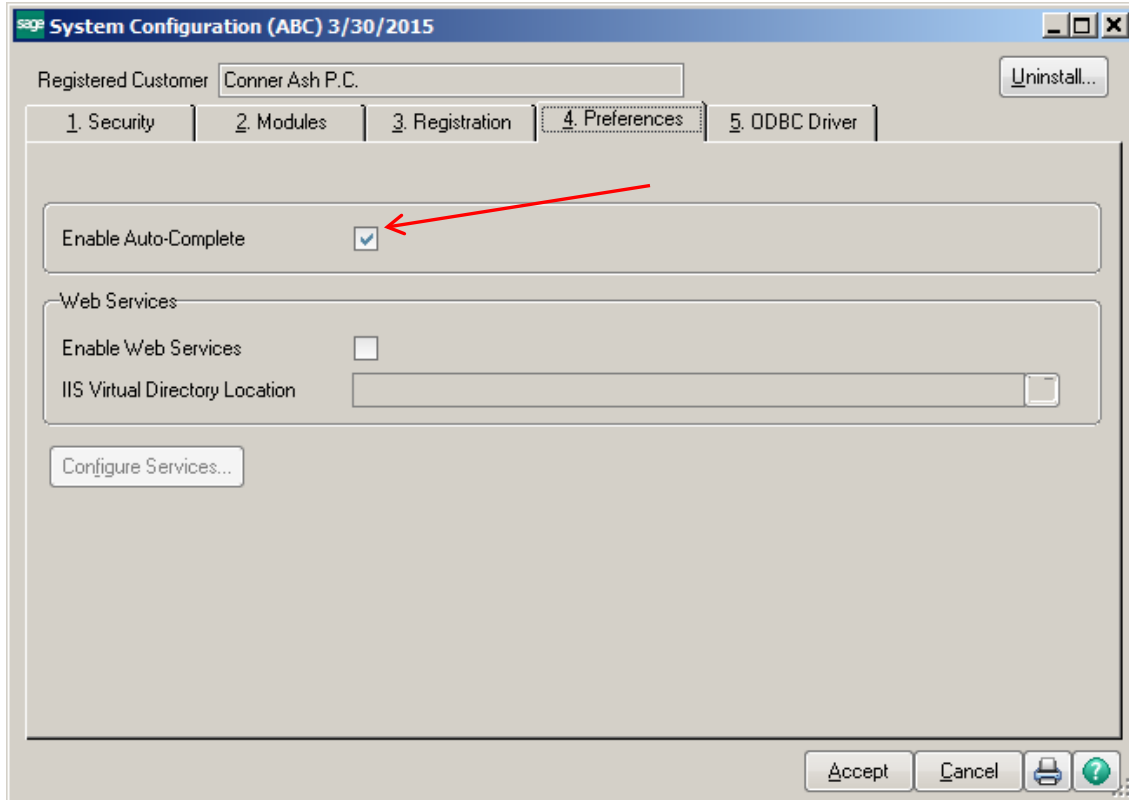
1. Maintenance | 2. Preferences | 3. Auto-Complete

	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"/>

User Account Locked

Accept Cancel Delete

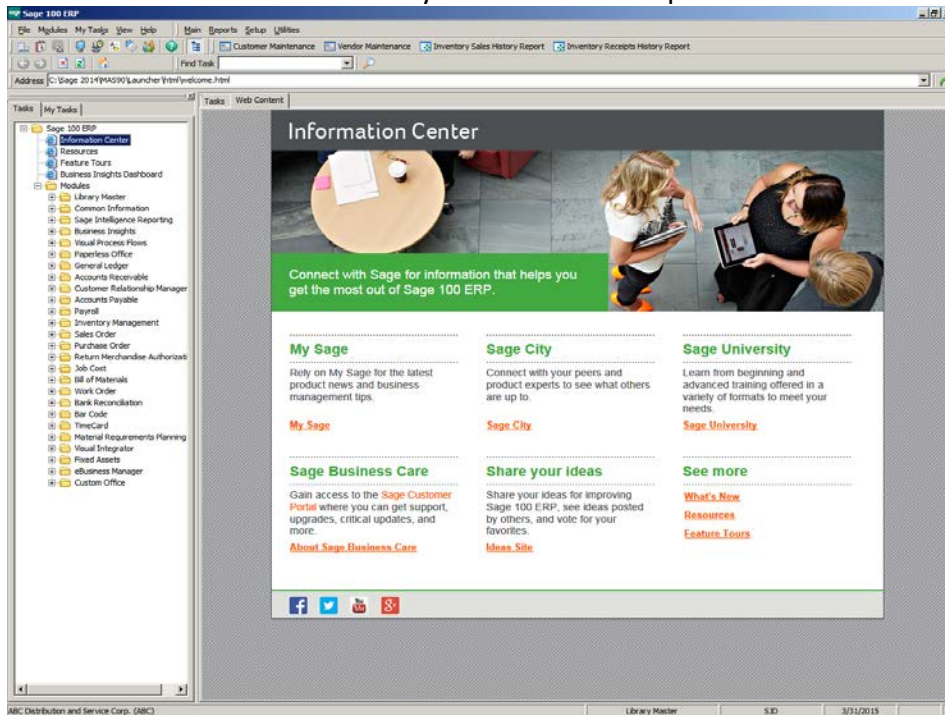
Enable: Select this check box to enable the auto-complete feature for this type of record. Clear this check box to disable the feature. This feature can be enabled for this user only if the Enable Auto-Complete check box is selected in [System Configuration](#) -> Preferences Tab.



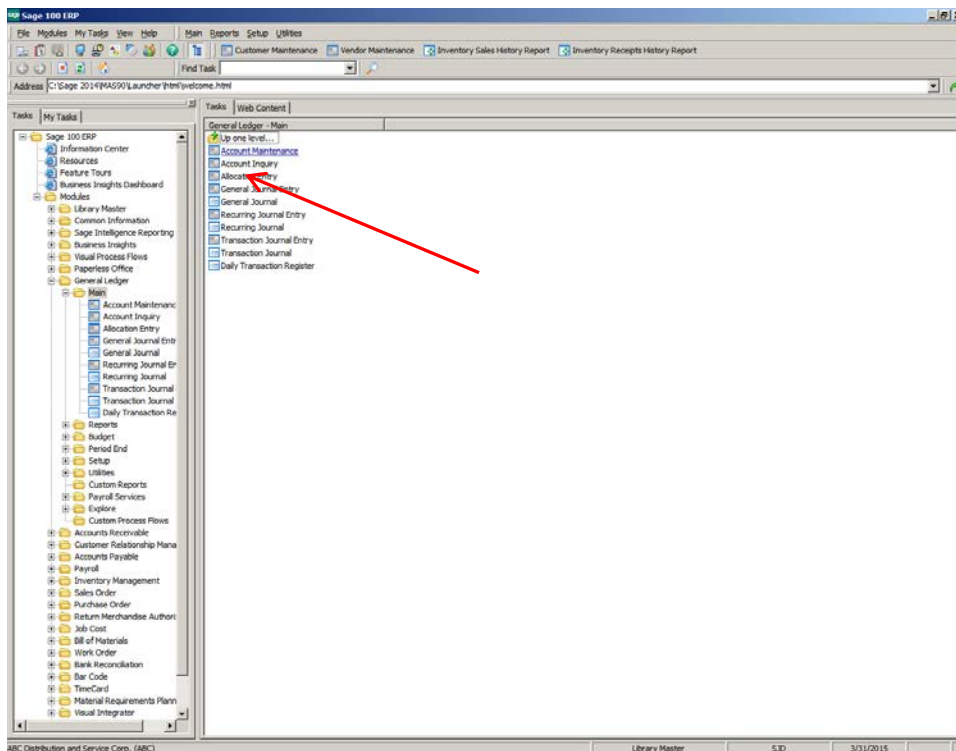
Navigating the Menus

Detail View – Shows entire desktop and provides access to features such as Tasks, MyTasks and Web Content.

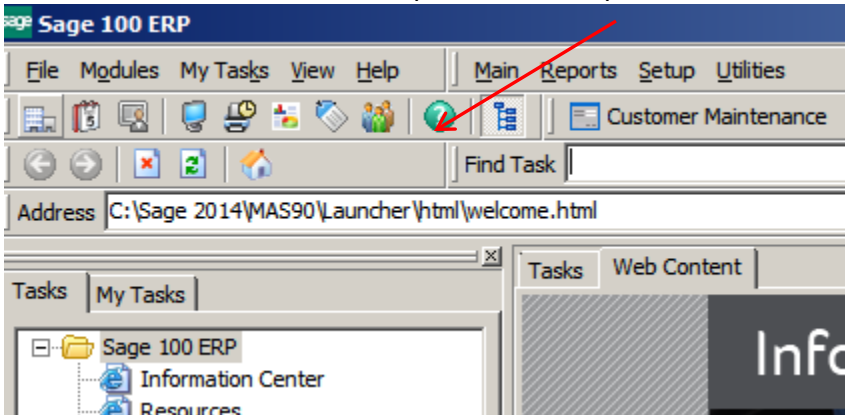
Click the Folder next to the Menu item you would like to open.



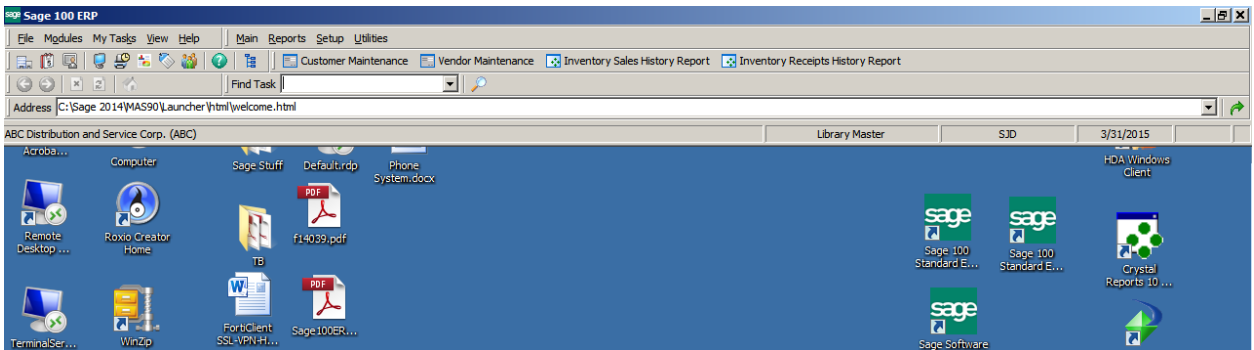
The menu item list will appear on the right side of the screen. Click on the menu item that you want to open.



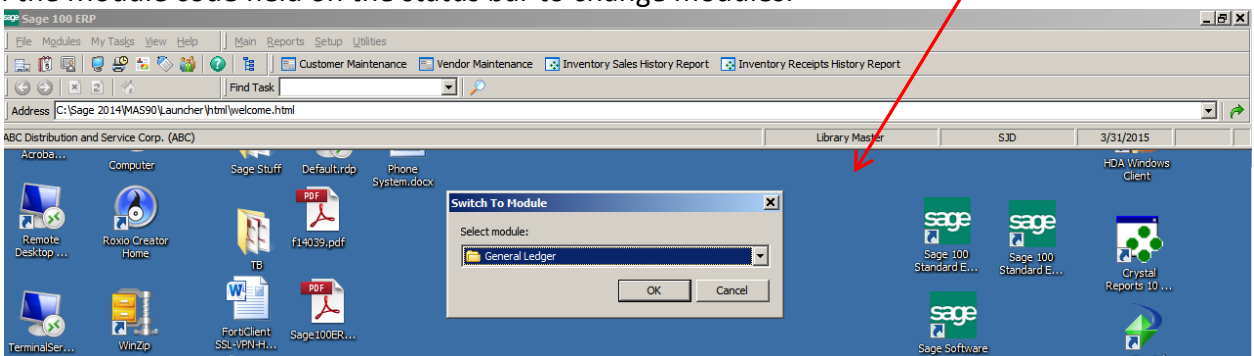
Collapsed View – Hides the Tasks, My Tasks and Desktop Web pages. It frees up your desktop space. Click on the Detail View button to collapse the desktop.



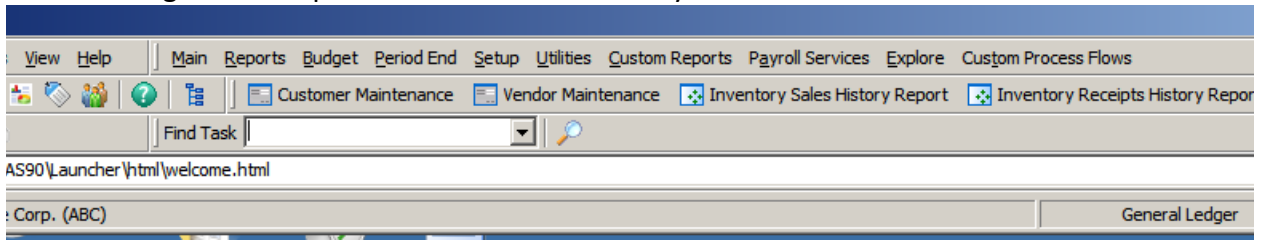
The Sage Desktop will be minimized to the top of the screen, showing the Windows Desktop in the background.



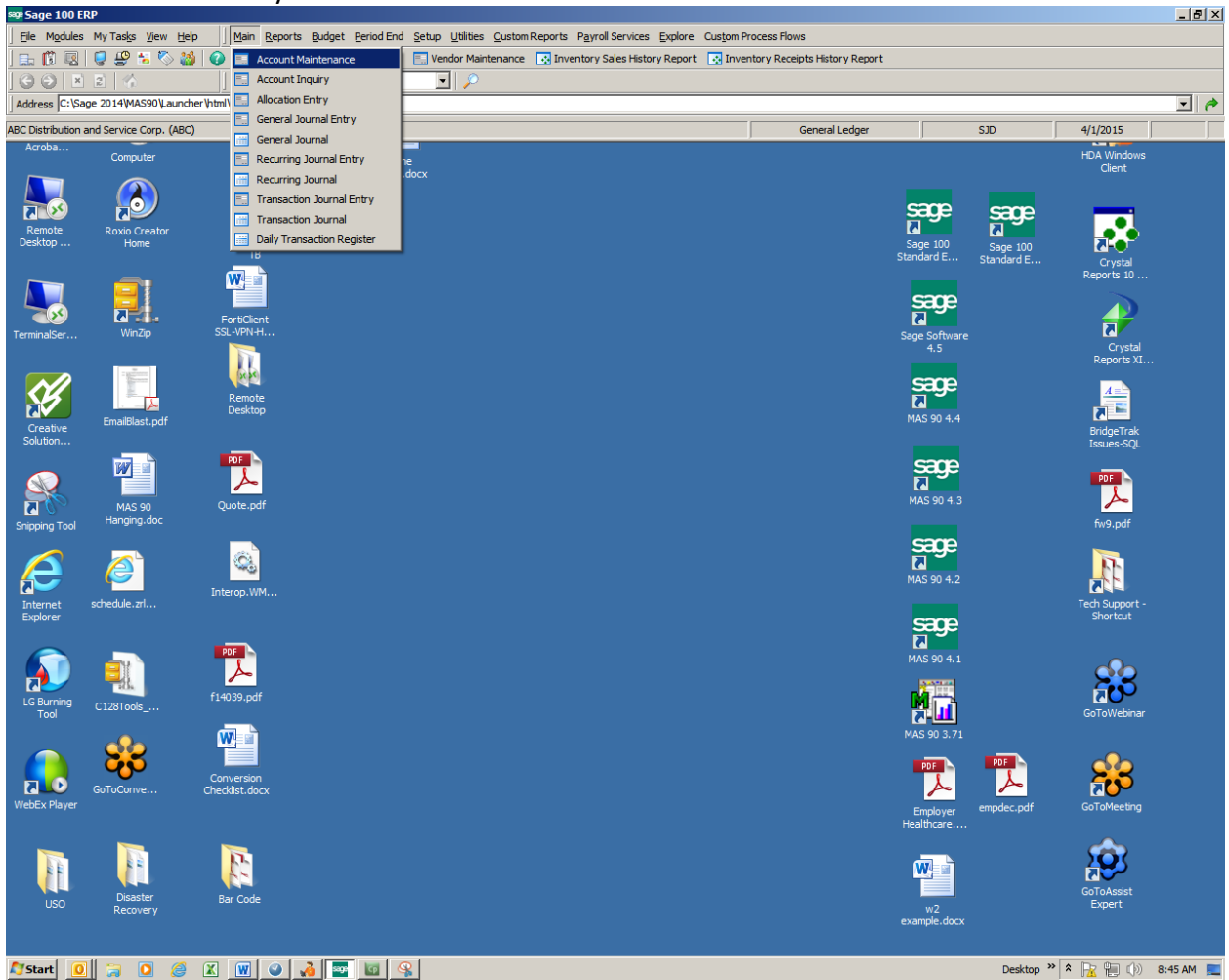
Click on the Module code field on the status bar to change modules.



The menu will change at the top to the module menu that you have selected.

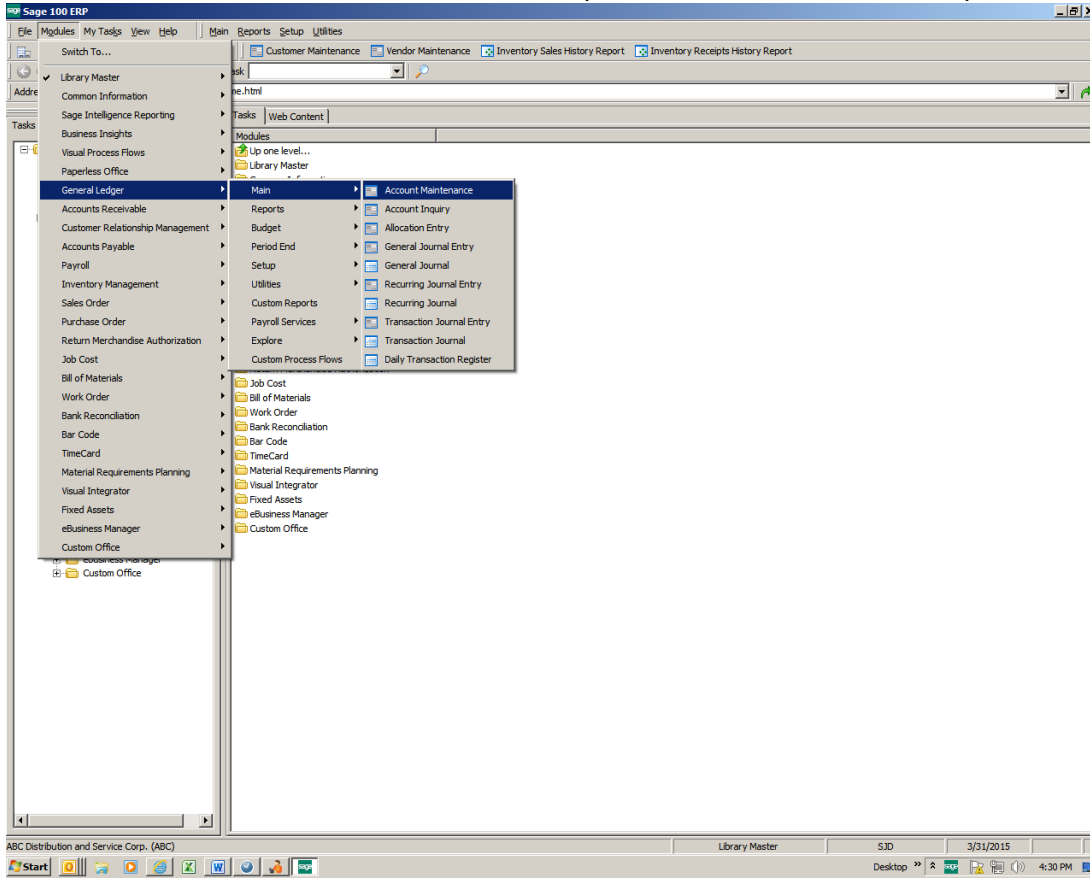


Click on the menu item that you would like to access.



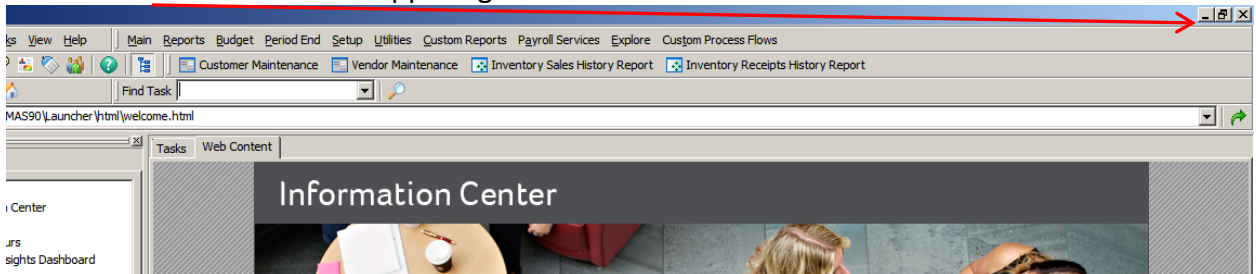
Cascading View – Click Modules from top menu, then scroll to the menu you would like to select. Scroll to the right to select the menu items.

Note: This view can be used with full screen Desktop or with a minimized Desktop.

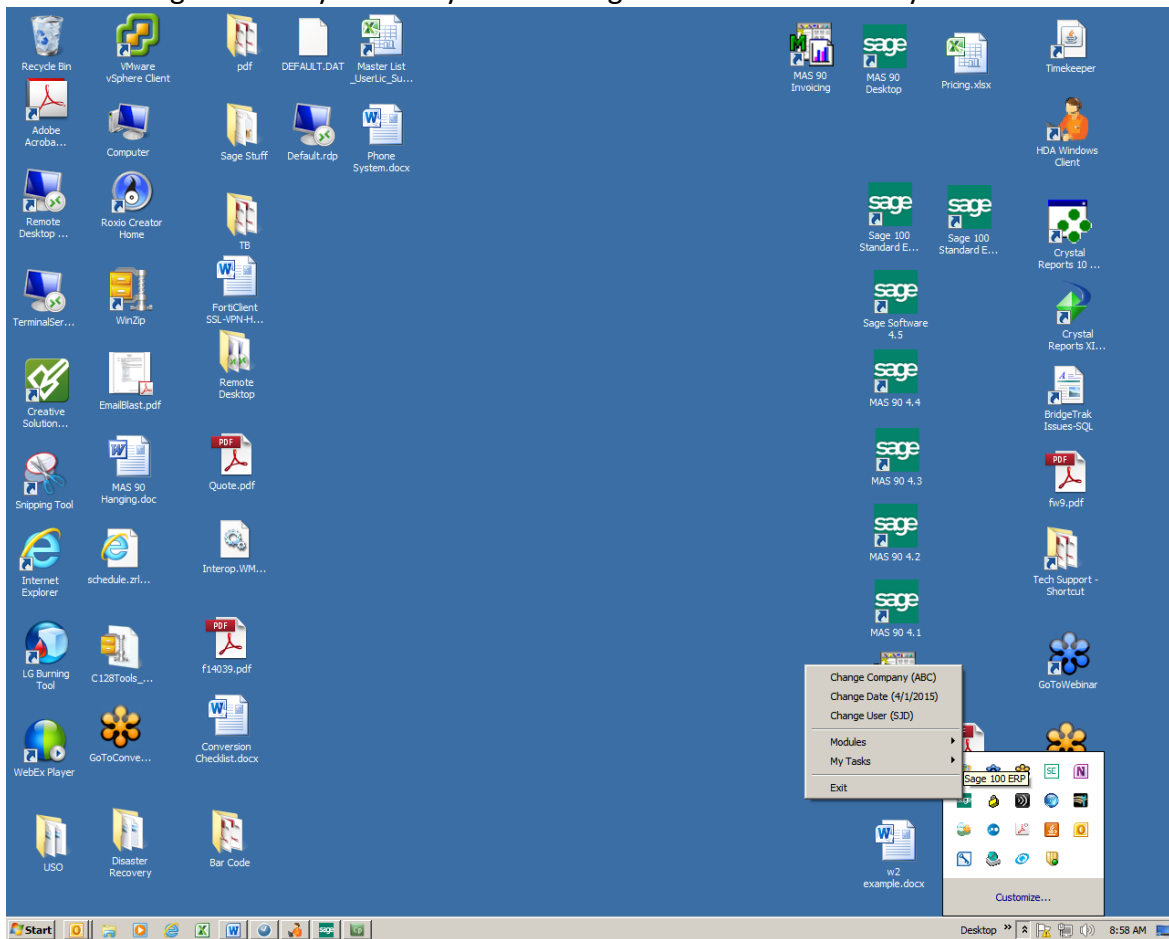


Minimized View – allows you to minimize your Desktop but still access most of the software functions.

Click on the Minimize button in the upper right-hand corner.

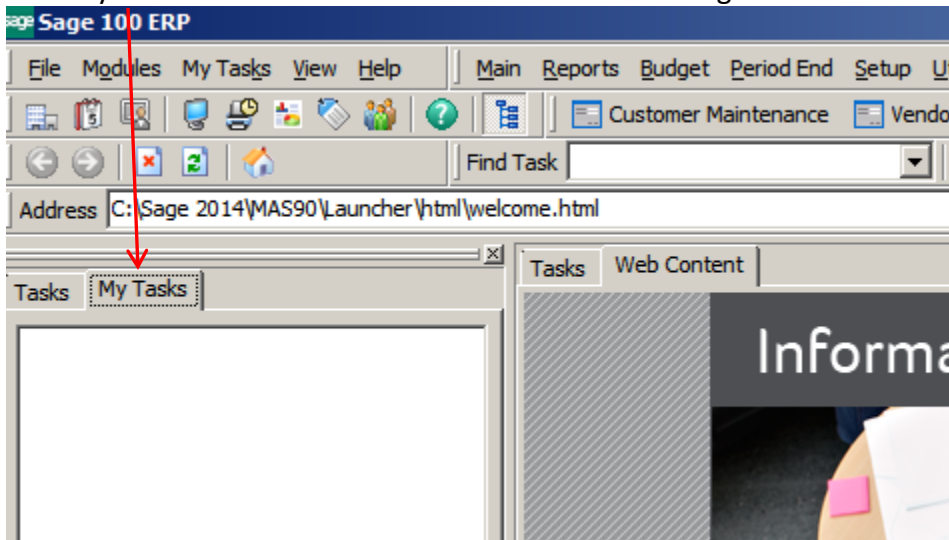


Right click on the Sage icon in System Tray. Then navigate to the menu item you would like to access.



My Tasks:

Click on the My Tasks tab to create new tasks or access existing tasks.



Right click in the blank white area. Click on New and select either the Public or Private folder.

Sage 100 ERP

File Modules My Tasks View Help Main Reports Setup Utilities

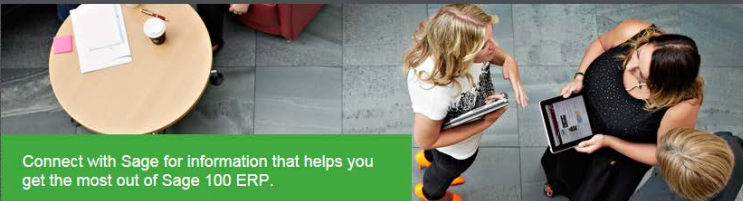
Customer Maintenance Vendor Maintenance Inventory Sales History Report Inventory Receipts History Report

Address C:\Sage 2014\MAS90\launcher\html\welcome.html

Tasks My Tasks

Tasks Web Content

Information Center



Connect with Sage for information that helps you get the most out of Sage 100 ERP.

My Sage

Rely on My Sage for the latest product news and business management tips.

[My Sage](#)

Sage City

Connect with your peers and product experts to see what others are up to.

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Sage University

Learn from beginning and advanced training offered in a variety of formats to meet your needs.

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Gain access to the [Sage Customer Portal](#) where you can get support, upgrades, critical updates, and more.

[About Sage Business Care](#)

Share your ideas

Share your ideas for improving Sage 100 ERP, see ideas posted by others, and vote for your favorites.

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See more

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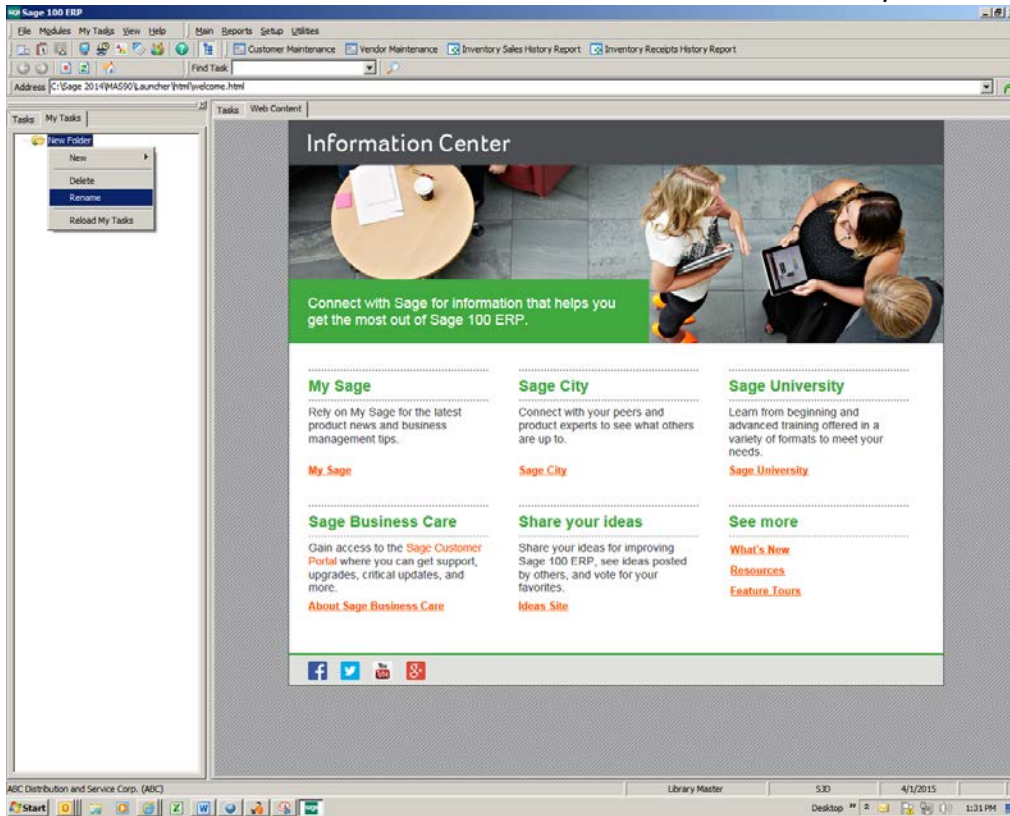
[Resources](#)

[Feature Tours](#)

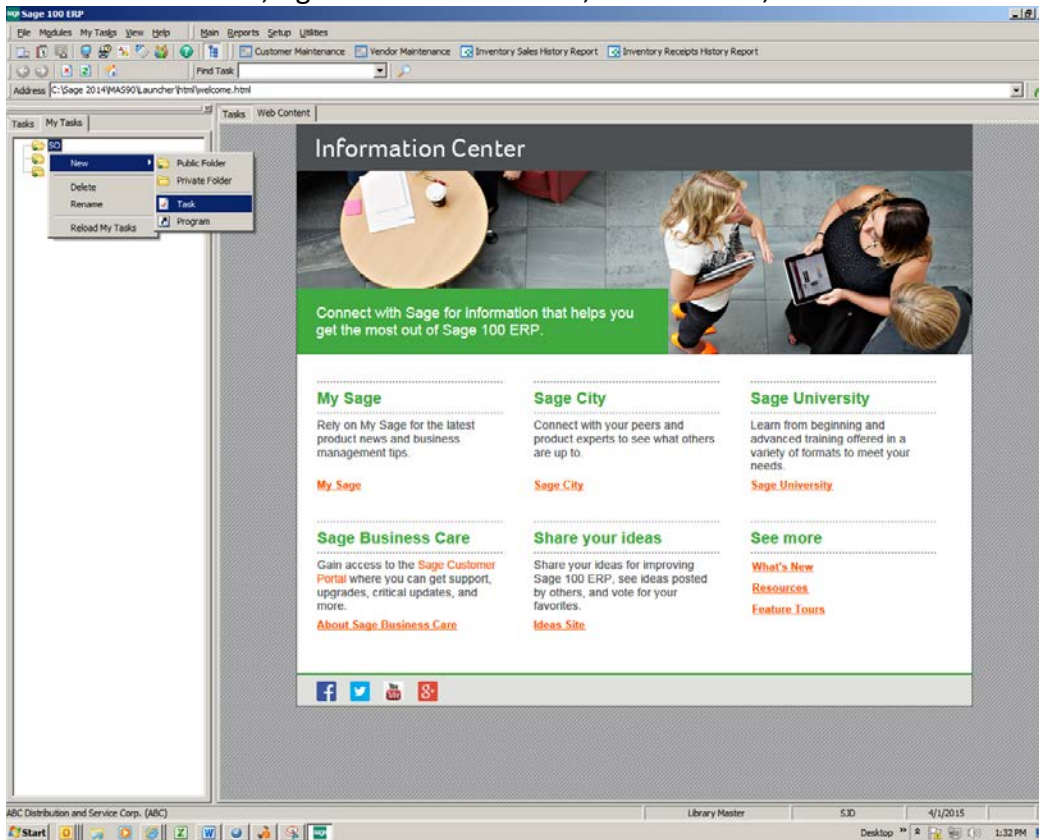
Facebook Twitter YouTube Google+

ABC Distribution and Service Corp. (ABC) Library Master SID 4/1/2015 Desktop 1:30 PM

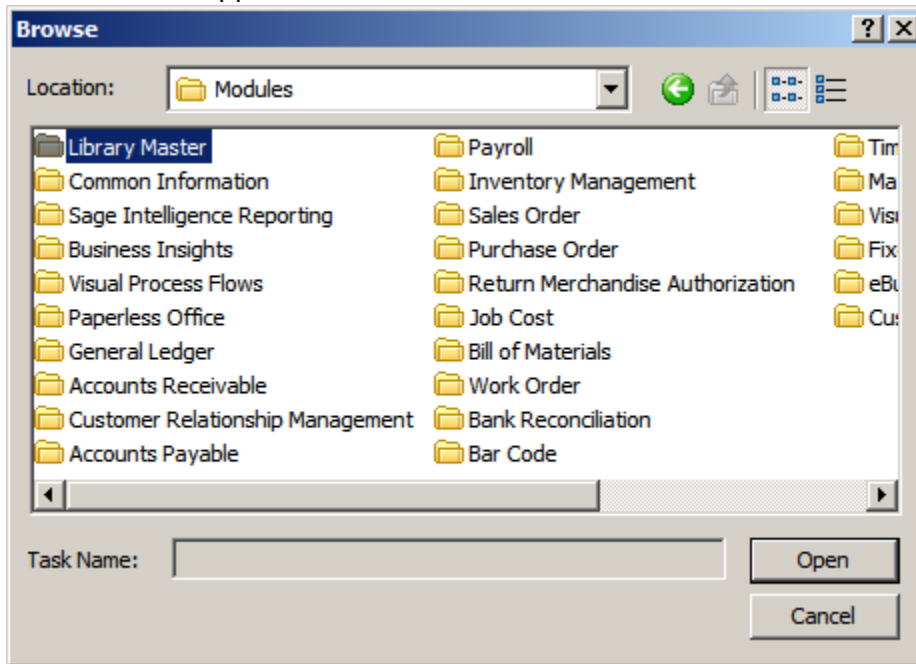
Right click on the folder and select Rename. Enter a folder name to identify the tasks within the folder.



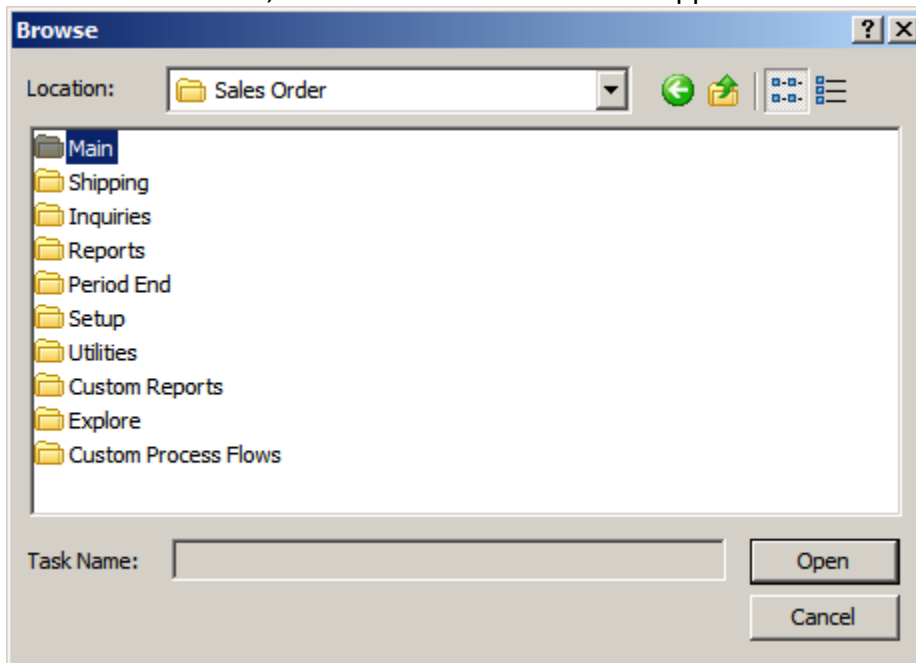
To add a Task to the Folder, right click on the Folder, click on New, then click on Task.



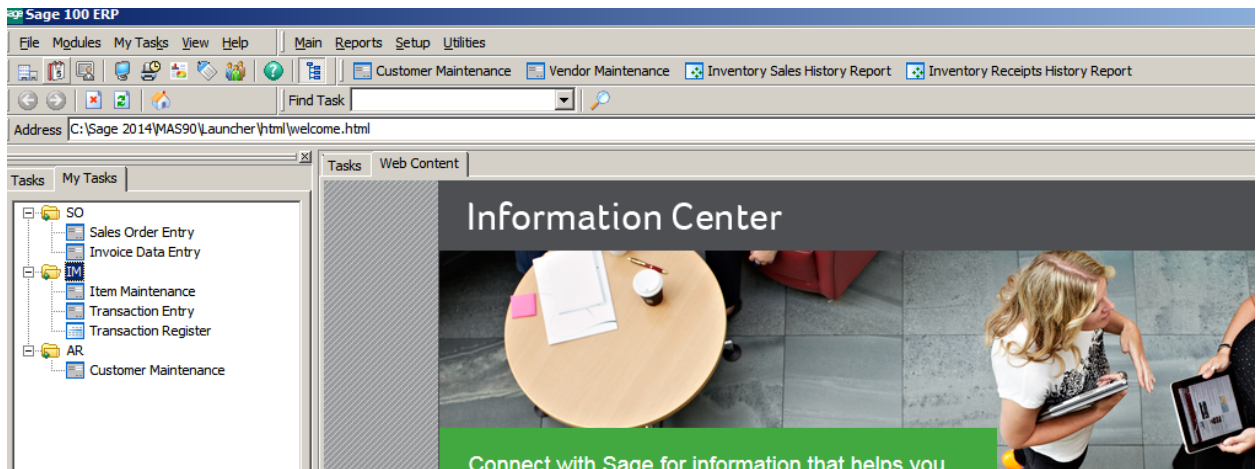
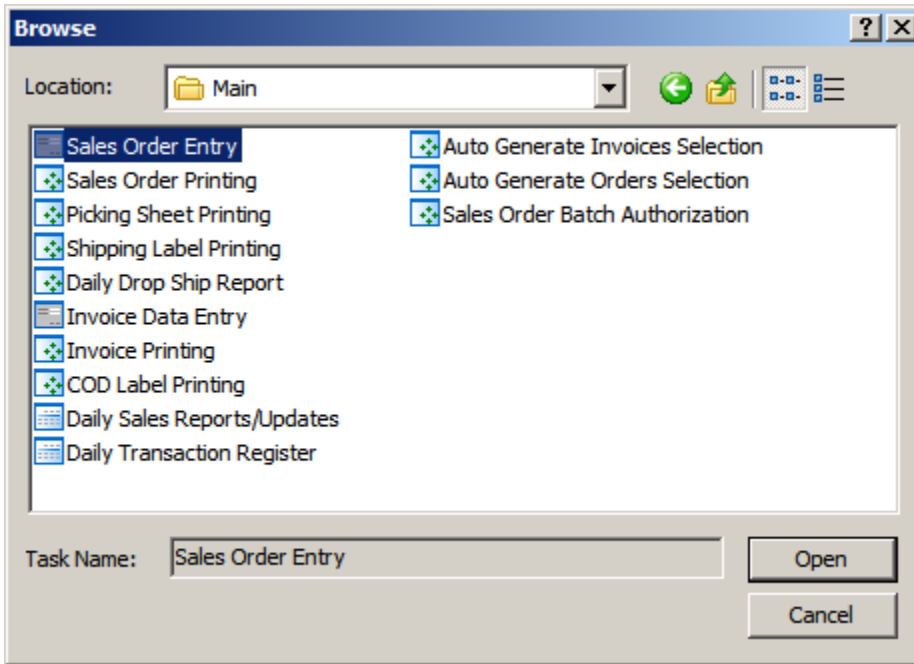
A Browse window will appear.



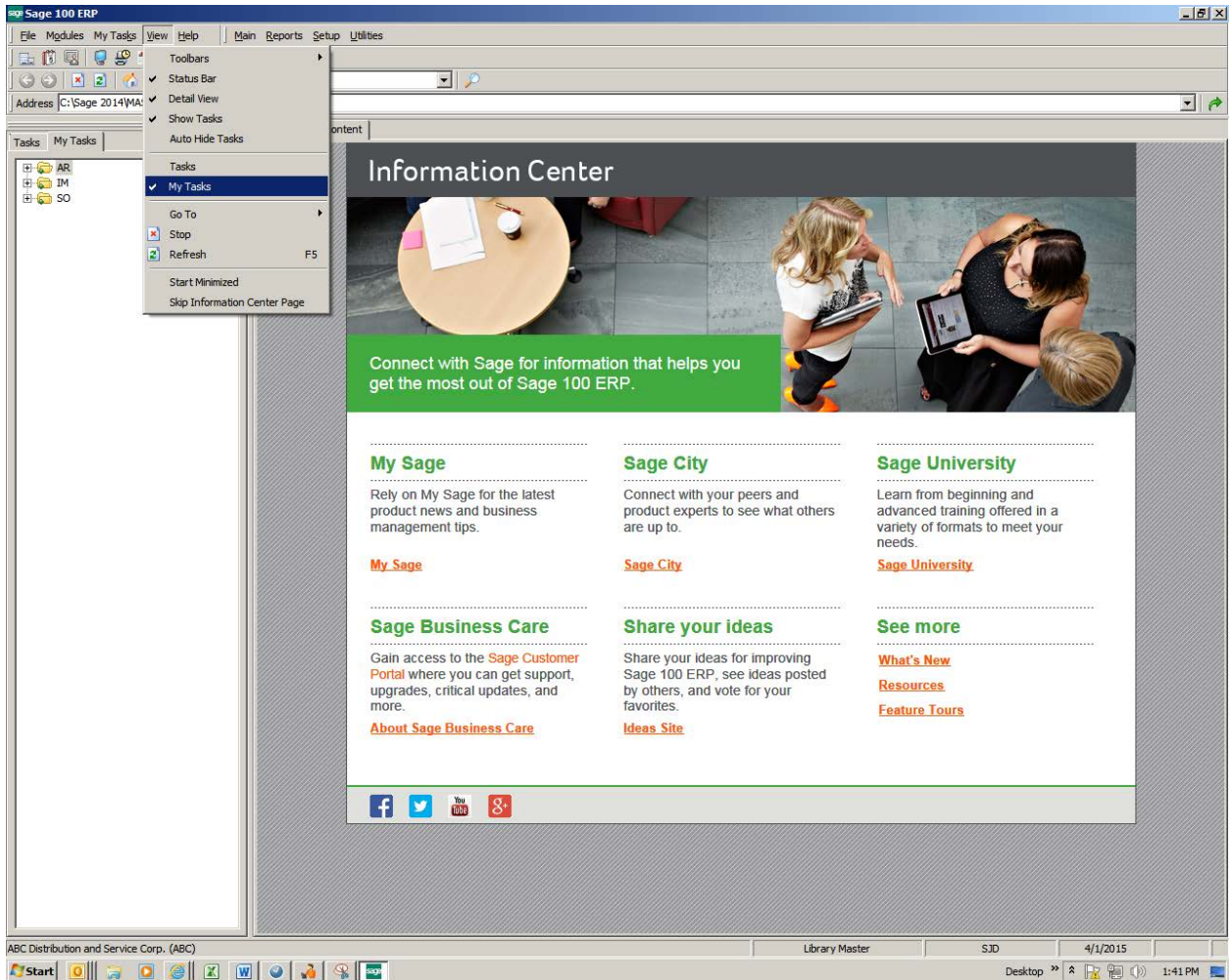
Double click on the Module, another Browse window will appear.



Select the Menu, and then double click on the Task. You can select multiple tasks to add by repeating this process.



To set the My Tasks tab as your default when opening Sage, click on View, select My Tasks from the drop down list.



Bonus Round:

- Undock menus
- Add menu items to top screen