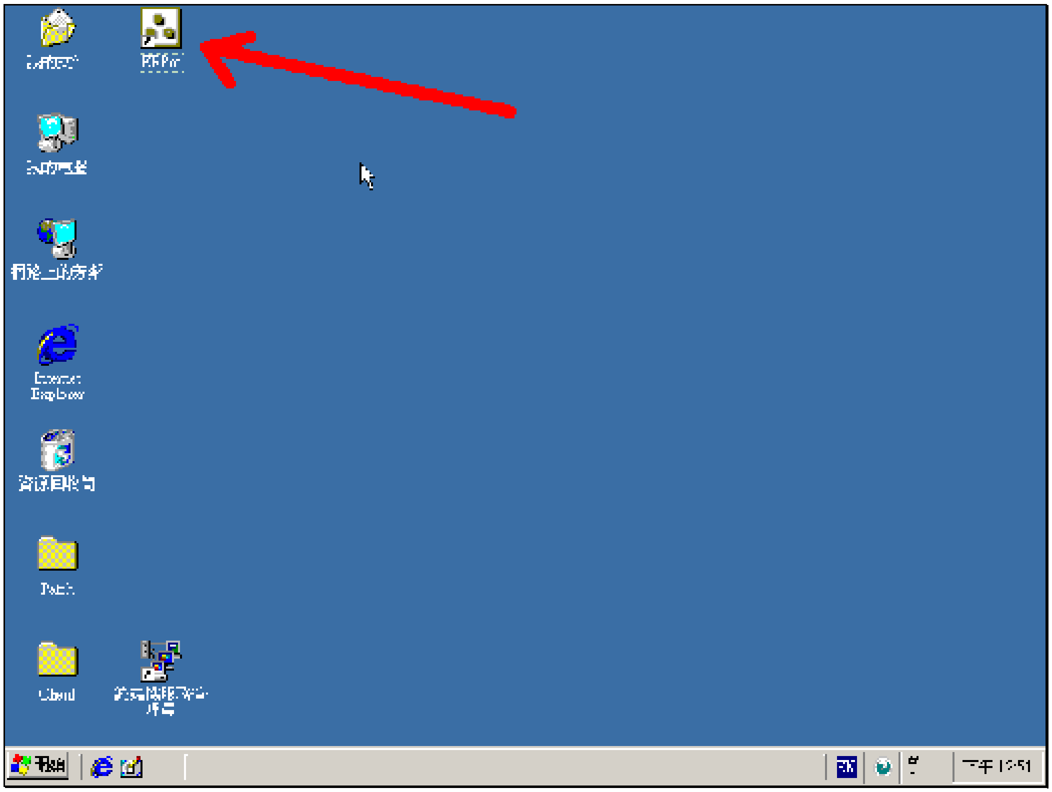
ERPro Training Note

System Manager

Contents

1. Start up

To execute the program by clicking the ERPRO icon on your Desktop.



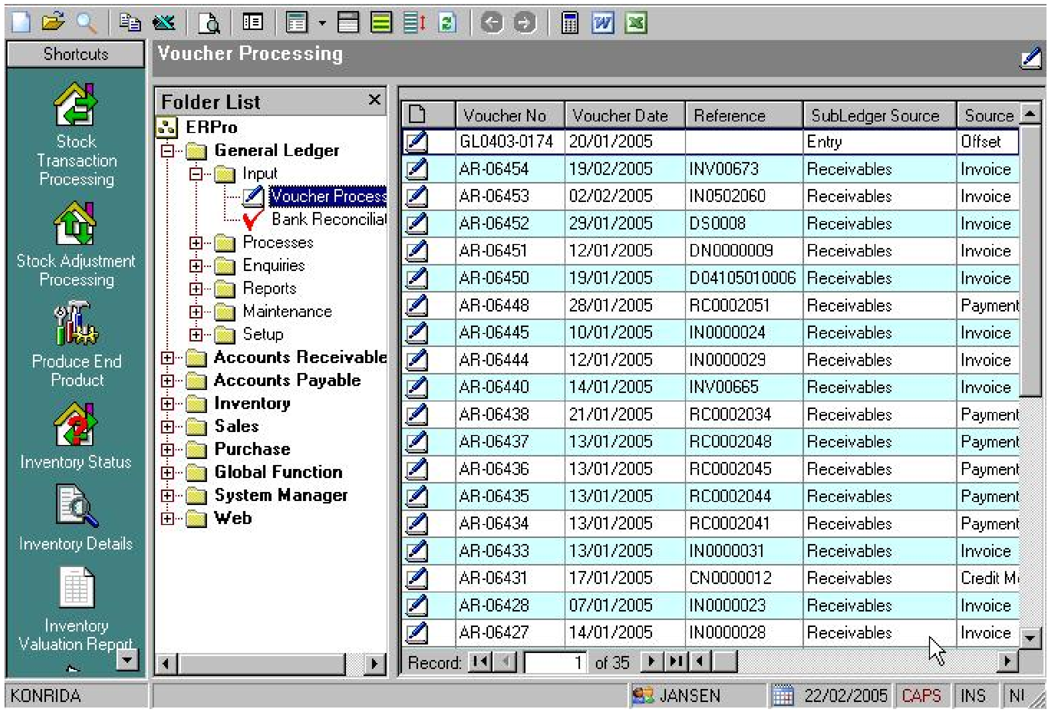
After a while, you will see the login in screen of the system:

To log on the system you have to input the user name, password and choose the company. Click the **OK** button to confirm.

If you logged on to the system successfully, the main menu will be shown. Otherwise, you have to re-enter the login information again.

2. Main Menu

You can find all the available modules on the Folder List:

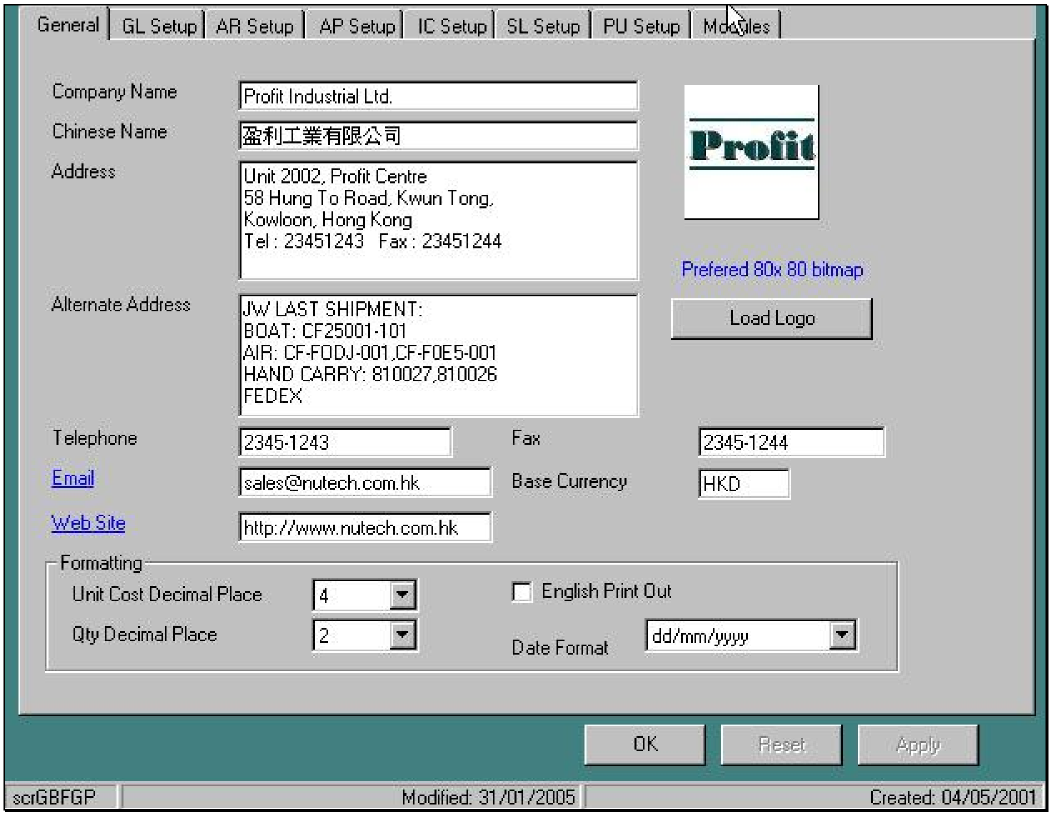


To execute the module, move the cursor to module that you want to execute.

To exit the program, select File – Exit or click the from the upper right corner.

3. Change Company Logo

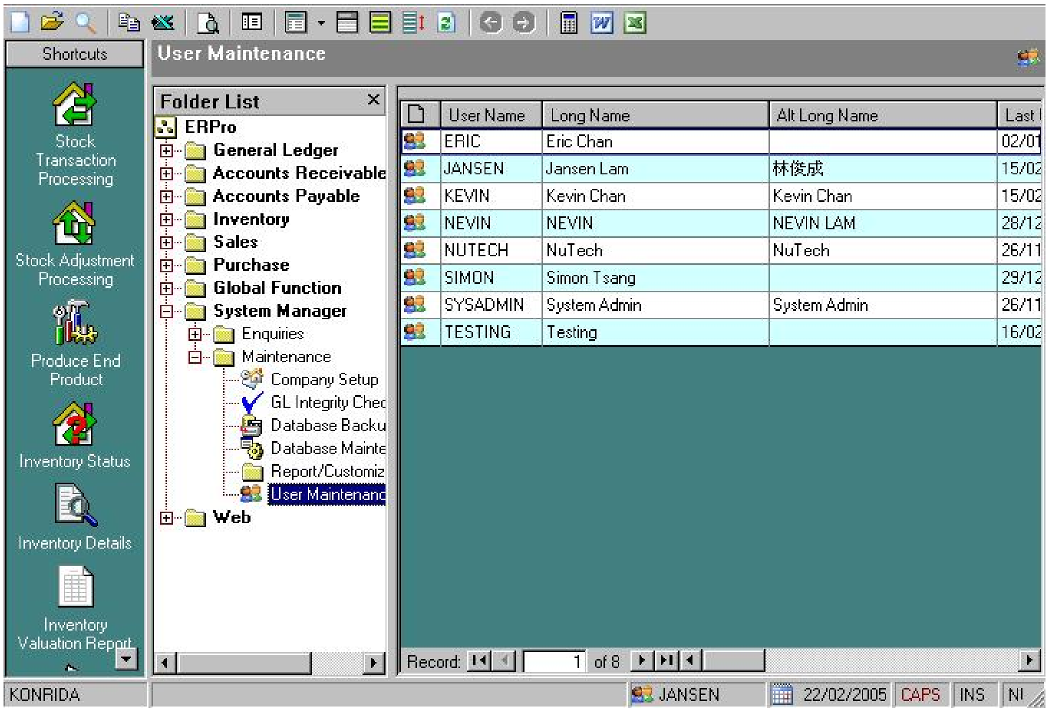
To change the company logo, use the Company Setup. This function is located on **System Manager > Maintenance > Company Setup**



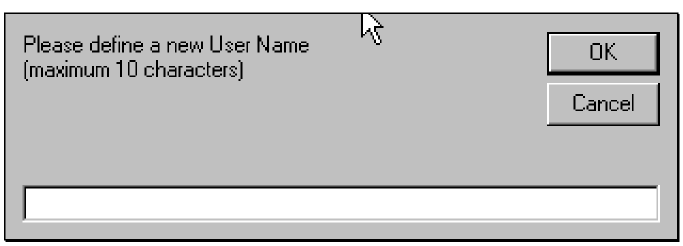
Click the **Load Logo** button to select the image file from disk and click **OK** to confirm.

4. Create User

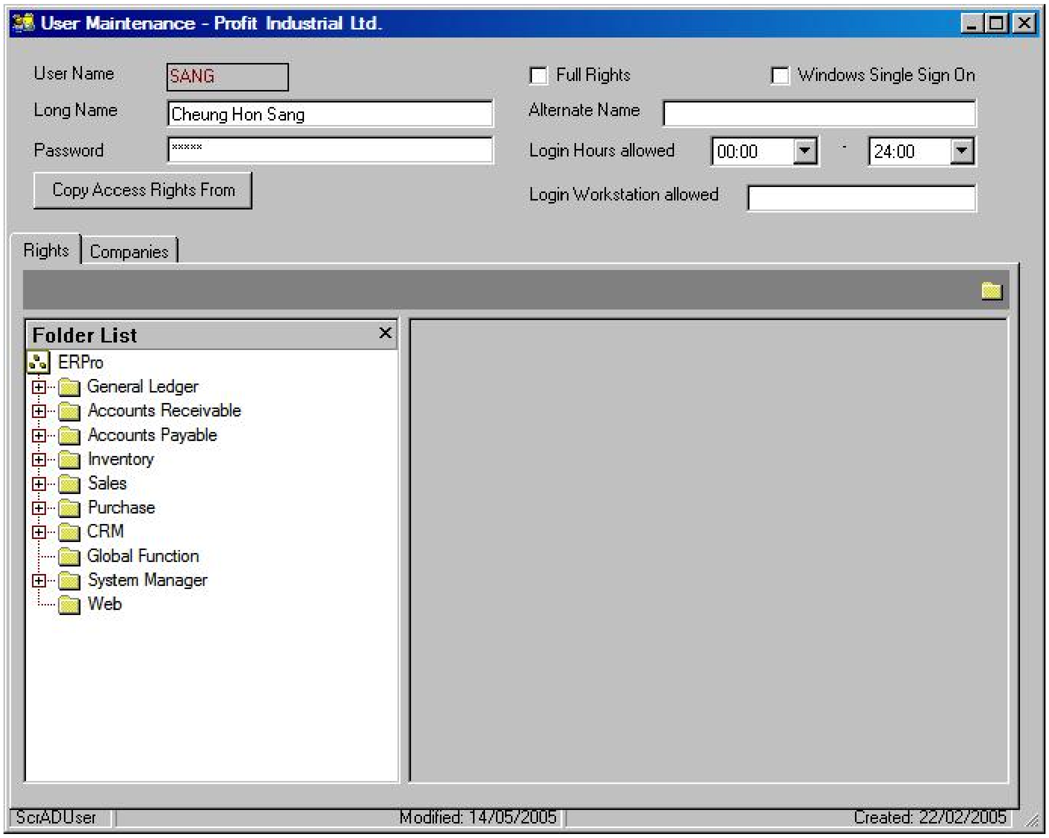
Use the **User Setup** to create users. This function is located on **System Manager > Maintenance> Setup > User Maintenance**



Click the **New** button of the control tool bar.

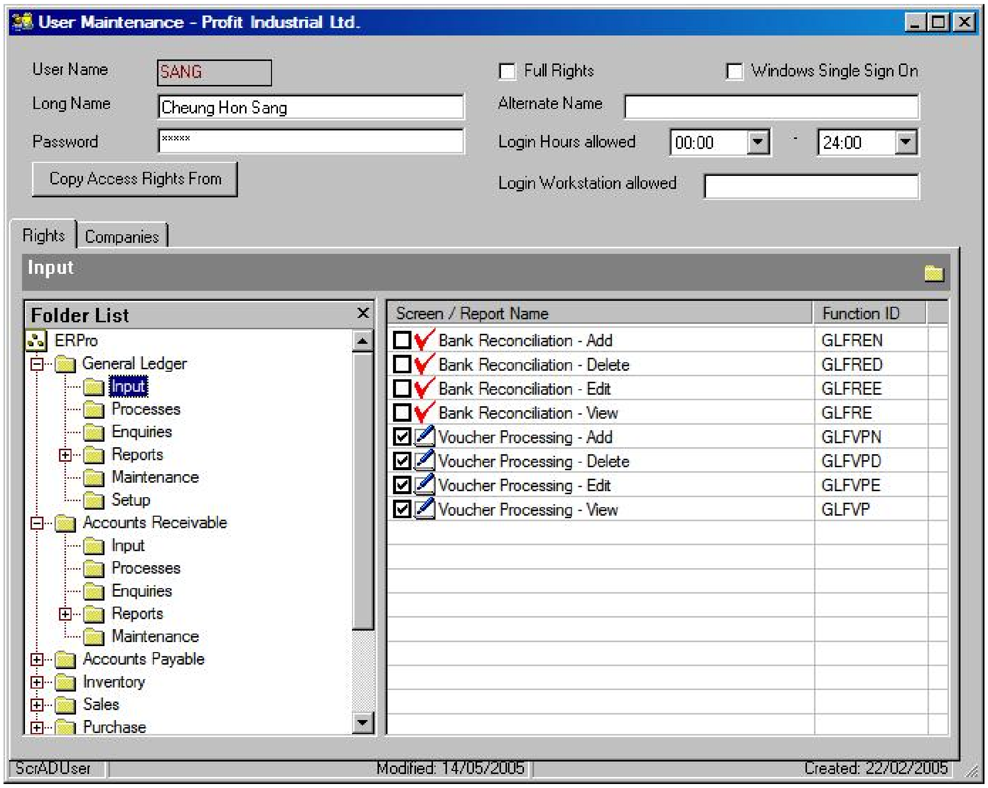


Input the User Name (User ID) you wish to add.

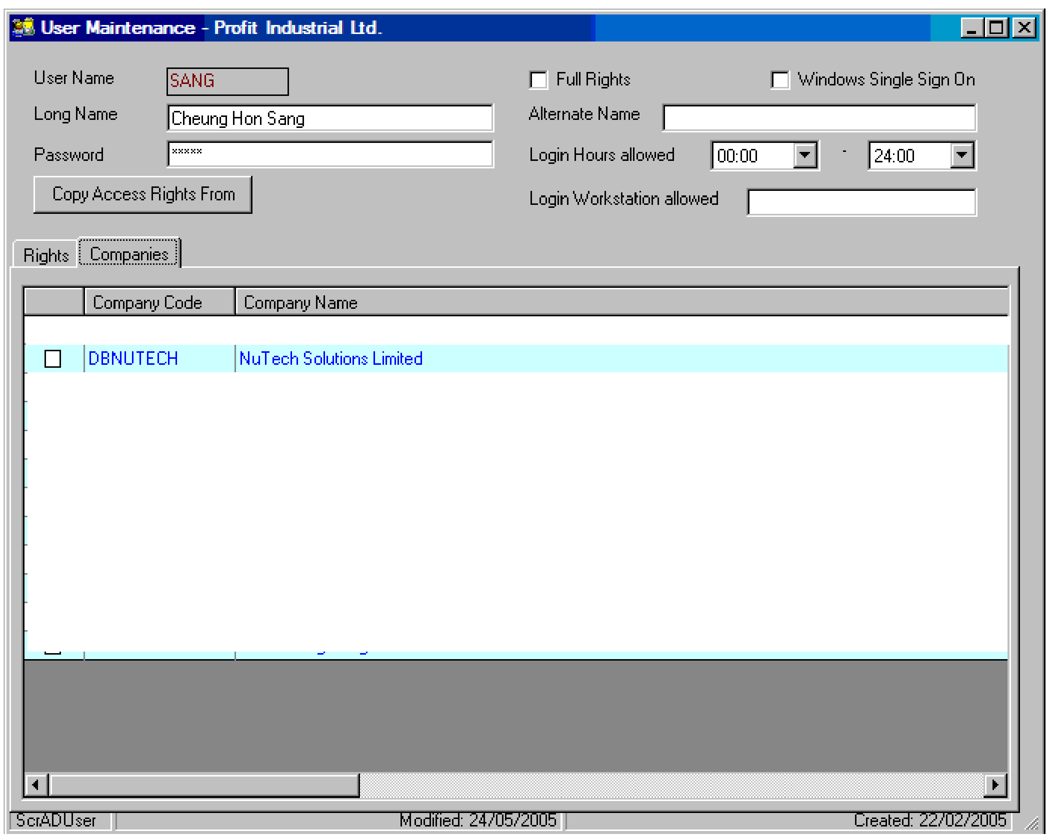


Check the **Full Rights** check box if you wish to grant the user with all rights.
Check the **Windows Single Sign On** if you wish the user can sign on to the ERPro using the Windows Logon User ID.
Input the **Login Hours allowed** and/or **Login Workstation allowed** enhancing the security.

You can also define additional rights for the user.



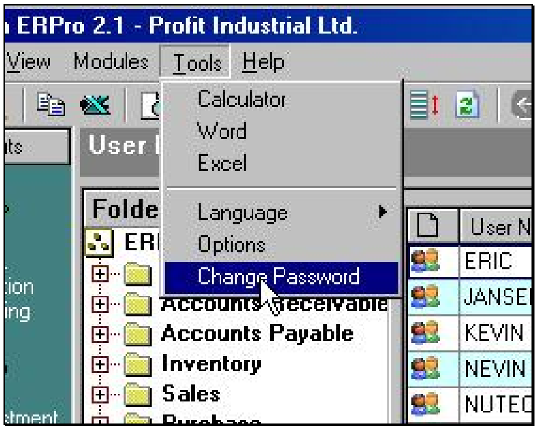
And the access rights for companies



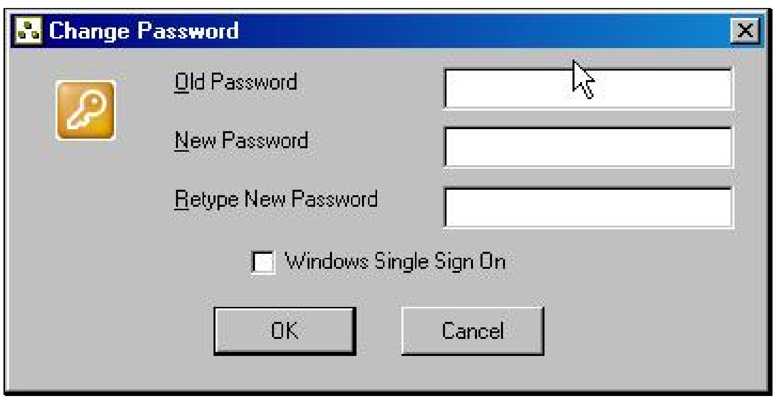
After creating the user, exit the whole system and try to use the new user name to logon and see the result.

6. Change User Password

To change the password, you have to use logged on to the system and go into menu Tools > Change Password.



Filling the column **Old Password** and enter the new password in both **New Password** and **Retype New Password** columns:

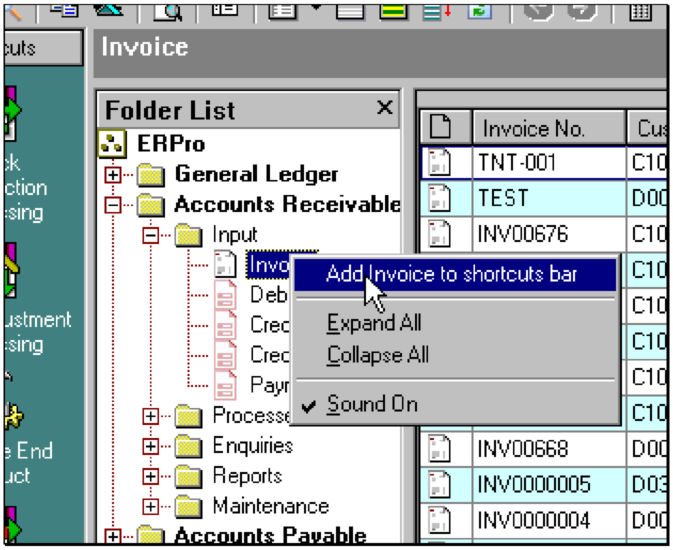


You can optionally select Windows Single Sign On option if preferred.

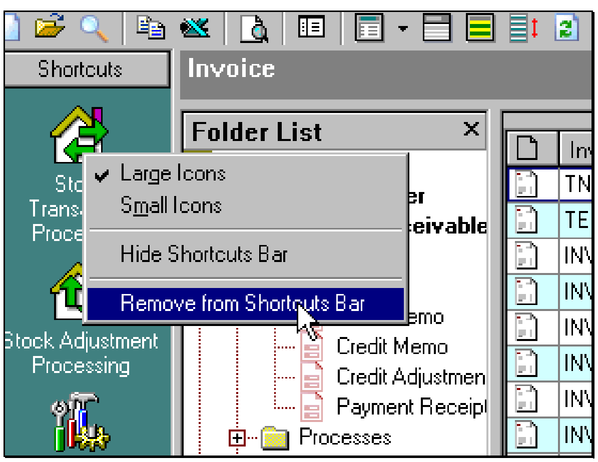
The new password will be affected from the next time you are logging on to the system.

7. Define Shortcuts Bar

The **Shortcuts Bar** is located on left hand side of the main menu. To setup the shortcuts bar, locate the cursor to the function you wish to add, and then click the right mouse button to select the item **Add FUNCTION to shortcust bar** from the popup menu:



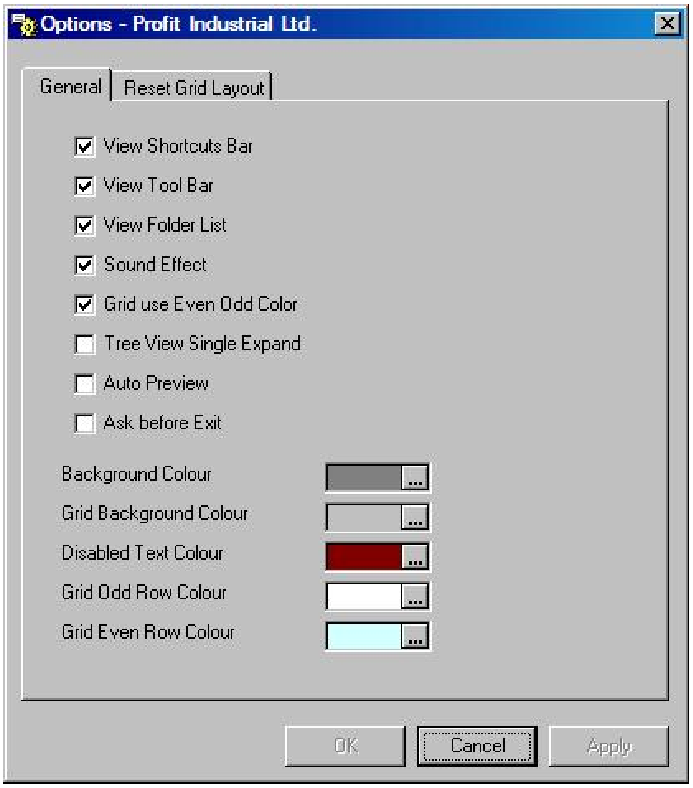
To remove the button from the shortcuts bar, move the cursor to the button that you want to remove and click the right mouse button:



8. User Options

Use User Options to define the appearance of ERPro for the current machine for the logged on company.

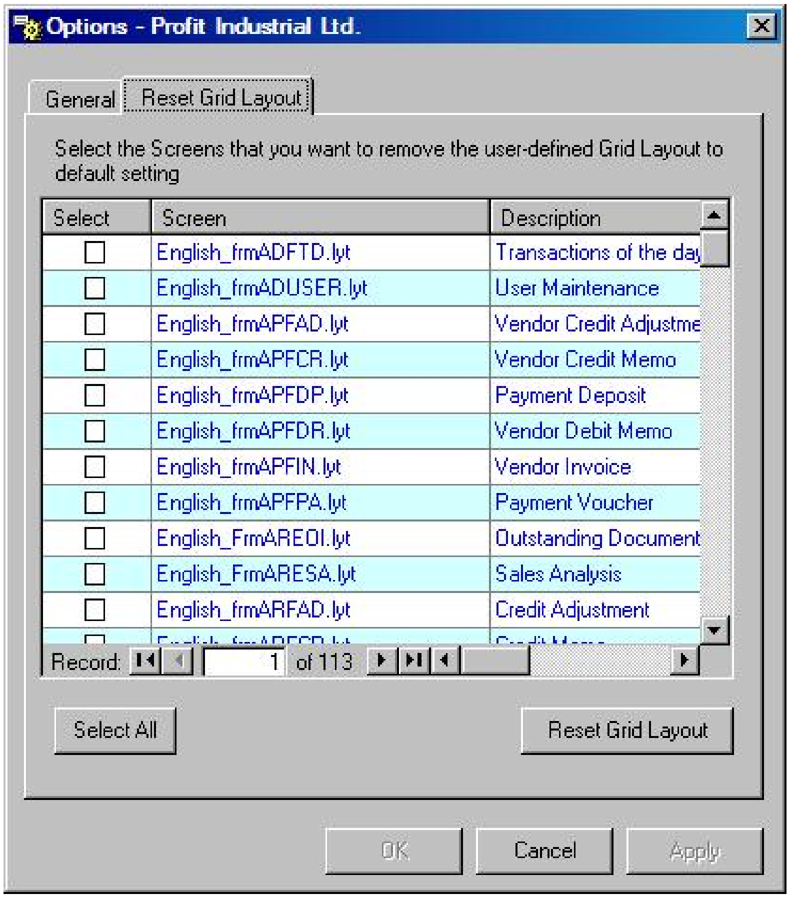
From the Main Menu, select Tools - Options



General Tab

View Shortcut Bar	Display the Shortcut Bar or not
View Tool Bar	Display the Tool Bar or not.
View Folder List	Display the Folder List or not
Sound Effect	Enable Sound Effect or not
Grid use Even Odd Colour	The Grid Area use alternate colour or not
Tree View Single Expand	When enable, the folder list will expand one branch only
Auto Preview	Enable Auto Preview in Table Form or not
Ask before Exit	Enable will prompt you "Exit or not" when exit ERPro
Background Colour	Define the Background Colour
Grid Background Colour	Define the Background Colour for the grid
Disable Text Colour	Define the colour of the disable Text
Grid Odd Row Colour	Define the colour of the Odd Row of the Grid
Grid Even Row Colour	Define the colour of the Even Row of the Grid

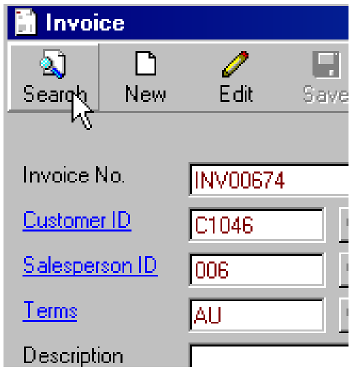
Reset Grid Layout Tab
For every Table Form, user can define their Grid Layout by themselves, e.g. the Column position, Group by settings, etc. However, if the user wished to reset the Grid Layout to it original state, use this tab to reset the grid layout



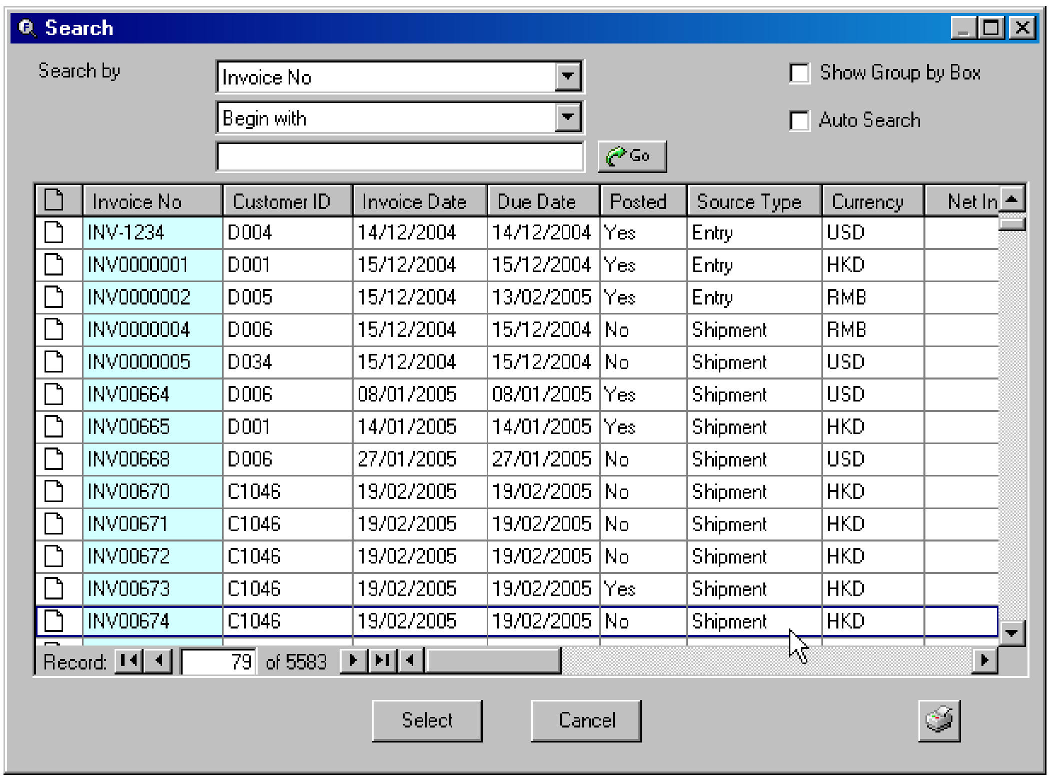
Find the Screen that you wish to reset, click the “Select” box and click “Reset Grid Layout” button.

9. Use Search Dialog

The search dialog is available for all entries. To call up the search dialog, click the **Search** button of the tool bar:

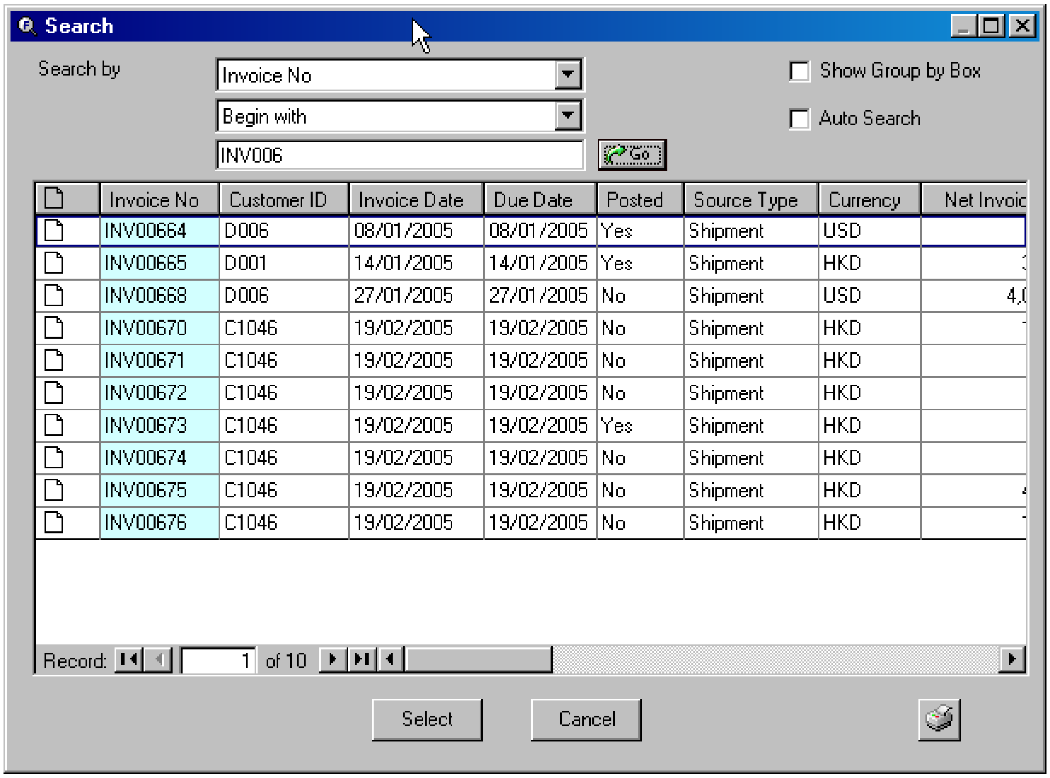


And then the search dialog will be shown:



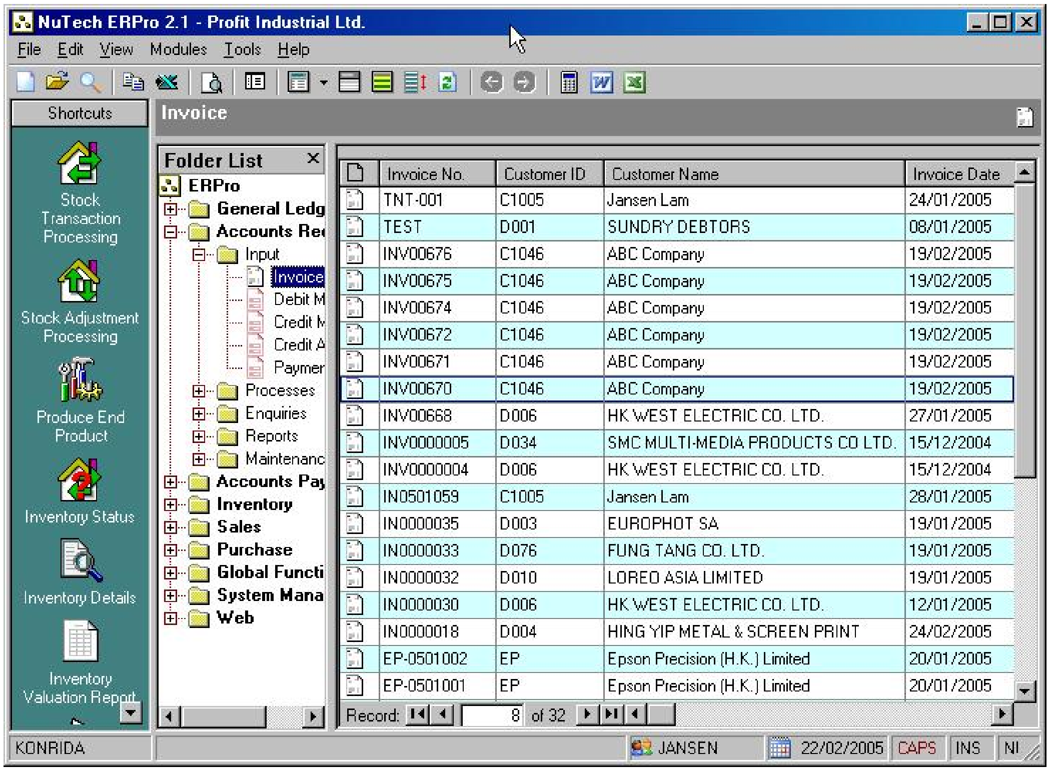
Press the **Up/Down arrow** or **Page Up/Page Down key** to select item and press **Select** button to confirm.

You can also enter some hint in the **Search Value** column for more easily to search:



10. Work with Table Form

Table Form is an advance method for record searching and it is available for all entries.

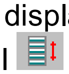


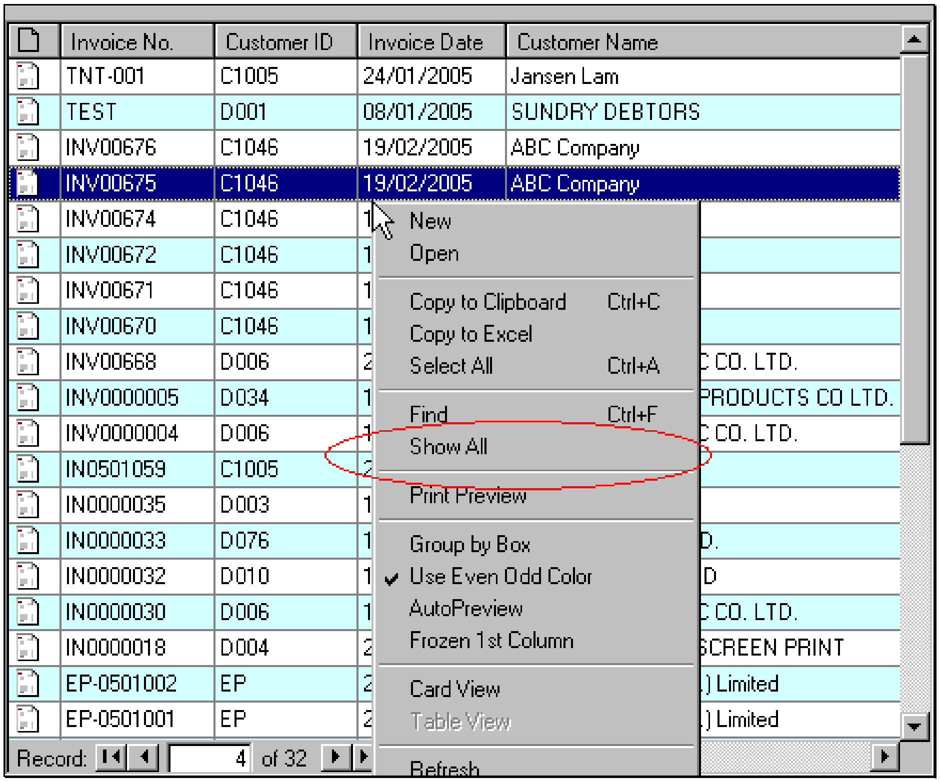
Press the **Up/Down/Left/Right arrow** or **Page Up/Page Down key** to control the cursor position.

You can also click the header of the table and the Table Form will sort by that column.

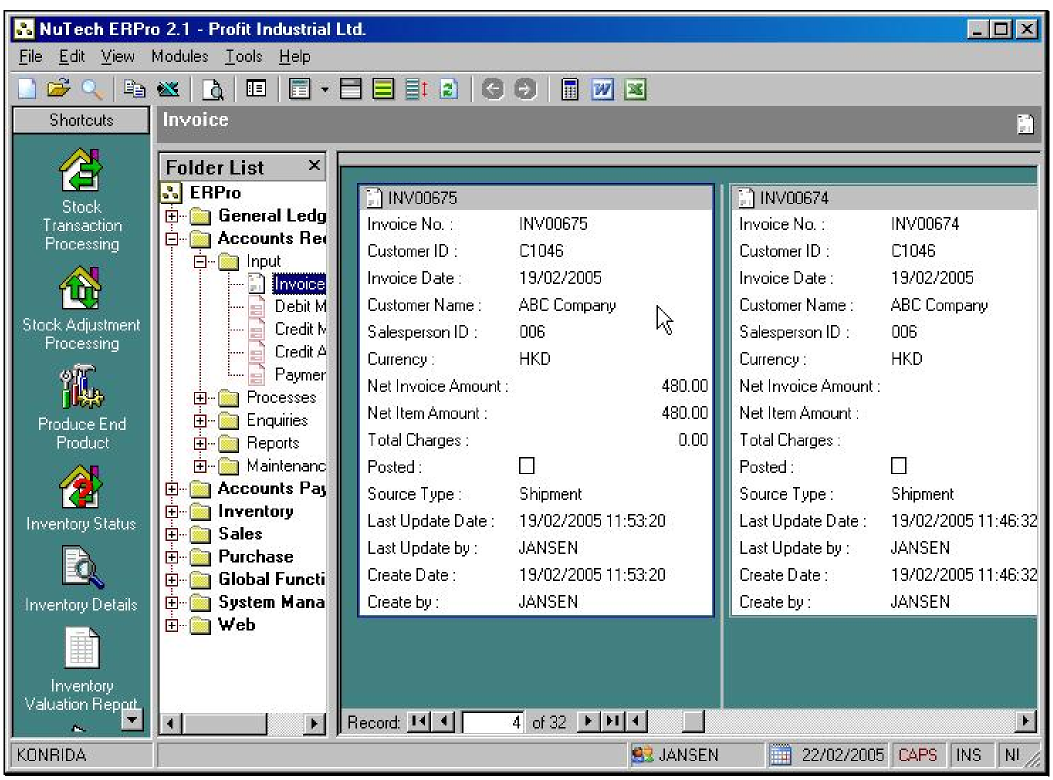
You can also drag and drop the header of the Table Form to organize the column position.

You can also resize the column by dragging the line between two columns from the header.

For transactional type of table, the table form is usually display the unposted transactions. To view all transaction, click the Show all  button from the tool bar, or right click the Table Form and select ‘Show All’



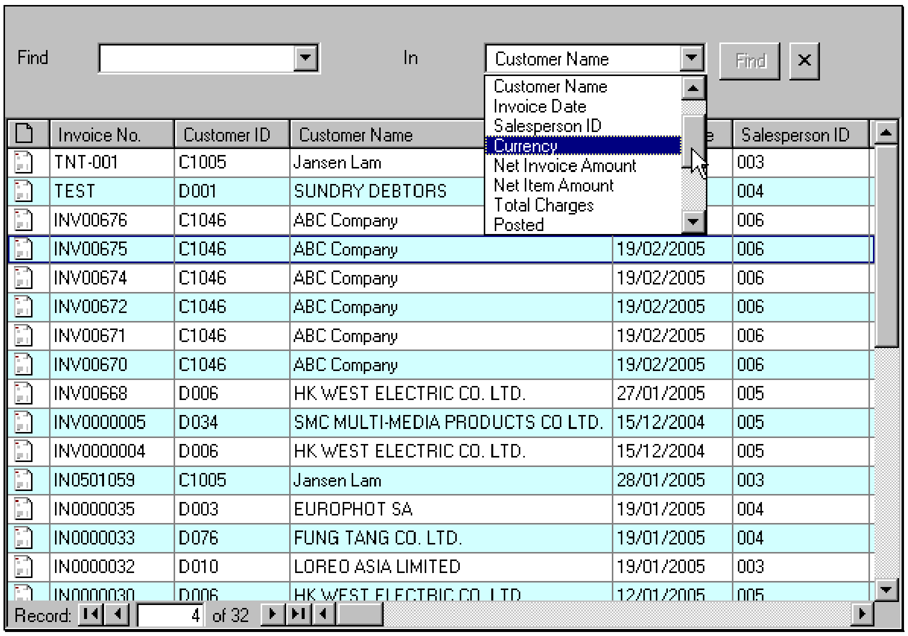
You can also change the Table Form from Table View to Card View by clicking the change view  button.



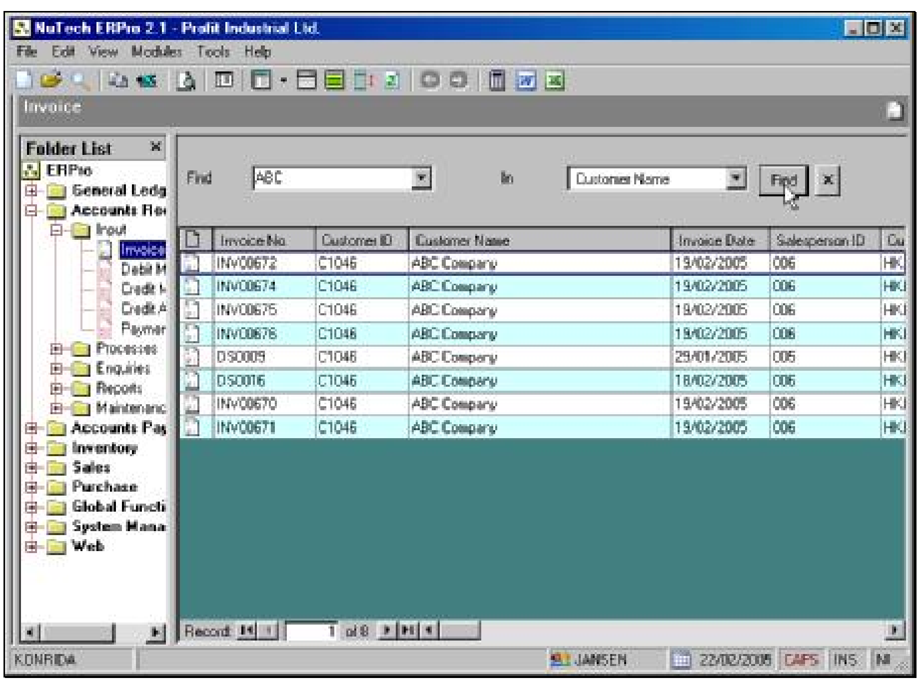
You can also export the Table Form information to Excel or Clipboard by first select the rows you wish to export and then right click select either 'Copy to Clipboard' or 'Copy to Excel'.

You can print the selected rows by first select the rows you wish to print and right click > select 'Print Preview' > and then click the 'Print' button.

To search rows from the Table Form, click the Search  button from the tool bar. Select the field that you wish to find and enter the text from the **Find** text box.

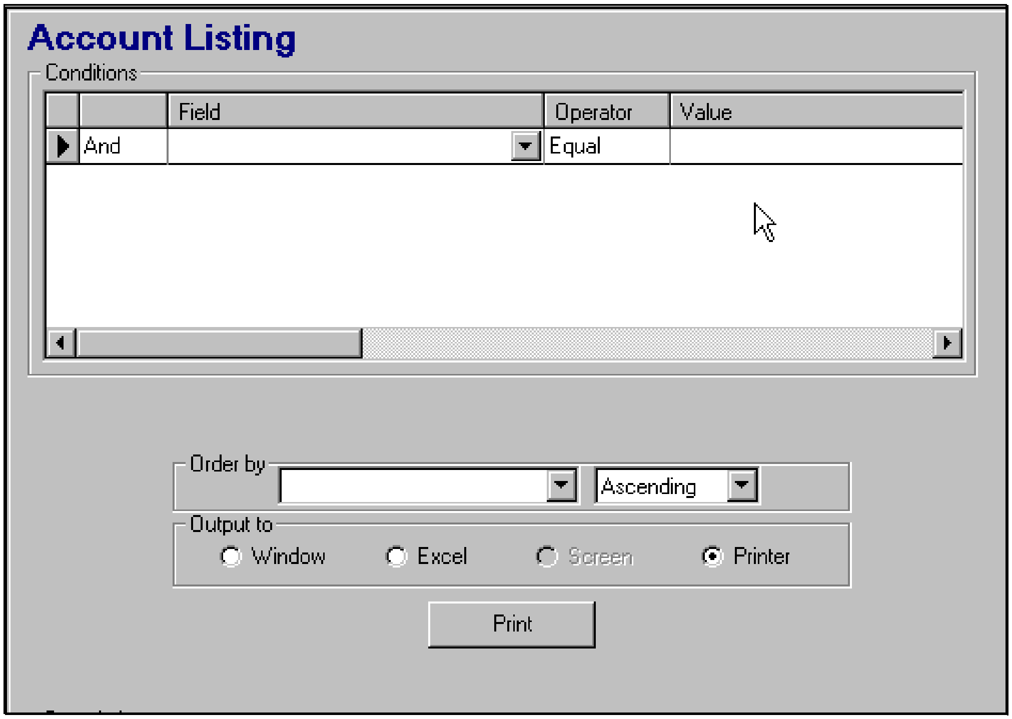


Click the Find button to search.



11. Work with Report Control

The **Report Control** controls the reporting contents of all the reports. In the **Report Control**, you can define the sorting order and the filter conditions:



From the Field Column, select the Field Name that you wish to filter. All the Field Name in the Report is available to select.

From the Operator Column, select the Operator for comparison.

Operators:

Equal	*Show the data that is exactly equal the given value.*
Not Equal	*Show the data that is not equal the given value.*
Contains	*Show the data that contains in the given value.*
Begin with	*Show the data that is begin with the given value.*
Between	*Show the data that is between 2 given values, use **..** to separate the values*
> or =	*Show the data that is greater than or equal to the given value*
< or =	*Show the data that is less than or equal to the given value*
>	*Show the data that is greater than the given value*
<	*Show the data that is less than the given value*

Select "And/or" when multiple conditions is given.

Select the "Order by" combo box to control the sorting sequence of the result (This is only valid in Excel Reporting)

Select the “Output To” option to let the output go to Printer, Screen, Excel or Window. (Depended on the design of the report, not all options are available to select).

“Output to Window” is to display the raw information in a Table Format for easy reference.

In this example, this will print the Customer Balance Report with all customer name is begin with the letter H and the Customer Balance in Local Currency is greater than $10,000 and the Customer Default Currency is USD. The sorting order will sort by the Customer Balance descending. And the output will direct to Microsoft Excel.