

## PBS Tips and Tricks #13 – MySet #3

Setting up defaults that will auto fill values into any report that you want.

In the last two Tips & Tricks we covered two of the features in the MySet package of additions to PBS. These were (1) the ability to set up a user so they could view but not change master file data such as in Vendor Maintenance and (2) be able to set up a user so they could have their own customized version of a lookup specifying which of the sort columns were to be used for sorting and whether the sort sequence was ascending or descending.

In this installment, we cover the Break-Out like functionality that allows you to set default options for reports. Like Break-Out, the program will automatically fill in selected fields with user-defined content. As with other MySet functions, this set up is unique to each user but does not require administrative access, so each user can customize their report parameters individually. This MySet function only works with report selection parameter fields, not for data-entry screens like BreakOut does.

Let's take an example of the AP Aging set of parameters. This is a good example because there are 14 selection parameters on the first page alone. The program fills in half of these fields with its own defaults:

Aged open items Company 00 Passport Software, Inc.

File Tools Help

**Report criteria** | **Aging periods**

Aging date 03/26/2021

Age by Invoice date

By vendor Number

Starting vendor # "First"

Ending vendor # "Last"

Group by A/P accounts

For A/P account

Show zero balance vendors

Print vendors on separate pages

Report type Detailed

Vendor payment group

Show Invoice number

Show fully paid vouchers

Print SQL report

<F2> = 03/26/2020, <F1> = use previous report printing values

OK Cancel

Perhaps you want to age by due date, not invoice date, and run the report in vendor name sequence rather than vendor ID sequence. And, if you are using the Vendor payment group field in any of your vendors, you will also have to put an "F5" (all vendor payment groups including blank) into that field.

To make changes to a field, select or enter the value you want to have defaulted into that field. This can be a keyed-in value if appropriate, or the value resulting from a drop-down selection, or even a function key value. Then go to the Help screen at the top of the window and select the "MySet (Save default)". The changed field (new default valued field) will briefly be highlighted in yellow:

Aged open items Company 00 Passport Software, Inc.  
File Tools Help

**Report criteria** | **Aging periods**

Aging date 03/26/2020

Age by **Due date**

By vendor Number

Starting vendor # "First"

Ending vendor # "Last"

Group by A/P accounts

For A/P account

Show zero balance vendors

Print vendors on separate pages

Report type Detailed

Vendor payment group

Show Invoice number

Show fully paid vouchers

Print SQL report

<F2> = "First"

Proceeding through the other two fields and exiting the screen and then later re-enter this selection screen, the following will be presented as the new set of defaults:

Aged open items Company 00 Passport Software, Inc.

File Tools Help

Report criteria Aging periods

Aging date 03/26/2020

Age by Due date

By vendor Name

Starting vendor company name "First"

Ending vendor company name "Last"

Group by A/P accounts

For A/P account

Show zero balance vendors

Print vendors on separate pages

Report type Detailed

Vendor payment group All

Show

Show fully paid vouchers

Print SQL report

There are several items to be aware of when setting this up. First, the program only "remembers" the last field you changed, so to change a field (e.g. change from vendor number to vendor name) go to the Help drop-down and select the "MySet (Save default)". You must do this cycle for each field you wish to change. Second, having made a change to a field, the program automatically advances to the next field, however, you will reselect the field you changed as if you were going to manually type the content. Then, with the cursor in that field, go through the Help/MySet (Save defaults)" cycle.

Once you have all your defaults set, exit the program back to the main menu, re-enter the program "fresh" and confirm your selected defaults are saved and fully in place.