

PBS Tips and Tricks #11 - MySet

Please share this with your clients.

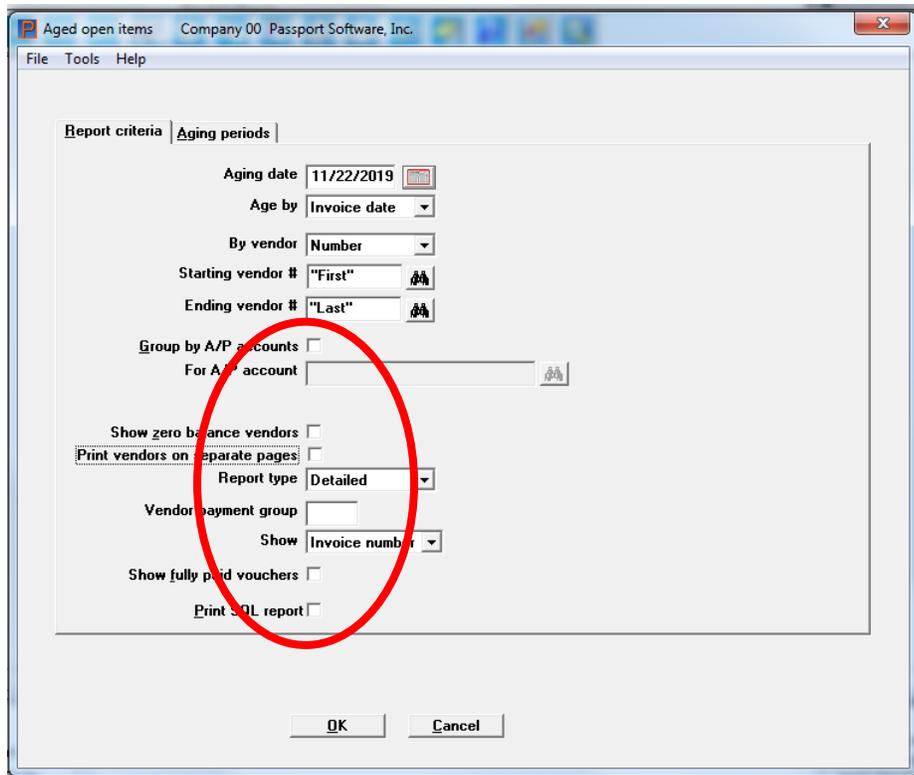
MySet is a set of user setups and defaults, making PBS screen life much easier. It is both a sub-set of the features of Break-Out and also a super-set, as it does a number of things Break-out never did. MySet is currently a group of three functions allowing you, or the administrator, to control aspects of the functionality of your screens. These controls are different from what you have set up in the Custom Menu setup of the PBS system. Most importantly, each user can now have their own individually tailored My-Set parameters.

So how does it work?

- MySet (View only): If a user is not tasked with maintaining a master file such as the Vendor or Customer Master data, but needs access to the information in those master file screens, such as names, addresses, emails, telephone number, concise summaries of purchase history etc., then a Query only flag is placed on that users login. They can then view the information for that screen, but cannot change it. This setting can be applied individually to each Master File in the PBS system (Vendors, Customers, Inventory Items, Employees, etc.)

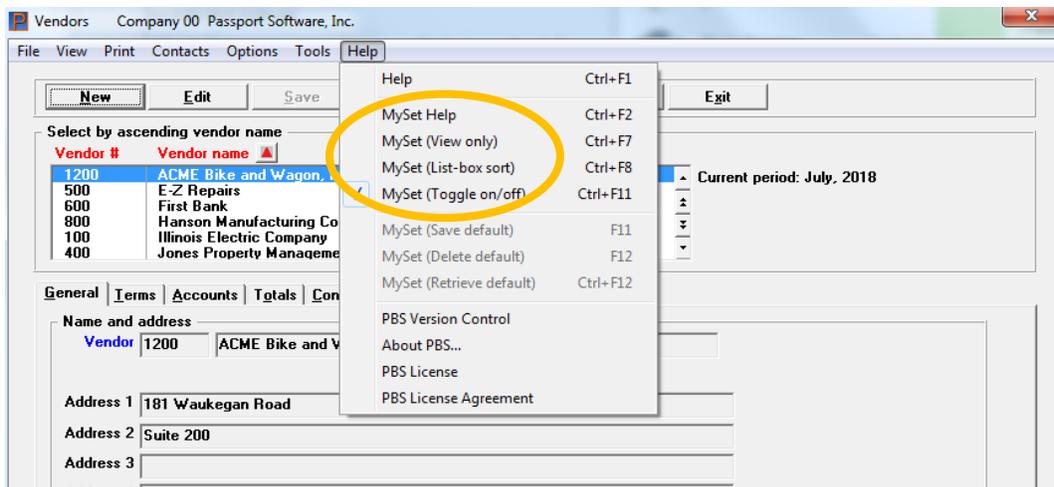
In the past, a user (thru the Custom Menu function) could have only *access* or *no access* to a menu item, but once access to the menu item was granted, Query/Add/Change/Delete abilities were all available. Now, with a Query-only function, they can be given access with no Add/Change/Delete capabilities.

- MySet (List-box sort): Depending on a user's function and knowledge of the system, use of the various Look-ups may differ from one user to another. For example, the AP Clerk may be very familiar with the Vendor ID's assigned to suppliers but the CFO may not, and prefer to look up the vendors by name. This function allows you to set up *each user for each Lookup* with a specific Look-up column (e.g. Vendor ID versus Vendor name) and a default sort order.
- MySet (Toggle on/off): This is the Break-Out like functionality in the graphic interface for PBS. Currently the function only applies to the parameter entry for reports, where much repetitive entry of fields is located. As an example, consider an AP Aging where you might want to default all the entry fields after Ending vendor # to values of your choice:



This requires only the entry of the as-of date, terms type selection, vendor sequence and vendor range. The remainder is pre-filled in and ready to go!

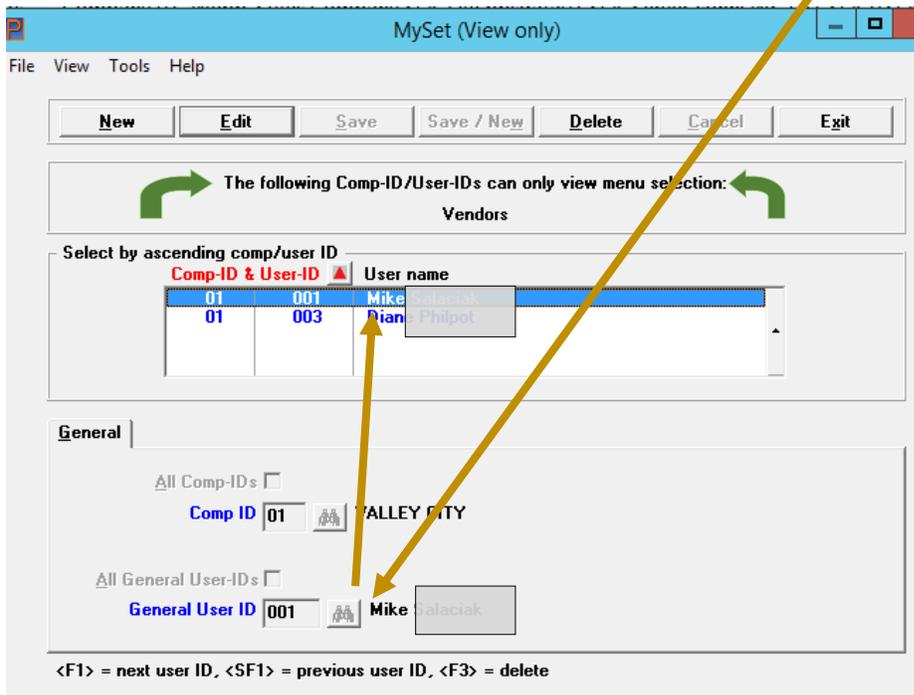
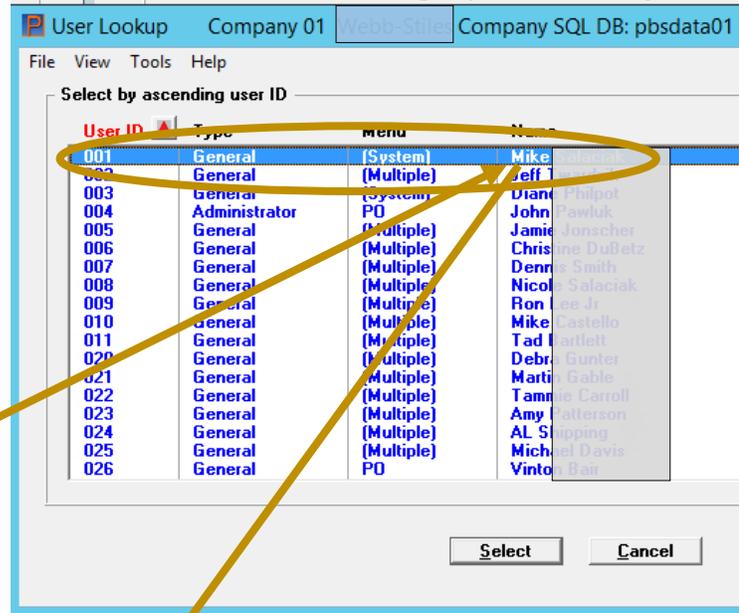
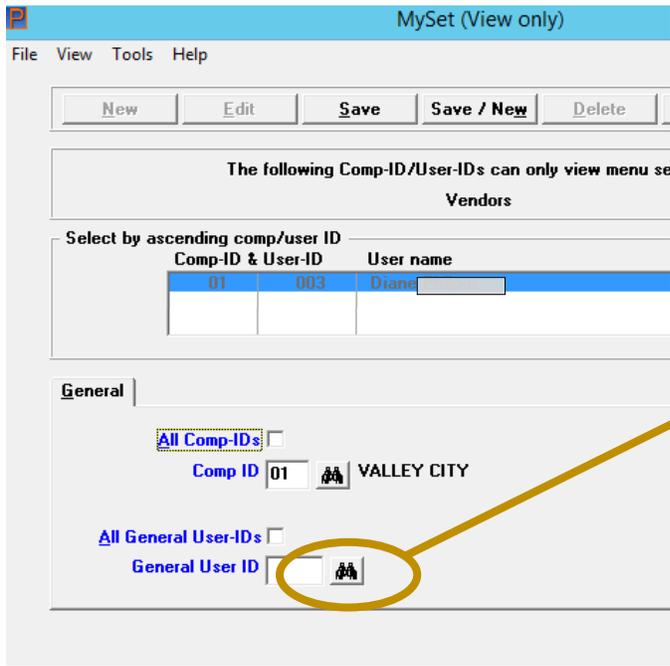
The MySet selection is available through the Help drop-down at the top of the PBS screen:



The functions are documented in the MySet Help screen, also available in the Help drop-down. As in the case of calling up the general Help function – Ctl_F1 (discussed in T&T#4), the MySet

Help can be called up using Ctl_F2. Other functions displayed above have their own Ctl_function key call-up as seen in the above Help drop down.

MySet (View only): Administrators can set View only screens when changing access privileges for someone else. While logged in as admin, select the screen to make View only, select the Help drop down and then MySet (View only). You will see a screen showing any existing View only users and options at the bottom to select an additional one:



On the screen above, we selected Mike from the Look-up (user ID 001 for company 01) and after saving this selection, Mike joins Diane on the list of people who can View only the Vendor Master screen. The green arrows pointing on the screen indicates the list shows the company ID and the user ID, in addition to name, which indicates that this choice is for a particular company for a particular person. Different choices can be made for the same person under different company ID's.

In the next installment we will explore the other two MySet functions. If you wish to read ahead, these functions are laid out in the MySet Help function (Ctl_F2).