**PBS Tips and Tricks #6 - User Setup and Custom Menus**

This Tips and Tricks segment on User Setup and Custom Menus deals with setting up user privileges and creating limits on what a person can do in PBS.

PBS has a rather straight forward but robust system for allowing you to determine who can do what within the system. The basic principles are:

-A user's login determines, via the User Setup and Custom Menus, what is available for them to use out of the complete set of functions that the system is licensed for.

-Under CTL/Setup there are two submenu entries, User Maintenance and Menu Maintenance. These are described in detail in Chapters 4 and 5 of the PBS Administration manual.
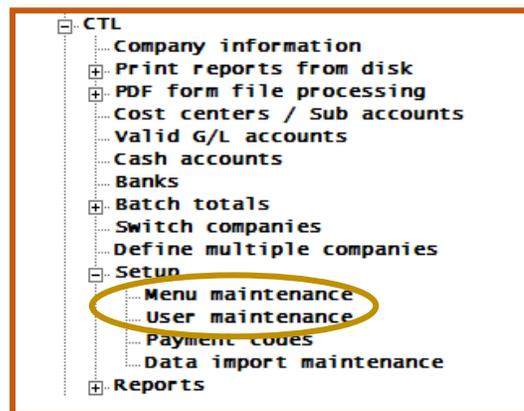


-Under User Maintenance you actually "create" the user, add names, addresses, password and certain user preferences such as the "screen look" – Graphical versus Classical and several other choices.

-One major choice here is the choice to make the user a PBS Administrator or a General User. The administrator has access to all programs, functions and reports while the General User will be restricted both as to which Companies they can access (in a multi-company environment) and what they can do within each company.

-Under Menu Maintenance you create a profile for a user e.g. Peter's Menu or, for a group (AP Clerks), by creating a custom menu by selecting which menus and sub-menus and specific functions will be displayed for that user to have on their menu and to get access to. Selecting the high level "AP" for example will give a person access to all of AP. Selecting "Payables" will turn on all of the functions within the "Payables" submenu – "Enter", "Edit List", "Post" etc. Selecting a particular item within a sub-menu e.g. "Select a group of vouches" with the "Prepare payments …" submenu gives access to only the selected items.

-Within the Menu Maintenance function, you can navigate to a high level menu item like "AP" or to a sub-menu like "Payables" or to an individual item. By selecting Edit you can then use the F1 key to enable the use of that function/menu or F3 to disable a previously enabled one. These two appear in the lower left corner of the screen when they are available.
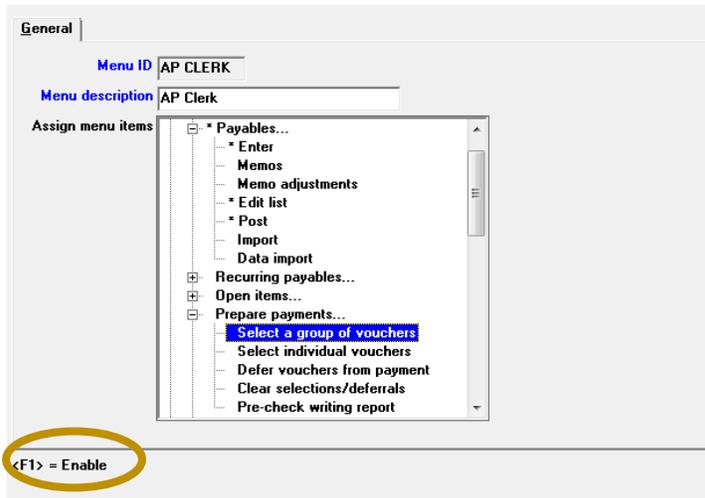
For example, within the "AP/Payables" sub-menu:
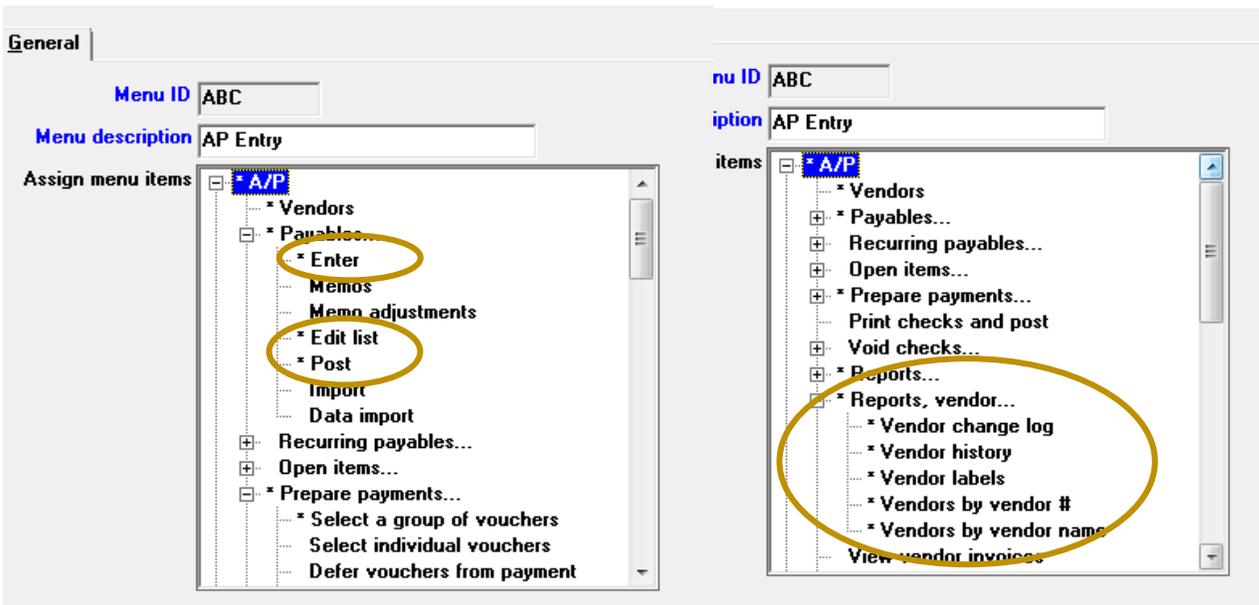


Under "Payables …", three items have been individually selected using the F1 key and these are the asterisked items. By contrast the "Reports vendor …" was selected at the sub-menu level and as a result all six of the individual functions underneath it have been selected.

These two setups plus three additional ones for the Vendors, Prepare Payments and Reports menus (also asterisked in the above) will result in the following abbreviated AP menu:
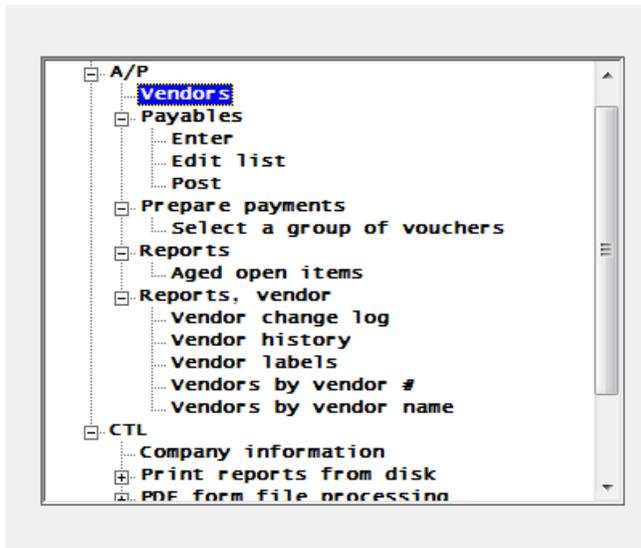
The connection between the user's entry in the User Maintenance screen (below left) and the custom menu for that user (below right) which is in the Menu Maintenance function is seen as follows:
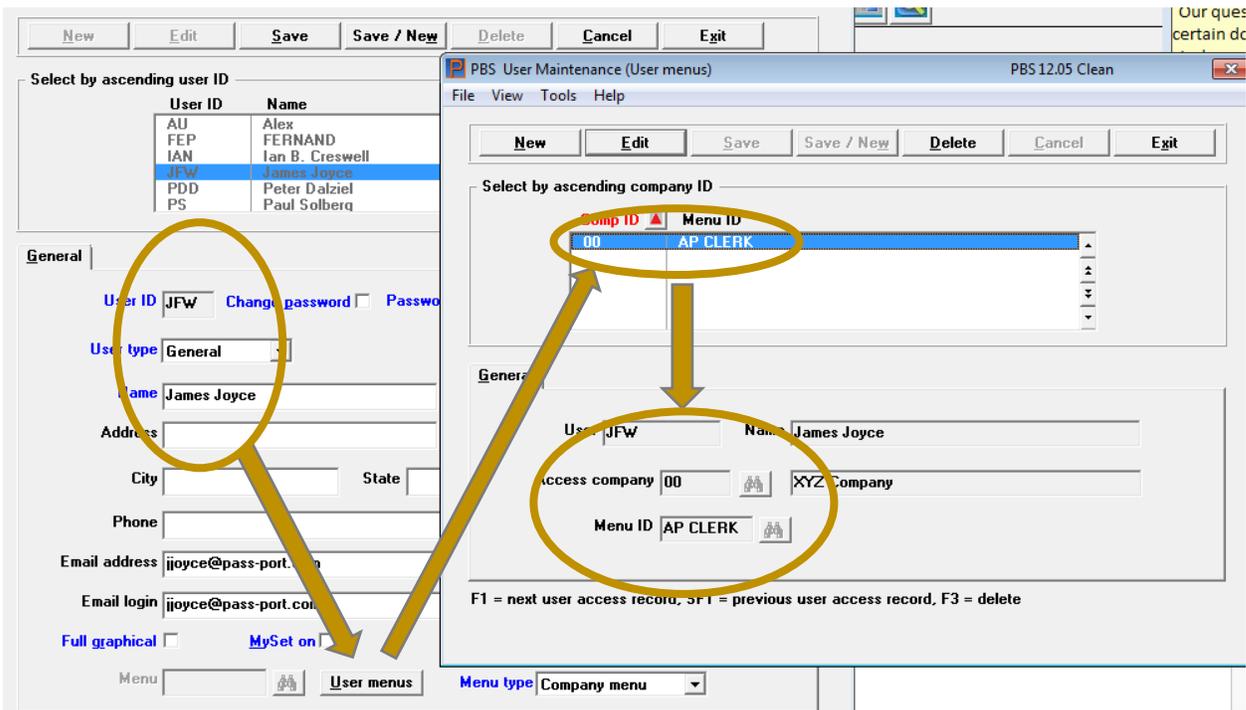


This setup will limit the specified user to the use of just the AP functions shown.

In Tips and Tricks #7 we will show how these custom menus can also be used to control who can see what printed-to-disk reports.