

Power Link Preferences

Tuesday, December 13, 2011

Tailoring XA to meet *your* needs

Rod Fortson – Sr. XA Consultant

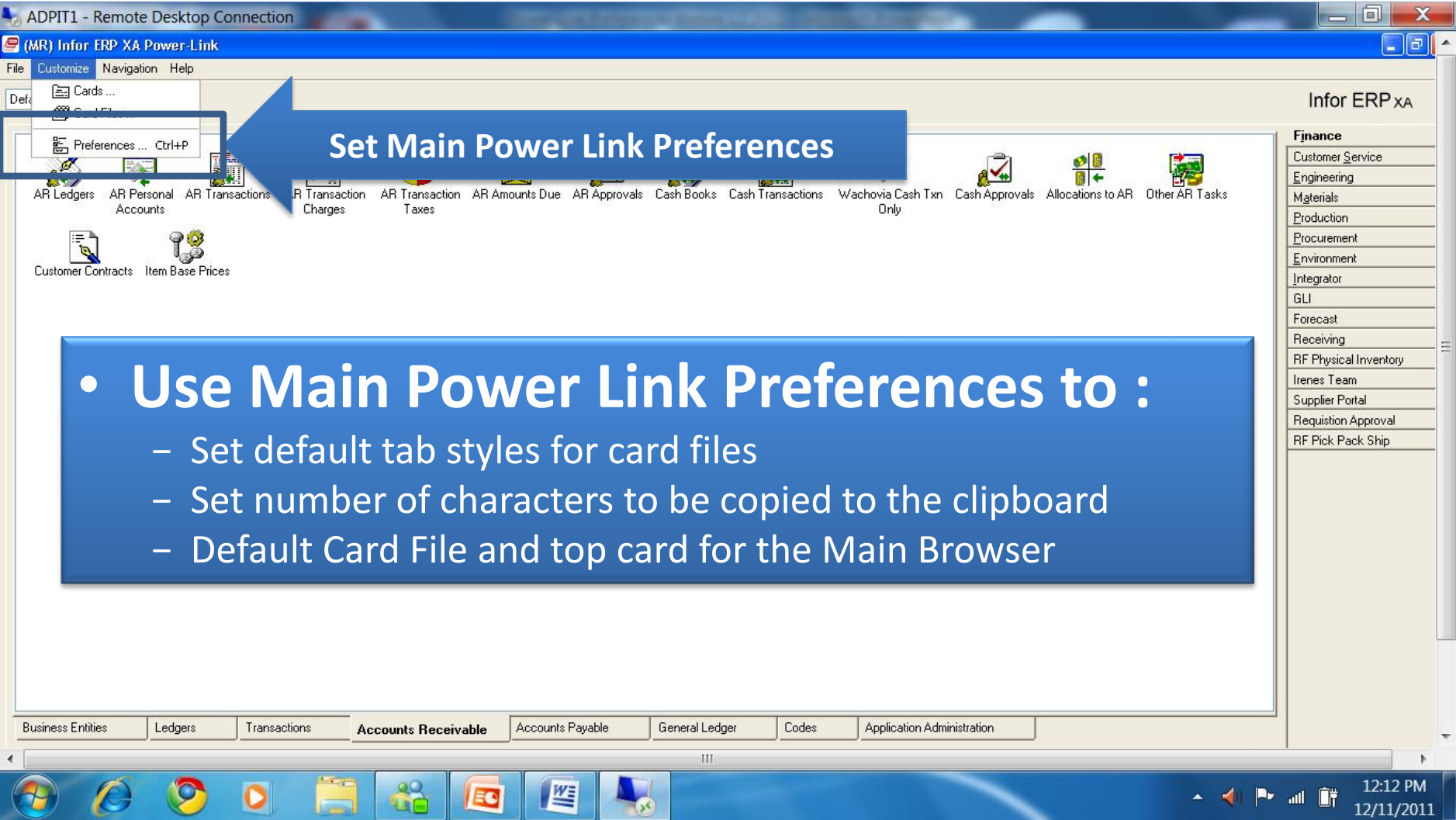
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- **Overview of Preferences**
- **Main Browser Preferences**
- **Object Preferences - Preference Types**
 - General Card Preferences
 - List Preferences
 - Card File & Card Preference
 - Template Preferences – Add, Change and copy defaults for the Object
 - Workspace Preferences
 - **New Open Actions** – What to do on double click?
- **Preference Settings – Advanced Object Examples**
- **Public & User Controlled Preferences**

- Each user sets personal preferences.
- Preferences designate 'default' settings for:
 - **Functionality setting examples:**
 - Auto create Enterprise Items in EPDM
 - Immediate processing of transactions (MRP Recommendations) and printing shop packets when creating MO's.
 - Default Company/Warehouse (CSM CO entry), Buyer, etc.
 - Lists: Views, Subsets, Sorts – Specify on Object Open
 - Card files and Active Card - When Open Power Link or double click a record
 - Templates – set when Create, Change and Copy
 - Broadcast/Receive (Workbenches) settings

- By setting Preferences, there can be fewer 'clicks' to perform your job.
- There are Preferences in each Power-Link object sometimes representing the header, detail and even release records.
 - **For example, PO entry has Preferences for**
 - Purchase Order Information, to.....
 - PO Item Information, to.....
 - PO Item Releases (for Blanket Items)

Main Browser Preferences



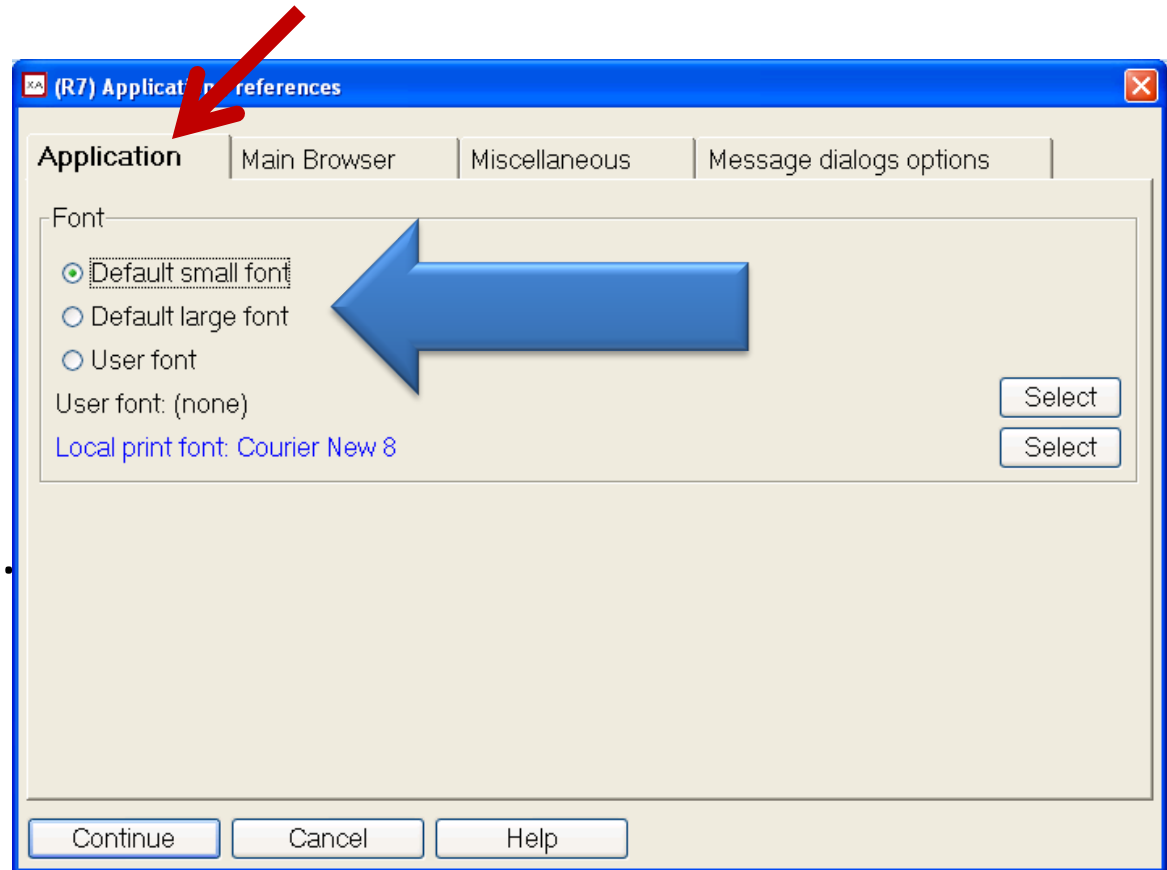
The screenshot shows the Infor ERP XA Power-Link interface. A blue callout box with the text "Set Main Power Link Preferences" points to the "Preferences ..." menu item in the "File" menu. Below the callout box, a blue box contains a list of preferences to be set:

- Use Main Power Link Preferences to :
 - Set default tab styles for card files
 - Set number of characters to be copied to the clipboard
 - Default Card File and top card for the Main Browser

The interface also shows a navigation pane on the right with a "Finance" section containing various modules like Customer Service, Engineering, Materials, etc. The bottom of the screen shows a taskbar with various application icons and a system tray with the date and time (12:12 PM 12/11/2011).

Main Browser Preferences

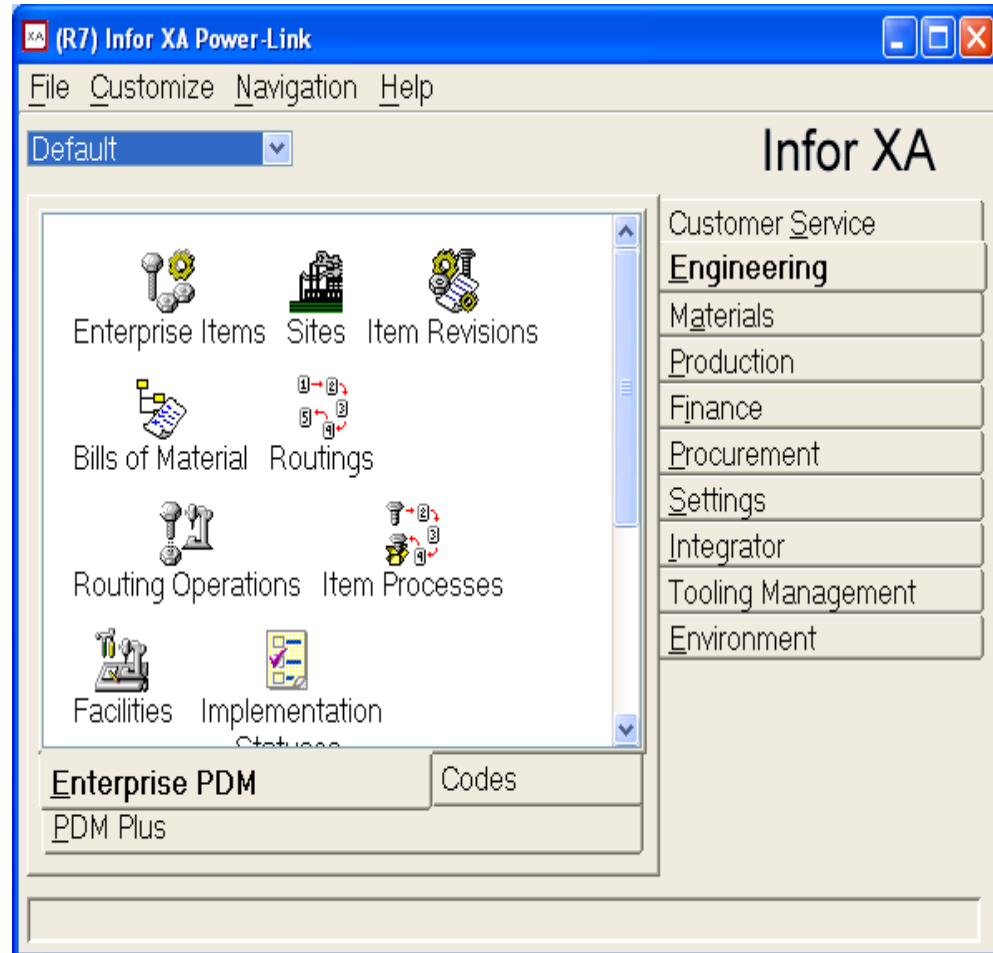
- The Application Card will define font size and style for all application cards.
- You can also change the local print font size and style if desired.



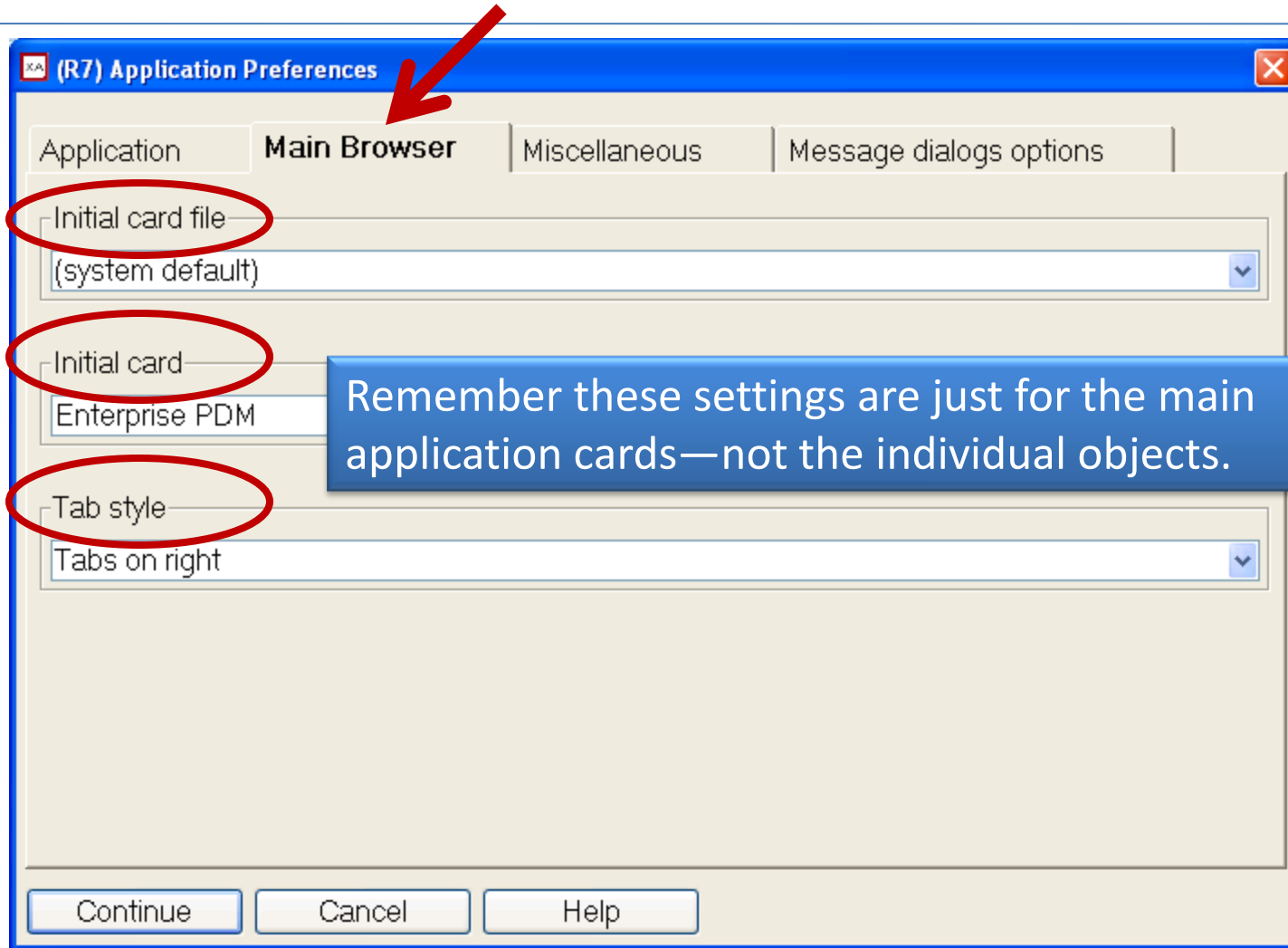
Large vs. Small Fonts

Small Font Preference:

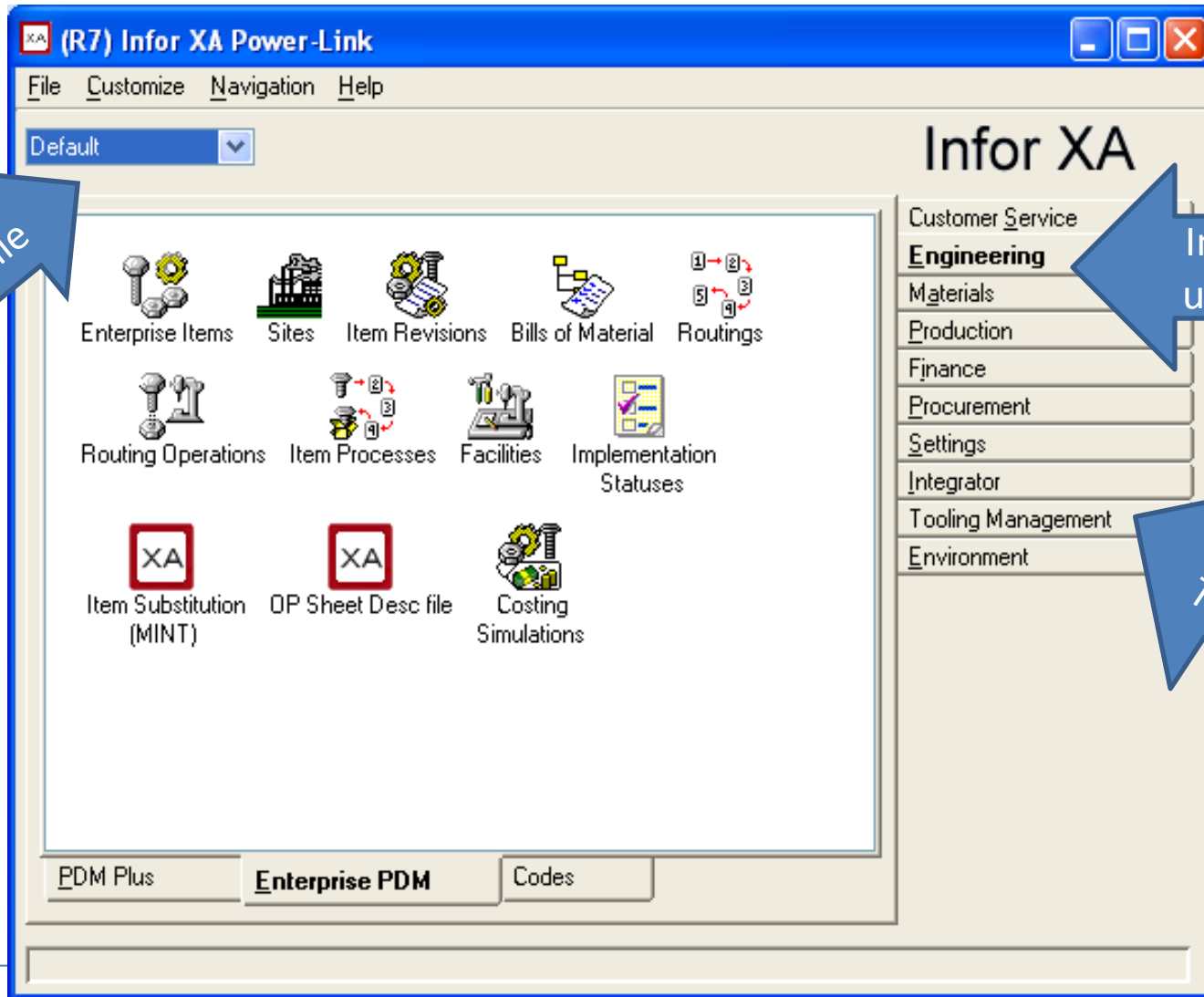
Large Font Preference:



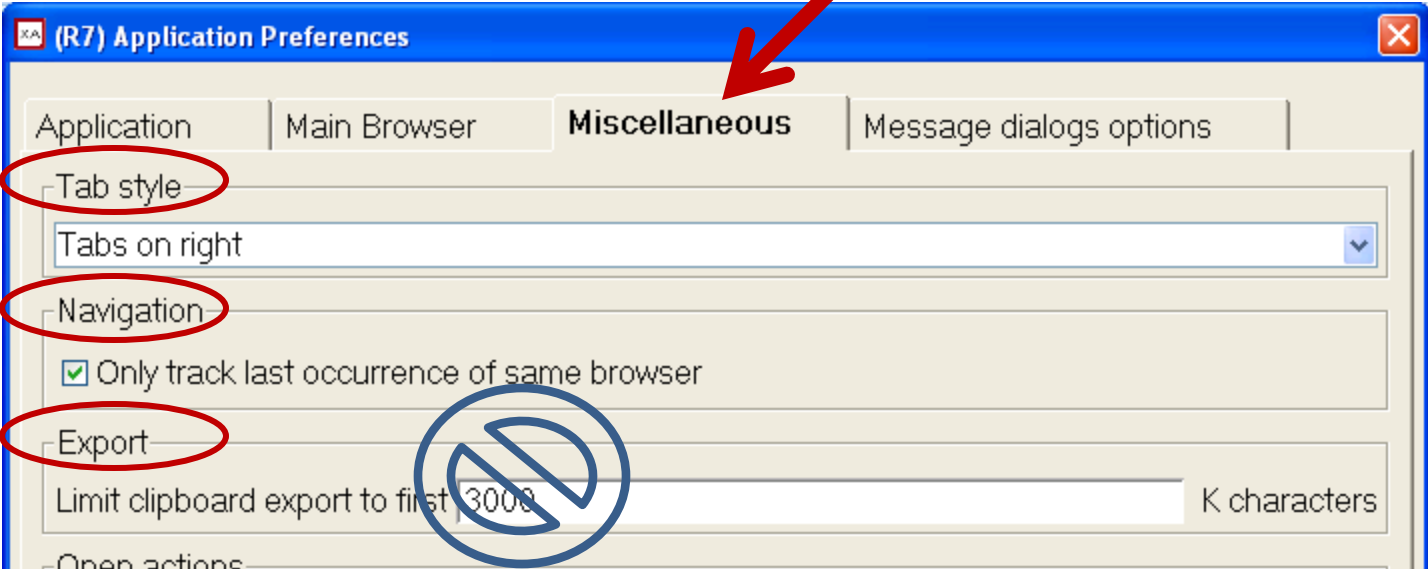
Main Browser - Card File Defaults



What Setting Card File Preferences Does



Main Browser - Miscellaneous



Tab Style

Sets Default tab style for all card files in Power-Link. For example, when double clicking on a PO, what type of tabs do you want on the card file that will open? Options are 1) tabs on top, 2) bottom, 3) right, 4) left or 5)card file. Default “card file” style is less user-friendly since all cards ‘shuffle’ when you click on a card.

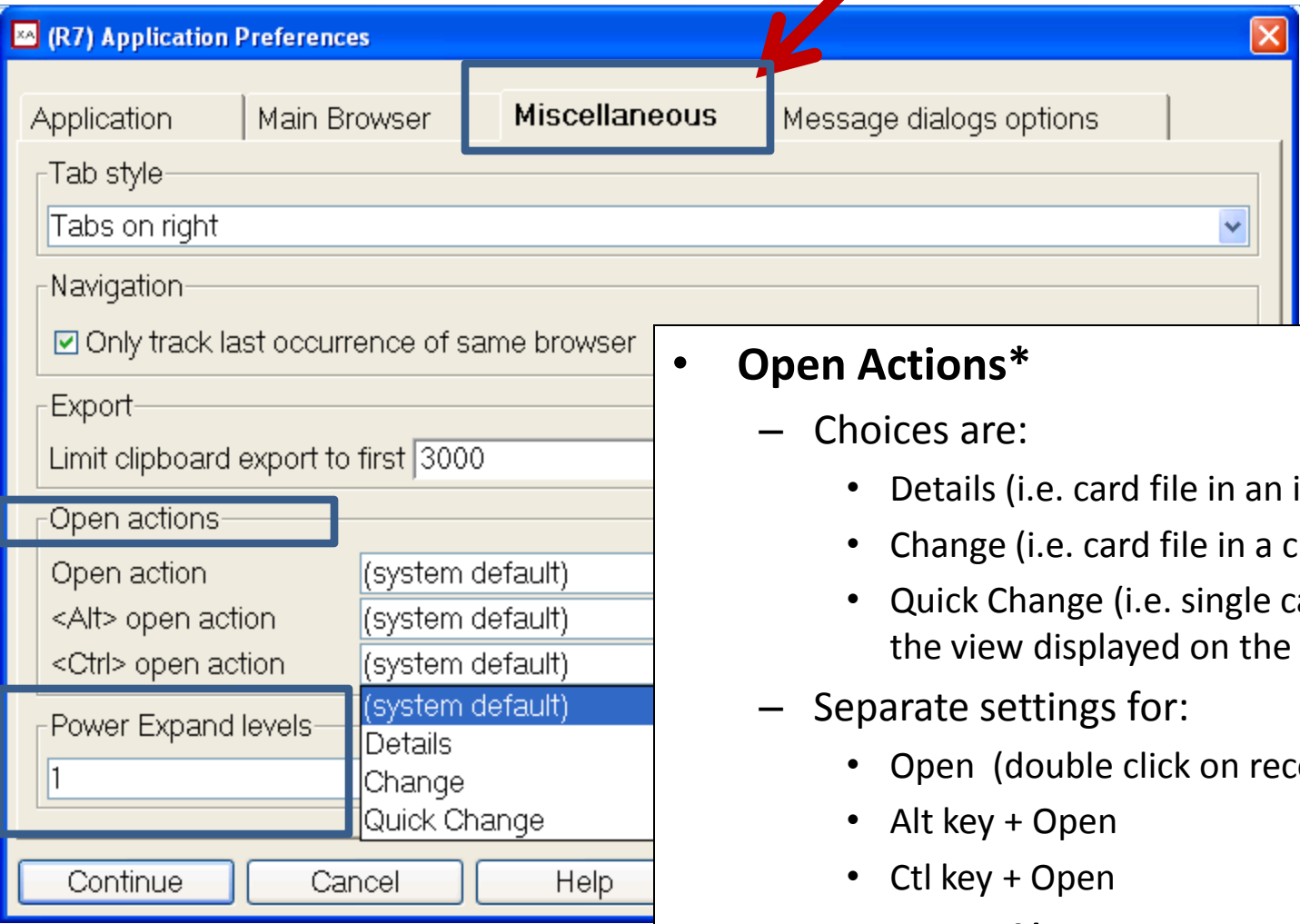
Navigation

Track ‘where you’ve been’ since you signed on today.

Export

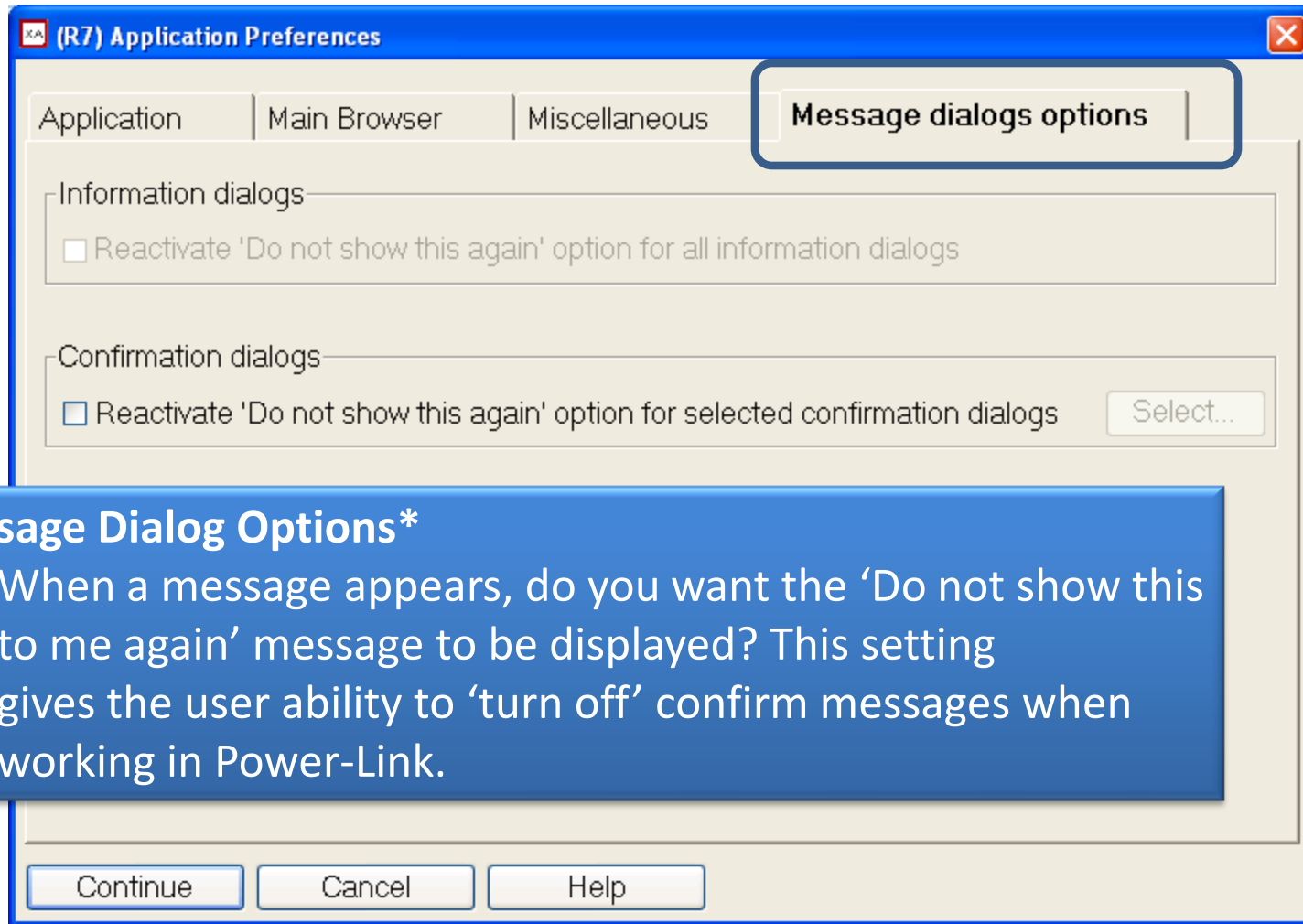
This sets the limit on **number of characters in a list** to copy to a clipboard to paste into Excel. **Set to 9999999 to prevent message.**

Main Browser – Miscellaneous



- **Open Actions***
 - Choices are:
 - Details (i.e. card file in an inquiry mode)
 - Change (i.e. card file in a change mode)
 - Quick Change (i.e. single card with the fields on the view displayed on the card)
 - Separate settings for:
 - Open (double click on record)
 - Alt key + Open
 - Ctl key + Open
- **Power Expand***
 - When clicking on the 'Plus' box on an overview card for orders or BOM's, can open all levels at one time or a single level.

Main Browser – Message Dialog (R7)*

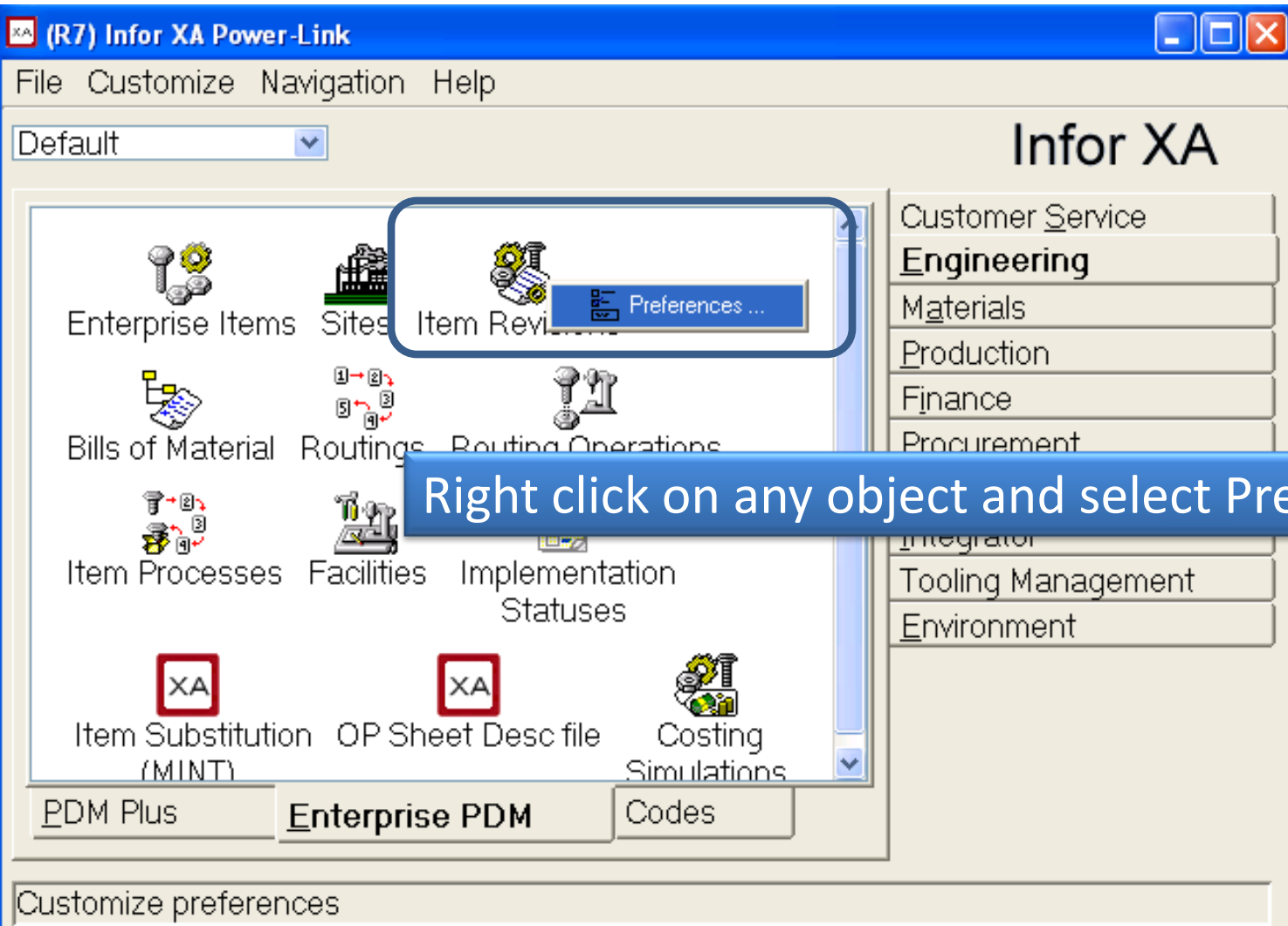


Message Dialog Options*

When a message appears, do you want the 'Do not show this to me again' message to be displayed? This setting gives the user ability to 'turn off' confirm messages when working in Power-Link.

- Most all of the R7 to R9 Biz Objects have User/Object Preferences.
- **Access preferences in three different ways:**
 1. Right click on any object icon on an application card to bring up preferences.
 - Sets specific functionality
 - Locks in preferred views, subsets, sorts, card files, templates, etc.
 - There is an advantage to setting a limiting subset (perhaps transaction date) on large files like transaction history or shipped items, so data will appear more quickly.
 2. From the list window in any object, select 'Customize' in menu and then 'Preferences.'
 3. From within the card file of an object.

Setting Business Object Preferences



The screenshot shows the Infor XA software interface. The title bar reads "(R7) Infor XA Power-Link". The menu bar includes "File", "Customize", "Navigation", and "Help". A dropdown menu is open, showing "Default". The main workspace is titled "Infor XA" and contains a grid of business objects. A blue callout box highlights the "Item Review" object, which has a context menu open with "Preferences ..." selected. A blue banner across the middle of the screen contains the text: "Right click on any object and select Preferences." The bottom of the interface shows a "Customize preferences" bar.

File Customize Navigation Help

Default

Infor XA

Enterprise Items Sites Item Review

Bills of Material Routings Routing Operations

Item Processes Facilities Implementation Statuses

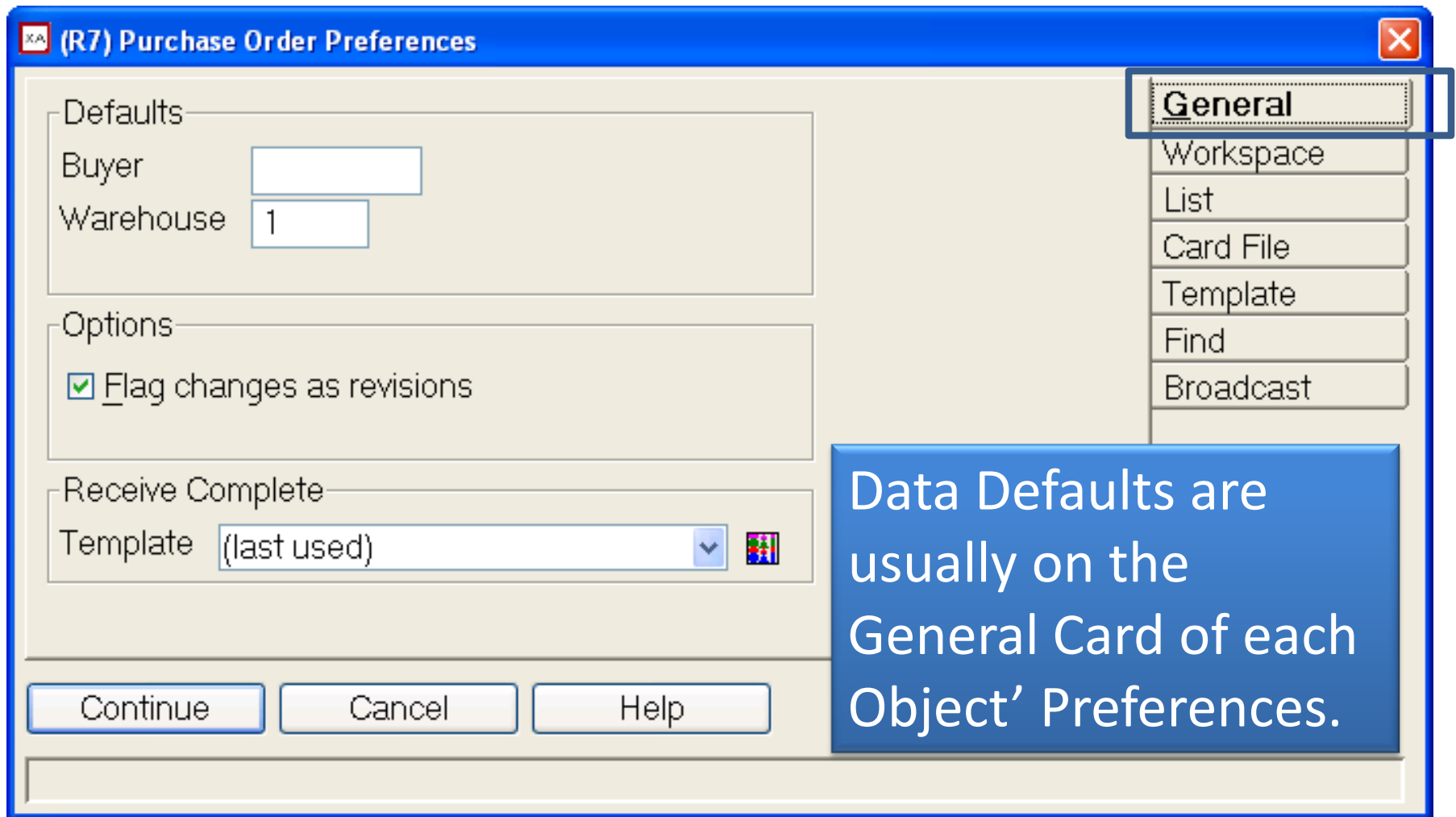
Item Substitution (MINT) OP Sheet Desc file Costing Simulations

PDM Plus Enterprise PDM Codes

Customer Service
Engineering
Materials
Production
Finance
Procurement
Integrator
Tooling Management
Environment

Customize preferences

Sample General Card - Objects



(R7) Purchase Order Preferences

Defaults



Buyer

Warehouse

Options

Flag changes as revisions

Receive Complete

Template  

Continue Cancel Help

General

Workspace

List

Card File

Template

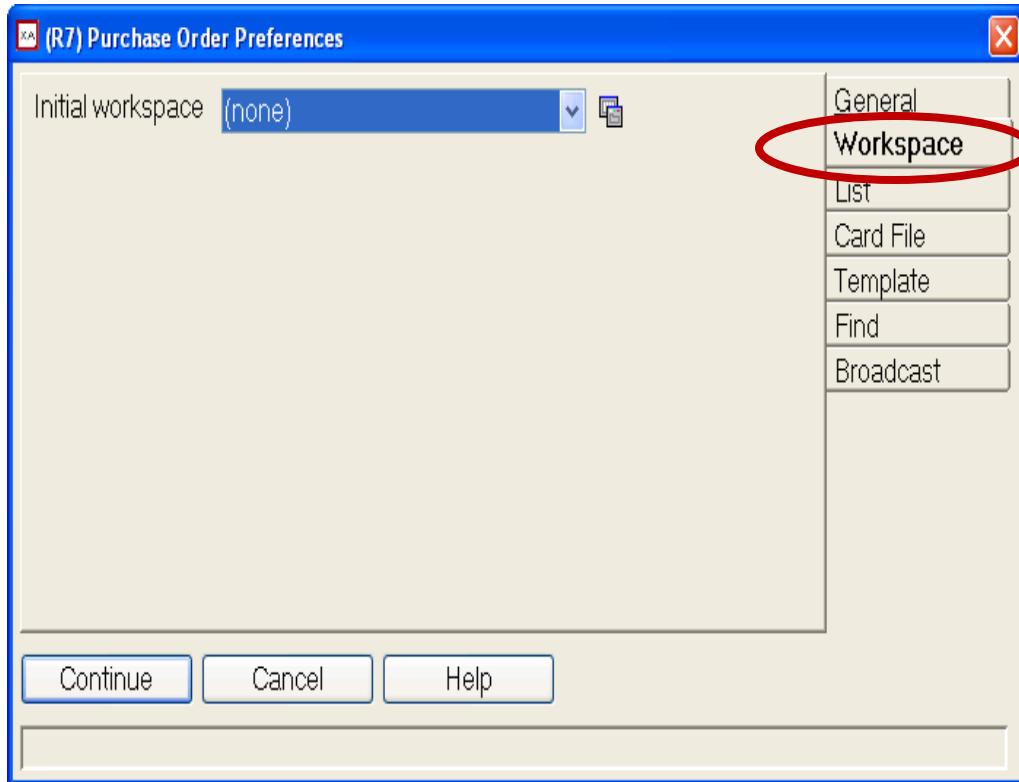
Find

Broadcast

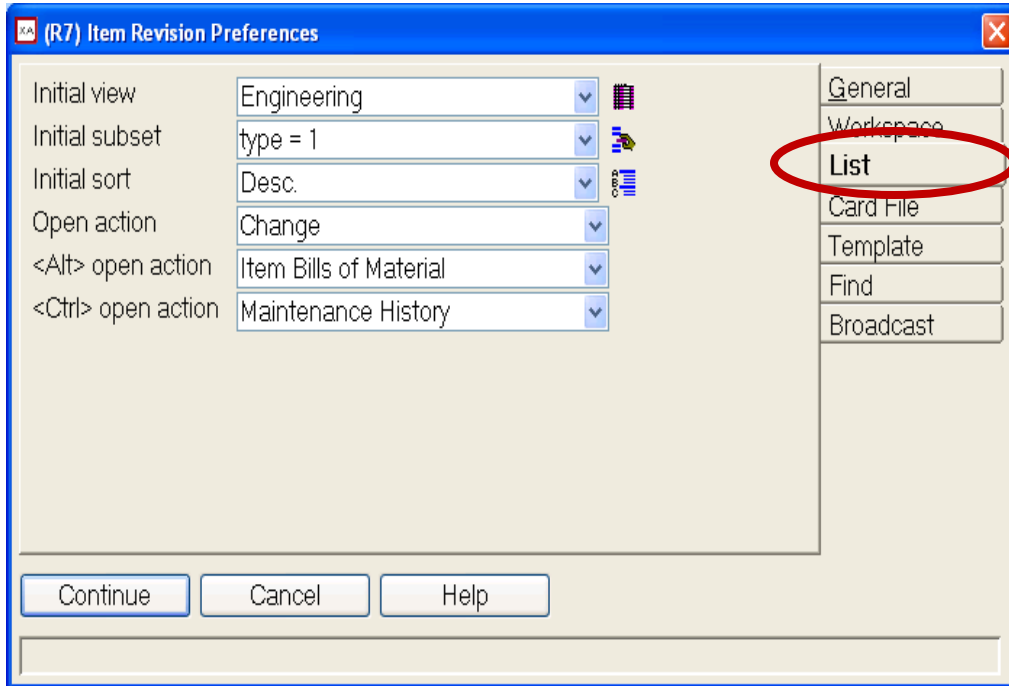
Data Defaults are usually on the General Card of each Object' Preferences.

- Fields on the ‘General’ card will differ depending on the file
 - Different General Options for:
 - Item Revision (EPDM)
 - Default Site & Auto Create Enterprise Items
 - Purchase Orders
 - Default Buyer, Default Warehouse, and Change or Revise PO
 - Customer Orders
 - Default Company, Order Type, Warehouse & End Order
 - Manufacturing Orders
 - Default Warehouse & Shop Packet Print
 - MRP Recommendations
 - Immediate Processing of Order Create or change & Shop Packet Print

Workspace (R7)*

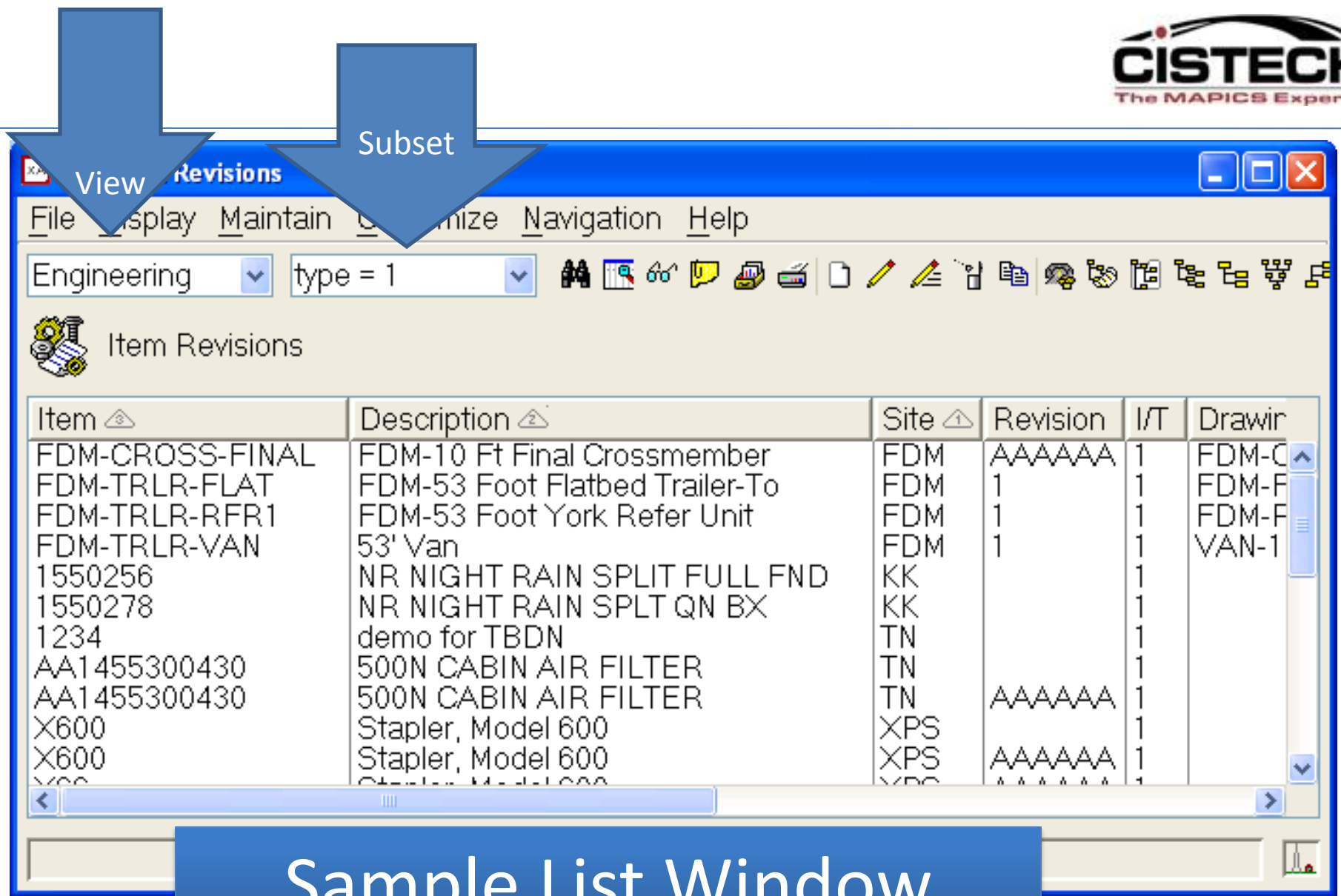


- Workspace* defines alternate sets of preferences (view, subset, sorts, etc.) for different XA tasks.
- Set the default workspace for this file or leave 'none.'
- See presentation made earlier on workspaces



- Double click on an object icon to open a list window.
- The list is defined by:
 - View (columns)
 - Subset (rows)
 - Sort
- Open Action*
 - When double clicking on an item/order on a list, perform the displayed action.

If you use a specific view, subset and/or sort the majority of the time, select them in **the List Preference to lock as your default.**



View Revisions

File Display Maintain Customize Navigation Help

Engineering type = 1

Item Revisions

Item	Description	Site	Revision	I/T	Drawir
FDM-CROSS-FINAL	FDM-10 Ft Final Crossmember	FDM	AAAAAA	1	FDM-C
FDM-TRLR-FLAT	FDM-53 Foot Flatbed Trailer-To	FDM	1	1	FDM-F
FDM-TRLR-RFR1	FDM-53 Foot York Refer Unit	FDM	1	1	FDM-F
FDM-TRLR-VAN	53' Van	FDM	1	1	VAN-1
1550256	NR NIGHT RAIN SPLIT FULL FND	KK		1	
1550278	NR NIGHT RAIN SPLT QN BX	KK		1	
1234	demo for TBDN	TN		1	
AA1455300430	500N CABIN AIR FILTER	TN		1	
AA1455300430	500N CABIN AIR FILTER	TN	AAAAAA	1	
X600	Stapler, Model 600	XPS		1	
X600	Stapler, Model 600	XPS	AAAAAA	1	
X600	Stapler, Model 600	XPS	AAAAAA	1	

Sample List Window

Advanced Object Open Actions 7*



The screenshot shows the Infor ERP XA interface with a context menu open over the 'Purchase Order Item Releases' icon. The menu lists various actions, with a sub-menu highlighting several 'Open' actions:

- (application preference)
- Activate
- Attachments
- Buyer details
- Calling using Bluetooth
- Cancel
- Change
- Compare
- Complete Receiving
- Copy
- Create
- Debit Memos
- Delete
- Enterprise Item details
- Import Operations
- Inventory Transaction History
- Item Revision details
- Item Warehouse details
- Maintenance History
- Manufacturing Order details
- Mass Change
- Mass Change Comments
- Mass Delete
- Planner details
- Purchase Order Header details
- Purchase Order Item details
- Quick Change
- Quick Change Details

At the bottom of the menu, the following actions are highlighted with a blue box:

- Open action
- <Alt> open action
- <Ctrl> open action

A blue callout box points to these actions with the text: "Look at all the Alternate Open Options – including Bluetooth call to Vendor."

Open Action Samples*



Open (double click) in change mode

The screenshot shows the 'Change Item Revision' dialog box for item 'FDM-53 Foot York Refer Unit'. The 'Description' field contains 'FDM-53 Foot York Refer Unit'. The 'Item type' is set to 'Assembly', 'Inventory code' to 'Inventory', and 'Item class' to 'FRFR = FDM Refrigeration Units'. The 'Item Characteristics' list on the right includes Stocking this item, Engineering, Item Processes, Location Control, Costing Parameters, Current Costs, Current Cost Dates, Standard Costs, Standard Cost Dates, Purchasing, Vendor Performance, Sales, and Shipping. The 'APC item' is set to 'No'. Buttons for 'Update', 'Cancel', and 'Help' are at the bottom.

Alt + Open – Display BOM list (EPDM)

The screenshot shows the 'Item Bills of Material' window for 'FDM-53 Foot York Refer Unit'. The table displays the following data:

APC BOM	Alt ID	BOM description	Comp's
No		FDM-53 Foot York Refer Unit	2

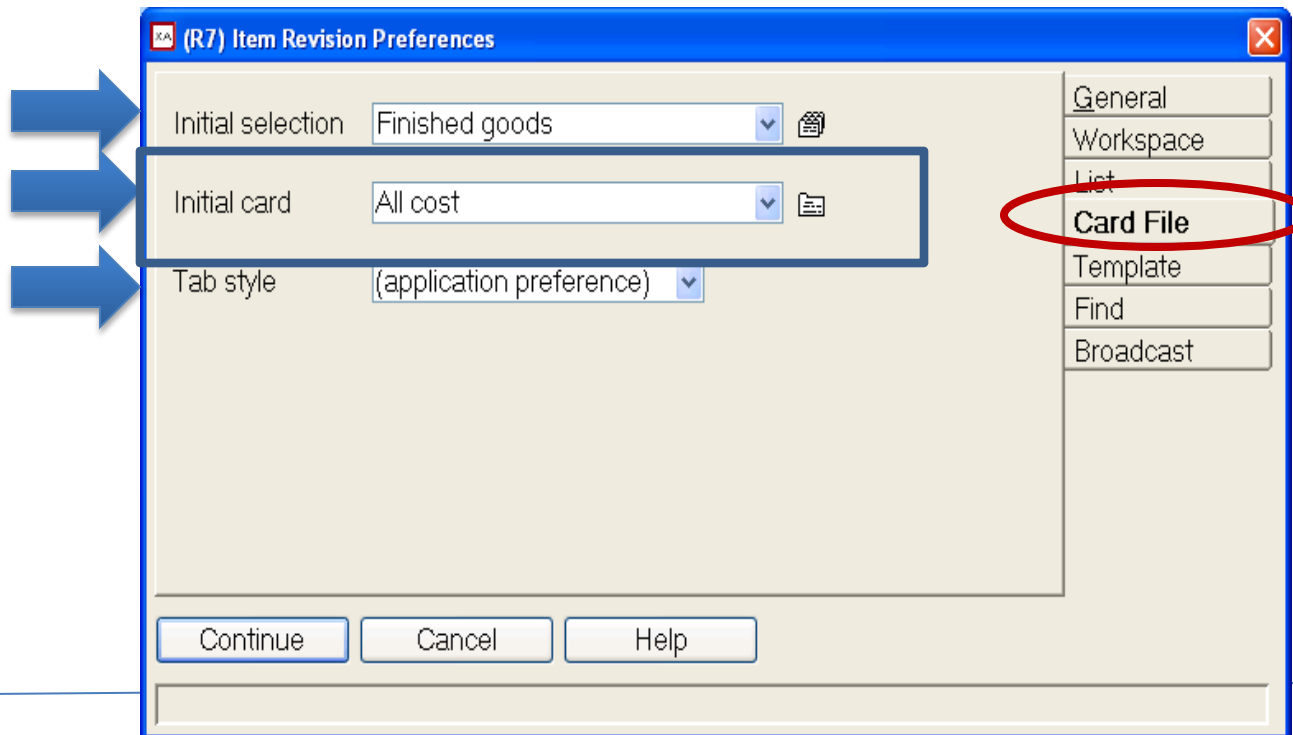
Ctrl + Open – Display Maintenance History

The screenshot shows the 'Item Revision Maintenance History' window for 'FDM-53 Foot York Refer Unit'. The table displays the following data:

Date	Time	Transaction description (derived)	Object type
11/20/2006	4:18:13 PM	Copy Item Revision	Item Revision

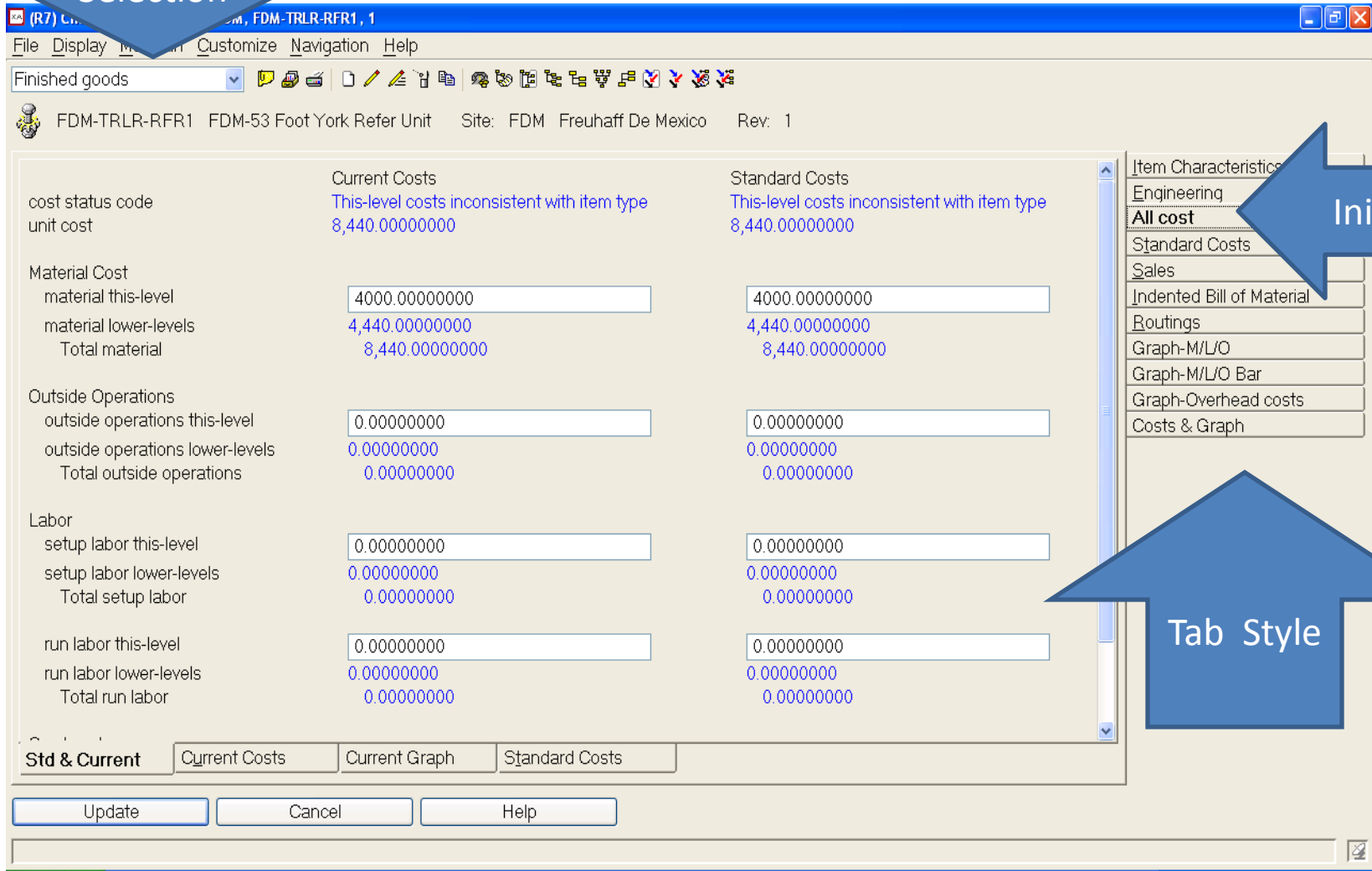
Card File Preferences

- When double clicking on an item on the list, a card file will be displayed.
- **Use the Card Preference to define:**
 - **Initial Selection** – Card File to be used to display the record
 - **Initial Card** – The card that will be the active (top) card.
 - **Tab Style** – Where will the tabs appear (can use the default as set in the Browser preference – Miscellaneous for all card files or change for this object).



What Your Preferences Do!

Initial Selection



The screenshot shows a software window titled '(R7) C...' with a menu bar (File, Display, Customize, Navigation, Help) and a toolbar. The main area displays cost data for 'Finished goods' (FDM-TRLR-RFR1, FDM-53 Foot York Refer Unit, Site: FDM, Freuhaff De Mexico, Rev: 1). The data is organized into three columns: 'Current Costs', 'Standard Costs', and 'Item Characteristics'. The 'Current Costs' and 'Standard Costs' columns show values for various cost categories, with some values in red text indicating inconsistencies. The 'Item Characteristics' column lists various cost types, with 'All cost' selected. A blue arrow labeled 'Initial Card' points to the 'All cost' selection. Another blue arrow labeled 'Tab Style' points to the 'Current Costs' tab at the bottom of the window. The window also has 'Update', 'Cancel', and 'Help' buttons at the bottom.

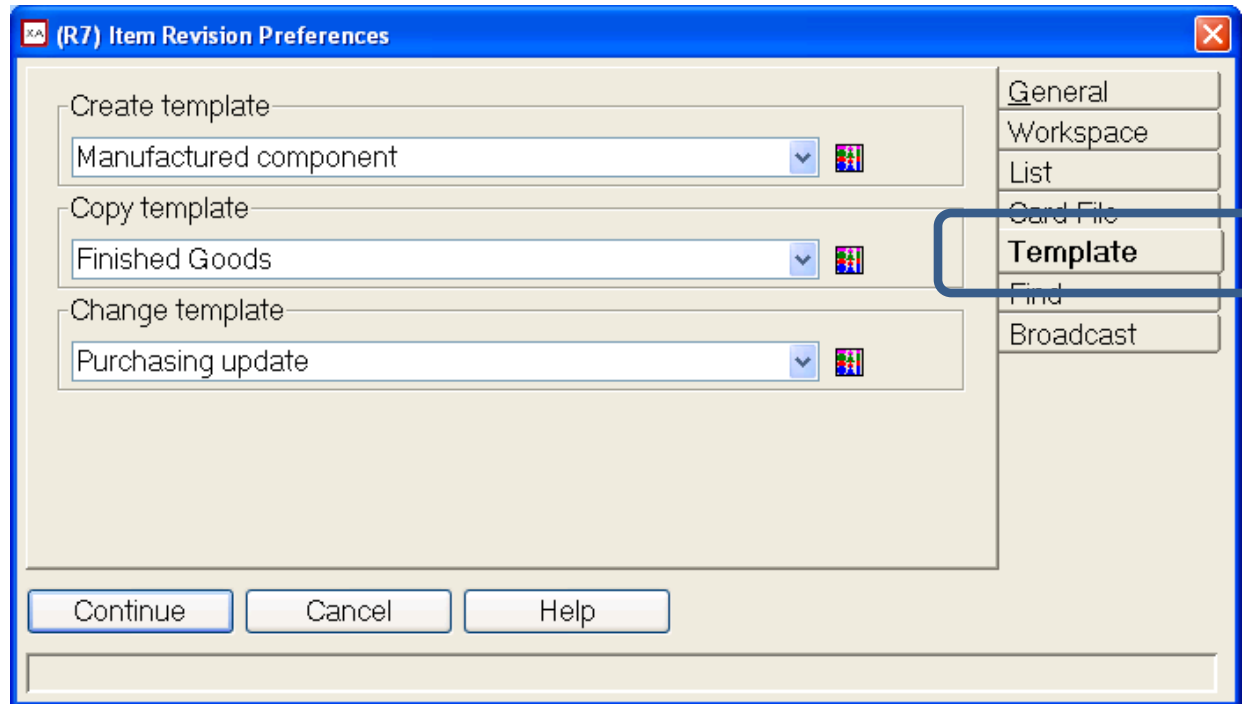
	Current Costs	Standard Costs
cost status code	This-level costs inconsistent with item type	This-level costs inconsistent with item type
unit cost	8,440.00000000	8,440.00000000
Material Cost		
material this-level	4000.00000000	4000.00000000
material lower-levels	4,440.00000000	4,440.00000000
Total material	8,440.00000000	8,440.00000000
Outside Operations		
outside operations this-level	0.00000000	0.00000000
outside operations lower-levels	0.00000000	0.00000000
Total outside operations	0.00000000	0.00000000
Labor		
setup labor this-level	0.00000000	0.00000000
setup labor lower-levels	0.00000000	0.00000000
Total setup labor	0.00000000	0.00000000
run labor this-level	0.00000000	0.00000000
run labor lower-levels	0.00000000	0.00000000
Total run labor	0.00000000	0.00000000

Initial Card

Tab Style

Template Preferences

Separate templates for Create, Copy and Change in R7*



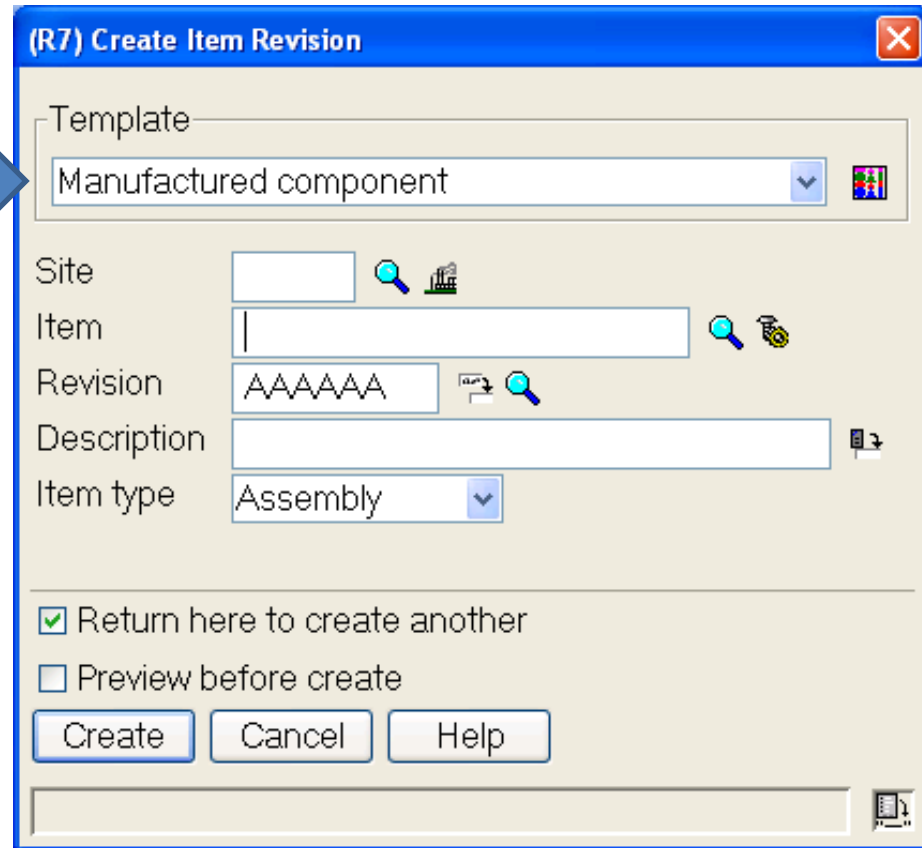
- Templates determine the fields, and sometimes default values, that are displayed during a record add, change or copy.
- Templates can set default values for fields regardless of whether or not they are displayed on the card

Template



Create Template

In this Item Revision example, you might have a template also for purchased components, raw material, maybe finished goods, and even supply items.



(R7) Create Item Revision

Template
Manufactured component

Site

Item

Revision
AAAAAA

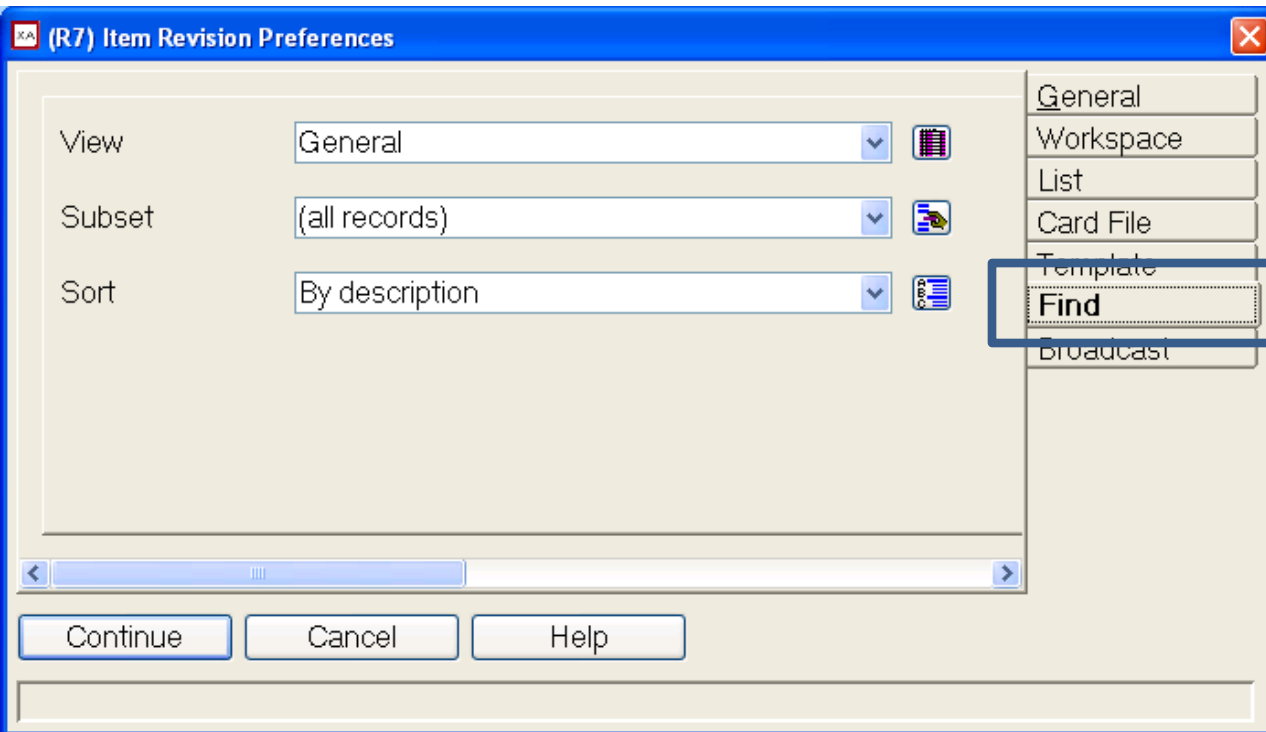
Description

Item type
Assembly

Return here to create another
 Preview before create

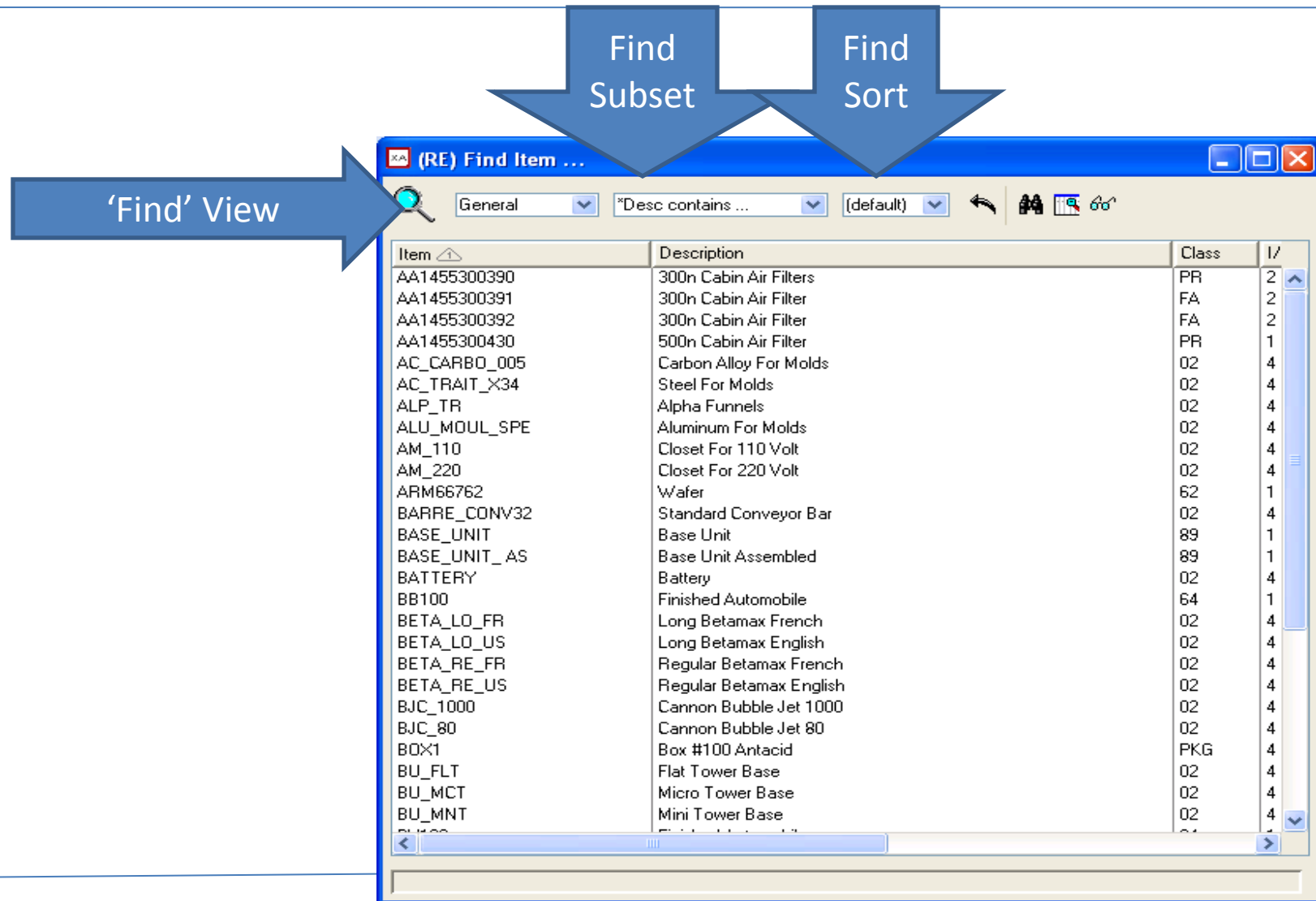
Create Cancel Help

Find Preference



- Defines the View, Subset and Sort used when using a 'Find' option on a card.
- Any time there is a button with a Magnifying Glass symbol, click on the button to bring up the 'Find' option.

The 'Find' screen



Find Subset

Find Sort

'Find' View

Item	Description	Class	I/O
AA1455300390	300n Cabin Air Filters	PR	2
AA1455300391	300n Cabin Air Filter	FA	2
AA1455300392	300n Cabin Air Filter	FA	2
AA1455300430	500n Cabin Air Filter	PR	1
AC_CARBO_005	Carbon Alloy For Molds	02	4
AC_TRAIT_X34	Steel For Molds	02	4
ALP_TR	Alpha Funnels	02	4
ALU_MOUL_SPE	Aluminum For Molds	02	4
AM_110	Closet For 110 Volt	02	4
AM_220	Closet For 220 Volt	02	4
ARM66762	Wafer	62	1
BARRE_CONV32	Standard Conveyor Bar	02	4
BASE_UNIT	Base Unit	89	1
BASE_UNIT_AS	Base Unit Assembled	89	1
BATTERY	Battery	02	4
BB100	Finished Automobile	64	1
BETA_LO_FR	Long Betamax French	02	4
BETA_LO_US	Long Betamax English	02	4
BETA_RE_FR	Regular Betamax French	02	4
BETA_RE_US	Regular Betamax English	02	4
BJC_1000	Cannon Bubble Jet 1000	02	4
BJC_80	Cannon Bubble Jet 80	02	4
BOX1	Box #100 Antacid	PKG	4
BU_FLT	Flat Tower Base	02	4
BU_MCT	Micro Tower Base	02	4
BU_MNT	Mini Tower Base	02	4

Workbench – Check Preferences



(R7) Item Revisions

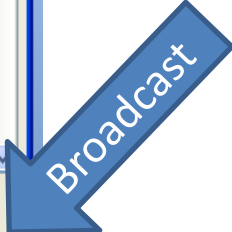
File Display Maintain Customize Navigation Help

General (all records)

Item Revisions

Item	Description	Site	Revision	From	To	Rel	Class	I/T	Drawing nu
AA1455300390	300N Cabin Air Filter	TN				Yes	PR	2	300390
AA1455300391	300N Cabin Air Filter	TN				Yes	FA	2	2
AA1455300392	300N Cabin Air Filter	TLN				Yes	FA	2	2
AA1455300392	300N Cabin Air Filter	TN				Yes	FA	2	2
AA1455300392	300N Cabin Air Filter	100				Yes	FA	2	2
AA1455300430	500N CABIN AIR FILTER	TN				Yes	PR	1	
AA1455300430	500N CABIN AIR FILTER	TN	AAAAAA			Yes	PR	1	
AA1455300430	AA1455300430	100	AAAAAA			Yes		1	

If your data is not being displayed in the other Window(s) – make sure you check to make sure that the other files are available for a Work Bench to be created !



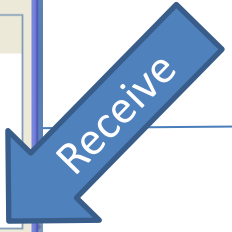
(R7) Item Warehouses - AA1455300430 500N CABIN AIR FILTER Site: TN TBDN Tennessee Rev: AAAAAA

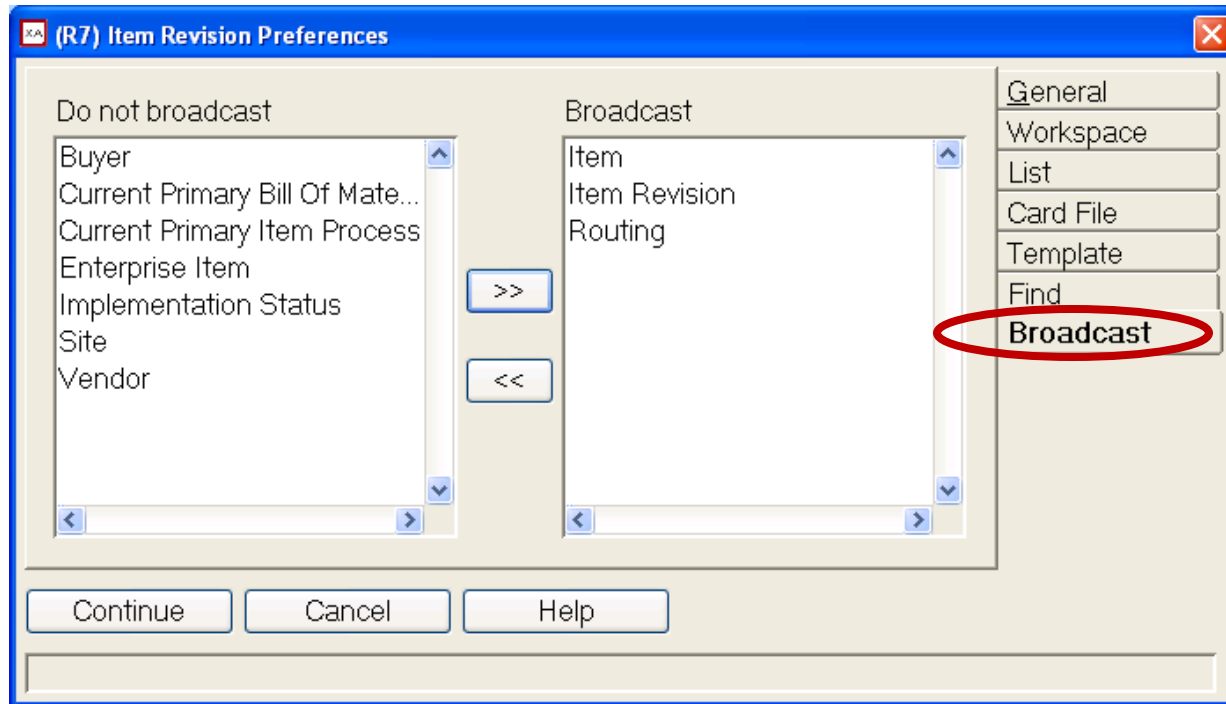
File Display Maintain Customize Navigation Help

General *(all records)

AA1455300430 500N CABIN AIR FILTER Site: TN TBDN Tennessee Rev: AAAAAA

Planner	Primary ...	On-hand	Stk ...	On-order	Allocated	Available
TN1		0.000	EA	0.000	0.000	0.000
1	100	122.000	EA	0.000	1.000	121.000





- When using the Broadcast/Receive options, these settings determine the files/info that will be broadcast to another window.
- **No harm in adding all files to the Broadcast list.**
- If the receiving window in a workbench is not updating, **check this preference for the file's broadcast capability.**

'Hidden' Preferences – Move On



- Any card that has Create, Change, Delete options also has preference settings on the card file that opens when 'Create' or 'Change' is selected.
- For example, Purchase Order create has secondary 'Create' option on the PO Item Card.
- Once the 'PO Item Create' card file is displayed, PO Item Create preferences can be set or you can go directly to the separate PO Item object to set preferences.

From PO Header to PO Item Create



(RE) Create Purchase Order - P000428

File Display Maintain Customize User Navigation Help

Default

P000428 Vendor: 1 Radio Shack Global Buyer: 100 Steve Watson

Details: (none)

Item	Whs	Line	Contr...	Quantity	UM	Price	Dock	Stock
1105	1	1		100.000	SI	23.9800	10/02/2008	10/06/20

Requested Approved

Create Cancel Help

Pending

- General
- Vendor Preferences
- Vendor Address
- Ship-to Address
- Bill-to Address
- Items**
- Variance
- Comments
- Amounts
- Dates
- Overview

Create – Template Preferences



The screenshot shows a remote desktop connection to an Infor ERP XA Power-Link application. The main window displays a dashboard with various icons for procurement and supply chain management. A dialog box titled '(MR) Purchase Order Item Preferences' is open, with the 'Template' tab selected. The dialog box contains three sections: 'Create template', 'Copy template', and 'Change template', each with a dropdown menu currently set to '(public preference)'. A blue arrow points from the 'Preferences...' icon in the main dashboard to the 'Template' tab in the dialog box. The Windows taskbar at the bottom shows the system clock as 3:10 PM on 12/11/2011.

PO Item Create Card File Preferences



ADPIT1 - Remote Desktop Connection
(MR) Infor ERP XA Power-Link
File Customize Navigation Help
Default

Infor ERP XA

- Finance
- Customer Service
- Engineering
- Materials
- Production
- Procurement**
- Environment
- Integrator
- GLI
- Forecast
- Receiving
- RF Physical Inventory
- Irenes Team
- Supplier Portal
- Requisition Approval
- RF Pick Pack Ship

Item Revisions Warehouse Addresses Buyers Vendors Purchasing Activity Purchase Requests Requisitions Quotes Contracts Purchase Orders Purchase Order Item Purchase Order Purchase Order Purchase Order Purchase Order Purchase Order Purchase Order History Purchase Order History Items

Purchase Order History Item Releases Vendors/Items Li Expedite & Release Lisa Expedite & Release

Preferences ...

Or, **Right Click on any of the XA Business Objects** for the User to set their Preferences....

1:25 PM 12/11/2011

PO Item Preferences



XA (RE) Purchase Order Item Preferences

Defaults
Warehouse: 1

Options
 Include Vendor/Item comments
 Include Item Receiving operations
 Flag changes as revisions

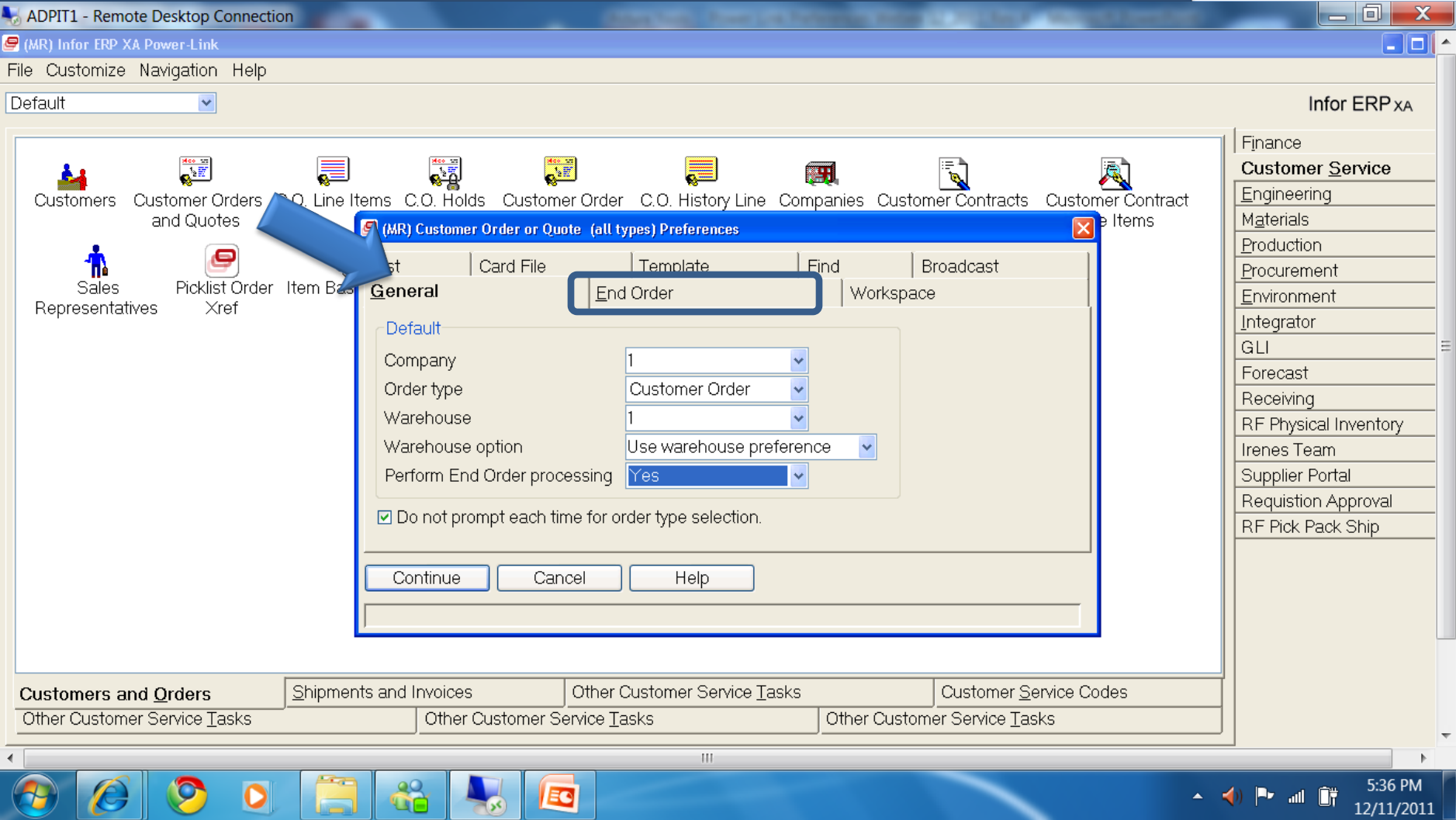
Receive
Template: (last used)

Continue Cancel Help

General
Workspace
List
Card File
Template
Find
Broadcast

From PO, to PO Item Preferences. You could then set the PO Blanket Releases

Advanced Preferences in 7.8 to 9



ADPIT1 - Remote Desktop Connection

(MR) Infor ERP XA Power-Link

File Customize Navigation Help

Default

Customers Customer Orders and Quotes C.O. Line Items C.O. Holds Customer Order C.O. History Line Companies Customer Contracts Customer Contract Items

Sales Representatives Picklist Order Xref

(MR) Customer Order or Quote (all types) Preferences

Card File Template Find Broadcast Workspace

General

Default

Company 1

Order type Customer Order

Warehouse 1

Warehouse option Use warehouse preference

Perform End Order processing Yes

Do not prompt each time for order type selection.

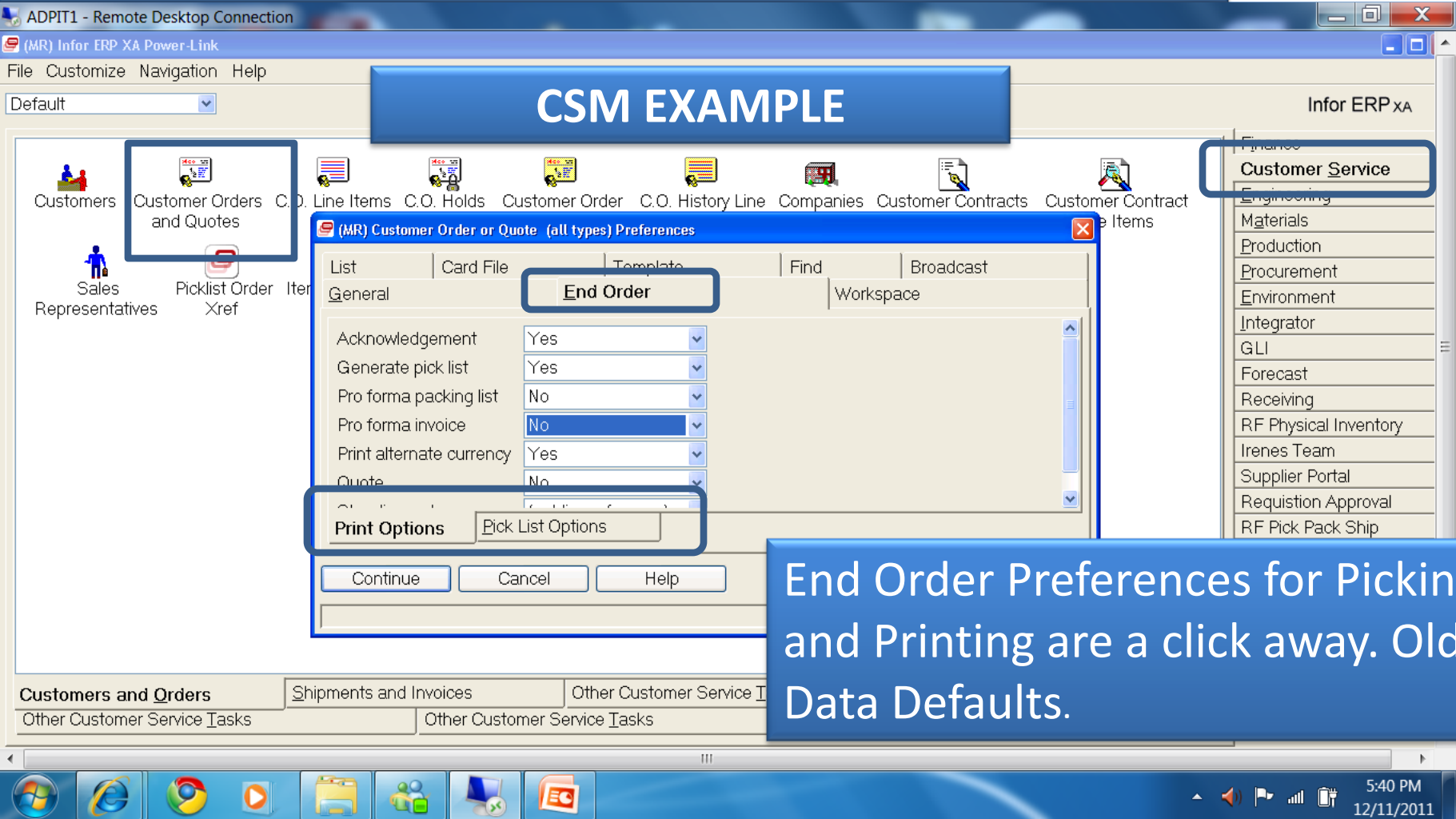
Continue Cancel Help

Customers and Orders Shipments and Invoices Other Customer Service Tasks Customer Service Codes

Other Customer Service Tasks Other Customer Service Tasks Other Customer Service Tasks

5:36 PM 12/11/2011

Advanced Preferences in 7.8 to 9



CSM EXAMPLE

Customer Order or Quote (all types) Preferences

General

End Order

Acknowledgement: Yes

Generate pick list: Yes

Pro forma packing list: No

Pro forma invoice: No

Print alternate currency: Yes

Quote: No

Print Options: Pick List Options

Continue Cancel Help

End Order Preferences for Picking and Printing are a click away. Old Data Defaults.

Object Preferences in 7.8 to 9

PRODUCTION EXAMPLE

The screenshot shows the 'Manufacturing Order Preferences' dialog box in Infor ERP XA. The 'Host Print' tab is active, displaying a list of print options with dropdown menus. A blue arrow labeled 'M.O. Preferences' points to the dialog box. The background shows the Infor ERP XA main interface with a navigation pane on the left and a menu on the right.

Print options	Value
Standard costs	Yes
Order tracking dates	No
Material detail	Yes
Sequence by	Warehouse location
Operation detail	Yes
Inactive operations	No
Additional descriptions	(public preference)
Standard times	Yes
Miscellaneous detail	No
Extended description	Yes

Public Preferences in 7 to 9

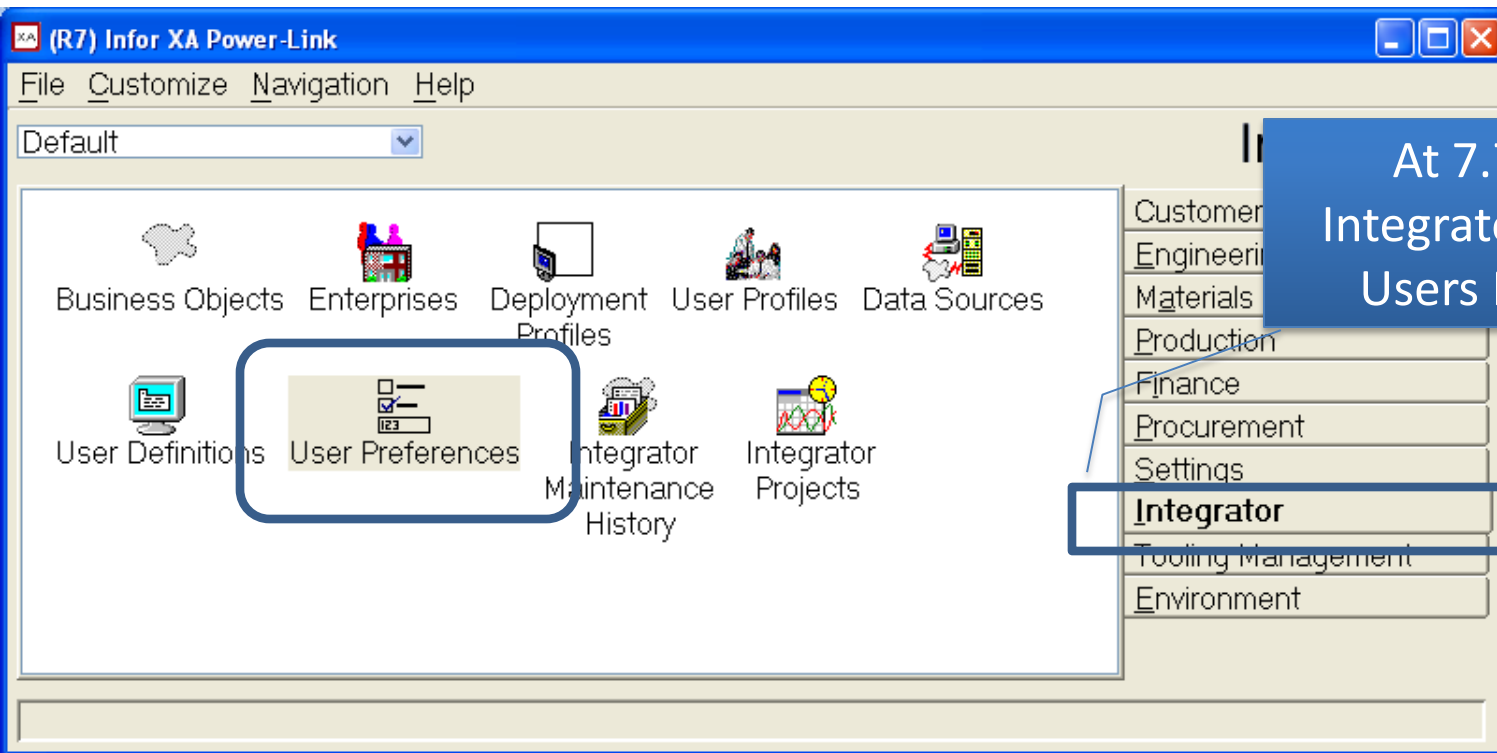


Note: At Release 6 User Preferences are set in Integrator not on the Environment Card

The screenshot shows a remote desktop connection to a system. The main window is titled "(MR) User Preferences" and has a menu bar with "File", "Maintain", "Customize", and "Help". The "General" tab is selected. A tree view on the left shows a hierarchy of categories, with "Buyer" expanded. A context menu is open over the "(public)" entry under "Buyer", with the "Change" option highlighted. A blue arrow points from this "Change" option to a smaller dialog box titled "(MR) Buyer Preferences (Public)". This dialog box has tabs for "List", "Card File", "Template", "Find", and "Broadcast", with "General" selected. It contains a "Defaults" section with a "Buyer" text field. At the bottom are "Continue", "Cancel", and "Help" buttons. The Windows taskbar at the bottom shows the time as 9:22 PM on 12/12/2011.

Controlling User Preferences

- At R7.7 persons with Integrator access can set or copy preferences for users. At R7.8 that function has been moved out of Integrator and is available in base XA.



At 7.7 must use Integrator to control a Users Preferences.

Forcing Preferences for Users/Object



ADPIT1 - Remote Desktop Connection

(MR) Infor ERP XA Power-Link

File Customize Navigation Help

Default

Maintenance Reasons Media Files System-Link Destinations System-Link Requests System-Link Destination Transformations Navigation Bookmarks Maintenance Classes User Definitions User Preferences User Profiles Settings Application Support Tasks Commerce Tasks

Infor ERP XA

- Finance
- Customer Service
- Engineering
- Materials
- Production
- Procurement
- Environment**
- Integrator
- GL
- Forecast

Settings History Product Updates

12:41 PM 12/11/2011

Controlled by IT or Security Team with proper Change Management – Releases 7.8 through 9 only - Great for Security and SOX!

Forcing a Users Preferences for Object



The screenshot shows a remote desktop connection titled "ADPIT1 - Remote Desktop Connection". The main application window is "(MR) User Preferences" with a menu bar (File, Maintain, Customize, Help) and a toolbar. A list of users is displayed in a table:

Definition	User	Security	Owner	Status	Modified
Iris Reyes - Data Entry	IRIS	User	Active	Yes	
Jim Carabello - Admin	JIM				
John Wargo - Sr. Acct	JOHNW				
Karan Sian	KARAN				
Ken Wong - Dir Materials	KEN				
Li He - Supply Chain Pl	LI				
Liberty User	LIBERTY				
Lisa Hansell - Controller	LISAH				
Marlena Skandy - Acct	MARLENA				
Miguel Gonzalez - Subasy	MIGUEL				
Modesta Colon Cust Serv	MODESTA				
Mxaplus	MXAPLUS				
Norman Schmelz Mats Mgr	NORMAN				
Peter Hoffmann	PETERH				
Peter Toskovich - Tr Mgr	PETER				
Peter-daniel Aminzia	PETERD				
Qsecofr	QSECOFR				
Renee Sansevere	RENEE				
Rick Kreie - Quality	RICK				
Rolando Guardiola - Ht	SHORTY				
Scott Chester Receiving	RECEIVE				
Sheldon Betsalel - Vp	SHELDON				
Tom Cresci - Tr Super	TOMC	User	Active	Yes	
Tom Vargues - Planner	TOM	User	Active	Yes	
Toni Reinlagen Ast Of Mgr	TONI	User	Active	Yes	
Ysys Ifm	YSYS	User	Active	Yes	

An overlay dialog box titled "(MR) Purchase Order Preferences (LI)" is open, showing the "General" tab. It contains the following settings:

- Buyer: 100
- Warehouse: MRO
- Options: Flag changes as revisions: Yes
- Receive Complete: Template: Receipt to Inspection_RIC

Buttons at the bottom of the dialog are Continue, Cancel, and Help.

A blue callout box on the right contains the text: "Set the Preferences for this Particular User – Notice the complete set of preferences can be controlled !!"

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the date and time: 12:58 PM, 12/11/2011.

Conclusion – A Few Facts



- Each person sets their own Preferences at Release 6. There is no security option to 'block' Preferences. (These can be Forced at 7-9)
- Each Browser/Power-Link user/Team Leader needs to review how the User uses XA and **determine if there are Preference settings that will make the user more efficient.** For example, if, every time a PO is created the person entering the PO clicks on the 'Item' instead of the default Summary card, set the preference so that the 'Item' card is the 'Initial Card.' Or have a custom card file and set as your preference.
- Using the Preference tools inside the Browser allows each user to 'tailor' the Browser/Power-Link to suit individual needs.
- **Preferences save time and add control of processes in XA – LEAN!**

Thanks for joining us today!

These materials will be posted on the CISTECH Website at:

www.cistech.net

MAPICS Education/Education Material