



PURCHASE ORDERS

RELEASE NOTES – DECEMBER 2016

This document explains new product enhancements added to the ADMINS Unified Community for Windows **PURCHASE ORDER** system.

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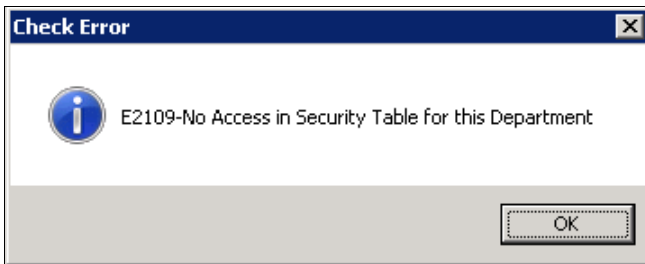


1. QUERIES

Users can be restricted to access only purchase orders for certain Department Groups. To improve response time for those users when doing a PO Query, a security check was added when the PO# is typed in.

1.1. Improved Response Time [Fix]

Access the PO Query Screen by selecting **Purchase Orders** ▶ **Queries** ▶ **View All Purchase Orders**; then **[Select]** the purchase order to be reviewed, taking you to the PO Query Detail screen. If a user has no access to the purchase order department group, this message will be displayed:



[ADM-AUC-PO-434]

2. PO NUMBERING

Some municipalities prefer to start the purchase order numbers with each new fiscal year. AUC now offers sites the option to reset the next Purchase Order number from the menu.

2.1. Set Starting PO Number for the Fiscal Year [New]

Select **Purchase Orders** ▶ **Year End Processing** ▶ **Set starting PO# for New Year**. The starting number is set based on the current year Purchase Order numbers – the first two places of the Purchase Order number are incremented by one to arrive at the new starting number.

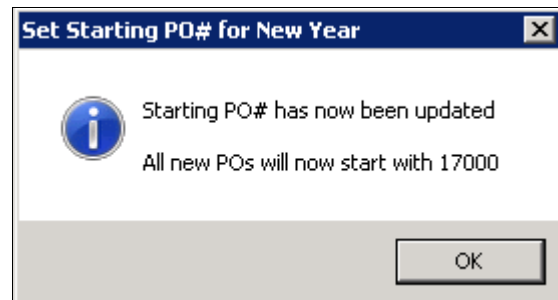
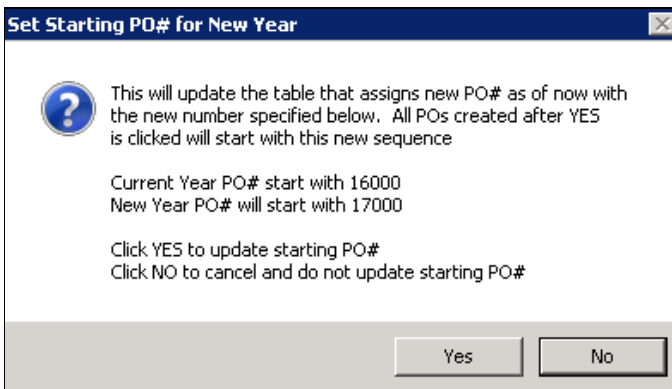


Figure 1 Set Starting PO # for New Year

This numbering affects POs created via the Create New from Posted method as well as those created from scratch.



To prevent unintended consequences, this process should only be run once per fiscal year. The PO Module Control #3005 should be set to “C” if computer generated Purchase Order numbers are to be used.

PO numbers are never re-used in the AUC system; if the starting number is set to 17000 and purchase orders numbered 17001-17008 exist, the next purchase order created will be assigned #17009. This can happen on sites that have carved out ranges of Purchase Order numbers in the past when using Manual PO numbers rather than computer generated PO numbers.

Purchase Order Module Control		
Seq#	Description	Answer
3005	Generate PO# via [C]omputer or [M]anual	C

The PO numbering will not affect purchase orders that are rolled from the prior year; these purchase orders retain the original number.

[ADM-AUC-PO-433]

3. HELP REFERENCE LIBRARY

Effective with this software update, there are some enhancements to the structure of the Help Reference Library.

3.1. Numbering Added to Help Reference Libraries [New]

A numbering scheme was added to all Help Reference libraries to make documents easier to find when support staff refers a user to a help document. Figure 2 shows a sample of the new numbering scheme. For example, one may ask how to change the signature on a purchase order. Support staff will refer the user to the help document **PO-260 Changing a Signature on a PO Form**, and the document is found in numerical order in the Help Reference Library.



Purchasing Help Reference Library

Goto...

Actions

Help Categories

- 1 Ledgers
- 2 Purchasing
- 3 Accounts Payable
- 4 Human Resources
- 5 Budget
- 6 Collections
- 7 Property Tax
- 8 Motor Excise
- 9 Misc Billing
- 0 System
- D Product Demos

Release Notes

- Ledgers
- Purchasing
- Accounts Payable
- Human Resources
- Budget
- Collections
- Property Tax
- Misc Billing
- System
- Other

Reference Card		Last Run	Time
PO-100	Purchase Order User Help Documents Index	29-Nov-2016	13:13:33.73
----- PURCHASE ORDER ENTRY -----			
PO-110	Enter PO's	14-Oct-2016	11:56:28.32
PO-120	Release PO's	14-Oct-2016	11:56:36.61
PO-130	Edit List	23-Nov-2016	16:26:26.79
PO-130	Create a New PO from a Posted PO	14-Oct-2016	11:56:41.69
PO-140	Change Orders	14-Oct-2016	11:57:27.03
----- PURCHASE ORDER PROCESSING -----			
PO-210	Approvals/Dashboard	28-Nov-2016	12:32:29.84
PO-220	Approvals - Budgets	14-Oct-2016	11:59:42.91
PO-230	Approvals - Levels 1 - 5	14-Oct-2016	12:25:44.29
PO-240	Liquidate Purchase Orders	14-Oct-2016	12:25:50.80
PO-260	Changing a Signature on a PO Form	14-Oct-2016	12:25:56.87
----- VENDORS -----			
PO-310	Vendor - Maintain Vendors	02-Nov-2016	13:53:24.52
PO-320	Vendor - Name Search	14-Oct-2016	12:26:29.39
PO-330	Vendor History	28-Nov-2016	13:20:47.14
PO-340	Vendor Terms	14-Oct-2016	12:26:35.81
PO-350	Vendor Classification	14-Oct-2016	12:26:43.62
PO-360	Merge Vendors	14-Oct-2016	12:26:53.30
PO-380	Put a Hold on a Vendor	14-Oct-2016	12:27:00.23
PO-390	Vendor Minority Codes	14-Oct-2016	12:27:05.98
PO-410	Adding Vendors on the Fly	14-Oct-2016	12:27:15.80
PO-420	Foreign Addresses	14-Oct-2016	12:27:20.99
----- CONTRACTS -----			
PO-510	Contract Entry	14-Oct-2016	12:27:27.19
----- COMMODITY ITEMS -----			
PO-610	Adding Commodity Items	02-Nov-2016	14:06:53.87
PO-620	Uploading Commodity Items from CSV	14-Oct-2016	12:27:54.19
----- TABLES -----			

[\[More\]](#)

Figure 2 New Numbering System for the Help Reference Library

3.2. Alphabetical Index for Help Documents [New]

An alphabetical index with hyperlinks is found at the top of each help Reference Library. Click **[View]** to access the index of help topics in alphabetical order, with links that open each help document.

AUC PURCHASING USER

HELP DOCUMENTS INDEX

-A-

- [Accounting Transactions](#) GL-1030
- [Add Commodity Items](#) PO-610
- [Adding A Vendor](#) PO-310
- [Adding a Vendor "on the Fly"](#) PO-410
- [Address Table](#) PO-710
- [ADMINS Report Generator \(ARG\)](#) PO-980
- [Approval Levels – One through Five](#) PO-230
- [Approving a Purchase Order](#) PO-210, 220
- [ARG](#) PO-980

-H-

- [History of Vendor Activity](#) PO-330
- [Hold on a Vendor](#) PO-380
- [How to:-Non-AUC Users Rec'v Email Reports](#) PO-960

-J-K-L-

- [Journal Entries \(Budget Transfers\)](#) GL-280
- [Liquidate a Purchase Order](#) PO-240

-M-N-O-

Figure 3 Help Documents Alphabetical Index with Clickable Links



Some sites may not permit users to open a linked document. For those sites, the index is numbered to allow you to rapidly retrieve the help you need. If the reference is to a Release Note, the **Month and Year** of the release note will be referenced.

	
Controlling Access to the Budget	BU-130
Cost Breakdown Reports	DEC-2016 ¹
Create CSV Files from Excel Templates	BU-310

<p>¹ Refers to a Release Note, for the cited month and year – in this case, Budget Release Notes for December of 2016.</p>

Figure 4 Index Referring to a Release Note

Each user may have a unique perspective on how to search for help on a given topic; as such, submit suggestions for additional entries or terminology to support@admins.com so that ADMINS may build these links into upcoming software releases.

[ADM-AUC-DOC-111]

3.3. New or Updated Documentation

The following new or updated documentation was added to the Help Reference Library.

- PO-100 Purchasing User Help Documents Index
- PURCHASE ORDER ENTRY PO-250 Create a New PO from a Posted PO [New]
- VENDORS PO-330 Vendor History [Updated]