



ADMINS Unified Community

Fiscal Year 2019 Highlights

Among the new features ADMINS has incorporated this past Fiscal Year:

SYSTEM WIDE CHANGES

- Record locking information screen – adding notification as to who is locking whom with contact information [September 2018](#)
- Retrieve Output Files – added a Customized Subject Line for the email report option [March 2019](#)
- Added a “Favorites” screen to allow users to automate their most frequently used tasks with a “one click” button; includes the option to copy favorites menu from one user to another [December 2018](#)
- Emails sent by the system now indicate the originating distribution list [December 2018](#)
- Retrieve Output Files Customized Subject Line [March 2019](#)
- System controls in place to ensure that only one copy of an upload template may be opened at a time [December 2018](#)
- Super User flag on the User Profile to allow viewing reports generated from all users [December 2018](#)
- Re-organized **Help Reference Libraries** to differentiate between templates and instructions [December 2018](#)
- New and enhanced documentation (all modules)
 - Favorites [Updated] [December 2018](#)
 - I forgot to print my reports [Updated] [December 2018](#)
 - System Administration Kit [Updated] [December 2018](#)

ACCOUNTS PAYABLE MODULE

- Filtered approval path table lookups to restrict to “Active”, “All” or only “Inactive” [June 2019](#)
- Wire & No Check transactions will always use the Voucher Check Date instead of the Disbursement General Ledger effective date, regardless of module control #2080 value [September 2018](#)
- Void an entire posted warrant without having to hit each check # individually [December 2018](#)
- Delete unused accounts payable batches en masse [September 2018](#)
- Automated turning off AP Voucher Entry for users for year end [September 2018](#)
- Added Invoice Information to the Voucher Edit List [March 2019](#)
- Allowed access to the Fixed Asset field for sites not using the AUC Fixed Asset Module [March 2019](#)
- Added a report to the disbursement process to provide a count of checks, wires, ach, no checks [March 2019](#)
- Enhanced voucher batch transfer emails to include the user initiating the transfer [June 2019](#)
- Improved the AP Check Download File screen to display longer file names [June 2019](#)
- Filtered vendor lookups to segregate cancelled one-time vendors [December 2018](#)
- Enhanced uploading vouchers process with error checking to validate spreadsheet data formats [December 2018](#)
- Credit Card voucher processing Added budget overrides for credit card vouchers [June 2019](#)

1099 Processing

- Mark closed vouchers with 1099 codes [September 2018](#)
- Enhanced lookup on vendors in the summary screen to include the form used [December 2018](#)
- Adding a Vendor to the 1099 File prompt updated to “New/Omitted” [March 2019](#)

New and enhanced reports:

- 2094 Duplicate Federal Tax ID Numbers [Enhanced] [March 2019](#)
- 2168 Warrant Listing – added void information [Enhanced] [March 2019](#)
- 2501 Approval Path Edit List (Optional Filter out Unused) [Enhanced] [June 2019](#)
- 2559 Item History Report [Updated] [December 2018](#)
- 2618 Vendor-Assigned commodity Items report [New] [December 2018](#)
- 2650 Posted Vouchers – filter on department / vendor [Enhanced] [March 2019](#)
- 2685 Check History – List of Checks by Bank [Enhanced] [March 2019](#)

Documentation Updates

- AP–167 View Attachments in the Approvals Screen [New] [March 2019](#)
- AP–210 Implementing a New Bank Account [New] [December 2018](#)



ADMINS Unified Community

Fiscal Year 2019 Highlights

- AP-215 Bank Table [New ttl] [September 2018](#)
- AP-285 Delete Accounts Payable Batches en masse [New] [September 2018](#)
- AP-710 1099 Processing [Updated] [September 2018](#)
- AP-830 REAP Reporting (Massachusetts only) [Updated] [September 2018](#)
- AP-845 Locking Screen [New] [September 2018](#)
- AP-980 Upload Vouchers-Spreadsheet [Updated] [June 2019](#)

BUDGET MODULE

Budget Group Table Changes to allow for seamless staffing transitions:

- Added a global approval change button [December 2018](#)
- Added a button to the Budget Groups screen to [Copy All Budget Groups] from one user to another [December 2018](#)
- Enhanced the [Add User] and [Add User All Groups] buttons to set Access types for all levels [December 2018](#)
- The Operating Budget Cost Breakdown and the Query screen was revised to provide more space for descriptive text [December 2018](#)
- A [2 Remove Position] button added to Tables ► Position Maintenance-Budgeting screen [December 2018](#)
- Change a budget group on a position [December 2018](#)
- Budget Groups Available for Entry & Approval show only groups with accounts [March 2019](#)

New [New] and Enhanced [Enhanced] Reports:

- 12076 Operating Budget Cost Breakdown Edit list [Enhanced] [December 2018](#)
- 12560 Budget Cost Breakdown Item Listing [Enhanced] [December 2018](#)
- 12561 Cost Breakdown Item Listing by Account [Enhanced] [December 2018](#)

Budget processing documents were updated in the Help Reference Library

- BU-110 Processing [Update] [March 2019](#)
- BU-130 How to Restrict Access in Budget [New] [September 2018](#)

FIXED ASSET MODULE

- The calculation of depreciation now offers filtering on Location, Class and / or Sub-Class Codes [September 2018](#)
- A default depreciation method was added to the Asset Classification table [September 2018](#)
- Last Transaction Date and Error Checking added to the change processing screen [March 2019](#)
- Added Class Codes and Descriptions to show assets moving within classes (e.g., from Construction class to Building class) [March 2019](#)
- Added a sorting option for the Asset Work Edit List [December 2018](#)
- Added flexibility to Asset Changes to include changing the sub-class via a change order [December 2018](#)

New [New] and Enhanced [Enhanced] Reports:

- #13590 Asset Classification Table edit list [Enhanced] [September 2018](#)
- #13621 In Service History Report [New] [December 2018](#)

Fixed Asset processing documents were updated in the Help Reference library

- FA-115 The Fixed Assets Manual [Updated] [March 2019](#)
- FA-200 Acquiring Fixed Assets [Updated] [September 2018](#)
- FA-220 Asset Changes [Updated] [March 2019](#)
- FA-230 Depreciation Processing [Updated] [September 2018](#)
- FA-410 Querying Fixed Assets [Updated] [March 2019](#)
- FA-610 Fixed Asset Tables [Updated] [September 2018](#)
- FA-650 Upload Fixed Assets Acquisition Template [Updated] [June 2019](#)

GENERAL LEDGER MODULE

- Create New Fiscal Year in Batch [September 2018](#)
- Find a transaction by searching for a dollar amount [December 2018](#)
- Copy Accounts Changing Fiscal Year process added [December 2018](#)



ADMINS Unified Community

Fiscal Year 2019 Highlights

- Added highly visible on-screen messages for **“Inactive”** and **“Flagged for Deletion”** accounts [June 2019](#)
- Added a Special Revenue Fund radio button on the Maintain Elements Table [March 2019](#)
- Added a posting control # to the fiscal period screen for reference to fund balance closing [December 2018](#)

Year-end processing:

- Reports were enhanced with funds selected and fiscal year listed on reports (when more than one fiscal year is to be closed); [December 2018](#)
- Close to Fund Balance – Default Fund Selection to **“Close”** or **“Leave Open”** [March 2019](#)
- The process now stops if there are unposted GL transactions to allow for work completion prior to close processing. [December 2018](#)
- Added the posting number to the lookup on the Reverse Close to Fund Balance lookup [June 2019](#)
- Added an email distribution list to the Create New Year Overnight in batch process [June 2019](#)
- User Defined fields on accounts in closed fiscal periods may be edited so that the fields can be used on the report selection screen [December 2018](#)
- Enhanced the notes field on the Transaction History Screen to provide more detail on the **[Display – Notes]** field to relate Real Estate transactions with General Ledger entries. [December 2018](#)
- Allow the option to **require** fund balancing on journal entries [December 2018](#)
- Split the account number & description in to separate columns on the Trial Balance [March 2019](#)
- User Account Security screen – find usernames on partial search terms [December 2018](#)
- Overnight Posting Reports include date, time, output file names [December 2018](#)

3rd Party Interfaces

- Added an upload of accounts into the GL Crosswalk via a spreadsheet [June 2019](#)
 - Added Field Logging of changes to the GL Crosswalk – who changed, what, when [June 2019](#)
- Cash Receipts – Added Excel® reporting option for the acquire process; expanded the legend with more information on reporting errors; added a summary of cash received [March 2019](#)
- OpenGov–Automated a scheduled task to run all processes; added a new export menu; added a date range option for transactions [March 2019](#)
- HARPERS Payroll - Added employee names to reports when acquiring transactions [December 2018](#)
- UMS/CUSI Interface [December 2018](#)
 - Expanded the filtering on the upload of transactions list [December 2018](#)
 - Enhanced the Upload Process reports [December 2018](#)
 - Added information on accounting screen for negative amounts/alternate processing [December 2018](#)
 - Added Field logging of changes to UMS Codes table [December 2018](#)

Added new [New] reports and revised existing [Enhanced] reports:

- #1050–Transaction Report–PO Transactions (Added Columns) [Enhanced] [September 2018](#)
- #1062–Fund List for Close to Fund Balance [New] [December 2018](#)
- #1072–Funds Selected for Reverse of Closeout Edit List [New] [December 2018](#)
- #1084–Fund List for Roll Balances Forward [New] [December 2018](#)
- #1085–Fund List for Reverse of Roll Balance Forward [New] [December 2018](#)
- #1165–Transaction History–Amount Search [New] [December 2018](#)
- #1239–Close to Fund Balance–Unposted Transactions [New] [December 2018](#)
- #1269–Detail of Summary Posting [New] [March 2019](#)
- #1291–Revenue and Expenditure Summary w/WIP [New] [June 2019](#)
- #1610 Trial Balance [Enhanced] [March 2019](#)
- #1630–Transaction Detail with Notes (Added RE deds notes) [Enhanced] [December 2018](#)

Documents were added and updated in the Help Reference library

- GL–255 Upload Crosswalk Accounts [New] [June 2019](#)
- GL–270 Enter One Time Journal Entries [Updated] [September 2018](#)
- GL–610 Reports [Updated] [June 2019](#)
- GL–700 Using the OpenGov Interface [New] link
- GL–720 Create New Fiscal Year [Updated] [September 2018](#)
- GL–722 Create New Fiscal Year Overnight (in batch) [New] [September 2018](#)



ADMINS Unified Community

Fiscal Year 2019 Highlights

- GL-723 Copy Accounts Changing Fiscal Year (OnLine) [New] [December 2018](#)
- GL-940 Middletown BoE Year-End Grant Roll Forward [Updated] [March 2019](#)
- GL-950 Middletown BoE Year-End Receipt Roll Forward [Updated] [March 2019](#)
- GL-1110 Upload Allocation Codes Template [Updated] [June 2019](#)
- GL-1120 Upload Chart of Accounts Template [Updated] [June 2019](#)
- GL-1130 Upload Journal Entries Template [Updated] [June 2019](#)
- GL-1135 Upload Accounts to Crosswalk Template [New] [June 2019](#)

HUMAN RESOURCES MODULE

- Changes to Employees with Future Termination Dates [June 2019](#)
- New Notes Field for Benefits and Deductions on the Employee Maintenance Screen [June 2019](#)
- Two new module control values define the allowable date range when adding positions in the employee maintenance screen [March 2019](#)
- Payroll Batches for a split fiscal year have distinct General Ledger Posting numbers [March 2019](#)
- Added a process to update all active **additional wage** records with a new amount [March 2019](#)
- State of Rhode Island taxation of supplemental wages [March 2019](#)
- ERSRI export checks for valid and access to file path [December 2018](#)
- CT Part time sick accruals handles the 40 hour per year maximum [June 2019](#)

ACA processing

- Sites adopting or dropping Health Savings Accounts – handles split years [March 2019](#)
- New ACA type to indicate full/part time status independent of other employment data [June 2019](#)
- Export file now includes a salary column [June 2019](#)
- Several new error checks added to the process [June 2019](#)
- New prompts when creating attachments to ensure readiness [June 2019](#)
- Set Name & Social Security # on [V ACA] tab for Employee/Individual #1 [December 2018](#)

Timesheet entry enhancements:

- now allows adding a range of dates to an existing timesheet [December 2018](#)
- will allow direct entry of an employee number from any timesheet group for which the user has access [June 2019](#)
- Manual check now allows adding a range of dates to an existing timesheet [December 2018](#)
- Employee Maintenance screen now will display the first **ACTIVE** position of an employee [December 2018](#)
- **Enhanced the Bank Reconciliation Screen with a new report and a faster report** [September 2018](#)
- Added a button to remove Salary Change Records entered in error on the **[7 Salary]** tab [December 2018](#)
- Position Maintenance screen – added Remove Position and Position Segments buttons [December 2018](#)

Reports that were enhanced or added:

- #6138–CT Teachers Retirement Bureau with more categories [Enhanced] [September 2018](#)
- #6140–Excel® Encumbrance Summary [New] [March 2019](#)
- #6659–Employment Verification [Enhanced] [December 2018](#)
- #6630–Cost Code Table Edit List [Enhanced] [December 2018](#)
- #6662–Employee List – Benefits [New] [December 2018](#)
- #6663–Paycheck Summary – By Employee/Account [New] [December 2018](#)
- #6669 Timesheet History Reports [New] [June 2019](#)
- #6682–Salary Delete Log report [New] [December 2018](#)
- #6710–Employee List (New Columns Excel®) [Enhanced] [September 2018](#)
- #6714–Employee List – Grade Schedules – Columns added [Enhanced] [June 2019](#)
- #6789–EEO Reports [Enhanced] [December 2018](#)
- #6850–W2 Register (with TS Group Column) [Enhanced] [June 2019](#)
- #7227–Benefit Categories Report [Enhanced] [December 2018](#)

New and updated tables

- Pay Code Table now allows a higher % of hourly rate for vacation accrual calculations [September 2018](#)
- Added **hover text** to Timesheet Group table [December 2018](#)



ADMINS Unified Community

Fiscal Year 2019 Highlights

- ADMINS staff attended periodic IRS webinars to ensure that our processes and customers are kept current with new regulations; disseminated IRS provided reminders when received

Documents were updated [Enhanced] or added [New] to the Help Reference Library

○ HR-455 Additional Wage Update	[New]	March 2019
○ HR-590 Employee Reports	[New]	December 2018
○ HR-599 Implementing a New Bank Account	[Enhanced]	December 2018
○ Human Resources-610 Split Payroll	[Enhanced]	June 2019
○ HR – 895 Bank Table	[New itL]	September 2018
○ HR-1007 Danvers, MA CrewSense® Import	[New]	December 2018
○ HR-1055 AIG Export	[New]	June 2019

MISCELLANEOUS BILLING MODULE

- Use a service bureau or 3rd party printer for subscription-based billing [March 2019](#)
- Overdue balance process will now identify “old bills” that have been replaced with “new bills”. [December 2018](#)
- Added checking to identify parcels with both a current subscription and a drop subscription. [December 2018](#)
- MB-310 Subscription Billing [Enhanced] [March 2019](#)

PURCHASE ORDER MODULE

Print & Post options were enhanced to:

- Retain centralized control over spending, [June 2019](#)
- use decentralized data entry and printing, [June 2019](#)
 - without requiring printing and distribution by the central office [June 2019](#)
- The Fixed Assets flag is now available for sites using a Third-Party program for Fixed Assets [March 2019](#)
- AP/PO Dashboard provides query access for “Read Only” users [December 2018](#)
- Approvals screen has links to attachments on purchase order and purchase change orders [March 2019](#)
- Added the option to prevent removing user supplied attachments to posted purchase orders [June 2019](#)
- Users may now upload purchase orders from a spreadsheet [December 2018](#)
- Create New from Posted Purchase Order screen note that lines closed via C/O are not copied [September 2018](#)
- Added a fifth approver for electronic signatures [September 2018](#)
- PO entry screen now allows entry into lines four and five if the lines are blank on the bid [December 2018](#)
- Updated the vendor lookups in the Enter Vendors and View Vendors screens to retrieve vendor numbers more easily; added a lookup just for Cancelled (one-time) vendors [December 2018](#)
- Approval Path table lookups modified to optionally restrict the view to only active records [December 2018](#)

Query Screen

- Added helpful **hover text** on balance amounts [September 2018](#)
- Added “**Deliver To**” and “**Invoice To**” Columns to the Purchase Order Query screen [December 2018](#)

Added new reports and enhanced existing reports

- #3032 Change Order History Report – easier comparison of changes [Enhanced] [September 2018](#)
- #3665 POs Charged to Non-Expenditure Accounts [Enhanced] [June 2019](#)
- Overnight –Attachments added to open POs within the last x days [New] [June 2019](#)

Added new documents and updated documents to the Help Reference Library

- PO-105 Purchase Order Types [New] [June 2019](#)
- PO-235 View Attachments from the Approvals Screen [New] [March 2019](#)
- PO-255 Implementing Electronic Approval Signatures [New] [September 2018](#)
- PO-260 Changing a Signature on a Purchase Order Form [Updated] [September 2018](#)
- PO-770 Email Open PO Listings to Departments [New] [September 2018](#)
- PO-800 Upload POs from a Spreadsheet [New] [September 2018](#)
- PO-830 Upload Vendors Template [Enhanced] [December 2018](#)



ADMINS Unified Community

Fiscal Year 2019 Highlights

REVENUE COLLECTIONS MODULE

- Added a “save to PDF” on the Information Reports run on the Bill Payment Inquiry screen [June 2019](#)
- Added message to the Bill Locator screen reminding users that Balances do not include interest [June 2019](#)
- Added an option to allow payments to parcels in bankruptcy [March 2019](#)
- Allow spaces in file names used to import lockbox files [March 2019](#)
- Lockbox processing enhanced with error checking [June 2019](#)
- Enhanced the submit batch screen with deposit date and message columns [June 2019](#)
- Enhanced Form 410 (Tax Title balance due form) with parcel number on all pages [June 2019](#)

Batch Query Screen

- Added a new column to show the type of batch (Adjustment or Receipt) [June 2019](#)
- Dates may be updated on the screen prior to submitting the batch [June 2019](#)
- Now limited to two years of history to speed processing [June 2019](#)
- New Batch Query History screen added to provide access to older posted activity [June 2019](#)
- Automated task for UniBank Daily Balance E-Billing File [September 2018](#)
- Updated the Refunds Process ▶ [Maintain Work File] screen to allow any selected refund amount (including interest) to be changed to zero [December 2018](#)

New and updated reports:

- #4101 Cash Activity by Deposit Date/Batch [New] [September 2018](#)
- #4636 Revenue Detail by Category (By Year, By Type) [Enhanced] [June 2019](#)
- #4650 Lockbox Summary Report [Enhanced] [June 2019](#)
- #4702 Bill Type as of a Date Excel® includes Parcel Location [Enhanced] [March 2019](#)
- #4727 Cash Activity by Deposit Date [Enhanced] [September 2018](#)
- #5613 List Parcels in Bankruptcy [New] [March 2019](#)
- #11386 Tax Title/Deferred Redeemed Parcels [Enhanced] [December 2018](#)

Documents were updated in the Help Reference library

- RC-910 Refunds [Updated] [December 2018](#)
- RC-1510 Implementing a New Bank Account [Updated itL] [December 2018](#)
- RC-1220 Upload Treasury Receipt Codes Template [Updated] [June 2019](#)
- RC-1620 Unibank Daily File [Updated] [September 2018](#)

TAX MODULES

- Motor Vehicle Excise Query screen – selection on registration plate number added [September 2018](#)
- A [4 Copy Deed] button was added to the Real Estate Sales History screen [September 2018](#)
- Added a per diem field to the Betterments PREPAY/PAYOFF screen to align with the data available on the Municipal Liens Certificates [December 2018](#)
- Added a process to Remove Old Tax Years from the Collections files [March 2019](#)
- Personal Property Mass Abatements of low value bills now processes properties with different use codes [March 2019](#)

New and enhanced reports in the Tax Modules

- A new report provides a list of motor vehicle taxpayers signed up for electronic billing [June 2018](#)

Documents were updated in the Help Reference library

- RE- 1775 Cranston, RI Remove Old Tax Year From Collections [New] [March 2019](#)
- RE-350 Q1 Tax Balancing Template [June 2019](#)
- RE-370 Q2 Balancing Template [June 2019](#)
- RE-390 Q3 Balancing Template [June 2019](#)
- RE-650 Upload Real Estate Sales History Template [June 2019](#)
- RE-655 Upload Liens Template [June 2019](#)



ADMINS Unified Community

Fiscal Year 2019 Highlights

SYSTEM MODULE

User Profile screen enhancements

- Added last user login data to help “super-users” satisfy auditors requests for information [September 2018](#)
- Added a Restricted Desktop User check box on the User Profile screen to prevent users with abandoned sessions having trouble on their next login [December 2018](#)
- Phone number added to the screen for record locking message [September 2018](#)
- Searches on usernames and departments may be restricted to “All”, only “Active”, or only “Inactive” [December 2018](#)
- Override Username Restriction for Super Users on Retrieve Output Files [June 2019](#)
- Print and Post Purchase Order Radio Button [June 2019](#)
- Copy Favorites Button [June 2019](#)
- SuperUsers can Maintain Favorites screen for other users [December 2018](#)
- Department Group Profile screen lookups may be restricted to “All”, only “Active”, or only “Inactive” [December 2018](#)
- Enhanced the Locked Record screen with a full complement of menu selections to allow users waiting for a locked record to readily navigate to another screen [December 2018](#)

Department Group Security screen

- Copy User Security Button [December 2018](#)
- A partial search term will display the desired record on the User Account Security screen; for example, entering “Al” will return the first username, such as “Alex” or “Alice” [December 2018](#)

New Reports added on the menu:

- #46 Report of Last Logins (to identify inactive users) [June 2019](#)

New Documents added to the Help Reference Library

- SY-105 Record Locking on An Update Screen [New] [September 2018](#)
- SY-115 Favorites Screen [New] [March 2019](#)

WEBINARS

- Calendar Year End
 - [W2 & 1099R Processing](#)
 - [1099 Accounts Payable \(MISC, INST, S\) Processing](#)
 - [ACA Processing](#)
- Fiscal Year End
 - [Purchase Order Rollovers](#)
 - [Human Resources Labor Distribution \(split year\)](#)

In addition, ADMINS support staff conducted *hundreds* of GoToMeeting ad-hoc training sessions to provide sites with “*Just In Time*” training – training when users are ready to learn.

PREVIEW OF COMING ATTRACTIONS

- Schedule an update to training on their own
- Upload of phone numbers to the User Profile screen from a CSV file
- Emailing W2 to employees