BUDGET

RELEASE NOTES – DECEMBER 2018

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

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1. MAINTENANCE

ADMINS changed the Operating Budget (Cost Item Breakdown) Screen and related reports to free up more space for descriptions on the screen and reports as well as to streamline the reports by eliminating unused / blank lines. To access the screen, select **Budget ▶ Maintenance ▶ Operating Budget (Cost Item Breakdown**).

1.1. Operating Budget (Cost Item Breakdown) Screen Change [Enhanced]

Figure 1 Before – the screen had columns for Position and Emp#

Figure 2 After– With Position and Emp # removed, Line Description field expanded to allow more text

1.2. Operating Budget (Cost Item Breakdown) Edit List Changes [Enhanced]

Figure 3 Before – five lines were included on all Accounts

```
12076-BU0PBENTDET.REP        Printed 12-Nov-2018 at 10:25:22 by THERESA
                                                      Town of Admins
                                                   Cost Breakdown Edit List

For Budget Year: 2020
   Budget Group: HIGH SCHOOL
============================================ ==== ==== =============== ======== =========== ============ ============ ======================================
Account#                                                                                                 Account
Decription                                   LOS  Line Item           Quantity Item Price Base Budget   Breakdown   Note/Line Note
============================================ ==== ==== =============== ======== =========== ============ ============ ======================================

1000-300-2120-100-06-00-51260
HS DEPT HEADS                                 1    1                    1.0000  295,309.000       [1] 295,309  Moved assistant principal salaries to this line
                                              1    2                    1.0000  40,000.0000       [2]  40,000
                                              1    3                                              [3]         Guidance Director now in line #1000-300-2710-100-06-0-51210
                                                                                              ------------ ------------
                                 *** Account Total ***                                               0     335,309
-------------------------------------------------------------------------------------------------------------------------------------------
1000-300-2120-116-06-00-51260
RTI TEAM STIPENDS - HS                        1    1                                              [4]
                                                                                              ------------ ------------
                                 *** Account Total ***                                               0          0
```

Figure 4 After – unused lines omitted; only lines with dollars or line notes are included

In Figure 4, for the **HS DEPT HEADS** account, [1] has dollars and a note, [2] only dollars, and [3] only a note. There is no data listed for unused lines. The edit list continues to list a single line (shown at [4]) for each account, even where no dollars or line notes are entered.[1]

[ADM-AUC-BU-3901]

2. REPORTS–OPERATING BUDGET

ADMINS enhanced two reports to go with the screen changes described in section 1.1. The **12560 Budget Cost Breakdown Item Listing** and **12561 Cost Breakdown Item Listing by Account** were changed to eliminate the **Position** and **Emp#** columns and expand the **Note/Line Note/Message** column. These reports are run from the **Budget ▶ Reports ▶ Report Library ▶ Operating Budget** screen.

2.1. 12560 Budget Cost Breakdown Item Listing [Enhanced]

```
12560-BUITMLST.REP          Printed 06-Nov-2018 at 13:59:42 by ANTHEA                                                            Page 1
                                                      Town of Admins
                                               Budget Cost Breakdown Item Listing

For Budget Year: 2020
   Budget Group: HIGH SCHOOL
============================================ ==== ==== =============== ⊘ ⊘ ======== =========== ============ ============ ======================================
Account#                                                                                              Cost       Account
Decription                                   LOS  Line Item           Postion Emp# Quantity Item Price Breakdown   Total   Note/Line Note
============================================ ==== ==== =============== ======== ======== =========== ============ ============ ======================================

1000-300-2210-550-06-00-52040                                                                                       2,000
PRINT & BIND - HS                             1    1                    000                                                
                                              1    1                    000             1.0000           500    Grade 8-12 Documents printed upon request. Handbooks,
                                                                                                               Programs of Studies etc
                                              1    2                    000             1.0000          1,000   Grade 12 Programs & printed materials for concerts,
                                                                                                               events and graduation
                                              1                                        1.0000                  Grade 8-12 ...                    ...for students
```

Figure 5 Before–Report #12560 Budget Cost Breakdown Item Listing–Position and Emp# columns on the report

```
12560-BUITMLST.REP            Printed 12-Nov-2018 at 11:09:26 by THERESA                                                              Page 1
                                                              Town of Admins
                                                   Budget Cost Breakdown Item Listing

For Budget Year: 2020
   Budget Group: HIGH SCHOOL
=======================================  ====  ====  ===============  ========  ============  ============  ============  ========================================================
Account#                                                                                          Cost       Account
Decription                                LOS  Line  Item             Quantity  Item Price     Breakdown     Total  Note/Line Note
=======================================  ====  ====  ===============  ========  ============  ============  ============  ========================================================
1000-300-2120-100-06-00-51260                                                                                 335,309
HS DEPT HEADS                                    1
                                           1     1                     1.0000   295,309.000     295,309            Moved assistant principal salaries to this line
                                           1     2                     1.0000    40,000.0000      40,000
1000-300-2210-550-06-00-52040                                                                                   2,000
PRINT & BIND - HS                                1
                                           1     1                     1.0000                       500            Grade 8-12 Documents printed upon request. Handbooks, Programs
                                                                                                                  of Studies etc
                                           1     2                     1.0000                     1,000            Grade 12 Programs & printed materials for concerts, events and graduation
                                           1     3                     1.0000                       500            Grade 8-12 Schedules and tickets printed for students and families
                                                                                                                  This is additional justification for budget request

                                                                                                ------------  ------------
                          *** Budget Group HIGHSCHOOL Total ***                                    337,309       337,309
                                                                                                ============  ============
```

Figure 6 After Report #12560 Budget Cost Breakdown Item Listing with the expanded width for Note/Line Note

Figure 7 After Report #12560 Budget Cost Breakdown Item Listing as run to Excel®

2.2. 12561 Cost Breakdown Item Listing by Account [Enhanced]

Figure 8 Report #12561 Cost Breakdown Item Listing by Account – eliminate Position and Emp# columns

```
12561-BUITMACCT.REP           Printed 12-Nov-2018 at 11:30:10 by THERESA                                                            Page 1
                                                                Town of Admins
                                                     Cost Breakdown Item Listing By Account
For Budget Year: 2020
========== ==============================================  ==== =====  ================  ========  ===========  ============  ============ ===================================
Budget     Account#                                                                                   Cost       Account
Group      Decription                              LOS Line  Item            Quantity  Item Price   Breakdown      Total  Line Note / Message
========== ==============================================  ==== =====  ================  ========  ===========  ============  ============ ===================================
HIGHSCHOOL 1000-300-2120-100-06-00-51260
           HS DEPT HEADS                                      1                                                                 335,309
                                                     1    1                  1.0000  295,309.000     295,309              Moved assistant principal salaries to this line
                                                     1    2                  1.0000  40,000.0000      40,000
                                                                                                   -----------  ------------
                                     *** Account Total ***                                            335,309       335,309

HIGHSCHOOL 1000-300-2210-550-06-00-52040
           PRINT & BIND - HS                                 1                                                                   2,000
                                                     1    1                  1.0000                      500              Grade 8-12 Documents printed upon request. Handbooks, Programs of Studies
                                                     1    2                  1.0000                    1,000              Grade 12 Programs & printed materials for concerts, events and graduation
                                                     1    3                  1.0000                      500              Grade 8-12 Schedules and tickets printed for students and families
                                                                                                   -----------  ------------
                                     *** Account Total ***                                              2,000         2,000  This is additional justification for budget request


                                                                                                   ============  ============
                          *** Grand Total #Accounts 2       ***                                       337,309       337,309
                                                                                                   ============  ============


--------------------------------------------------------
Selection Legend:
--------------------------------------------------------
*** indicate this LOS has been Omitted from the budget
```

Expanded field width

Figure 9 After – Report # 12561 Cost Breakdown Item Listing by Account with expanded Line Note/Message column

Figure 10 After – Report # 12561 Cost Breakdown Item Listing by Account as run to Excel®

[ADM-AUC-BU-3901]

3. TABLES

ADMINS enhanced buttons and added new buttons to the **Position Maintenance** and **Budget Group** tables.

3.1. Budget Groups ▶ Detail

3.1.1. Copy User–All Groups [New]

ADMINS added a process to copy **all** budget groups from one user to another user on the budget group detail screen. Select **Budget▶Tables ▶ Budget Groups**. Click on **[1 Detail]** to display the Detail screen.

The new button is called **[Copy User–All Groups].** The system will display a prompt requiring a **"FROM"** and **"TO"** username to be entered.
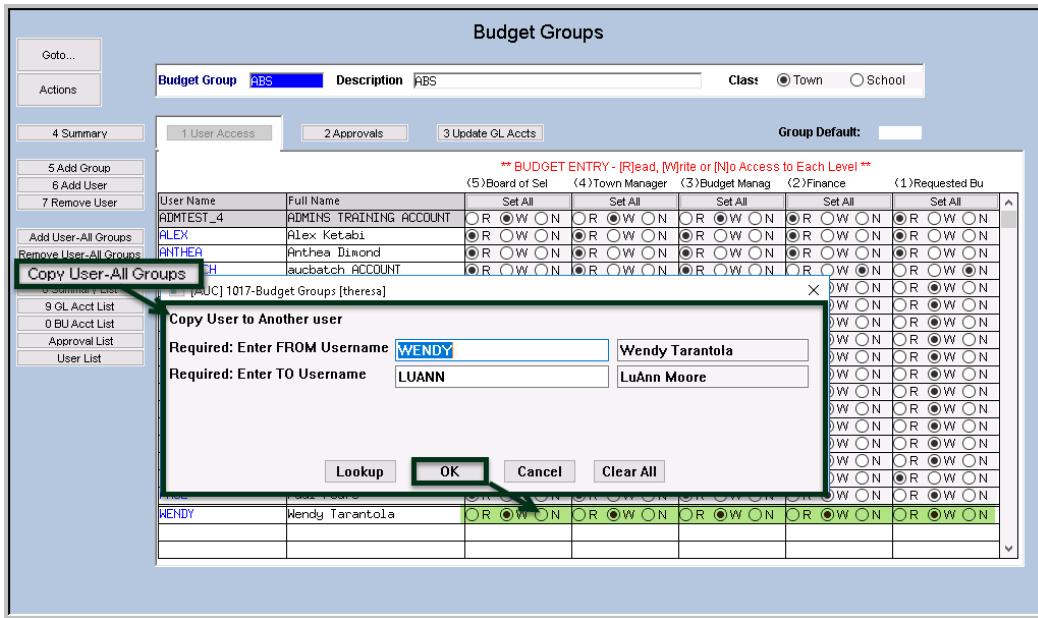
This will create access for a new user, **"LuAnn",** with the same characteristics as the **"From"** user, **"Wendy"**, for **all levels** and **all budget groups**. This will save time when a new staff member requires similar access to an existing user.
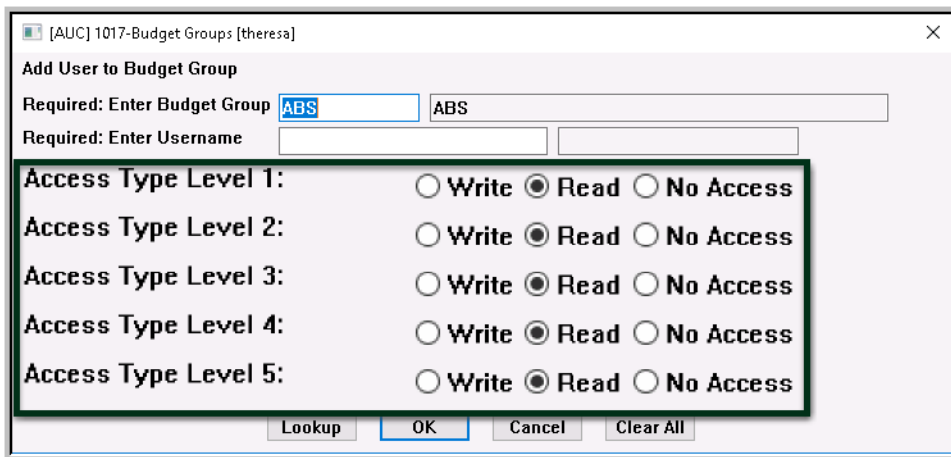

[ADM-AUC-BU-3880]

3.1.2.   Add User [Enhanced]

Figure 11 Add User now has the Access Types selection

The **[6 Add User]** button was enhanced to include the Access Type for each Level.

Prior to the software update, the user was added and then the Access Type for each level could be edited. The Access Type will be set when the user is added, but will continue to be editable in the screen as usual.

Different access types may be assigned for each Level.

[ADM-AUC-BU-3898]

3.1.3.   Add User All Groups [Enhanced]
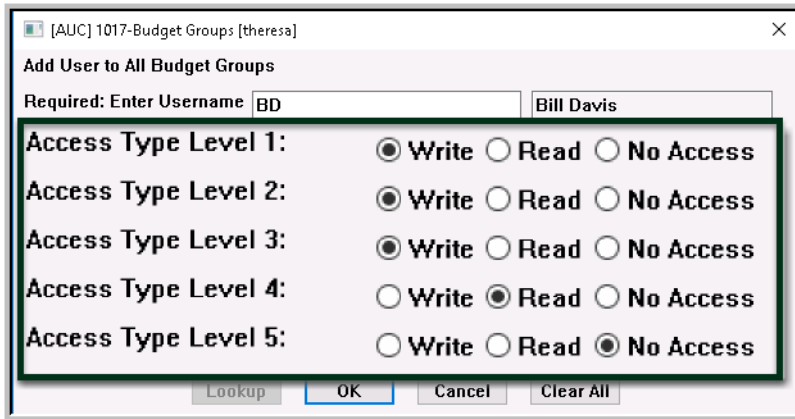
The **[Add User All Groups]** button was enhanced to include the Access Type for each Level.

Prior to the software update, the user was added and then the Access Type for each level could be set via the radio button. The Access Type will now be set when the user is added, and will continue to be editable in the screen as usual.

Different access types may be assigned for each Level.

[ADM-AUC-BU-3898]

3.2.   Position Maintenance–Budgeting ▶ [Remove Position] [New]

A **[2 Remove Position]** button was added to the **Tables ▶Position Maintenance–Budgeting** screen. This allows removing a position if an error was made when creating the position. The **[2 Remove Position]** button is only in focus if the budget has not been created for the position (Figure 13). If the budget has been created, the **[2 Remove Position]** button will not be in focus/available (Figure 14). Instead, select **Change Status** from the menu under the **[Actions]** button (Figure 15) to inactivate the position.
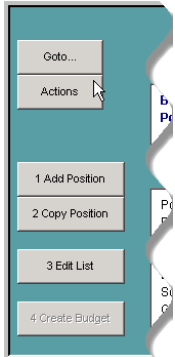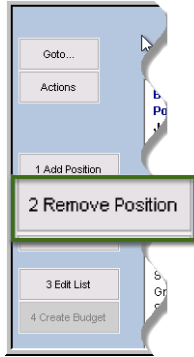

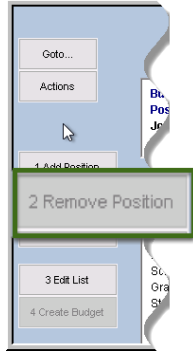**Figure 12 Before**   **Figure 13 New button**   **Figure 14 Not in focus/unavailable**   **Figure 15 Actions ▶ Change Status**
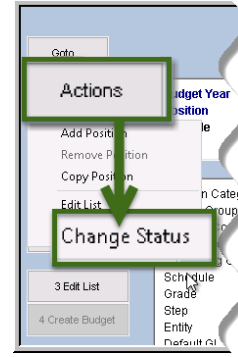
[ADM-AUC-BU-3899]

4. CHANGE BUDGET GROUP ON A POSITION [Enhanced]

The place to change a budget group on a position is on the **Budget ▶ Tables ▶ Position Maintenance** screen. If the budget group is to be changed after the budget is initialized and positions are built, the system will not allow adding the position in the new budget group until the position is removed from the old budget group. The system now reports that the position is already budgeted for in another budget group. Consider the following illustration in Figure 16: The budget was initialized with a position in the **"SCHOOL"** budget group. The new budget group **"ARTS"** is where the position should be budgeted.

1.   Delete any existing budgeted positions with that position #.

2. Set the new budget group on the position.
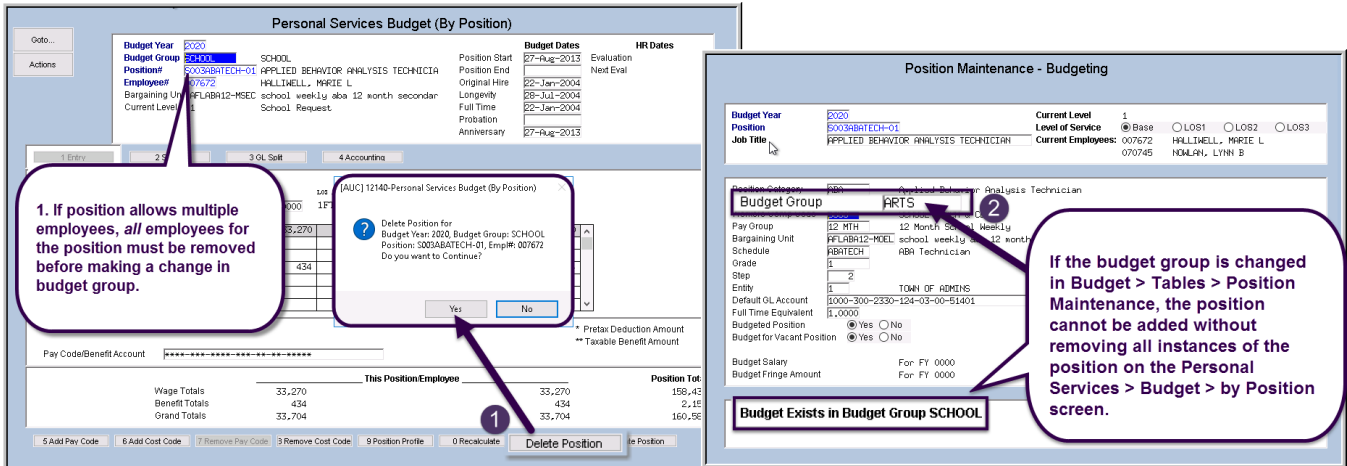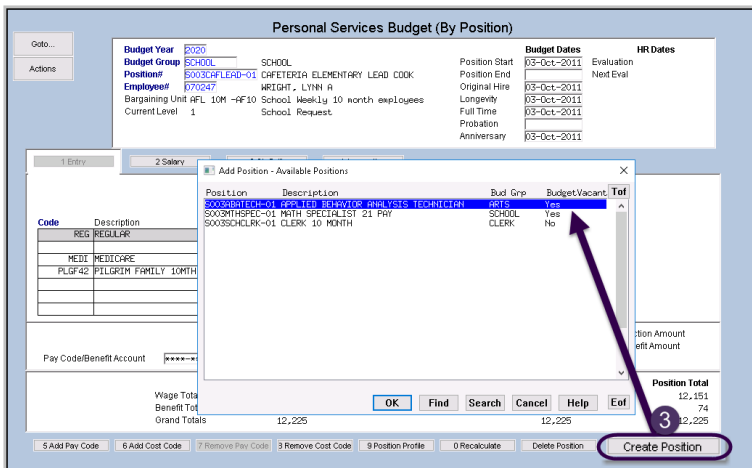3. Add the position in the new budget group.

Figure 16 Changing the budget group – new message on the Position Maintenance – Budgeting Screen

Prior to the software update, a change to the budget could be made on the **Position Maintenance–Budgeting** table, without notifying the user that the budgeted position existed in a budget group already. Now an informational message appears at the bottom of the screen. Delete all existing employee records for the position before changing the budget group prior to creating a new position within the new budget group. Once the **Budget group** for the **position** is updated, the position may be created on the **Budget ▶ Maintenance ▶ Personal Services Budget (By Position)** screen:

As shown in **Figure 17**, the position is now available to add in the new budget group **"ARTS".**

- The position with the original **"SCHOOLS"** budget group is *removed* from all files.
- The position with the new **"ARTS"** budget group will be *added* to all files.

[MBE-SAP-SAPLAUC-983]

Figure 17 Creating the position in the new budget group

5. MODULE CONTROL #12106 Description

The description on module control #12106 was changed to clarify that if Operating Budget Notes should *NOT* be copied to the new year, the value should be left blank.

Seq#	Description	Answer
12106	Enter "Y" to Copy Operating Budget Notes to the New Year.	
12110	Update Level Amount with Cost Item Breakdown Values (this will	N

Figure 18 Before

Figure 19 After – added <mark>hovertext</mark> **explaining how to use the module control value**

[ADM-AUC-BU-3902]

6. PREVIEW OF COMING ATTRACTIONS

ADMINS conducts annual customer site visits. These visits provide the opportunity to solicit customer recommendations on new features. As a result, the **ADMINS** team is enthusiastically working on a **"User Favorites"** feature to be implemented in the coming months.

6.1. Favorites Screen [New]

AUC has hundreds of processes and screens and thousands of reports. To provide ease of use for infrequent users and to allow regular users to customize working with **AUC**, a **"Favorites"** screen is in development. This screen may be set as the user's home screen that is displayed when accessing **AUC**.
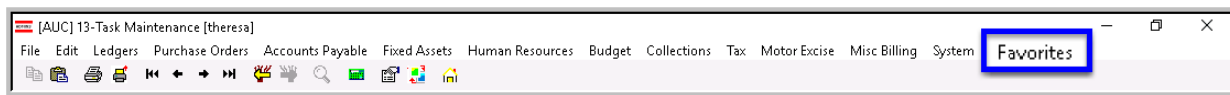

Figure 20 Select Favorites ▶ User Favorites to access the screen and make selections.

The screen will allow the selection of up to 45 items to be available on the **Favorites** screen.The available screens will be limited to those to which each user is allowed access. All menu, department and account security will remain in effect. Users will make selections from menus.
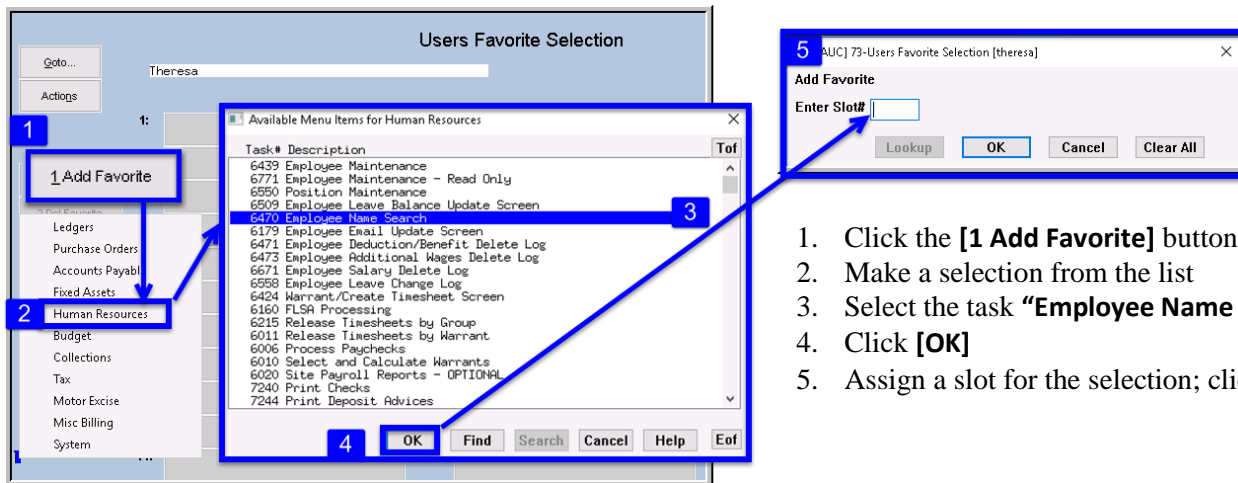

1. Click the **[1 Add Favorite]** button
2. Make a selection from the list
3. Select the task **"Employee Name Search"**
4. Click **[OK]**
5. Assign a slot for the selection; click **[OK]**

Figure 21 Steps to create a favorites screen

In the example shown a user has chosen the AP/PO Dashboard and also the PO Query screen.

Figure 22 A user's selections

1. The **[1 Add Favorite]** button displays a menu of available tasks
2. The **[2 Del Favorite]** button allows the removal of a favorite from a slot
3. The user's name as entered in the user profile screen
4. A favorite task in slot #1
5. A second favorite task in slot #3

[ADM-AUC-SY-8067]

7. HELP REFERENCE LIBRARY

7.1. New or Updated Documentation

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

- SITE SPECIFIC   BU–160 Bellingham, MA Departmental Budget Entry Guide   [New]
- SYSTEM   BU–320 System Administration Kit   [Revised]

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[1] This change does not apply to the Middletown Board of Education, which uses a custom report.