



BUDGET

RELEASE NOTES – JUNE 2018

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

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1. POSTING MESSAGES [Fix]

When posting a large number of transactions, users would sometimes get logged off of the AUC server and see this message:

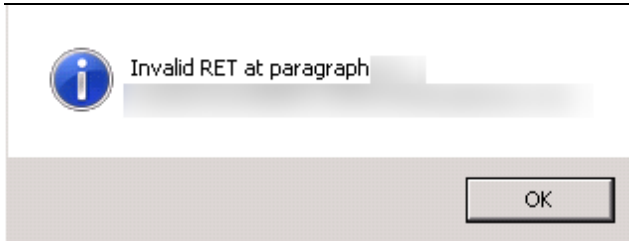


Figure 1 Before “Invalid RET at paragraph...” error message

This has been fixed and the user will now see a successfully completed message like this one once the process has completed.



[ADM-AUC-GL-8290]

1.1. Post Personal Services Budget

A similar change was made for posting Personal Services Budgets; the user will no longer see the error message in Figure 1.

[ADM-AUC-GL-8290]



2. REPORTS ▶ Standard Budget Report (Portrait) 4 Columns [New]

Task 12474: Standard Budget Report (Portrait) 4 Columns

Standard Budget Report (Portrait) 4 Columns
Will print up to 4 selected columns on report in portrait layout

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

12474 Standard Budget Report (Portrait) 4 Columns

Report Title: Standard Budget Report (Portrait) 4 Columns

Budget FY: 2019

1 Selection Criteria

2 Totals By

Element	From	To	Group	Type	Category	Sub-Class	Acc
Fund	0000	0000					<input type="checkbox"/> A
Department	000	000					<input type="checkbox"/> Li
Function	0000	0000					<input type="checkbox"/> F
Program	000	000					<input checked="" type="checkbox"/> E
Location	00	00					<input checked="" type="checkbox"/> R
Year	00	00					

Select Columns to Display on Report...

Column 1: CURBUD

Column 2: CURACT

Column 3: LV1BUD

Column 4: LV2BUD

Column 5: []

Column 6: []

Column 7: []

Other Defined

- DOE Line 1
- DOE Line 2
- COA Code 3
- COA Code 4
- COA Code 5
- COA Code 6

A new report is available in the **Budget ▶ Reports ▶ Operating Budget Reports Library**. This report provides more space for the combined account number and description. Select **12474–Standard Budget Report (Portrait) 4 Columns**. Make up to four column selections.

12474-BUBUDRPTPORT4.REP Printed 11-Jun-2018 at 17:14:00 by THERESA Town of Admins Page 9

Budget Fiscal Year: 2019 to 2019 Standard Budget Report (Portrait) 4 Columns

Account# and Description	2018 Budget	2018 Actual YTD	Level 1	Level 2
1000-750-0000-007-00-00-59121 PEARL ST DAM REMOVAL DATED 9/19/16	15,600	15,600	15,600	0
1000-750-0000-007-00-00-59122 MCWT LOAN NO. DW-13-11 WATER TRMT	254,563	0	254,563	0
1000-750-0000-007-00-00-59123 MCWT TITLE S LOAN NO. IS-37-1036-E	14,786	0	14,786	0
1000-750-0000-007-00-00-59210 TITLE V - MCWT LOAN NO. 97-1036	1,472	0	1,472	0
1000-750-0000-007-00-00-59211 TITLE V - MCWT LOAN NO. 97-1036-1	2,765	0	2,765	0
1000-750-0000-007-00-00-59213 GEN OBLIG BOND DATED 4/15/05	47,250	0	47,250	0
1000-750-0000-007-00-00-59214 GEN OBLIG BOND DATED 5/15/08	65,400	32,700	65,400	0
1000-750-0000-007-00-00-59215 GEN OBLIG ADVANCE REF DATED 3/1/10	312,150	156,075	312,150	0
1000-750-0000-007-00-00-59216 SCHOL CONSTR REFUNDING DATED 9/15/11	142,800	95,025	142,800	0
1000-750-0000-007-00-00-59218 MUNICIPAL PURP LOAN DATED 11/28/12	70,300	37,000	70,300	0
1000-750-0000-007-00-00-59220 MUNICIPAL PURP LOAN DATED 09/04/14	376,557	181,803	376,557	0
1000-992-0000-009-00-00-59010 TRANSFER TO TRUST FUND	6,600,000	6,600,000	6,600,000	0
*** Grand Total ***	37,268,923	22,325,093	37,248,923	205,538

***** Selection Legend *****

Account Type: ER
BudYr: 2019 to 2019
Entity Type: Town
Account Sub Type: P
Column 1: Current GL Fiscal Year Adjusted Budget
Column 2: Current GL Fiscal Year Actuals
Column 3: Approved Level 1 Budget
Column 4: Approved Level 2 Budget

Figure 2 New Standard Budget Report (Portrait) with 4 Columns

[ADM-AUC-BU-3894]

3. GLOBAL APPROVAL NAME CHANGE [New]

To allow a site to quickly and easily replace all instances of one approver with another (helpful when a key staffer is replaced), a new feature is introduced with this software update. Access the screen by selecting **Budget ▶ Tables ▶ Budget Groups**.



Budget Groups						
Budget Group	Description	Class	Include Group in Budget	Status		
ARTICLES	ARTICLES	Town	<input type="radio"/> Yes <input checked="" type="radio"/> No	Active		
ARTS	ARTS	Town	<input checked="" type="radio"/> Yes <input type="radio"/> No	Active		
ASSESSMENT	ASSESSMENT	Town	<input checked="" type="radio"/> Yes <input type="radio"/> No	Active		
ASSESSORS	ASSESSORS	Town	<input checked="" type="radio"/> Yes <input type="radio"/> No	Active		
AUXPOLICE	AUXPOLICE	Town	<input checked="" type="radio"/> Yes <input type="radio"/> No	Active		
CRPCD	CRPCD	Town	<input type="radio"/> Yes <input checked="" type="radio"/> No	Active		
SCHOOL CURRICULUM	SCHOOL CURRICULUM	School	<input checked="" type="radio"/> Yes <input type="radio"/> No	Active		

Select any group and click on the [1 Detail] button; then click on the new [Global User Change] button:

Global User Change on Budget Approvals

Required: From: [] To: WENDY

Run as Preview Print PDF

If Printing use Duplex Yes No

Buttons: Lookup, OK, Cancel, Clear All

Change User on All Groups and Levels

New User must be in Group and have [W]rite access to the Level

Figure 3 – The new Global User Change button replaces one user with another for all groups and levels

1702-GLBUDGRPCHGALL.REP Printed 13-Jun-2018 at 12:43:57 by THERESA

Global User Change on Budget Approvals

Groups With No Changes

Group	Description	Entity	Status	Apprvl	Budget Type	Level	Description	Primary Approver	Secondary Approver	Tertiary Approver
ABS	ABS	Town	Active	5	Operating Budget	Board of Selectmen	BETES	THERESA		
						Town Manager	BETES	HARILYN		
						Budget Manager	BETES	HARILYN		
						Level 2	BETES	HARILYN		
						Level 1	BETES	HARILYN		
				5	Personal Services		LJANN	THERESA		
							LJANN	THERESA		
							LJANN	THERESA		
							LJANN	THERESA		
				1	Capital B		LJANN	THERESA		
							LJANN	THERESA		
Total All Groups 1										

Change User for Budget Approvals

Check Reports
Press OK to Continue and Apply Changes
Press Cancel to Exit without Changes

Buttons: OK, Cancel

Figure 4 Report of Groups with No Changes

Two reports will be produced; check each and if satisfied with the lists, click [OK] on the prompt to continue and apply the changes. Select [Cancel] to exit the process without making any changes.



1702-GLBUDGRPCHGALL.REP Printed 13-Jun-2018 at 12:43:57 by THERESA
Town of Admins
Global User Change on Budget Approvals
Groups with Name Changes From [] To WENDY

Group	Description	Entry	Status	Appr'l	Budget Type	Level Description	Primary Approver	Secondary Approver	Tertiary App
ADM	ADM	Town	Active	5	Operating Budget	Board of Selectmen	THERESA	LOANN	
						Town Manager	THERESA	LOANN	
						Budget Manager	THERESA	LOANN	
						Level 2	THERESA	LOANN	
						Level 1	THERESA	LOANN	
				5	Personal Services		LOANN	THERESA	
							LOANN	THERESA	
				1	Capital P		LOANN	THERESA	
ADOSER	ADOSER	Town	Active	5	Operating		THERESA	THERESA	THERESA
							THERESA	THERESA	THERESA
				5	Personal		LOANN	THERESA	THERESA
							LOANN	THERESA	THERESA
				1	Capital Projects		LOANN	THERESA	
AFFORD	AFFORD	Town	Active	5	Operating Budget	Board of Selectmen	THERESA		
						Town Manager	THERESA		
						Budget Manager	THERESA		
						Level 2	THERESA		
						Level 1	THERESA		
				5	Personal Services		LOANN	THERESA	
							LOANN	THERESA	

Figure 5 Report of Groups with Name Changes from “Old User” to “WENDY”

Budget Groups

Budget Group: CRPCD Description: CRPCD Class: Town School

4 Summary 1 User Access 2 Approvals 3 Update GL Accts

5 Add Group

6 Summary List 7 GL Acct List 8 BU Acct List 9 Approval List 0 User List

Global User Change

Operating Budget	# of Approval Levels	5 out of 5 allowed for this Class and Budget		
Description	Primary	Secondary	Tertiary	
(5) Board of Selectmen	MARILYN		WENDY	
(4) Town Manager	MARILYN		WENDY	
(3) Budget Manager	MARILYN		WENDY	
(2) Level 2	MARILYN		WENDY	
(1) Level 1	MARILYN		WENDY	

One example of where the original user was changed to "WENDY" - the new user.

Figure 6 Result of the Global User Change

[ADM-AUC-BU-3887]

4. HELP REFERENCE LIBRARY

4.1. New or Updated Documentation

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

- OTHER
 - BU-250 How to Exit from AUC [New]
 - BU-260 The Best Way to Contact Support [New]