



Budget Module

Release Notes

June 2023

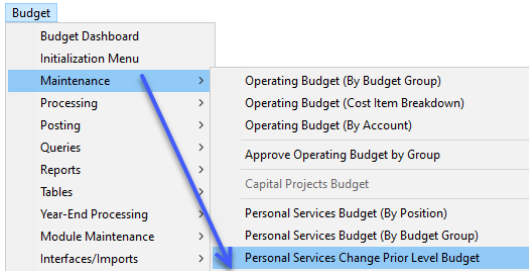
This document explains new product enhancements added to the **ADMINS Unified Community for Windows (AUC) BUDGET** system.

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1 Personal Services Change Prior Level Budget [Enhancement]



Before the software update, if changes were needed for a prior approved level, the entire personal services budget had to be disapproved, returned to the previous level, and then all the changes made to the prior approved level would have to be re-done, along with the additional changes.



To make it easier to reach back and fine-tune positions that were approved at a prior level, **ADMINS** added a new feature to the

Personal Services budget.



This process cannot be used to add or remove a position.

The **[2 Approvals]** tab of the Budget Groups screen defines the Personal Services Approval Levels. In this example, the current Approval Level is **(2) Finance**.

Operating Budget

Description	Primary	Secondary	Tertiary
(5) Board	THERESA		
(4) CFO	THERESA		
(3) Budget Manager	THERESA	JREBELO	MROCHE
(2) Finance	THERESA	JREBELO	MROCHE
(1) Department	THERESA	JREBELO	MROCHE

Personal Services

Description	Primary	Secondary	Tertiary	** SET IN SYSTEM PROFILE **
(5) Board	LUANN	ANTHEA	WENDY	
(4) CFO	LUANN	ANTHEA	WENDY	
(3) Budget Manager	LUANN	ANTHEA	WENDY	
(2) Finance	LUANN	ANTHEA	WENDY	
(1) Department	LUANN	ANTHEA	WENDY	

Personal Services Budget (By Position)

Budget Year	2024	Budget Dates	24-Aug-2017	HR Dates	
Budget Group	DISTRICT	Position Start		Evaluation	
Position#	5003CUS2NDS-02 CUSTODIAN	Position End		Next Eval	
Employee#	071034 JENNESS, KEITH G	Original Hire	24-Aug-2017		
Planned Employee	000000	Longevity	24-Aug-2017		
Bargaining Unit	AFL -AF School Weekly 12 month employees	Full Time	24-Aug-2017		
Current Level	2 Finance	Probation			
		Anniversary	24-Aug-2017		

The only previous level available is **(1) Department**. To make a change to a position in the previous level, from the menu, select:



Budget ▶ Maintenance ▶ Personal Services Change Prior Level Budget

Position	Title	Employee #	Name	Amount
S003BATECH-02	ABA TECH DIPIETRO 10 MONTH BENEFITS	071655	WALSH, KAREN	29,764
S003ADJCOLN-01	ADJUSTMENT COUNSELOR 26 PAYS	070943	SKINNER, LYNN M	75,365
S003BEHTECH-01	BHV TECH GRANDFATHERED DIPIETRO	007672	HEALY, MARIE L	30,551
S003BEHTECH-01	BHV TECH GRANDFATHERED DIPIETRO	070376	POULIOT, LYNN J	30,596
S003BEHTECH-01	BHV TECH GRANDFATHERED DIPIETRO	070697	VIVEIROS, LYNN K	30,596
S003BEHTECH-01	BHV TECH GRANDFATHERED DIPIETRO	070745	OSTERGREN, LYNN B	30,596
S003BEHTECH-02	BHV TECH DIPIETRO 10 MTH BENEFITS	071377	WALEY, MARIE	29,864
S003BEHTECH-02	BHV TECH DIPIETRO 10 MTH BENEFITS	071654	PADDEN, LYNN	29,866
S003BEHTECH-02	BHV TECH DIPIETRO 10 MTH BENEFITS	071905	GARZA, KAREN E	28,073
S003BLDSUB -01	BUILDING SUBSTITUTE 1YR ONLY DIPIETRO	071428	GOODWIN, MARIE	112
S003BLDSUB -01	BUILDING SUBSTITUTE 1YR ONLY DIPIETRO	071549	DULCHINOS, LYNN	112
S003CFLEAD-01	CAFETERIA ELEMENTARY LEAD COOK	070247	ZAPFALA, LYNN A	18,216
S003CUS2NDS-02	CUSTODIAN	071034	JENNESS, KEITH G	53,189
S003CUS2NDS-02	CUSTODIAN	071167	REMILLARD, MARIE	53,075
S003CUSHEAD-03	HEAD CUSTODIAN DIPIETRO	006036	HAMPTON, MICHAEL	59,496
S003ILASPED-03	ILA -10 MONTH DIPIETRO	071497	DEPARDO, MARIE	21,905
S003ILASPED-03	ILA -10 MONTH DIPIETRO	071610	GARZA, KAREN R	21,913
S003KNITC -01	DIPIETRO KINDERGARTEN TEACHER	010077	DEVLIN, KAREN M.	97,328
S003KNITC -01	DIPIETRO KINDERGARTEN TEACHER	010183	SHERLOCK, KAREN C.	86,828
S003KNITC -01	DIPIETRO KINDERGARTEN TEACHER	010200	THOMPSON, LYNN R.	90,093

The system will display a multi-record screen. Select the year, budget group, and prior approval level at the top of the screen.

Next, find the position and employee # to be changed, click on it, and click the [1 Do Change] button to access the Change Prior Level Personal Service Position screen. The screens are the same as the Personal Services Budget

(By Position) screen with a few exceptions.

1.1 Screen #12177 [1 Entry] Tab

Change Prior Level Personal Service Position

Budget Year: 2024
 Budget Group: DISTRICT
 Position#: S003CUS2NDS-02
 Employee#: 071167
 Bargaining Unit: 961

Position Start: 08-Nov-2018
 Position End: 02-Jul-2018
 Original Hire: 08-Nov-2018
 Longevity: 02-Jul-2018
 Full Time: 02-Jul-2018
 Probation: 26-Jun-2018
 Anniversary: 26-Jun-2018

Selected Level: 1

Code	Description	Base	Ovr	Total
LNG	LONGEVITY	228		228
REG	REGULAR	52,200		52,200
ALTFAM	ALTUS FAM SCHOOL 52 *			
HMOBF	HMO BLUE FAMILY 12MTH SCHOOL *			
MEDI	MEDICARE	647		647

Wage Totals: 52,428
 Benefit Totals: 647
 Grand Totals: 53,075

Buttons: 5 Add Pay Code, 6 Add Cost Code, 7 Remove Pay Code, 8 Remove Cost Code, 9 Position Profile, 0 Recalculate, Post Change, Exit Remove Change

Make the changes here, post the changes, and if the changes apply to subsequent levels, repeat the process for each level that requires the change.

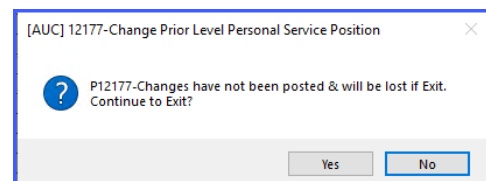
If the current level is 4, and the change is made to level 1, if required, make changes to levels 2, 3, and 4 to reflect the position changes made in level 1.

Figure 1 New screen allows changing one position at a time in an approved previous level of the budget

Once the change(s) are made, click on the [Recalculate] button, which will generate several reports. Review the reports, and when satisfied with the changes, click on the [Post Change] button to post the new data to the position & employee for that level. If errors are made or if there is any reason to abandon the change, click on the [Exit Remove Change] button. The position will remain unchanged.

Exiting the multi-record screen using the yellow branch arrow before posting the change will display this message:

“Changes have not been posted & will be lost if Exit. Continue to Exit?”





While on this screen, the pull-down menus are not accessible – to move to another screen, either **Post** or **Exit**.

The **[Recalculate]**, **[Post Change]**, and **[Exit Remove Change]** buttons are available from all the tabs on this screen.

1.2 [2 Salary] Tab

Change Prior Level Personal Service Position

Budget Year: 2024
Budget Group: FIRE
Position#: 0220FIRLT -04
Employee#: 071157
Planned Employee: 000000
Bargaining Unit: FIRE -FI
Selected Level: 1

Position Start: 19-May-2022
Position End: []
Original Hire: 05-Jul-2018
Longevity: 05-Jul-2018
Full Time: []
Probation: []
Anniversary: 05-Jul-2018

Budget Dates: 19-May-2022
HR Dates: Evaluation Next Eval

1 Entry | **2 Salary** | 3 GL Split | 4 Accounting

Effective Date	Ovr	Reason	Bargaining Unit	Schedule	Grade	Step	Annual Amt	Hourly Rate	Days	Salary	Salary %
01-Jul-2023	<input type="checkbox"/>	Actual Salary	FIRE -FI	FI	1	2	70,631	32,3400	366	100,00	

5 Add Date | 6 Remove Date | **8 Recalculate** | Post Change | Exit Remove Change

1.3 [3 GL Split] Tab

Change Prior Level Personal Service Position

Budget Year: 2024
Budget Group: FIRE
Position#: 0220FIRLT -04
Employee#: 071157
Planned Employee: 000000
Bargaining Unit: FIRE -FI
Selected Level: 1

Position Start: 19-May-2022
Position End: []
Original Hire: 05-Jul-2018
Longevity: 05-Jul-2018
Full Time: []
Probation: []
Anniversary: 05-Jul-2018

Budget Dates: 19-May-2022
HR Dates: Evaluation Next Eval

1 Entry | 2 Salary | **3 GL Split** | 4 Accounting

Line	Account#	Salary Per	Benefit Per	Up to 5	Start Date	End Date	Actual Amount
1	1000-220-0000-002-00-00-51120	100,0000	100,0000				

5 Add Line | 6 Delete Line | **8 Recalculate** | Post Change | Exit Remove Change

1.4 [4 Accounting] Tab

Change Prior Level Personal Service Position

Budget Year: 2024
Budget Group: FIRE
Position#: 0220FIRLT -04
Employee#: 071157
Planned Employee: 000000
Bargaining Unit: FIRE -FI
Selected Level: 1

Position Start: 19-May-2022
Position End: []
Original Hire: 05-Jul-2018
Longevity: 05-Jul-2018
Full Time: []
Probation: []
Anniversary: 05-Jul-2018

Budget Dates: 19-May-2022
HR Dates: Evaluation Next Eval

1 Entry | 2 Salary | 3 GL Split | **4 Accounting**

Code	Account	Base	1BFT	2BFT	Total
FIRE CL	1000-220-0000-002-00-00-54600	960			960
FIRE HLD	1000-220-0000-002-00-00-51530	3,060			3,060
FIRE LNG	1000-220-0000-002-00-00-51600	272			272
FIRE PFR	1000-220-0000-002-00-00-51800	12,600			12,600
REG	1000-220-0000-002-00-00-51120	70,631			70,631
HL1521	0000-000-0000-000-00-00-00000	*			
HMDS TRN	0000-000-0000-000-00-00-00000				
MEDI	1000-195-0000-001-00-00-57010	1,213			1,213
Wage Totals		87,513			87,513
Benefit Totals		1,213			1,213
Grand Totals		88,726			88,726

*Budget COA-Not Budgeted

5 Position Profile | **8 Recalculate** | Post Change | Exit Remove Change



1.5 Reports Generated During the Change Process

There are several reports generated during the recalculation process, a sample of each is shown below.

1.5.1 #12184 Position Salary Records – Freeze Salary (Change)

12184-BUREP:BUPSVCHGFRZONE.REP Printed 24-May-2023 Page 1

Position Salary Records - Freeze Salary (Change)

Budget year: 2024

Position#	Position Title	Budget Group	Employee	Effective	Unit	Bargaining	Schedule Grade Step	Annual Amount	Hourly Rate Note
T220FIRDPT-01	Actual Salary	FIRE	ARMSTRONG	01-Jul-2023	MGMT-TR		TWN MISC 1 6	111,000	53.1600

#Positions: 1

1.5.2 #12186 Personal Services Accounting Change Report

12186-BUPSCHGACC.REP Printed 24-May-2023 Page 1

Personal Services Accounting Change Report

Budget Group : FIRE
Selected Level: Department

Position	Description	Account	Base Budget	Old LOS 1	Old LOS 2	New Base Budget	New LOS 1	New LOS 2	Error
	REGULAR - hours	1000-220-0000-002-00-00-51120 ADMINISTRATIVE PERSONNEL	108,000			111,000			
	MEDICARE	1000-195-0000-001-00-00-57010 MEDICARE-EMPLOYER CONTRI	1,493			1,537			
T220FIRDPT-01	DEPUTY FIRE CHIEF		Total	109,493		112,537			
FIRE	FIRE		Total	109,493		112,537			

1.5.3 #12185 Personal Services Change Report

12185-BUPSCHGMST.REP Printed 24-May-2023 Page 1

Personal Services Change Report

Budget Group : FIRE
Selected Level: Department

Position	Position Description	Employee	FTE Description	Base Budget	Old LOS 1	Old LOS 2	New Base Budget	New LOS 1	New LOS 2
T220FIRDPT-01	DEPUTY FIRE CHIEF	ARMSTRONG, KEITH E	1.000 REGULAR - hours	108,000			111,000		
T220FIRDPT-01	DEPUTY FIRE CHIEF	ARMSTRONG, KEITH E	1.000 MEDICARE	1,493			1,537		
FIRE	FIRE		Total	109,493			112,537		

1.6 #12180 Position Profile Report

The [Position Profile] report is available from the buttons at the bottom of each of the screens.

12180-BUPSCHGPROFILE.REP Printed 24-May-2023 at 13:35:27 Page 1

Prior Level Change Position Profile

Budget Year : 2024
Budget Group : FIRE FIRE
Selected Level: Department

Position# Employee HR Dates

T220FIRDPT-01 DEPUTY FIRE CHIEF ARMSTRONG
Position Hire: 24-Sep-2020 Evaluation:
Original Hire: 01-Jun-1982 Next Eval:
Longevity: 02-Jan-1997 Full Time: 02-Jan-1997
Probation: Anniversary: 01-Jun-1982

Line Account Percent Type Percent Type BudgetAmt Start Date End Date ActualAmt

1 1000-220-0000-002-00-00-51120 ADMINISTRATIVE PER 100.000 % 100.000 %

Effective	OVR Reason	Bargaining Unit	Schedule Grade Step	Annual Amount	Hourly Salary	Salary Days
01-Jul-2023	Yes Actual Salary	MGMT -TR	TWN MISC 1 6	111,000	53.1600	366 100.00

Code	Description	Code Default Account	FTE 1.000 Base Budget	PTE LOS 1 OVR	PTE LOS 2 OVR	PTE OVR	FTE 1.000 Total
REG	REGULAR - hours	0000-000-0000-000-00-000000	111,000				111,000
ALTS2I	ALTUS IND TOWN 52	0000-000-0000-000-00-000000					
FSA	FLEXIBLE SPENDING ACCOUNT	0000-000-0000-000-00-000000					
HMO5 TWN	HMO BLUE SINGLE TOWN	0000-000-0000-000-00-000000					
MEDI	MEDICARE	1000-195-0000-001-00-00-57010 MEDICARE-EMPLOYER		1,537			1,537
				112,537			112,537



1.7 How Many Levels are Available to the Change Process?

Personal Services Change Prior Level Budget

Year: 2024
Budget Group: CLERK
Department: TOWN CLERK
Prior Approval Level: 1

Position	Title	Employee	Name	Amount
T161TWNCLRK-02	TOWN CLERK	070176	CARBONARO, KEITH J	77,247
T162PT CLRK-01	CLERK PART TIME TOWN CLERK	070584	RENAUD, KAREN	18
T162PT CLRK-01	CLERK PART TIME TOWN CLERK	070984	CAPEZIO, MARIE A	14
T162PT CLRK-01	CLERK PART TIME TOWN CLERK	071526	FERNANDES, KEITH E	16
T162TCLCONT-01	TOWN CONSTABLE			1

Personal Services Change Prior Level Budget

Year: 2024
Budget Group: CLERK
Department: Finance
Prior Approval Level: 2

Position	Title	Employee	Name	Amount
T161TWNCLRK-02	TOWN CLERK	070176	CARBONARO, KEITH J	77,247
T162PT CLRK-01	CLERK PART TIME TOWN CLERK	070584	RENAUD, KAREN	18
T162PT CLRK-01	CLERK PART TIME TOWN CLERK	070984	CAPEZIO, MARIE A	14
T162PT CLRK-01	CLERK PART TIME TOWN CLERK	071526	FERNANDES, KEITH E	16
T162TCLCONT-01	TOWN CONSTABLE	007284	DILL, KEITH	1

The budget is currently at Level 3, so now levels 1 and 2 are both available to the process.

From any level, all previously approved levels are available to be updated via this process.



If the budget is currently at level 3, and a change is made to a position in level 1, this process will not change levels 2 and 3. Each previous level stands alone and must be changed (*if required*).

[ADM-AUC-BU-3982]

2 Site Specific #12750 Press Release Reports [Enhancement]

Budget

- Budget Dashboard
- Initialization Menu
- Maintenance >
- Processing >
- Posting >
- Queries >
- Reports >
- Tables >
- Year-End Processing >
- Module Maintenance >
- Interfaces/Imports >
- Site Specific >
 - Budget School Committee Report
 - Press Release Reports
- Help Reference Library

Communities are now using Video Conferencing to encourage participation and attendance at events and public meetings. The Press Release Report will now include the event information using four new fields that can be filled in each time the report is run.

These values will be saved and automatically filled in each time the report is run.

To run the Press Release Reports, from the menu, select:



Budget ▶ Site Specific ▶ Press Release Reports

If the values need to change, type over them and the new values will be saved for the next time.

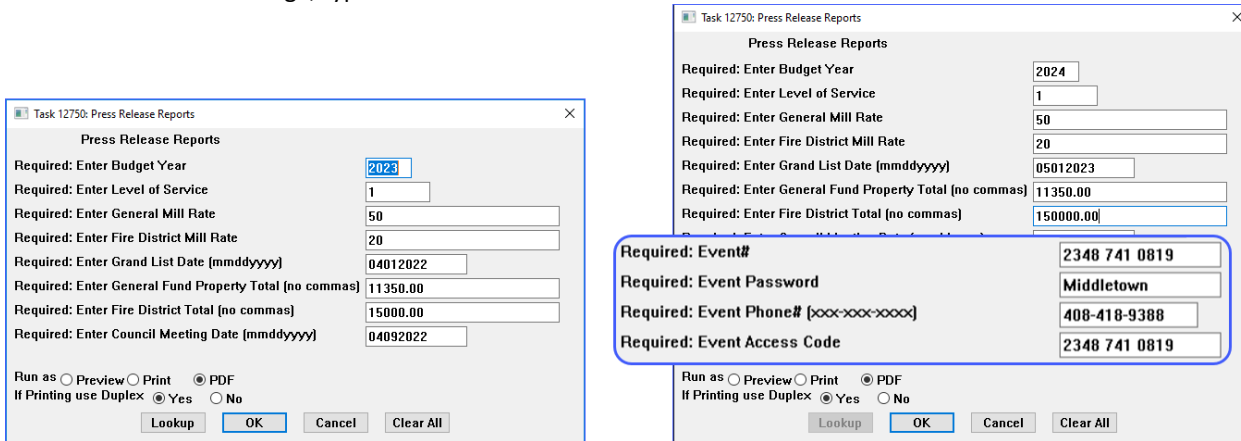


Figure 2 Before & After – added four fields to the prompt for the Press Release Reports

The information will be shown at the bottom of the report. It will look like this:

```

A PUBLIC HEARING WILL BE HELD REMOTELY AND IN THE
MUNICIPAL BUILDING ON ALL THE ABOVE BUDGETS BY THE
COMMON COUNCIL OF THE CITY OF MIDDLETOWN, CONN.,
April 09, 2022      AT 6:00 P.M. WebEx.com -
Event # 2348 741 0819; Password: Middletown
Or Dial 408-418-9388 Access Code: 2348 741 0819

```

[MDT-SUP-SAPLAUC-2204]

3 New Content on ADMINS.com

- [Maintaining Email Distribution Lists](#)
- [Printing to the Local Printer](#)


[ADM-AUC-DEMO-47]

4 ADMINS Video Library


Please check out these [Videos & Quick Tips \(admins.com\)](#). These videos are a valuable resource for a first look at many of the features available in **ADMINS**, as well as a refresher for “once in a while” tasks. The videos provide “just-in-time” training when new staff is coming aboard.



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AUC Video Launchpad

Below is a list of training videos for new users to get acquainted with AUC, and for current users to take a deeper dive into a process or get a refresher for "once a year" tasks.

Getting Started

- [Logging In to AUC & Basics](#) (7:00)
- [Logging out of AUC](#) (1:54)
- [Reset AUC Password](#) (2:00)
- [Use the Training Area](#) (2:04)
- [Clear Data From A Field](#) (1:17)
- [Favorites Screen](#) (2:23)
- [Index Of Help Documents](#) (0:51)
- [Reprinting A Report](#) (4:20)
- [Optimize the PDF Viewer](#) (3:37)
- [Email Signatures](#) (1:36)
- [Quick Task & Report Button](#) (2:12)
- [Check for Record Locks](#) (2:14)
- [Attachments in AUC](#) (4:20)
- [How to Configure RDP for Local Printers](#) (2:19)

GL Training

- [Add a New GL Account](#) (4:07)
- [Budget Transfers via a JE](#) (2:55)
- [Drill Down on Account](#) (4:51)
- [Transaction History Queries](#) (7:07)
- [General Ledger Reports](#) (10:09)
- [Expenditure Summary Report](#) (4:04)
- [Set Up A New Fund](#) (9:17)
- [Automate Reports using Job Stream](#) (24:28)
- [How to Upload a Journal Entry](#) (5:57)
- [How to Reverse a Journal Entry](#) (4:08)
- [Fixed Assets Module](#) (1 hour 21 minutes)
- [Budget Transfers via a Journal Entry \(HVMA\)](#) (3:00)

AP/PO Training

- [Approvals - The AP/PO Dashboard](#) (3:49)
- [Purchase Order Entry](#) (7:28)
- [Reprint Purchase Order](#) (3:17)
- [PO Change Orders](#) (5:43)
- [Request A PO Liquidation](#) (2:34)
- [Liquidate a PO](#) (3:11)
- [Create a Direct Payment Voucher](#) (5:35)
- [Create a Voucher from a PO](#) (6:20)
- [Voucher Change Orders](#) (4:22)
- [Liquidate a Voucher](#) (4:16)
- [Transfer AP Voucher Batch](#) (4:22)
- [Delete AP Vouchers/Batch](#) (2:29)
- [PO Queries](#) (7:14)
- [PO & Voucher Reports](#) (2:47)
- [Querying Vouchers](#) (5:29)
- [Add a New Vendor](#) (2:54)
- [Vendor Attachments](#) (2:50)
- [Add a Vendor Remit Address](#) (3:20)
- [Voucher Selection Error Report](#) (2:59)
- [AP Disbursement Process](#) (10:45)

Collections & Tax

- [Enter Bill Payment Receipts](#) (7:14)
- [Enter Treasury/ Departmental Receipts](#) (10:57)
- [Reprint a Bill](#) (4:01)
- [Bill Inquiry Screen](#) (7:26)
- [Bill Locator Screen](#) (3:30)

HR Training

- [Create A Payroll Warrant](#) (3:31)
- [Timesheet Entry](#) (7:34)
- [HR Adjustment via Employee](#)
- [Maintenance Screen](#) (3:49)
- [How To "Uncalculate" A Warrant](#) (2:14)
- [Create A Recon File After Warrant Is Posted](#) (1:10)
- [Add Historical Salary Change Record](#) (2:47)

Power Users & IT Staff

- [Email Distribution Lists](#) (4:34)
- [User Account Security](#) (6:32)

We are adding content all the time so check back often; we also send out a "Featured Video of the Month" email.

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