



# BUDGET

## RELEASE NOTES – MARCH 2018

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

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# 1. MAINTENANCE

## 1.1. Personal Services by Position ▶ Recalculate Position Reports [Fix]

Prior to the software update, the reports were not printing as duplex reports. This was corrected. Now the report as shown will print on both sides of the page when sent to a duplex printer.

Town of Adams Personal Services Change Report										
Budget Group : SCHOOL Current Level: School Request										
Position	Position Description	Employee	FTE Description	Base Budget	Old LOS 1	Old LOS 2	Old LOS 2	Base Budget	New LOS 1	New LOS 2
S003ABATECH-01	APPLIED BEHAVIOR ANALYSIS TECHNI	HALLIWELL, MARIE L	1.000 MEDICARE	434	497			434	482	
SCHOOL	SCHOOL		Total	434	497			434	482	

Town of Adams Personal Services Change Report										
Budget Group : SCHOOL Current Level: School Request										
Position	Position Description	Employee	FTE Description	Base Budget	Old LOS 1	Old LOS 2	Old LOS 2	Base Budget	New LOS 1	New LOS 2
Grand Total				434	497			434	482	

Figure 1 Personal Services Change Report

[ADM-AUC-BU-3884]

## 1.2. Personal Services Multiple Positions ▶ Create New Position [Fix]

After the budget was initialized, if a position was created in Human Resources, and steps taken to bring the position into budget, the system would create only the first position. This was corrected.

Now, if the position is filled by more than one employee, both employee budgeted personal services screens will be populated. For example, a new position S012TEASCHO-02 is created in position maintenance in the Human Resources module, and set to **Allow Multiple Employees** and to **Budget Position**.

**Position Maintenance**

Position: S012TEASCHO-02  
 Position Description: TEACHER TEST  
 Current Employees: 000012 (GENERELUX, MARIE R) / 000020 (OSTEGREN, LYNN M)

Position Category: TEACH (TEACHERS)  
 Timesheet Group: SCHOOL-BRMS (memorial school)  
 Bargaining Unit: SINGL -01 (school singleton contractual days)  
 Schedule: SA (School Administrator)  
 Grade: 5  
 Step: 1

Budget Group: SCHOOL (SCHOOL)  
 Pay Group: 26 (26 Pays)  
 EEO Category: 13 (Teachers aides)  
 EEO Type: FT (Full-Time)  
 Workers Comp Code: 01  
 FLSA Code: F (Full-Time)  
 Employment Type: F (Full-Time)  
 Employment Status: F (Full-Time)  
 Accrual Group: A (Town of Adams)  
 Entity: TOWN OF ADAMS  
 Default Account#: 0000-300-2330-125-03-00-51401  
 Full Time Equivalent: 1.0000  
 Supervisor Position: 0000 -000  
 Budget Salary: 0000 (For FY 0000 Posted on)  
 Budget Fringe Amount: 0000 (For FY 0000 Posted on)

Supervisors:

Allow Multiple Employees:  Yes  No  
 Allow Employee in this position to take another Position:  Yes  No  
 Budgeted Position:  Yes  No  
 Budget for Vacant Position:  Yes  No  
 Encumber Position:  Yes  No

Figure 2 Add New Position in Human Resources after Budget is Initialized



**Employee Maintenance**

Employee Number: 000012 MARIE R. GENEREUX  
Position: S012TERSCHO-02 TEACHER TEST 2 Of 2

Employee Attachments (9)  
Employee Position Attachments

**Employee Maintenance**

Employee Number: 000020 LYNN M. OSTEGREN  
Position: S012TERSCHO-02 TEACHER TEST 4 Of 5

Employee Attachments (9)  
Employee Position Attachments

1 Contact 2 Personal 3 Ded/Ben 4 Add Wages 5 Payroll 6 Accounting 7 Salary 8 Dates/Class 9 Degrees 0 Custom U Accidents V ACA

Pay Classification				Y Salary Change	
Bargaining Unit	SNGL	-01	school singleton co	Effective Date	10-Mar-2018
Grade Schedule	SA		School Administrator	Annual Salary	89214,48
Grade	6			Period Salary	3431,33
Step	1			Daily Salary	343,13
FTE	1,0000			Hourly Rate	70,8051
				Per Diem	424,83
				Tier#	1

Group Information	
Entity	1 TOWN OF ADMINS
Timesheet Group	SCHOOL-BRMS Memorial school
Pay Group	26 26 Pays
FLSA Code	
Lump Sum Indicator	<input type="checkbox"/>

**Additional Rates**

In **Human Resources**, the new position is assigned to multiple employees on the **Employee Maintenance Screen**– this example uses employee #s 12 and 20:

- Budget
  - Budget Dashboard
  - Initialization Menu
  - Maintenance
  - Processing
  - Posting
  - Queries
  - Reports
  - Tables**
    - Budget Groups
    - Levels of Service
    - Bargaining Unit Table
    - Benefit Categories
    - Cost Code
  - Year-End Processing
  - Module Maintenance
  - Interfaces/Imports
  - Site Specific
- Help Reference Library

**Position Maintenance**

Add the position in the **Budget > Tables > Position Maintenance Screen.**

**Position Maintenance - Budgeting**

1 Add Position  
2 Copy Position  
3 Edit List  
4 Create Budget

**Add Position**

Position Description  
Budget Group  
Account Number: 0000-000-0000-000-00-00-00000  
Entity  
Department: 000  
Department Desc  
Position Desc  
Sequence

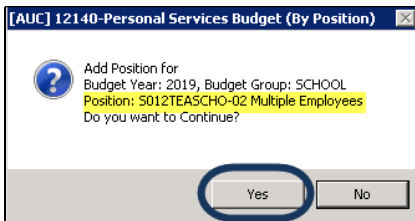
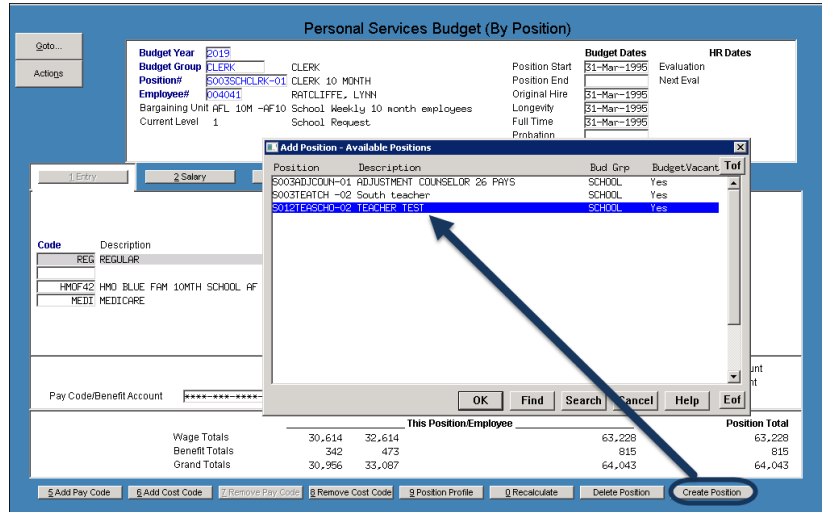
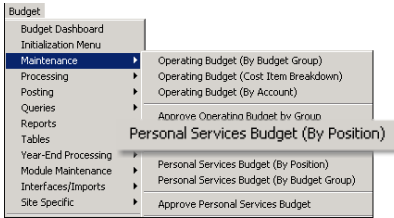
**Position Maintenance - Budgeting**

Budget Year: 2018  
Position: S012TERSCHO-02  
Job Title: TEACHER TEST  
Current Level: 1  
Level of Service: Base  
Current Employees:

Position Category: TEACH TEACHERS  
Budget Group: SCHOOL SCHOOL  
Workers Comp Code  
Pay Group: 26 26 Pays  
Bargaining Unit: SNGL -01 school singleton contractual days  
Schedule Unit: SA School Administrator  
Grade: 6  
Step: 1  
Entity: 1 TOWN OF ADMINS  
Default GL Account: 1000-300-2300-125-03-00-51401  
Full Time Equivalent: 1,0000  
Budgeted Position:  Yes  No  
Budget for Vacant Position:  Yes  No  
Budget Salary: For FY 0000  
Budget Fringe Amount: For FY 0000

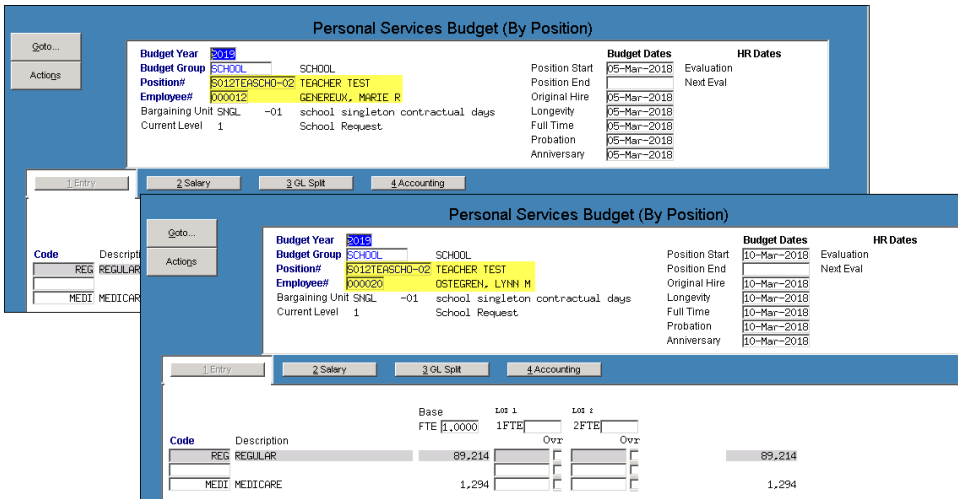


Go to the **Budget ▶ Maintenance ▶ Personal Services Budget (by Position)** screen and click on **[Create Position]**. Select the new position from the lookup and click on **[OK]**.



The system will display an information box describing the position—click **[OK]** to continue:

The system creates the position with **both** employees—#12 and #20:



[ADM-AUC-BU-3881]

### 1.3. Understanding Approval Levels [Enh]

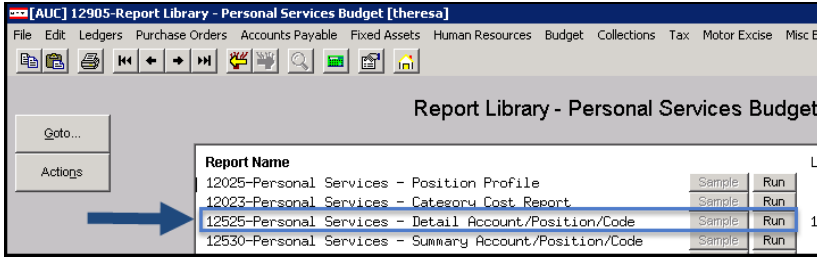
The BU-110 Budget Processing document was updated to clarify how approval levels are used.

[ADM-AUC-BU-3886]



## 2. REPORTS

### 2.1. Report 12525–Personal Services–Detail Account/Position/Code [Enh]



Employee numbers and dates of hire now print on Report **12525–Personal Services–Detail Account/Position/Code**. Access the report by selecting **Budget ▶ Reports▶ Report Library ▶ [Personal Services]**. These columns are only available on the Excel® version of the report due to page width limits on the Preview/Print/PDF® version

Account	Account Description	Position#	Position Description	Code	Employee	Current Level	Base
1000-300-2120-127-03-00-512	SPED COORD.CLERK-SOUTH	S003SPDNONU-C	NON UNION CLERK 19.5 HOURS	REGULAR - hours	FORREST	School Reques	12,847
1000-300-2120-127-03-00-512	SPED COORD.CLERK-SOUTH						12,847
1000-300-2210-100-03-00-512	PRIN SALARY - SOUTH	S003PRIPRIN-01	PRINCIPAL	REGULAR - hours	BUSKIRK	School Reques	102,803
1000-300-2210-100-03-00-512	PRIN SALARY - SOUTH						102,803
1000-300-2305-110-03-00-512	ELEM TEACHERS - SOUTH	S003TEAGR01-01	SOUTH SCHOOL TEACHER	longevity - mtrs reporting	BOYLE	School Reques	1,238
1000-300-2305-110-03-00-512	ELEM TEACHERS - SOUTH	S003TEAGR01-03	SOUTH SCHOOL TEACHER	longevity - mtrs reporting	BARDELL	School Reques	1,774
1000-300-2305-110-03-00-512	ELEM TEACHERS - SOUTH	S003TEAGR02-03	SOUTH SCHOOL TEACHER	longevity - mtrs reporting	DIGIANDO	School Reques	1,000
1000-300-2305-110-03-00-512	ELEM TEACHERS - SOUTH	S003TEAGR02-04	SOUTH SCHOOL TEACHER	longevity - mtrs reporting	CORNELL	School Reques	1,008
1000-300-2305-110-03-00-512	ELEM TEACHERS - SOUTH	S003TEAGR01-01	SOUTH SCHOOL TEACHER	REGULAR - hours	BOYLE	School Reques	70,398
1000-300-2305-110-03-00-512	ELEM TEACHERS - SOUTH	S003TEAGR01-03	SOUTH SCHOOL TEACHER	REGULAR - hours	BARDELL	School Reques	77,133
1000-300-2305-110-03-00-512	ELEM TEACHERS - SOUTH	S003TEAGR02-03	SOUTH SCHOOL TEACHER	REGULAR - hours	DIGIANDO	School Reques	78,966

Figure 1 Before–No Columns For Employee Number and Position Hire Date on the Excel® Report

Account	Account Description	Position#	Position Description	Code	Emp#	Employee	PosHireDate	Current Level	Base
1000-195-0000-001-00-00-5701	MEDICARE-EMPLOYER CONTRIBUTION	S003TEAGR01-01	SOUTH SCHOOL TEACHER	MEDICARE	009804	BOYLE	8/31/1992	School Reques	923
1000-195-0000-001-00-00-5701	MEDICARE-EMPLOYER CONTRIBUTION	S003TEAGR01-03	SOUTH SCHOOL TEACHER	MEDICARE	003178	BARDELL	8/31/1992	School Reques	1,107
1000-195-0000-001-00-00-5701	MEDICARE-EMPLOYER CONTRIBUTION	S003TEAGR02-03	SOUTH SCHOOL TEACHER	MEDICARE	009935	DIGIANDO	8/29/1994	School Reques	1,035
1000-195-0000-001-00-00-5701	MEDICARE-EMPLOYER CONTRIBUTION	S003TEAGR02-04	SOUTH SCHOOL TEACHER	MEDICARE	009960	CORNELL	8/28/1995	School Reques	1,107
1000-195-0000-001-00-00-5701	MEDICARE-EMPLOYER CONTRIBUTION	S003TEAGR02-04	SOUTH SCHOOL TEACHER	MEDICARE	010610	ARSENAULT	8/23/2005	School Reques	1,031
1000-195-0000-001-00-00-5701	MEDICARE-EMPLOYER CONTRIBUTION								25,771
1000-300-2120-126-03-00-512	SPED COORDINATOR - SOUTH	S0030THOTH-01	PSYCHOLOGISTTEAM CHAIR	longevity - mtrs reporting	010040	MCGARRY	9/23/1996	School Reques	1,000
1000-300-2120-126-03-00-512	SPED COORDINATOR - SOUTH	S0030THOTH-01	PSYCHOLOGISTTEAM CHAIR	REGULAR - hours	010040	MCGARRY	9/23/1996	School Reques	40,343
1000-300-2120-126-03-00-512	SPED COORDINATOR - SOUTH								41,343
1000-300-2120-127-03-00-512	SPED COORD.CLERK-SOUTH	S003SPDNONU-C	NON UNION CLERK 19.5 HOURS	REGULAR - hours	070791	FORREST	8/21/2017	School Reques	12,847
1000-300-2120-127-03-00-512	SPED COORD.CLERK-SOUTH								12,847
1000-300-2210-100-03-00-512	PRIN SALARY - SOUTH	S003PRIPRIN-01	PRINCIPAL	REGULAR - hours	000140	BUSKIRK	8/11/2014	School Reques	102,803
1000-300-2210-100-03-00-512	PRIN SALARY - SOUTH								102,803

Figure 3 Added Columns for Employee Number and Position Hire Date on the Excel® Report

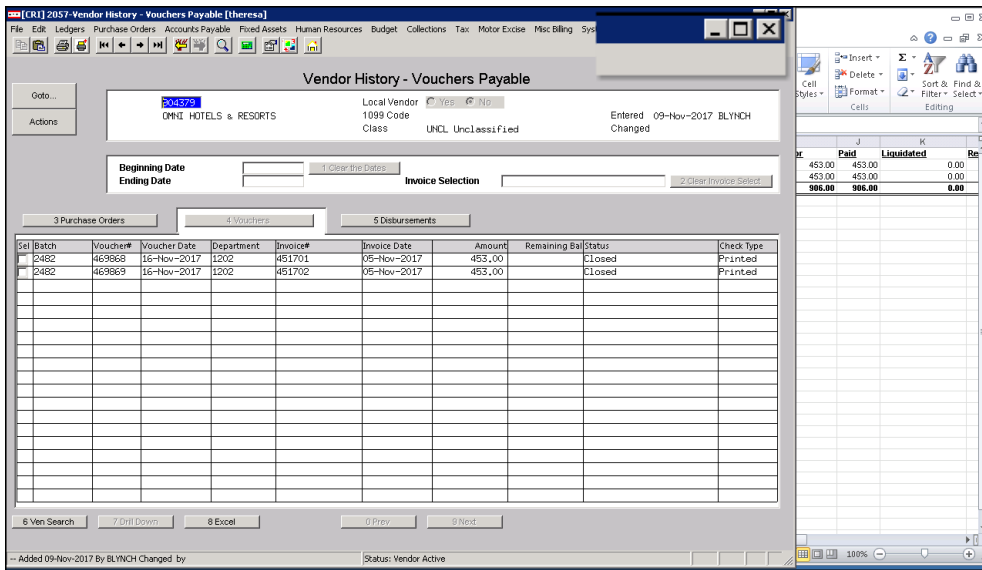
[ADM-AUC-BU-3876]



### 3. REPORTS “DROPPING OUT OF SIGHT” [FIX]–V92 SITES ONLY

Reports were hidden behind the AUC application, requiring users to minimize the AUC application to view or print reports.

1. Adobe PDF®
2. Excel®
3. Preview/LIS format



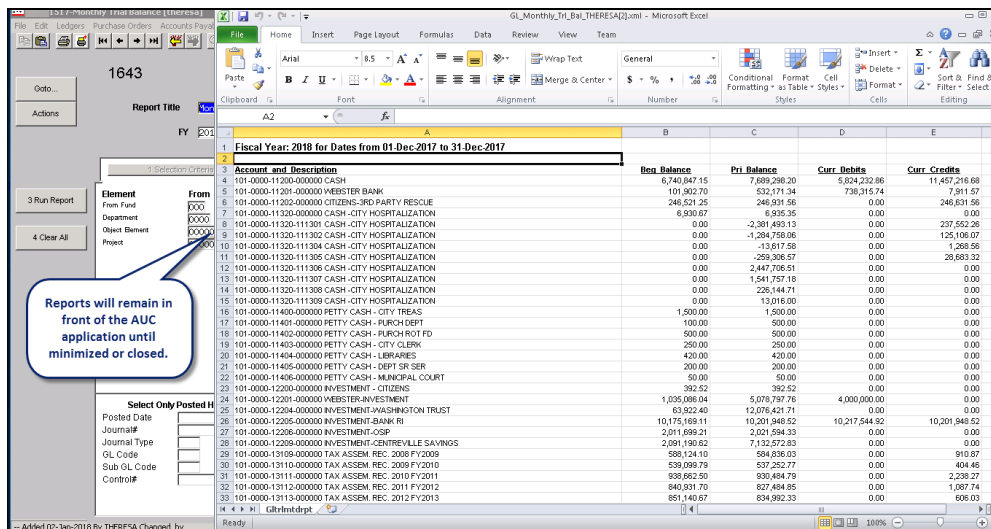
The user could use **Alt|Tab** or **Insert|Tab** keystroke combinations to toggle between the AUC Application and the hidden report.



Clicking on this resize button would allow the user to reduce the size of the application window to find the hidden reports.

**Figure 4 Before – Report “hiding” behind the AUC application**

With the software update, the reports will now remain the focal point until the user closes or minimizes the report.



**Figure 5 After**



If a small window like this appears at the top corner of the AUC application screen after running a report, minimize it using the "minus" sign, **NOT** the "X" in **RED**-- this will only need to be done once per AUC session

[ADM-AUC-V90-78]

## 4. HELP REFERENCE LIBRARY

### 4.1. New or Updated Documentation

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

- MAINTENANCE BU-110 Budget Processing

[Update]