



BUDGET

RELEASE NOTES – MARCH 2022

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

CONTENTS

1	PERSONAL SERVICES BUDGETING [0 ALL EMPLOYEES] BUTTON	2
2	COPY GROUP ALL USERS BUTTON [ENHANCEMENT]	2
3	APPROVALS SCREEN – NEW COLUMN HEADING [FIX]	4
4	REPORTS [ENHANCEMENT]	4
4.1	#12596 Budget Town Meeting w/ Cost Breakdown	4
4.2	#12598 Budget Town Meeting w/ Cost Breakdown and Notes	5



1 PERSONAL SERVICES BUDGETING [0 ALL EMPLOYEES] BUTTON

There is a new [0 All Employees] button added to the BU position maintenance screen. Prior to the software update, the screen showed two employees; now ALL employees assigned to the position will be listed when clicking [0 All Employees].

BU ▶ Tables ▶ Position Maintenance

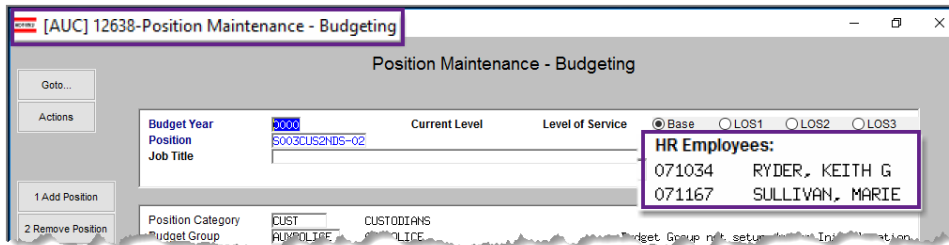


Figure 1 Before – a maximum of two employees holding the position were listed

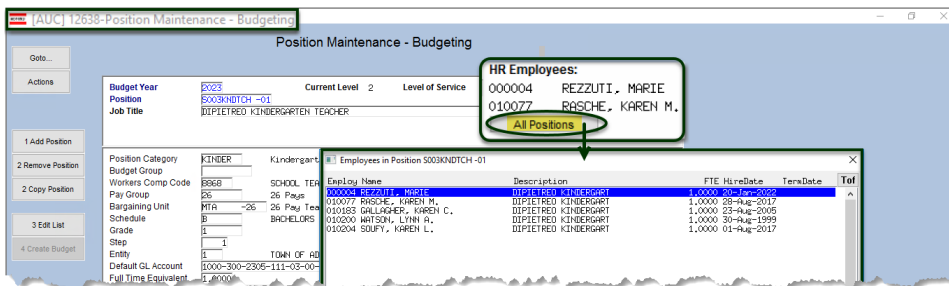


Figure 2 After – the [All Postions] button shows all employees holding the position

If there are two or fewer employees holding the position, then the button is not shown on the screen, and all the employees holding the position are displayed.

[ADM-AUC-BU-3965]

2 COPY GROUP ALL USERS BUTTON [Enhancement]

Is there a way for me to copy the users from one group to another?

The budget module uses “Groups” to control access to the budget. For example, if there is an “ADM” budget group, ADM can be set up to allow only the Assistant Clerk to do Data Entry, the Town Administrator to do approvals at the department level, and the Budget Manager, Finance Manager, and Town Manager to do approvals at their respective levels. To make it easy to create new groups and add users to the groups, ADMINS added a button to the screen to copy all users (and if the users exist - update the users) to be the same as the “copy from” group. This also includes the [3 Approvals] tab.





Budget ▶ Tables ▶ Budget Group ▶ Select Group ▶ [Detail]

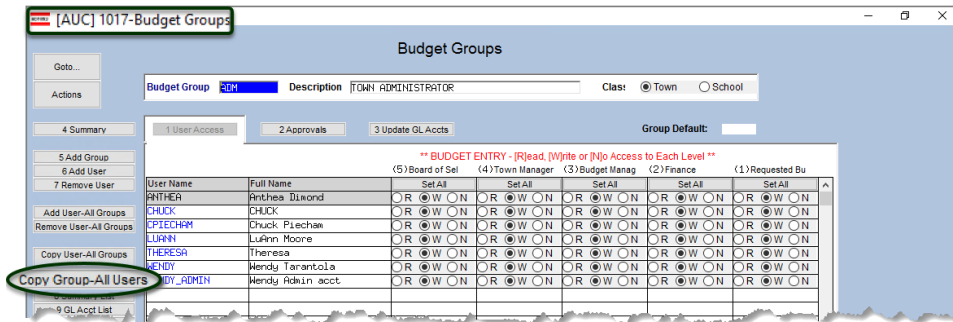
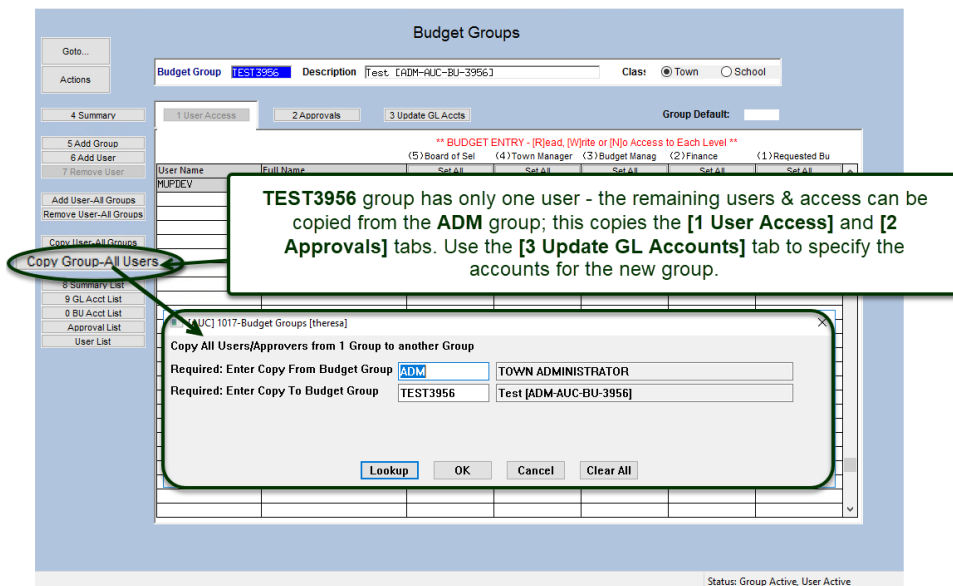


Figure 3 The ADM group will be used to “Copy From”



The “To” budget group must already exist; it can be a new or an existing group.

This example shows a brand-new group.

Figure 4 Budget Groups screen with new [Copy Group–All Users] button

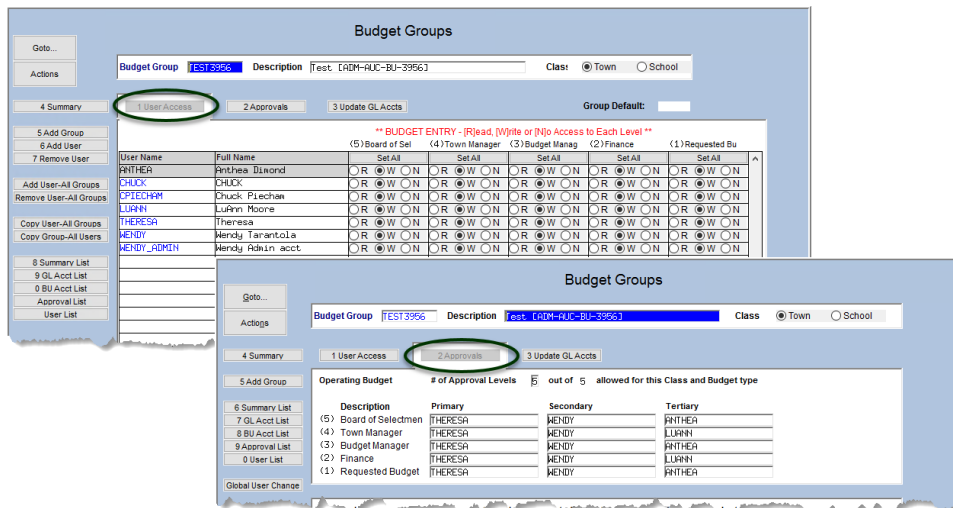


Figure 5 After – the Users and Approvers are copied from the ADM group to the TEST3956 group

If the users already exist on the “To” group, the records will be updated with the data on the “From” group.

[ADM-AUC-BU-3956]



3 APPROVALS SCREEN – NEW COLUMN HEADING [Fix]

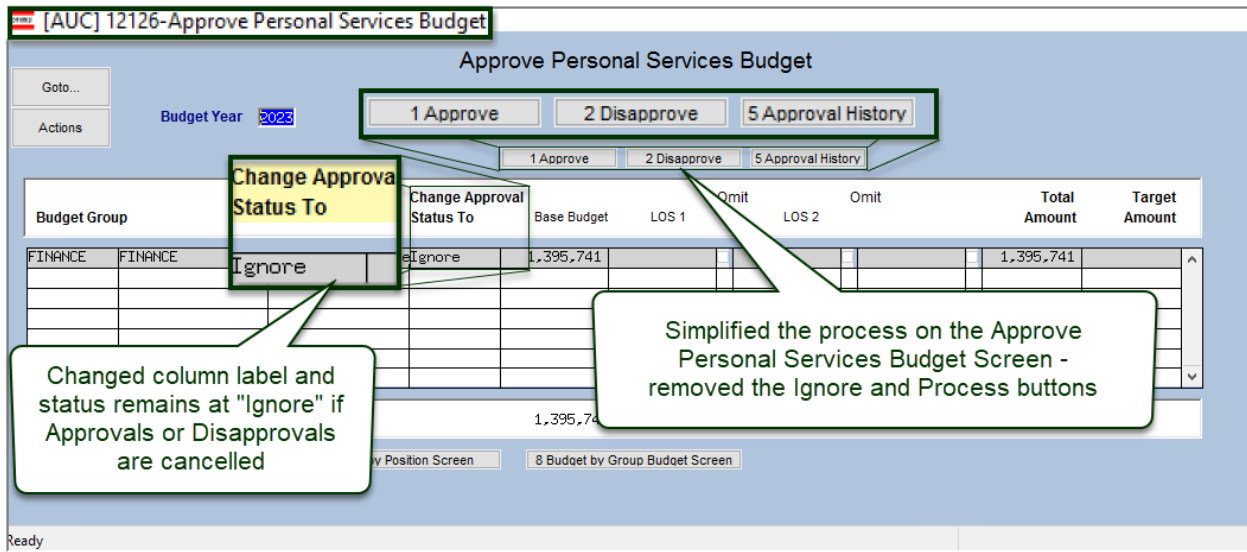


Figure 6 Approve Personal Services Budget screen is simpler to use

ADMINS changed the "Status" header to be "Change Approval Status To" and simplified the screen. Removed the [2 Ignore] and [4 Process Approvals Disapprovals] buttons.

[ADM-AUC-BU-3967]

4 REPORTS [Enhancement]

Depending on how the reports are run, the #12596 Budget Town Meeting w/ Cost Breakdown and #12598 Budget Town Meeting w/ Cost Breakdown and Notes can present **details** differently.

ADMINS added a legend to report #12596 and 12598 to show what selections were made on the prompt when the report was run. This will briefly show the difference in how the reports were run and why the results differ.

4.1 #12596 Budget Town Meeting w/ Cost Breakdown

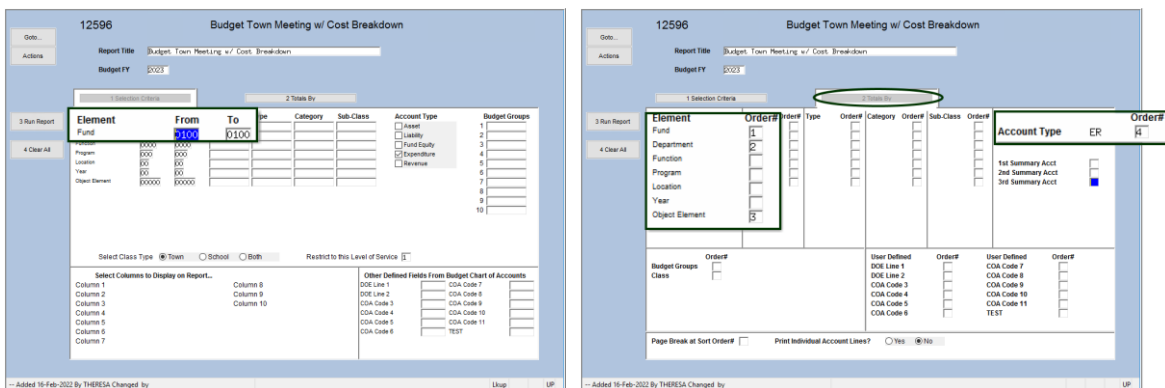


Figure 7 Specifying how to run the Budget Town Meeting w/ cost Breakdown report

Selections are made on the report selector screens that control how reports are filtered, sorted, totaled, and can be further refined by making selections on the resulting prompt. The report will look different if the Personal Services Budgets are included on one report, with only a particular range of objects, but the same selections are



not made on the other report. Differences will also exist, for example, if the included position descriptions are **By Position** on one report, and **By Grade Schedule/Step** on the other.

Task 12596: Budget Town Meeting w/ Cost Breakdown

Budget Town Meeting with Cost Breakdown

Include Personal Services Budgets: Yes No

Include Position Descriptions: Summary By Position By Grade Schedule/Step

Optional: Show only PersServ Detail for this Range of Objects First: Last:

Run as Preview Print PDF Excel

If Printing use Duplex: Yes No

Buttons: Lookup, OK, Cancel, Clear All

12596-BUBUDRPTIIM.REP Printed 17-Feb-2022 at 14:39:40 Page 4

Budget Town Meeting w/ Cost Breakdown

Budget Fiscal Year: 2023 to 2023

Account# and Description	2021 Adj Budget	2022 Actual YTD	2022 Budget	Requested Budget	Finance	Budget Manager	Town Manager	Board of Selectmen
Total Expenditures	30,093	30,087	30,093	30,093	0	0	0	0
Total 59040 TRANSFER TO GENERAL FUND	30,093	30,087	30,093	30,093	0	0	0	0
Total 430 Solid Waste Collection/Disposal	1,865,995	50,169	1,799,750	1,799,750	0	0	0	0

==== Selection Legend =====

Account Type: E
 BudYr: 2023 to 2023
 Fund: 0100 to 0100
 Entity Type: Town
 Level of Service: 1 - Inc/Dec
 Account Sub Type: P
 Column 1: 1 Year Prior Adjusted Budget
 Column 2: Current GL Fiscal Year Actuals
 Column 3: Current GL Fiscal Year Adjusted Budget
 Column 4: Approved Level 1 Budget
 Column 5: Approved Level 2 Budget
 Column 6: Approved Level 3 Budget
 Column 7: Approved Level 4 Budget
 Column 8: Approved Level 5 Budget

Include Personal Services: Y
 Include Position Descriptions: P

Figure 8 The legend shows if Personal Services were included or not on the report

4.2 #12598 Budget Town Meeting w/ Cost Breakdown and Notes

12598 Budget Town Meeting w/ Cost Breakdown and Notes

Report Title: Budget Town Meeting w/ Cost Breakdown and Notes

Budget FY: 2023

1 Selection Criteria

2 Tables By

3 Run Report	Element	From	To	Type	Category	Sub-Class	Account Type	Budget Groups
4 Clear All	Fund	0100	0100					
	Program	0000	0000				<input type="checkbox"/> Asset	1
	Location	00	00				<input type="checkbox"/> Liability	2
	Year	00	00				<input type="checkbox"/> Fund Equity	4
	Object Element	00000	00000				<input type="checkbox"/> Expenditure	5
							<input type="checkbox"/> Revenue	6
								7
								8
								9
								10

Select Class Type: Town School Both

Restrict to this Level of Service:

Select Columns to Display on Report...

Other Defined Fields From Budget Chart of Accounts

12598 Budget Town Meeting w/ Cost Breakdown and Notes

Report Title: Budget Town Meeting w/ Cost Breakdown and Notes

Budget FY: 2023

1 Selection Criteria

2 Tables By

3 Run Report	Element	Order#	Order#	Type	Order#	Category	Order#	Sub-Class	Order#	Account Type	ER	Order#
4 Clear All	Fund	1	1									
	Department	2	2							1st Summary Acct		
	Function									2nd Summary Acct		
	Program									3rd Summary Acct		
	Location											
	Year											
	Object Element	3	3									

Budget Groups Class

User Defined DOE Line 1 DOE Line 2 COA Code 3 COA Code 4 COA Code 5 COA Code 6

User Defined COA Code 7 COA Code 8 COA Code 9 COA Code 10 COA Code 11 TEST

Page Break at Sort Order# Print Individual Account Lines? Yes No



Task 12598: Budget Town Meeting w/ Cost Breakdown and Notes

Budget Town Meeting with Cost Breakdown Notes

Include Personal Services Budgets: Yes No

Include Position Descriptions: Summary By Position By Grade Schedule/Step

Optional: Show only PersServ Detail for this Range of Objects First: Last:

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

Buttons: Lookup, OK, Cancel, Clear All

12598-BUDRPTITM1.REP Printed 17-Feb-2022 at 14:53:05 City of ADMINS Page 5

Budget Fiscal Year: 2023 to 2023

Budget Town Meeting w/ Cost Breakdown and Notes

Account# and Description	2021 Actual	2022 Actual YTD	2022 Base Budget	Requested Budget	Finance	Budget Manager	Town Manager	Board of Selectmen
Total 59040 TRANSFER TO GENERAL FUND	0	30,087	30,093	30,093	0	0	0	0
Total 430 Solid Waste Collection/Disposl	1,445,740	50,169	1,799,750	1,799,750	0	0	0	0
Total 0100 TRASH-OPERATING	1,445,740	50,169	1,799,750	1,799,750	0	0	0	0
*** Grand Total ***	1,445,740	50,169	1,799,750	1,799,750	0	0	0	0

==== Selection Legend =====

Account Type: ER
 BudYr: 2023 to 2023
 Fund: 0100 to 0100
 Entity Type: Town
 Level of Service: 1 - Inc/Dec
 Account Sub Type: P
 Column 1: 1 Year Prior Actuals
 Column 2: Current GL Fiscal Year Actuals
 Column 3: Current GL Fiscal Year Original Budget
 Column 4: Approved Level 1 Budget
 Column 5: Approved Level 2 Budget
 Column 6: Approved Level 3 Budget
 Column 7: Approved Level 4 Budget
 Column 8: Approved Level 5 Budget

Include Personal Services: Y
 Include Position Descriptions: P

[MDT-SUP-SAPLAUC-2096]