



BUDGET

RELEASE NOTES – SEPTEMBER 2020

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

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1 POSTING

ADMINS made changes to the posting to make it easier to see if budget groups were not ready to post.

1.1 Budget Posting Screen [Enhancement]

The budget posting screen does not allow budget groups to be selected for posting if there is an issue – for example, some accounts within a group have not been approved.

The **Select Budget Groups for Post to GL** screen now highlights the groups that are not ready for posting, with a message that **Accounts Need Approval before GL Post**. The groups that are ready will be available for selection.

Sel	Group	Group Status	Revenue	Expenditure	Total to Post	Approved On	Button
<input checked="" type="checkbox"/>	ABS	Ready For Posting				02-Jul-2020	4 Details
<input checked="" type="checkbox"/>	ADM	Ready For Posting				02-Jul-2020	
<input checked="" type="checkbox"/>	ARTS	Ready For Posting		7,500	7,500.00	02-Jul-2020	
<input checked="" type="checkbox"/>	ATHLETICS	Ready For Posting	491,841		491,841.00	07-Jul-2020	
<input checked="" type="checkbox"/>	AUNPOLICE	Ready For Posting		5,817	5,817.00	02-Jul-2020	
<input type="checkbox"/>	CLERK	Accounts Need Approval before GL Pos		127,005		02-Jul-2020	
<input type="checkbox"/>	ELECTIONS	Accounts Need Approval before GL Pos		53,700		02-Jul-2020	
<input type="checkbox"/>	HEALTH	Accounts Need Approval before GL Pos		66,937		02-Jul-2020	
<input type="checkbox"/>	HWY	Accounts Need Approval before GL Pos		137,100		02-Jul-2020	
<input checked="" type="checkbox"/>	LUNCH	Ready For Posting				02-Jul-2020	

[ADM-AUC-BU-3932]

1.2 Budget Posting Report [Fix]

When posting the Operating budget and not all budget group were selected for posting, the non-selected groups were displayed on the **Budget GL Posting** report, creating a disconnect between this report and what was posted to the General Ledger. This has been corrected; the report will show only the posted groups.

[ADM-AUC-BU-3932]



1.2.1 Column Added [Enhancement]

Budget groups can be named differently from the department group. For example, there may be a budget group **CLERK** that is within Department #161, the **TOWN CLERK**. **ADMINS** added a column to the report to indicate which **Budget Group** is being posted; the report still is sorted and totaled by department group.

12316-BUOPBPST.REP Printed 27-Aug-2020 at 17:34:49 by City of ADMINS Post Budget to GL Page 1

Budget Posting

Account# and Description	Budget Amount
1000-299-0000-002-00-00-52020 POSTAGE	20
1000-299-0000-002-00-00-52210 MOTOR VEHICLES	600
1000-299-0000-002-00-00-52240 EQUIPMENT MAINTENANCE COSTS	1,600
1000-299-0000-002-00-00-52500 DUES/MEMBERSHIPS	100
1000-299-0000-002-00-00-52505 SEMINARS/TRAINING	1,000
1000-299-0000-002-00-00-54400 AMMUNITION	1,272
1000-299-0000-002-00-00-54600 UNIFORMS	1,225
Total 299 AUXILIARY POLICE	5,817

Figure 1 Before – no budget group column

12316-BUOPBPST.REP Printed 02-Sep-2020 at 10:42:08 by ANTHEA City of ADMINS Post Budget to GL Page 1

Budget Posting

Account# and Description	Budget Grp	Budget Amount
1000-161-0000-001-00-00-51120 ADMINISTRATIVE PERSONNEL	CLERK	40,807
1000-161-0000-001-00-00-51180 ELECTED/APPOINTED SALARY	CLERK	68,248
1000-161-0000-001-00-00-51500 OVERTIME	CLERK	500
1000-161-0000-001-00-00-52010 ADVERTISING	CLERK	300
1000-161-0000-001-00-00-52020 POSTAGE	CLERK	2,500
1000-161-0000-001-00-00-52040 PRINTING/COPYING	CLERK	2,200
1000-161-0000-001-00-00-52400 PROFESSIONAL SERVICES	CLERK	3,000
1000-161-0000-001-00-00-52500 DUES/SUBSCRIPTIONS	CLERK	450
1000-161-0000-001-00-00-52520 IN-STATE TRAVEL	CLERK	1,500
1000-161-0000-001-00-00-54090 OFFICE SUPPLIES	CLERK	2,000
1000-161-0000-001-00-00-54095 PRESERVATION OF RECORDS	CLERK	5,500
Total 161 TOWN CLERK		127,005

Figure 2 After – the budget group is CLERK, the Department #161 is TOWN CLERK

[ADM-AUC-BU-3932]

2 REPORTS

Report Library - Personal Services Budget

Report Name	View	Report	Last Run E
12025-Personal Services - Position Profile	Sample	Run	10-Dec-20
12023-Personal Services - Category Cost Report	Sample	Run	10-Dec-20
12525-Personal Services - Detail Account/Position/Code	Sample	Run	22-Jan-20
12530-Personal Services - Summary Account/Position/Code	Sample	Run	
12537-Personal Services - Summary Wages/Benefits	Sample	Run	
12855-Personal Services - Budget By Position (Excel)			
12037-Personal Services - Budgeted Position List	Sample	Run	
12112-Personal Services - Spreadsheet	Sample	Run	
12051-Personal Services - Detail - Account Selection	Sample	Run	18-Jan-20



2.1 #12855 Personal Services Budget by Position [Enhancement]

Select **Budget** ▶ **Reports** ▶ **[2 Personal Services]** ▶ **#12855 Personal Services Budget by Position** to run a new **Excel**® Report. Enter the required **Budget Year**; select up to nine Budget Groups or leave the optional report blank to report on all budget groups.



Year	Empno	Name	Bud Grp	Bud Description	Position	Pos Description	Barg Unit	Barg Unit Description	Abv	Effective Reason	Sched	Grade	Step	Annual Amt	Hrly Rt	Days	Sal %	
2021	000152	ROSE, KEITH C	ADM	Administration	T1231WADMIN-01	TOWN ADMINISTRATOR	MGMT	-TH Town Management & Singletons	6	7/1/2021	Actual Salary	TWN MISC	1	9	159,540	76.12	365	100.00
2021	001255	BAILEY, KAREN	ADM	Administration	T135HR OFCR-01	HUMAN RESOURCES DIRECTOR	MGMT	-TH Town Management & Singletons	6	7/1/2021	Actual Salary	TWN MISC	1	6	89,474	42.69	365	100.00
2021	071305	WORTHINGTON, MICHAEL P	COLLECTOR	COLLECTOR	T135CT CLTR-01	COLLECTOR-TREASURER	PROF	-01 Professional Municipal	6	7/1/2021	Actual Salary	P1	1	8	78,000	37.21	365	100.00

Figure 3 Personal Services Budget by Position Excel® report

[CRI-SUP-SAPLAUC-844]

3 QUICK REPORT SELECTOR [Enhancement]

The **Quick Report/Task Selector** button is in the toolbar on all **AUC** screens. This feature allows a user to run any report in **AUC** quickly from any module instead of going to the report library for each module. Read **SY-117 Quick Report Selector** in the Help Reference Library for details on how to use this feature.



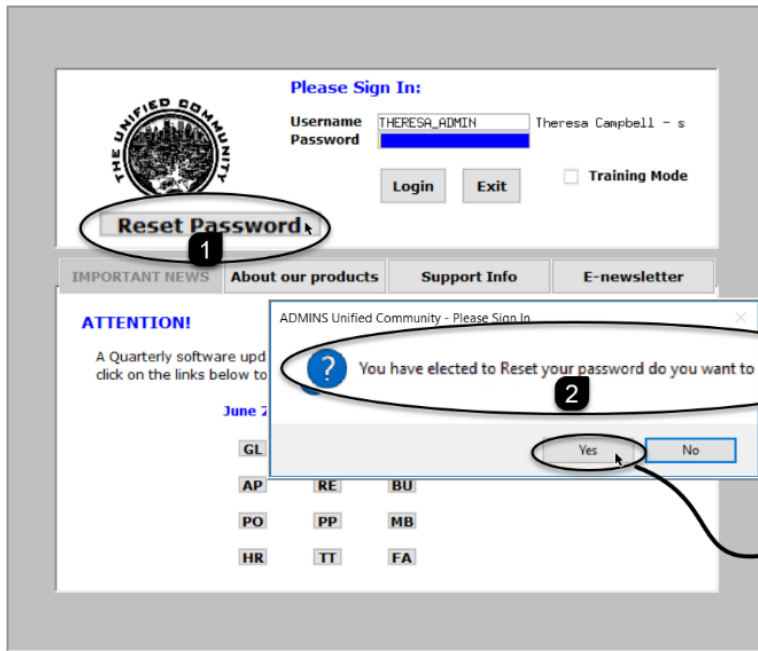
[ADM-AUC-DOC-183]

4 CHANGE / SET AUC PASSWORDS [Enhancement]

ADMINS added a **[Reset Password]** button on the login screen that allows users to reset their own **AUC** passwords. The feature requires an email address on the user profile for the user account.

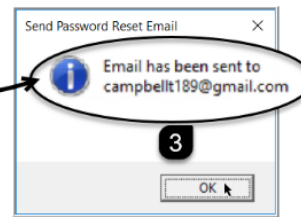


Figure 4 Before and After – the new Reset Password button on the login screen

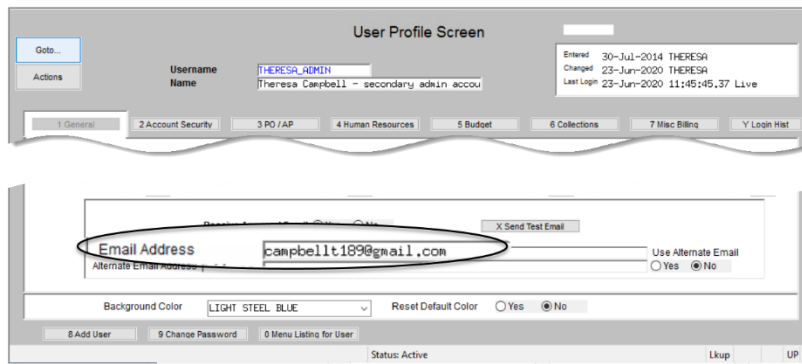


Use this feature if the password is forgotten.

1. Click the **Reset Password** button to initiate setting a new password.
2. Click **[Yes]** to the “You have elected to Reset your password do you want to Continue?” prompt.



3. Click **[OK]** to the popup showing where the email has been sent.



The email will be sent to the email address on the contact tab of the user profile table. The prompt will show which email address will be used. Check the email account for the new password for AUC.

Figure 5 Set up email addresses for AUC users

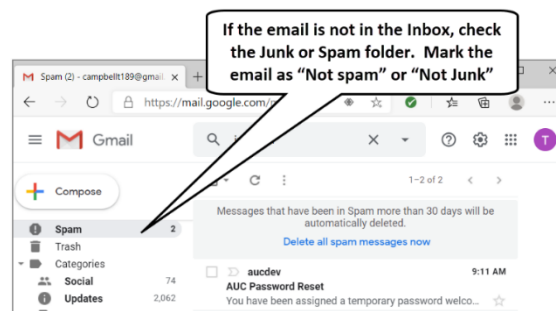
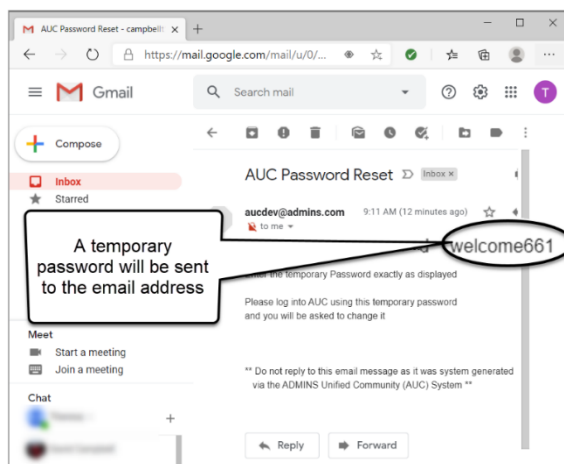
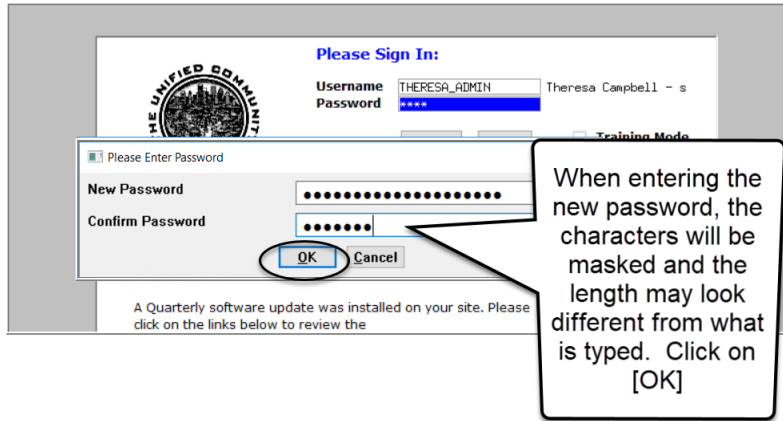


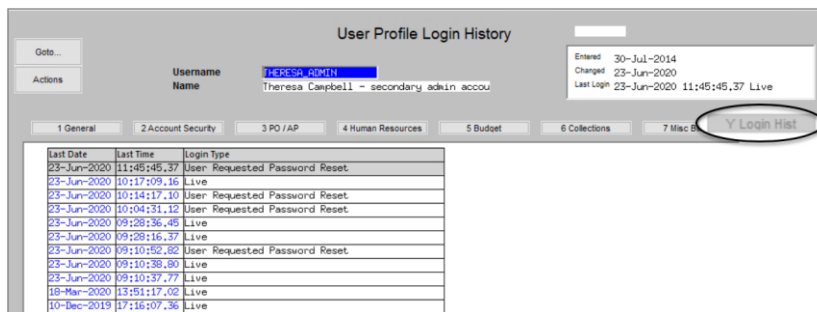
Figure 6 Sample email sent with temporary password



If the email is not found in the inbox, check the spam or junk folder. Use the password in the email exactly as shown (case sensitive). The system will immediately prompt for a new password.

Type a new password and confirm the new password.

Figure 7 Entering a new password

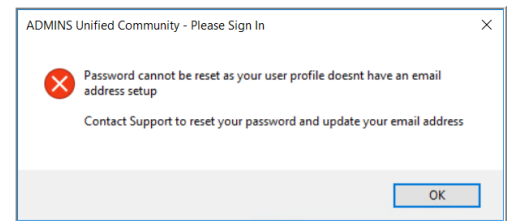


The super-user on the site may view the **User Profile** ► **[Y Login History]** tab to see logon and password reset activity.

Figure 8 Login History Screen for super-users

If the user profile does not have an email set up, the system will display this message. Contact the super user on your site or **ADMINS** to add an email address to the user profile.

If no email should be associated with the username, contact support@admins.com to reset the password.



[ADM-AUC-SY-8130]

4.1 New Message on Password Errors [Enhancement]

ADMINS changed the invalid password message to reflect the availability of the Reset Password button and to let users know that they may try again after five minutes.

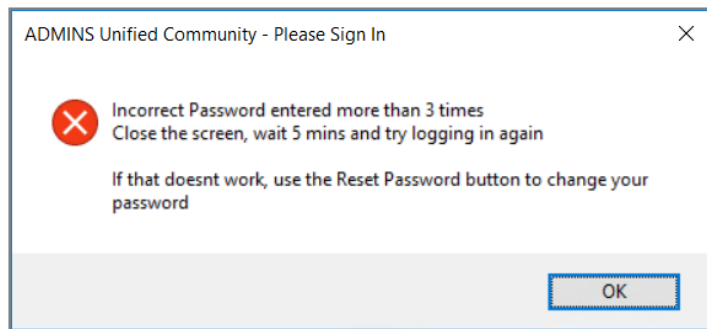


Figure 9 New Incorrect Password message

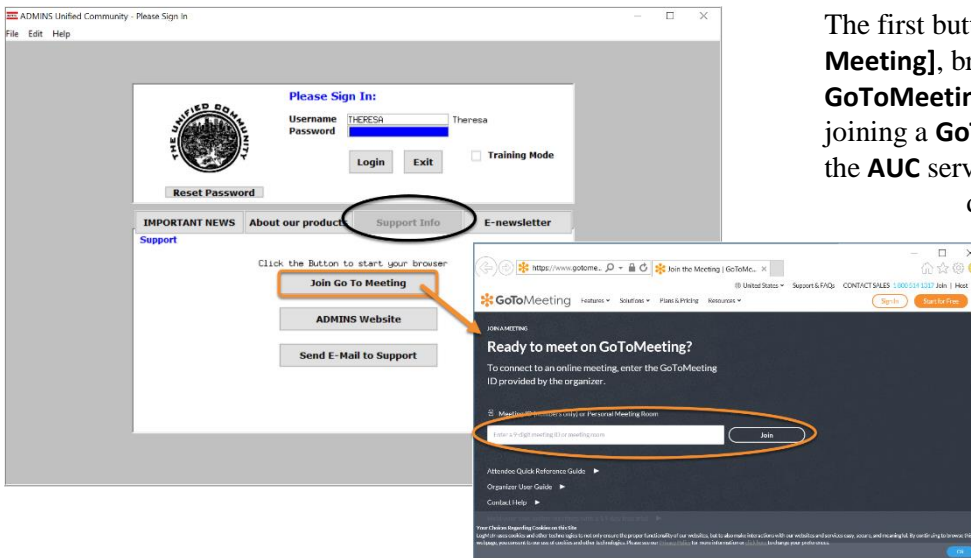
[ADM-AUC-SY-8159]



5 LOGIN SCREEN SUPPORT INFO TAB [Enhancement]

Many users only use this screen to log in – but there are other features available. Click on the **[Support Info]** tab. There are 3 buttons on this screen to easily join a **Go To Meeting**, access the **ADMINS** website or email **ADMINS** support.

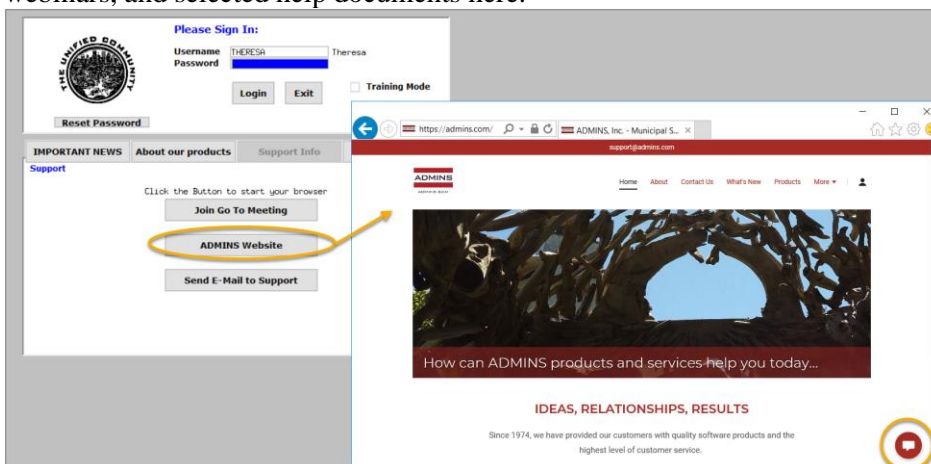
5.1 [Join Go To Meeting]



The first button, **[Join Go To Meeting]**, brings up the **GoToMeeting** website, to allow joining a **GoToMeeting** from the **AUC** server. Enter the nine-digit meeting number to be joined to the meeting.

5.2 [ADMINS Website]

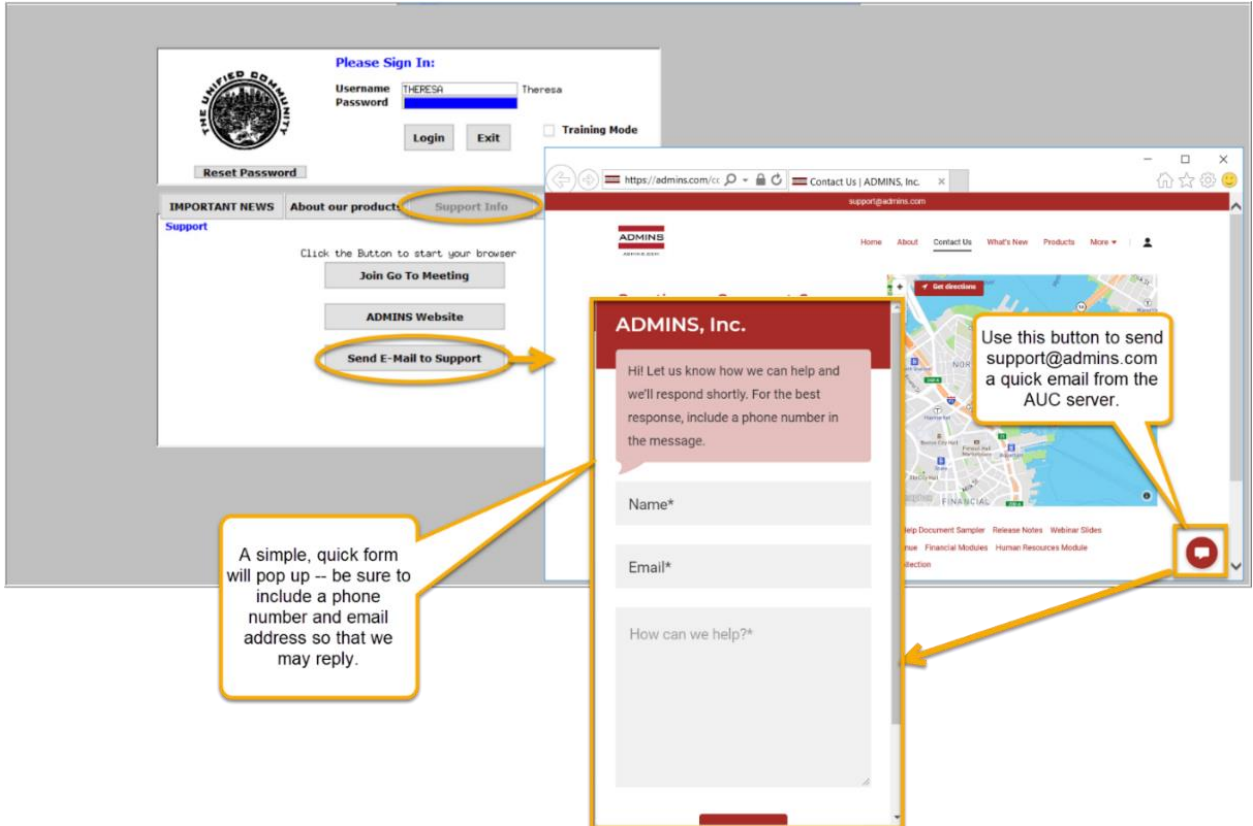
The second button will bring up the **ADMINS** website home screen. Access news, release notes, webinars, and selected help documents here.





5.3 [Send E-Mail to Support]

The third button opens the **ADMINS “Contact Us”** page to instantly send an email to **ADMINS** support. Every page on the website has the button to allow emailing support instantly.



[ADM-AUC-SY-8154]

6 HELP REFERENCE LIBRARY

In addition to the following new or updated documents added to the Help Reference Library, the **“SYSTEM”** sections of each library were standardized for the help documents that are not specific to the module. See the “System” bullet below for an example.

6.1 New or Updated Documents

- SYSTEM SY-117 Quick Report Selector [New]
- SY-145 Reset Password [New]