Fixed Assets

Release Notes — June 2024

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

CONTENTS

1   Export, Edit, and Import Voucher Data [Enhancement]

The fixed assets module in AUC has a new feature that enables exporting selected voucher data into an **Excel®**spreadsheet.

– In the **Excel®** spreadsheet, edit five columns to Select the Assets, Assign Asset Numbers, Sequence Numbers, Voucher Number to link to, and the Voucher Line to link to.

– Save the file as a .CSV and import it back into AUC.

– This feature can save time and effort using the **Excel®**features to simplify data entry, especially for sites that routinely add hundreds of fixed asset each year.

– Anything changed in the columns will update the voucher records, including clearing out the value if the columns for the record are blank. The changes will be visible on the Edit Selected vouchers screen to review and edit.
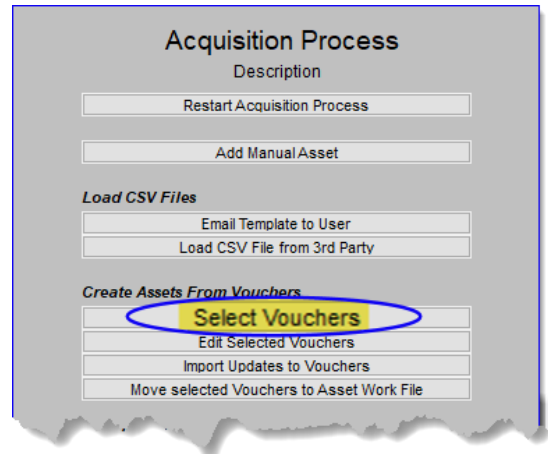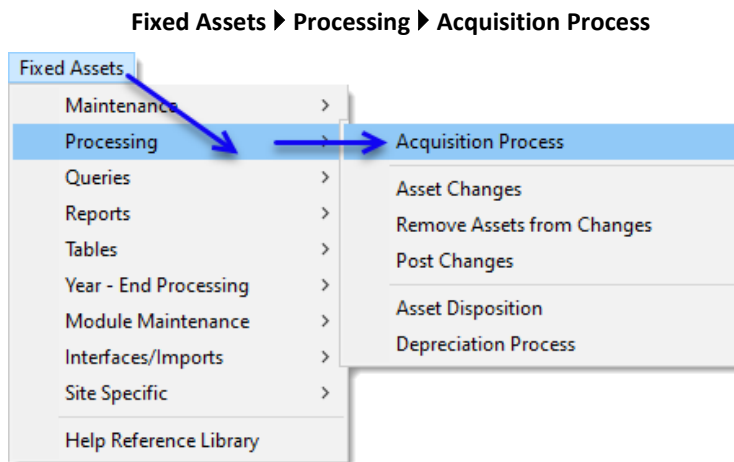
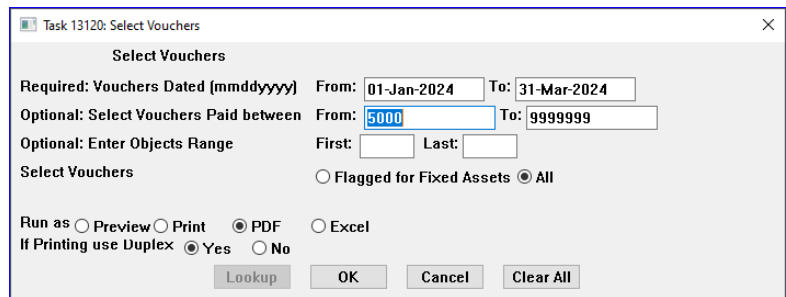## 1.1   How to Use the New Feature

To use the feature, follow these steps:
Open the fixed assets module and select the vouchers to export. To access the feature, from the menu, select:

Fixed Assets ▶ Processing ▶ Acquisition Process

Click on the **[Select Vouchers]** step:

Since this process can be run multiple times throughout the year, using a date range for a single month or quarter will make it more manageable when updating the asset records.

– **Vouchers Dated** is a required field

– Select a dollar amount range.

– Select by an "object code range" to group similar assets for updating.

– Select either vouchers ⊙ **Flagged for Fixed** asset, or select⊙ **All** vouchers.

Click on the **[Export]** button to create the excel file.

The **Excel®** file will open on the screen. Edit the following columns:

– Sel
– Asset
– Seq#
– Link_Voucher,
– Link_Line

Before making any changes, save the file in a location that is accessible to you.

Enter the data in the **Excel®** spreadsheet in the same way the data is entered on the **[Edit Selected Vouchers]** screen.

– Do not remove or add any columns.
– If any records (rows) removed from the Excel/CSV file no updates will be made to those records.
– Do not delete the column headers It is OK to remove rows that will not be updated, but it is not required. If the rows remain unchanged – then no updates to the voucher will be done.
– Only change the SEL, Asset, Seq#, Link Voucher, and Link Line field. Do not change any other fields, including the Voucher# or Line#.

Save the **Excel®** file as a **.CSV** and close it.
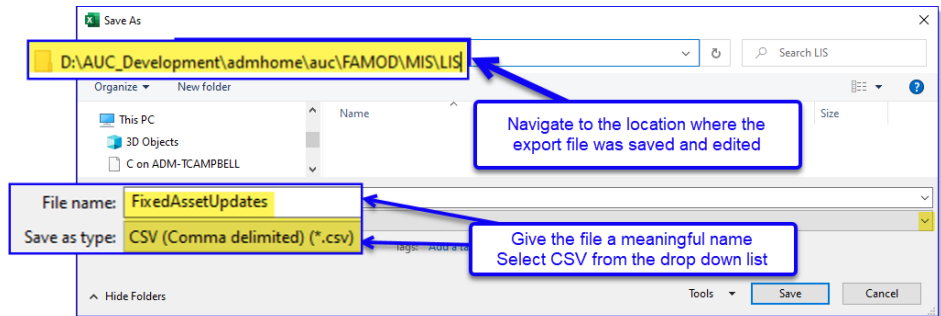
Go back to the fixed assets module Acquisition Process steps menu and click on the Import Updates to Vouchers button.
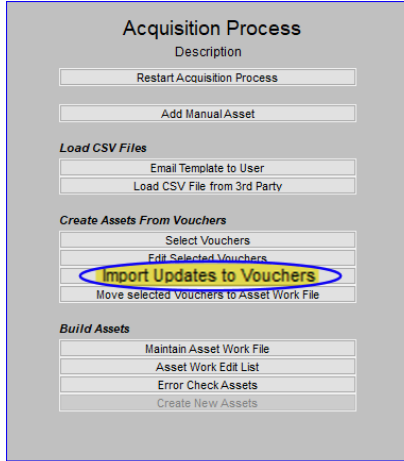
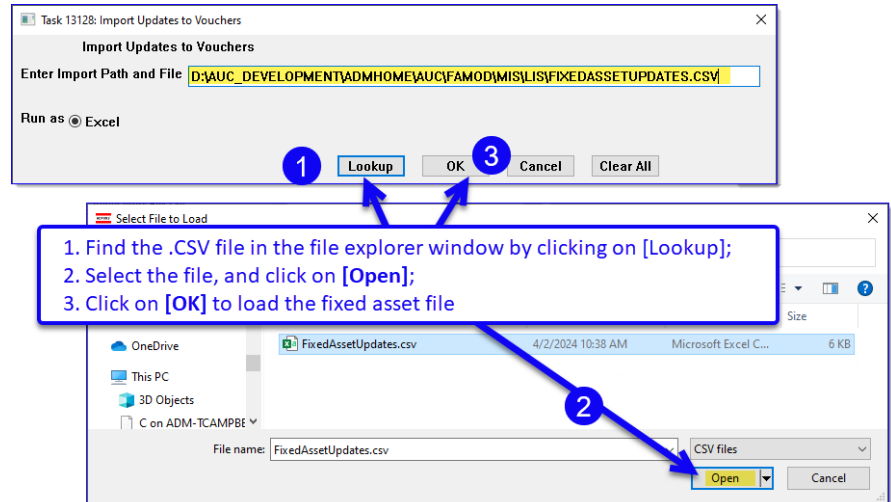Select the .CSV file that you edited and confirm the changes.

Review the imported voucher data on the Import Voucher Changes report. If you accidentally upload incorrect data or make an unintentional change, make the change directly on the **'Edit Selected Vouchers'** screen.

This report shows the Original values on the left, and the New Values on the right of the screen (highlighted in yellow).

If there are errors they will be identified in Column M, Error_Message. The records with errors will not be updated.

Return to the Edit selected vouchers screen to see the results.

Move the Vouchers to the Asset Work file and continue with the process as usual.

[ADM-AUC-FA-1913]

1.2 Move Vouchers to Asset Work File Report [Enhancement]

ADMINS added the option to produce the report in ⊙ **Excel**. To run the report, access the menu by selecting:

Fixed Assets ▶ Processing ▶ Acquisition Process

Click on the

Move selected Vouchers to Asset Work File step.

When run as ⊙ **Excel**, the report will look like this:

When run as ⊙ **PDF**, the report looks like this:

[ADM-AUC-FA-1914]

1.3 Maintain Asset Work File Excel List Button [Enhancement]

A new button has been added to the 'Maintain Asset Work File' step in the acquisition process. This button is available on the 'Classification' and 'Accounting' tabs.

The 'Edit List' button on the screens remains unchanged because it allows for a detailed version that would not be suitable to run as Excel.

There is only one 'Run as' option available, and the report will generate rapidly with the output appearing as shown.

[ADM-AUC-FA-1915]

2 Login to the Training Area [Enhancement]

ADMINS provides a training area, which is a replica of the modules available on the live AUC application. *(The data in the training mode is refreshed on demand overnight by the superuser or on a regular basis, determined by each site.)*
*See **SY–175 Copy Live to Training** in the Help Reference Library for details.*

ADMINS changed the location of the *Training Mode* option to be *above* the Password field, to help users select it before entering the password.

To access the Training area, select the ⦿ **Yes** option before typing in the password. After entering the password, you cannot switch the radio button for this session.
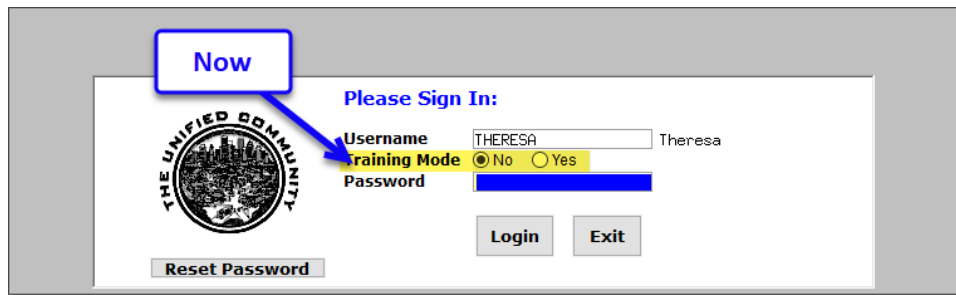
*(The default is ⦿ **No**; typing the password and {Enter} will go to **Live**).*

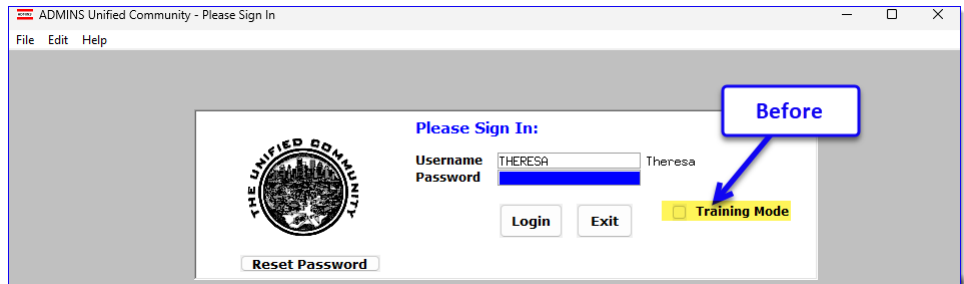To proceed to Training mode, click on [Yes]. The prompt will default to [Yes] if the Training mode radio button is ⦿ **Yes**, and will go straight to training by pressing **{Enter}** *(without clicking on any button)*.

Press [No] to log in to live.

[ADM-AUC-SY-8323]

Property of ADMINS, Inc. No unauthorized use, distribution or reproduction permitted.

Page 8 of 9
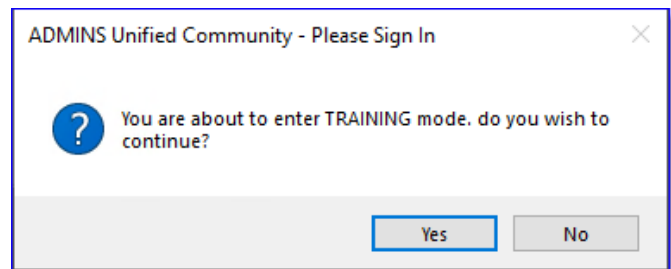
3   Email Address Checking [Enhancement]

When a prompt **requires** an Email or a button triggers a prompt that **requires** for an email address (which is mandatory, not optional), it will verify if it follows a valid email format.

For example, "xxx@cccc.domain".

Here is an example of the error that will appear if an invalid email address is detected:

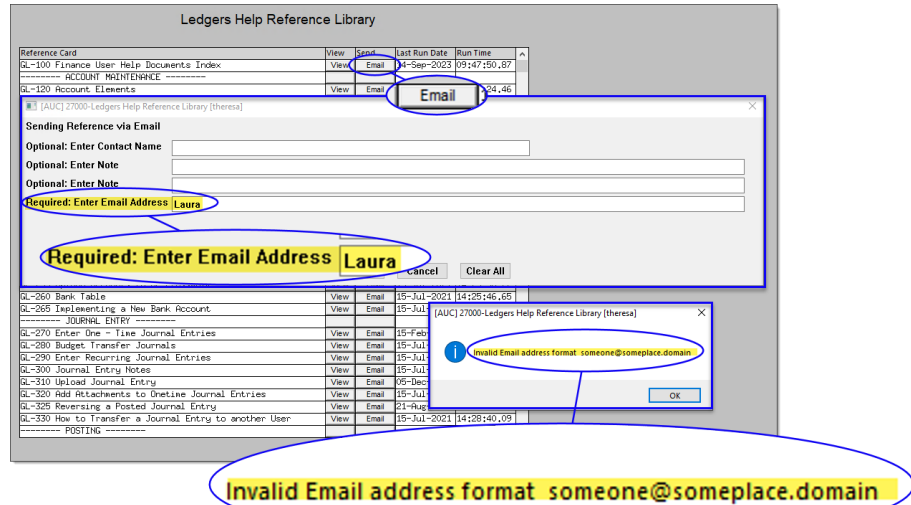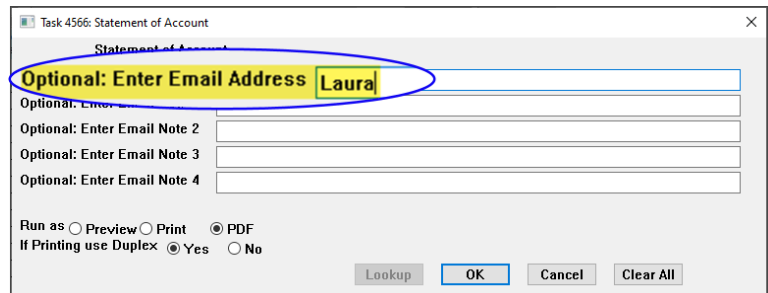Click [OK] on the prompt and enter a valid email address on the Required field.

The system does not check if an **Optional** field contains a valid email address. In this example, there is no error message even though the email address is invalid. No email will be sent.

[ADM-AUC-SY-8331]

4   Help Reference Library New & Updated Content

| Processing | FA–200 Acquiring Assets | [Updated] |
| System | SY–170 System Administration Requirements Kit | [Updated] |

4.1   New & Updated Content on **ADMINS.com**

SY–170 System Administration Requirements Kit   [Updated]