



# PURCHASE ORDERS

## RELEASE NOTES – DECEMBER 2018

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This document explains new product enhancements added to the ADMINIS Unified Community for Windows **PURCHASE ORDER** system.

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# 1. PURCHASE ORDER ENTRY [Enhanced]

Prior to the software update, purchase orders created from a Bid only allowed data entry into the fifth line of the description field on the items tab. **ADMINS** updated the screen to allow entry into lines four and five if lines four and five are blank on the awarded bid.

Line Item	Item Description	Qty	UOM	FA	Price	Freight	Other	Ext Amount
2	SAVIN MP 3054; REGISTRAR OF VOTERS, ID # 39989 35,000 COPIES EST. ANNUAL COPY PER COPY	1,000			.0050			.01
3	SAVIN MP 4054; TAX ASSESSOR ID # 39987 50,000 COPIES EST. ANNUAL COPY	1,000			.0050			.01
4	SAVIN MP 3054; COMMON COUNCIL ID # 39988 60,000 COPIES EST. ANNUAL COPY	1,000			.0050			.01

Figure 1 Before – only line five available for data entry on a Purchase Order created from a bid

Purchase Order Entry

PO # 15636

Vendor Code: 000355 01  
MASS DIVISION OF EMPLOY. & TRA Via Email  
HURLEY BLDG/REIMB UNIT  
19 STANFORD ST  
ATTN REIMBURSEMENT UNIT  
BOSTON MA 02114-0000

Dept Code: SCHOOL SCHOOL  
PO Date: 03-Dec-2018 FY 2019  
Type Code: Z Zero Tolerance

Deliver To: 8 KEOUGH ADMINISTRATION BL  
Invoice To: 8 KEOUGH ADMINISTRATION BL

1 Delivery Notes No text available  
J Internal Notes No text available

Ship To Attn: \_\_\_\_\_  
Ship Date: \_\_\_\_\_

Expected Amt: 558,00

Line Item	Qty	UOM	Item Description	FA	Price	Freight	Other	GL Total	Ext Amount
3	1,000		EXTERIOR CAR WAX & INTERIOR CLEANING TO INCLUDE VAC CLEANING & TIRE RIM CLEANING & POLISHING; UNIT COST PER VEHICLE		120,000			120,00	120,00

U By Account: 0000-000-0000-00-00-00000

Bid# 2017-019/3 30-Jun-2019

Purchase Order Items

PO # 15636

Vendor Code: 000355 01  
MASS DIVISION OF EMPLOY. & TRA  
HURLEY BLDG/REIMB UNIT  
19 STANFORD ST  
ATTN REIMBURSEMENT UNIT  
BOSTON MA 02114-0000

Dept Code: SCHOOL SCHOOL  
PO Date: 03-Dec-2018 FY 2019  
Type Code: Z Zero Tolerance

Deliver To: 8 KEOUGH ADMINISTRATION B  
Invoice To: 8 KEOUGH ADMINISTRATION B

1 Delivery Notes No text available  
J Internal Notes No text available

Ship To Attn: \_\_\_\_\_  
Ship Date: \_\_\_\_\_

Expected Amt: 558,00

Line Item	Item Description	Qty	UOM	FA	Price	Freight	Other	Ext Amount
1	TOTAL ANNUAL COST TO CITY: UNLIMITED USE OF CAR WASH FACILITY	1,000			378,000			378,00
	ANNUAL UNIT COST FOR 50 CARS							
4	Users may now supply additional information on line four shown here							
5	as well as line five as usual							

Figure 2 Lines four and five, if blank on the bid, may be used for data entry by the Purchase Order end user

[MDT-SUP-SAPLAUC-1747]

## 1.1. Purchase Order Requisition Printing on Release of Purchase Order

Users reported that the purchase order requisitions were flashing on the screen and dropping out of sight when the purchase orders were released during entry. **ADMINS** corrected this with the software update.

[MBE-SUP-SAPLAUC-978]



## 2. APPROVALS ► Change to Error Message [Enhanced]

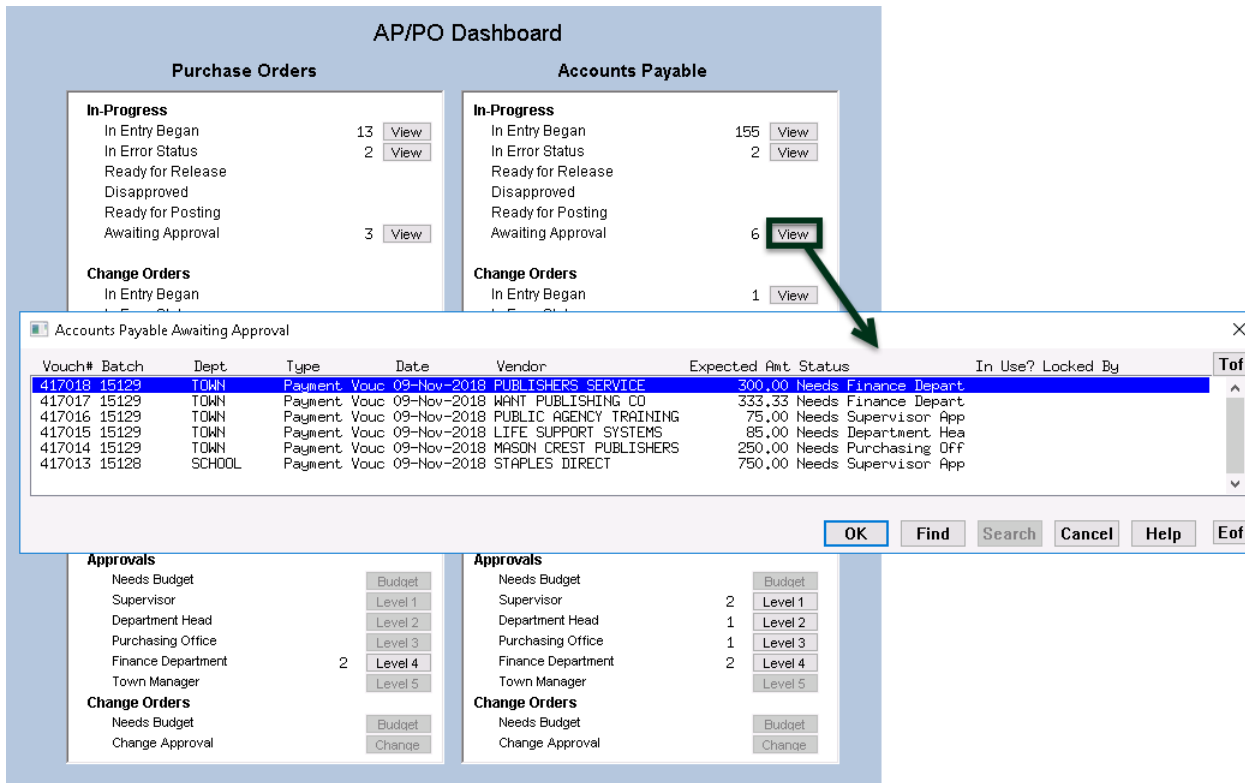


Figure 3 [Level] buttons were clickable and showed the number of records waiting to be approved

In the example, there are six vouchers in “Awaiting Approval” status. The vouchers are all visible to the user in the upper portion of the screen, as shown in Figure 3. If the user had **READ** only access, and clicked on the approval button, in the lower portion of the screen, the following message was displayed:

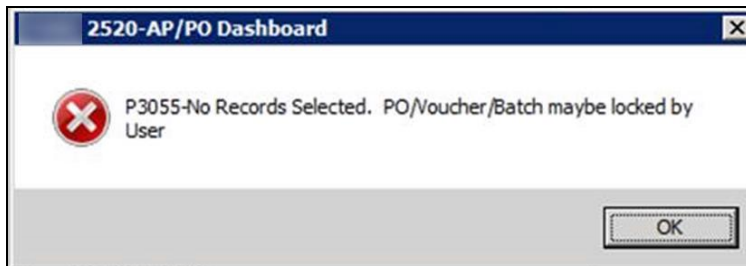


Figure 4 Before—message appeared when a user had **READ** access but no **WRITE** access to the department

This created confusion for users who thought action was required despite there being nothing to approve.

With the software update, **ADMINS** changed the dashboard. Now, if a user has **READ** only access, the user will still be able to **query** the records in the **top** portion of the screen, but the buttons on the bottom portion where the approvals are selected will only be available to the user if there are records awaiting approval, for a user with **FULL WRITE** access to the department and if the user is an approver for the department.



**AP/PO Dashboard**

**Purchase Orders**

**In-Progress**

In Entry Began	13	<a href="#">View</a>
In Error Status	2	<a href="#">View</a>
Ready for Release		
Disapproved		
Ready for Posting		
Awaiting Approval	3	<a href="#">View</a>

**Change Orders**

In Entry Began		
In Error Status		

**Accounts Payable**

**In-Progress**

In Entry Began	155	<a href="#">View</a>
In Error Status	2	<a href="#">View</a>
Ready for Release		
Disapproved		
Ready for Posting		
Awaiting Approval	6	<a href="#">View</a>

**Change Orders**

In Entry Began	1	<a href="#">View</a>
In Error Status		

**Accounts Payable Awaiting Approval**

Vouch#	Batch	Dept	Type	Date	Vendor	Expected Amt	Status	In Use?	Locked By	Tof
417018	15129	TOWN	Payment Vouch	09-Nov-2018	PUBLISHERS SERVICE	300,00	Needs Finance Depart			
417017	15129	TOWN	Payment Vouch	09-Nov-2018	WANT PUBLISHING CO	333,33	Needs Finance Depart			
417016	15129	TOWN	Payment Vouch	09-Nov-2018	PUBLIC AGENCY TRAINING	75,00	Needs Supervisor App			
417015	15129	TOWN	Payment Vouch	09-Nov-2018	LIFE SUPPORT SYSTEMS	85,00	Needs Department Hea			
417014	15129	TOWN	Payment Vouch	09-Nov-2018	MASON CREST PUBLISHERS	250,00	Needs Purchasing Off			
417013	15128	SCHOOL	Payment Vouch	09-Nov-2018	STAPLES DIRECT	750,00	Needs Supervisor App			

**Approvals**

Needs Budget	<a href="#">Budget</a>
Supervisor	<a href="#">Level 1</a>
Department Head	<a href="#">Level 2</a>
Purchasing Office	<a href="#">Level 3</a>
Finance Department	<a href="#">Level 4</a>
Town Manager	<a href="#">Level 5</a>

**Change Orders**

Needs Budget	<a href="#">Budget</a>
Change Approval	<a href="#">Change</a>

**Callouts:**

- Six vouchers are listed as this user has **READ** access to the **TOWN** group and **WRITE** access to the **SCHOOL**.
- Only one voucher is available as this user has **READ** access to the **TOWN** group and **WRITE** access to the **SCHOOL** group.

Figure 5 After – the records are not available for selection, reducing confusion

[ADM-AUC-AP-913]

### 3. VENDORS

The vendor history screen was fixed to display correct data when using a filter on invoice number. The Enter Vendors screen lookup was updated to more easily retrieve vendor numbers.

#### 3.1. Vendor History ▶ [4 Vouchers]

When using an **Invoice Selection** to filter vouchers on the vendor history screen, the system was displaying the correct batch and voucher for “**In Progress**” vouchers but the data in the remaining columns was incorrect. This was fixed.

View All Vouchers (Bills)										
3 Vouch#	2 Batch	4 DeptCode	5 VouchDate	6 Vendor Name	Year	Location	Status	Voucher Total	Balance	
<a href="#">470735</a>	<a href="#">15121</a>	UNCLASSIFIED	12-Nov-2018	POSTMASTER	2019	In-Prog	Entry Began	78,00	78,00	
<a href="#">470734</a>	<a href="#">15130</a>	UNCLASSIFIED	12-Nov-2018	POSTMASTER	2019	In-Prog	Entry Began			
<a href="#">470733</a>	<a href="#">15130</a>	UNCLASSIFIED	12-Nov-2018	POSTMASTER	2019	In-Prog	Entry Began	156,00	156,00	

Figure 6 There are three in progress vouchers for the vendor #46



**Vendor History - Vouchers Payable**

Goto...  Local Vendor  Yes  No  
 Actions POSTMASTER 1099 Code  Entered 12-Nov-2018 THERESA  
 Class UNCL Unclassified Changed

Beginning Date  1 Clear the Dates  
 Ending Date  Invoice Selection  2 Clear Invoice Select

3 Purchase Orders 4 Vouchers 5 Disbursements

Sel	Batch	Voucher#	Voucher Date	Department	Invoice#	Invoice Date	Amount	Remaining Bal	Status	Check Type
<input type="checkbox"/>	15130	470733	12-Nov-2018	UNCLASSIFIE	STAMPS	12-Nov-2018	156.00	156.00	Entry Began	Printed
<input type="checkbox"/>	15130	470734	12-Nov-2018	UNCLASSIFIE	STAMPS	30-Oct-2018			Entry Began	Printed
<input type="checkbox"/>	15121	470735	12-Nov-2018	UNCLASSTIE	STAMPS	24-Oct-2018	78.00	78.00	Entry Began	Printed

**Figure 7** The vendor history screen, without any invoice selection, shows the data correctly

On the **Vendor History** ► [4 Vouchers] screen, a filter of **STAMPS** is added on the **Invoice Selection**.

**Vendor History - Vouchers Payable**

Goto...  Local Vendor  Yes  No  
 Actions POSTMASTER 1099 Code  Entered 12-Nov-2018 THERESA  
 Class UNCL Unclassified Changed

Beginning Date  1 Clear the Dates  
 Ending Date  Invoice Selection  2 Clear Invoice Select

3 Purchase Orders 4 Vouchers 5 Disbursements

Sel	Batch	Voucher#	Voucher Date	Department	Invoice#	Invoice Date	Amount	Remaining Bal	Status	Check Type
<input type="checkbox"/>	15130	4	12-Nov-2018	UNCLASSIFIE	STAMPS	24-Oct-2018	78.00	78.00	Entry Began	Printed
<input type="checkbox"/>	15130	4	12-Nov-2018	UNCLASSIFIE	STAMPS	24-Oct-2018	78.00	78.00	Entry Began	Printed
<input type="checkbox"/>	15121	4			STAMPS					Printed

**Figure 8** Before – using a filter on Invoice Selection misrepresented the data

**Vendor History - Vouchers Payable**

Goto...  Local Vendor  Yes  No  
 Actions POSTMASTER 1099 Code  Entered 01-Mar-1995  
 Class UNCL Unclassified Changed 06-Aug-2007 CONVERT

Beginning Date  1 Clear the Dates  
 Ending Date  Invoice Selection  2 Clear Invoice Select

3 Purchase Orders 4 Vouchers 5 Disbursements

Sel	Batch	Voucher#	Voucher Date	Department	Invoice#	Invoice Date	Amount	Remaining Bal	Status	Check Type
<input type="checkbox"/>	15130	417035	12-Nov-2018	SCHOOL	STAMPS	12-Nov-2018	156.00	156.00	Entry Began	Printed
<input type="checkbox"/>	15130	417036	12-Nov-2018	SCHOOL	STAMPS	30-Oct-2018			Entry Began	Printed
<input type="checkbox"/>	15121	416915	24-Oct-2018	FIRE	STAMPS	24-Oct-2018	78.00	78.00	Entry Began	No Check P
<input type="checkbox"/>	14926	412851	05-Oct-2017	FINANCE	STAMPS	05-Oct-2017	196.00		Closed	Printed
<input type="checkbox"/>		39322	31-Jul-2017			03-Aug-2017			Closed	Printed

**Figure 9** After – the vouchers payable screen with the invoice selection shows the correct data

[ADM-AUC-AP-920]



### 3.2. Lookup a Vendor Number [Enhanced]

ADMINS offers the option to create “one-time” vendors when processing refunds. After use, the system stamps these vendors with a status of “Cancelled”. Over time, these vendors can clutter the vendor lookups. ADMINS changed the way that the vendor lookup works in the **Enter Vendors** and **View Vendors** screens.

#### 3.2.1. Lookups #1 through #8 Suppress Cancelled Vendors [Enhanced]

As shown, the first eight selections will list both **Active** and **Inactive Vendors**.



What is the difference between an “Inactive” vendor and a “Cancelled” vendor? Inactive vendors are set to be inactive as a result of a merge process or if a vendor is no longer to be used in processing purchase orders and vouchers. Cancelled vendors are assigned a vendor number during refund processing for a single use and marked as cancelled once the payment is processed.

The lists for lookups one through eight exclude vendors with a status of "Cancelled"; both "Active" and "Inactive" Vendors are included

Name	Vendor #	Revit	1Address	City	St	Zip	Class	Status	Tot
WEST ACADEMIC	022779	01	444 CEDAR STREET, SUITE 700	SAINT PAUL	MN	55101	UNCL	Active	
WEST ACADEMIC	022779	02	P.O. BOX 83378	CHICAGO	IL	60691	UNCL	Active	
WEST BAY COLLABORATIVE	019425	01	144 BIGNALL ST.	WARWICK	RI	02888	UNCL	Active	
WEST BAY RECOVERY, INC	021972	01	FILE #09-7879	CRANSTON	RI	02910	UNCL	Active	
WEST GROUP	004980	01	P.O. BOX 64833	SAINT PAUL	MN	55164	UNCL	Active	
WEST GROUP PAYMENT CTR	010466	01	PO BOX 6292	CAROL STREAM	IL	60137	UNCL	Inactive	
WEST INFORMATION PUBL	004345	01	P.O. BOX 6187	CAROL STREAM	IL	60197	UNCL	Active	
WEST MUSIC	005916	01	1212 5TH STREET	CORALVILLE	IA	52241	UNCL	Active	
WEST NEWTON HEARING CENTER	011221	01	1298 WASHINGTON STREET	WEST NEWTON	MA	02465	UNCL	Active	
WEST PAYMENT CENTER	000117	02	P.O. BOX 6292	CAROL STREAM	IL	60197	UNCL	Active	
WEST PUBLISHING COMPANY	000117	01	620 OPPERMAN DR.	SAINT PAUL	MN	55164	UNCL	Active	
WEST SUBURBAN TRADING CENTER	003169	01	366 WASHINGTON ST	WELLESLEY	MA	02181	UNCL	Active	
WEST VIRGINIA UNIVERSITY	007005	01	P O BOX 6064	MORGANTOWN	WV	26506	UNCL	Active	
WEST WARWICK WELDING INC	024647	01	970 MAIN ST	WEST WARWICK	RI	02883	UNCL	Active	
WESTBORO MOTORS	005366	01	271 TURNPIKE RD	WESTBOROUGH	MA	01581	UNCL	Active	
WESTBOROUGH POLICE DEPT.	012695	01	P.O. BOX 1123	WESTBOROUGH	MA	01581	UNCL	Active	
WESTBOROUGH SCHOOL DEPT.	003741	01	45 WEST MAIN STREET	WESTBOROUGH	MA	01581	UNCL	Active	
WESTERN DATALYNK INC.	017310	01	2055 PROSPERITY LANE	PLACERVILLE	CA	95667	UNCL	Active	
WESTERN ENVIRONMENTAL SERV,INC	004368	01	P.O. BOX 9035	SCOTTSDALE	AZ	85252	UNCL	Active	

Figure 10 The enhanced lookup excludes Cancelled, One Time vendors

#### 3.2.2. Lookup #9 Added for One-Time Vendors [New]

A ninth lookup option was added to the available lookup methods to present only vendors with a status of “Cancelled”. As such, the same vendor name and address may appear in the “cancelled” list multiple times, with a different vendor number each time.

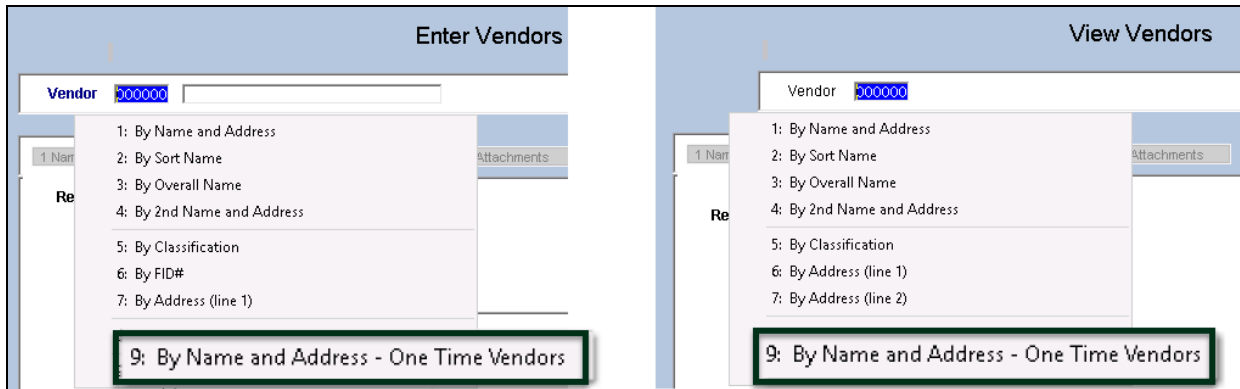


Figure 11 New lookup available on both the Enter Vendors and View Vendors screen

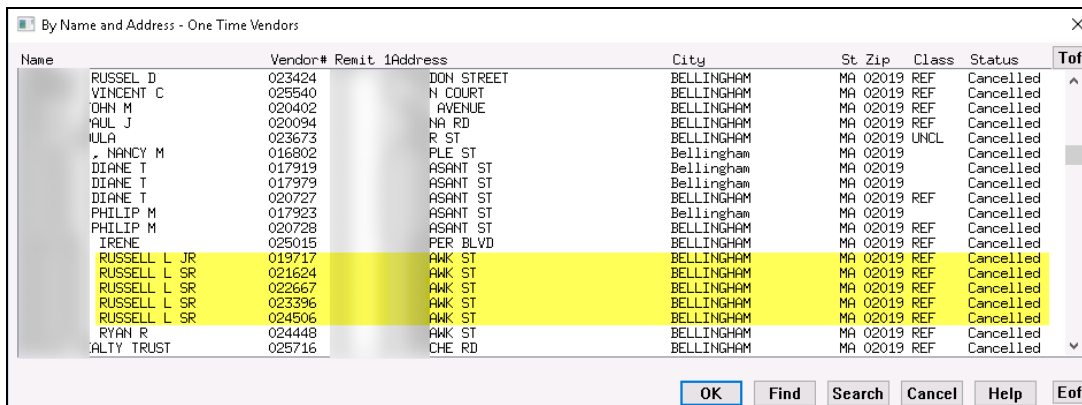
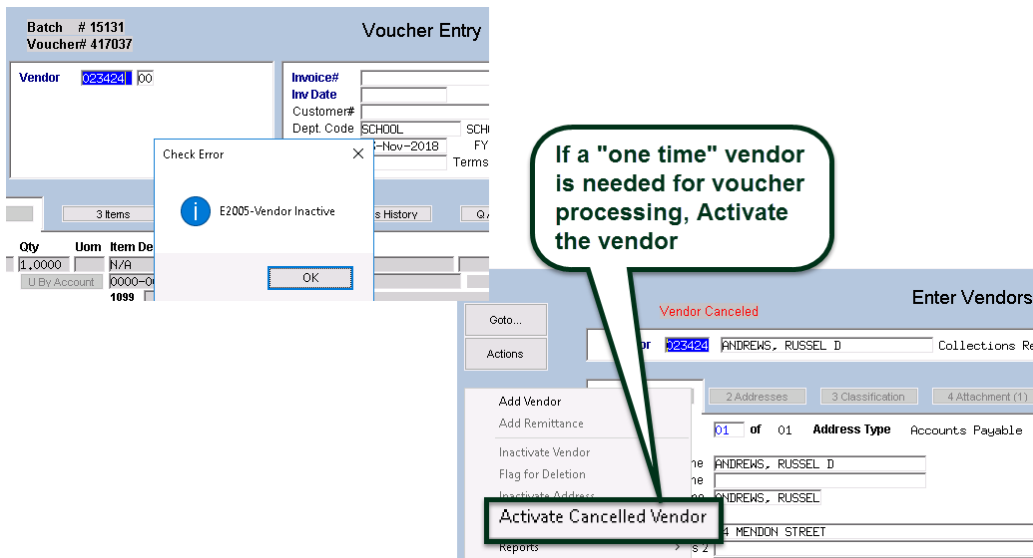


Figure 12 Choosing this lookup shows only vendor numbers used for a “one-time” vendor

### 3.2.3. Activate a Cancelled Vendor [Instructions]

If a “one-time” cancelled vendor is needed for voucher processing, activate the vendor in the **Enter Vendors** screen by selecting **[Actions] ▶ Activate Cancelled Vendor**. Only users with access to the **Enter Vendors** screen may activate a Cancelled vendor.





The screenshot shows the 'Enter Vendors' form with several fields highlighted in red boxes. The 'Vendor' field contains 'BRIDGES, LAURE' and the 'Class' dropdown is set to 'REF Refund Vendor'. The 'Time Vendor?' field is set to 'No'. Other fields include 'Restrict Access To', 'Federal ID#', 'Bank Code', 'ABA#', 'Bank Account', 'Customer#', 'HR ACH Tax Payment Type', 'Authorized Repres', 'Name', 'Phone#', 'Minorit', '1099 Code', 'Payment Type', 'Local Vendor?', and 'Business Type'.

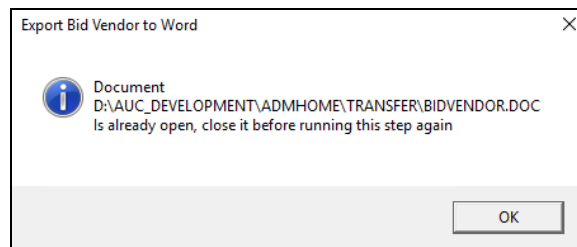
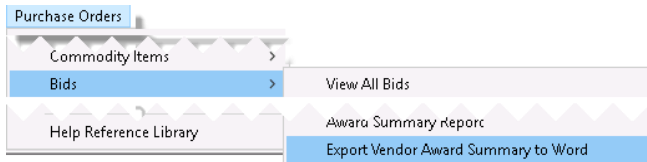
After activating a cancelled vendor, the vendor will still be classified as a **“Refund”** vendor. Change the **“Class”** to be something other than **“REF”** for refund vendor. Select the value from the lookup; classes are maintained in the Tables ► Vendor Classification screen.

Change the **“One Time Vendor Flag”** to **“No”** to ensure that the vendor will be available for future use.

The vendor will remain an **“Active”** vendor.

[ADM-AUC-AP-930]

## 4. BIDS [Enhanced]



Prior to the software update, exporting a Vendor Award Summary to Word<sup>®</sup> would abnormally terminate if the Word<sup>®</sup> file was already open. This was corrected. Users will see an information message to close the Word<sup>®</sup> file.

[ADM-AUC-PO-459]

## 5. QUERIES [Enhanced]

Select **Purchase Orders ► Queries ► View all Purchase Orders** to see the changes **ADMINS** added to the screen with this software update. Columns for **“Deliver To”** and **“Invoice To”** have been added to the **Purchase Order Query** screen. **Hover text** has also been added to see the full description of the fields.







View All Purchase Orders										
Vouchers										
2 PO#	3 DeptCode	4 PODate	5 EntryUser	6 Vendor Name	Year	Posted	InPrg	Chgs	Status	PO Balance
3210923	1400	09-Jan-2018	THERESA	GRIGGS & BROWNE CO INC	2018				Open	40,00
3210922	1400	09-Jan-2018	THERESA	WB MASON CO INC	2018				Open	77,15
3210921	1114	09-Jan-2018	THERESA	EAST SIDE AUTO SALE	2018				Open	150,00
3210920	1201	09-Jan-2018	THERESA	FEDERAL SIGNAL CORPORATION	2018				Open	20,00
3210919	1400	09-Jan-2018	THERESA	DISTINCTIVE WINDOW DESIGNS	2018				Open	47,50
3210918	1400	09-Jan-2018	THERESA	VINNY'S AUTO & TRUCK INC	2018				Open	127,28
3210917	1202	09-Jan-2018	THERESA	LEARNING FOR LIFE DIVISION	2018				Open	56,80
3210916	4520	09-Jan-2018	THERESA	ALL TRAFFIC SOLUTIONS	2018				Open	143,95

Figure 13 Before

View All Purchase Orders										
Vouchers										
2 PO#	3 DeptCode	4 PODate	5 EntryUser	6 Vendor Name	Year	Posted	InPrg	Chgs	Status	PO Balance
15598	FIRE	29-Aug-2018	THERESA	CRONATRON WELDING SYSTEMS,I	201				Open	13677,50
15591	FIRE	17-Aug-2018	ANTHERA	O'LEARY WELDING	201				Open	1369689,87
15589	FIRE	16-Aug-2018	ANTHERA	AL WHEELER	201			1	Open	38897,00
15546	FIRE	14-Aug-2018	ANTHERA	POSTMASTER	201				Open	50000,00
15544	FIRE	14-Aug-2018	ANTHERA	ANDREW MOWBRAY PUBLISHERS	201	1	1		Closed	
15532	FIRE	14-Aug-2018	THERESA	POSTMASTER	201				Open	55,00
15478	FIRE	14-Aug-2018	THERESA	POSTMASTER	201				Open	55,00

Figure 14 PO Query screen with new columns showing Delivery and Invoice Addresses

6 Vendor Name	DelvAddr	InvAddr	Posted	InPrg
CRONATRON WELDING SYSTEMS,I	FIRE	FIRE	2	
Vendor # 002361	Delv Addr FIRE FIRE STATION			
Hold Code				
Type School and Town				

Figure 15 Hover text shows vendor number, hold code & type, and description of delivery and invoice addresses

This additional information allows the user “at a glance” to know which department address is in use on each purchase order.

[MDF-SUP-SAPLAUC-962]



## 6. TABLES ▶ Approval Path Table ▶ Lookups [Enhanced]

Prior to the software update, using the lookup to find an approval path presented *all* of the approval paths. **ADMINS** modified the lookup so that users could restrict the view to only active records.

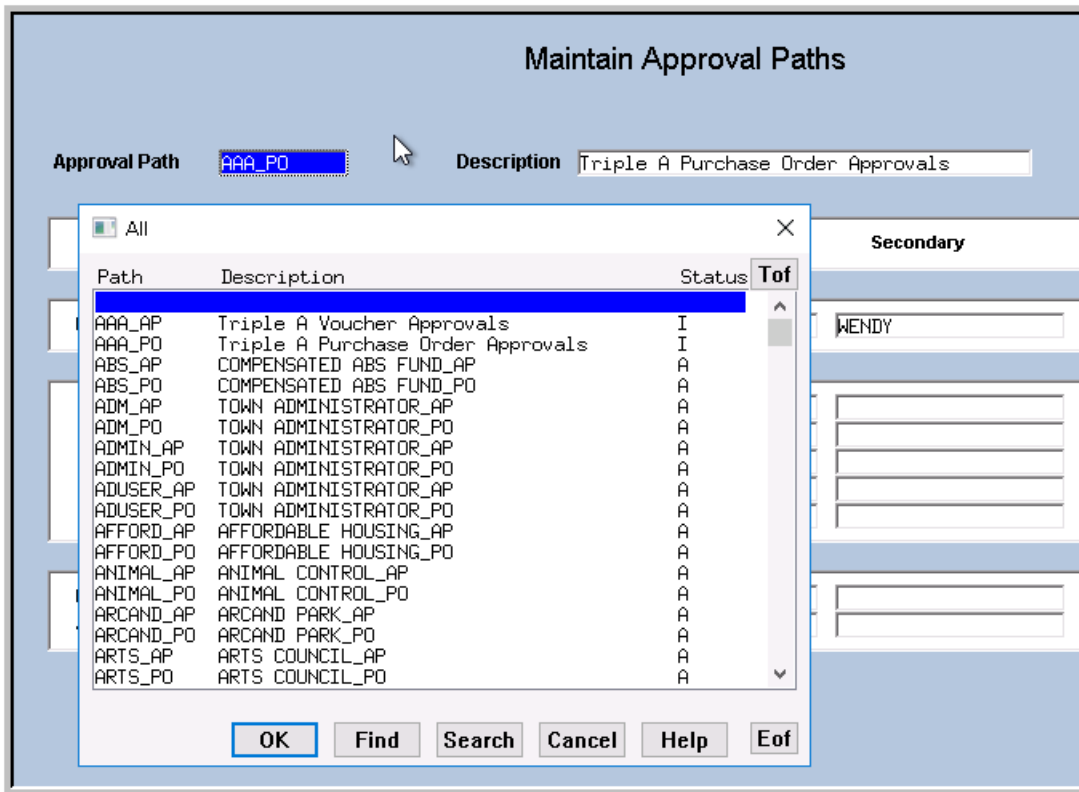


Figure 16 Before

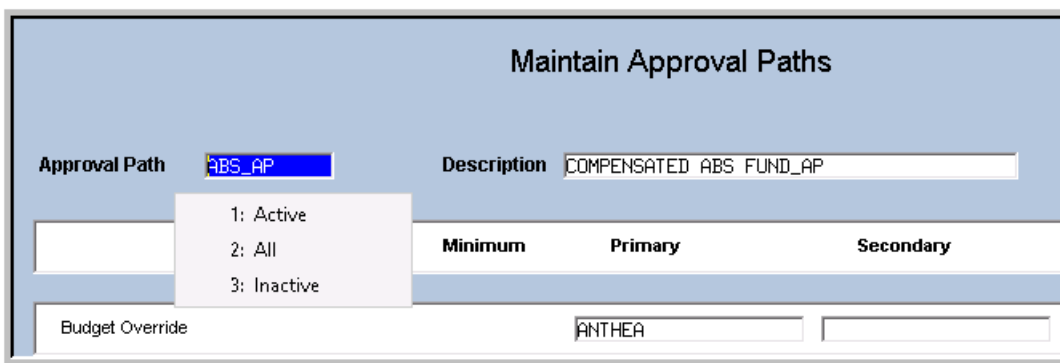


Figure 17 After – Filtering allows selection of only “Active” paths, “All” paths, or only “Inactive” paths

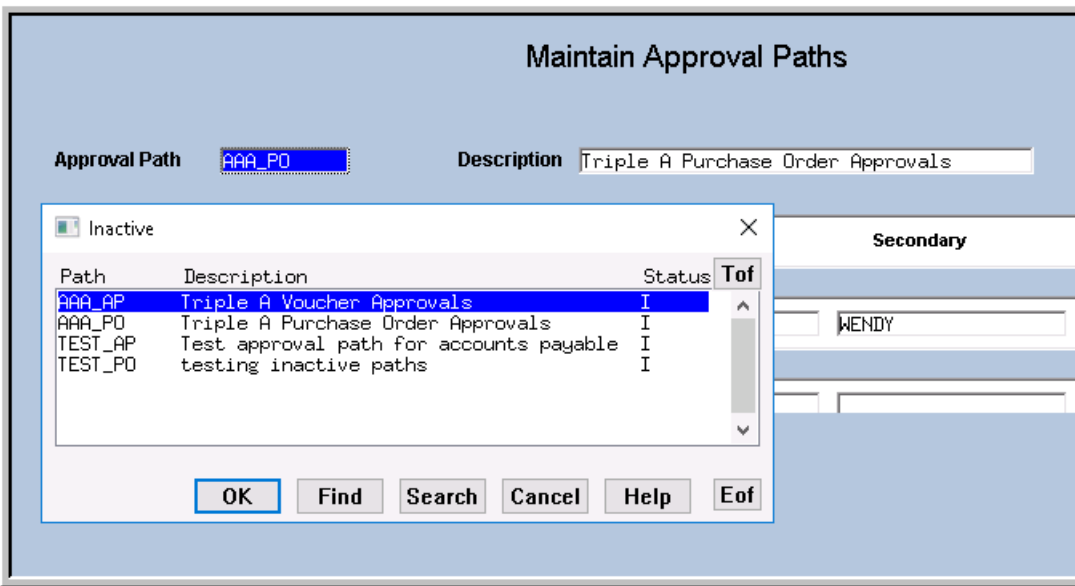


Figure 18 Selecting only Inactive paths

[ADM-AUC-PO-495]

## 7. INTERFACES/IMPORTS ► Upload POs from a Spreadsheet [Enhanced]

ADMINS added error checking to the process. To illustrate, intentional errors (entering alpha data in a number field) were introduced in the sample spreadsheet below, all marked with an orange highlight:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Vendor Number (Required)	2. Remit # (Required)	5. PO Date (Required)	6. PO Line# (Required)	7. Account# (Required)	8. Commodity Item (Optional)	9. Item Description (Required)	10. Quantity (Optional)	11. Price (Required)	12. Freight (Optional)	13. Other (Optional)	14. Retainage % (Optional)	15. Retainage Amount (Optional)					
#####	99	[MM/DD/YYYY]	###	(e.g. 100-000-666-000-00-52010)	(Optional)	(Required)	###	#####	#####	###	#####	###					
VENDOR	REMIT	A1BILDAT	LINE	XACTNUM	ITEM	ITEMDESC	QTY	PRICE	FREIGHT	OTHER	RETPCT	RETAMT					
bad		01	6/6/2018		0100-430-0000-004-00-00-52010	buy stuff			500								
000046	bad		6/10/2018		0100-430-0000-004-00-00-52010	more stuff			750								
002268		01	6/10/2018		0200-450-0000-004-00-00-53510	new stuff			345	bad		bad	bad				
014431		01	6/28/2018		1 0200-450-0000-004-00-00-53510	line 1			100								
014431		01	6/28/2018	bad	0200-450-0000-004-00-00-53510	line 2		bad	200				bad				
014431		01	6/28/2018		3 0200-450-0000-004-00-00-53510	line 3			300								
014431		01	6/28/2018		4 0200-450-0000-004-00-00-53510	line 4		bad									
014431		01	6/28/2018		5 0200-450-0000-004-00-00-53510	line 5			500								
014431		01	6/28/2018		6 0200-450-0000-004-00-00-53510	line 6			600		bad						
016305		02	7/10/2018		0100-430-0000-004-00-00-52010	next year			898							2	
46		01	7/20/2018		0100-430-0000-004-00-00-52010	next year 2			55								

The result is an error message and report of the errors; each error on the line will be reported as shown below:



3303-POPORLODERR.REP Printed 03-Dec-2018 at 11:00:05 by THERESA Page 1  
Town of Admins  
Upload POs Error Report

Correct all errors in spreadsheet, export to .CSV file, and restart upload process.

Row	Vendor Name	Vendor	Remit	Address Line 1
2		000000	01	
Error: Vendor# must be numeric and between 1 and 999999 Error: Invalid Vendor Remit Address				
3		000046	00	
Error: Remit# must be numeric and between 1 and 99				
4	ADCARE EDUCATIONAL INST INC	002268	01 5	NORTHAMPTON ST.
Error: Freight Amount must be numeric Error: Retainage % must be numeric Error: Retainage Amount must be numeric				
5	ALISHA FABBRICOTTI	014431	01 4	TALBOTT FARM DR
Error: Invalid Department Group				
6	ALISHA FABBRICOTTI	014431	01 4	TALBOTT FARM DR
Error: Invalid Department Group Error: PO Line# must be numeric and between 1 and 32767 Error: Quantity must be numeric Error: Retainage Amount must be numeric				
7	ALISHA FABBRICOTTI	014431	01 4	TALBOTT FARM DR
Error: Invalid Department Group				
8	ALISHA FABBRICOTTI	014431	01 4	TALBOTT FARM DR
Error: Invalid Department Group Error: Price must be numeric				
9	ALISHA FABBRICOTTI	014431	01 4	TALBOTT FARM DR
Error: Invalid Department Group				
10	ALISHA FABBRICOTTI	014431	01 4	TALBOTT FARM DR
Error: Invalid Department Group Error: Other Amount must be numeric				

Error Record Count: 9

Upload Purchase Order Spreadsheet X

Errors found in upload file  
No records were loaded

OK

**Figure 19 Report of errors in the upload spreadsheet**

No records will be loaded. Edit the spreadsheet to correct all the errors, save as a .csv file, and try again.

[ADM-AUC-PO-497]



## 8. PREVIEW OF COMING ATTRACTIONS

ADMINS conducts annual customer site visits. These visits provide the opportunity to solicit customer recommendations on new features. As a result, the ADMINS team is enthusiastically working on a “User Favorites” feature to be implemented in the coming months.

### 8.1. Favorites Screen [New]

AUC has hundreds of processes and screens and thousands of reports. To provide ease of use for infrequent users and to allow regular users to customize working with AUC, a “Favorites” screen is in development. This screen may be set as the user’s home screen that is displayed when accessing AUC.

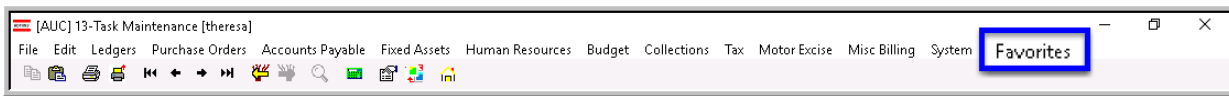


Figure 20 Select Favorites ▶ User Favorites to access the screen and make selections.

The screen will allow the selection of up to 45 items to be available on the Favorites screen. The available screens will be limited to those to which each user is allowed access. All menu, department and account security will remain in effect. Users will make selections from menus.

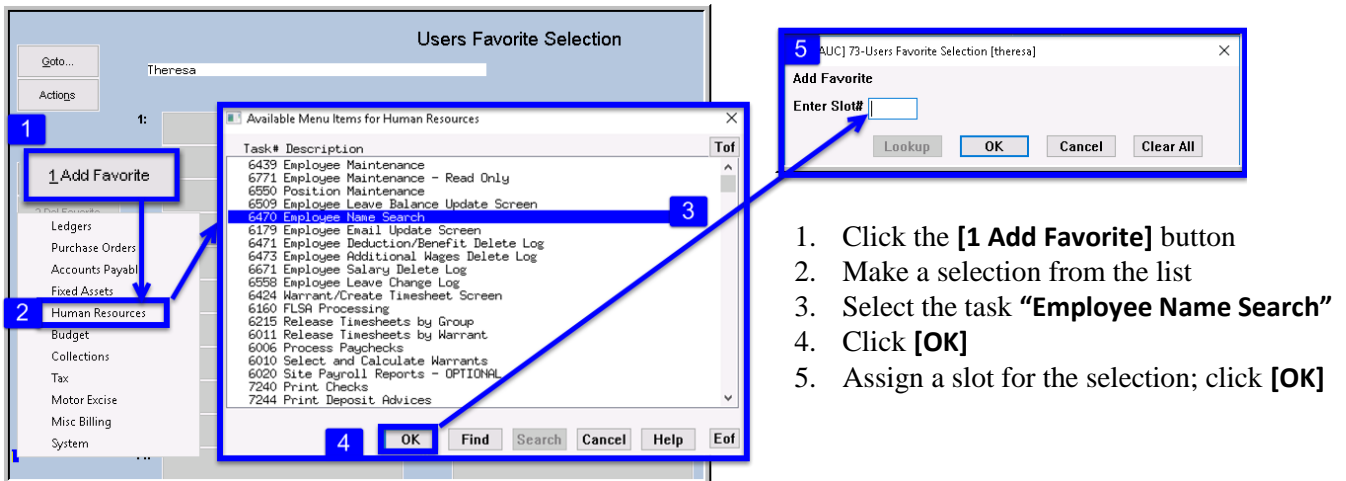


Figure 21 Steps to create a favorites screen

In the example shown a user has chosen the AP/PO Dashboard and also the PO Query screen.



Figure 22 A user’s selections

1. The [1 Add Favorite] button displays a menu of available tasks
2. The [2 Del Favorite] button allows the removal of a favorite from a slot
3. The user’s name as entered in the user profile screen
4. A favorite task in slot #1
5. A second favorite task in slot #3

[ADM-AUC-SY-8067]

## 9. HELP REFERENCE LIBRARY

The Help Reference Library was re-organized to separate *instructions* for using a template for uploads and the actual *Excel® templates*. In addition, the **PO-830 Upload Vendors Template** link was fixed and now may be used by clicking on [Run] from the **Purchase Orders ▶ Help Reference Library** screen (see **A** in Figure 24).

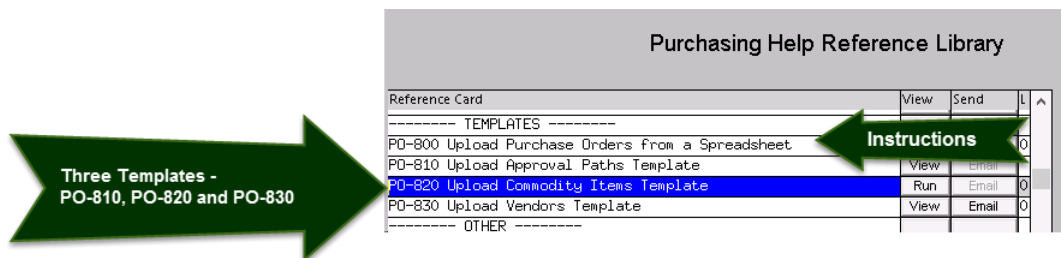


Figure 23 Before

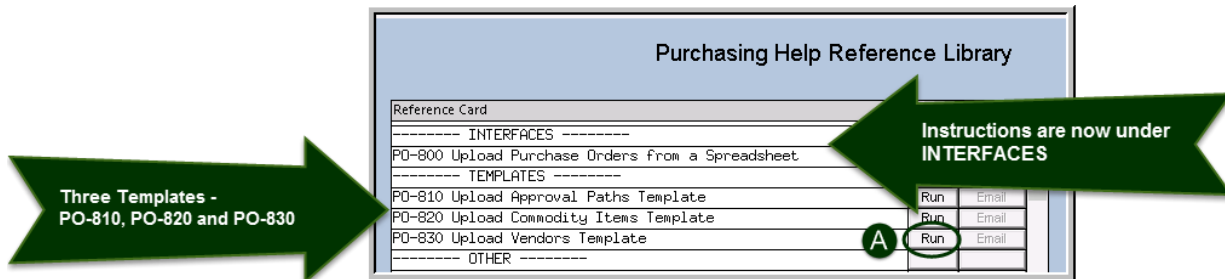


Figure 24 After

### 9.1. New or Updated Documents

- **TEMPLATES** PO–830 Upload Vendors Template [Fixed Link]
- **SYSTEM** PO–1010 System Administration Kit [Updated]