



PURCHASE ORDERS

RELEASE NOTES – DECEMBER 2019

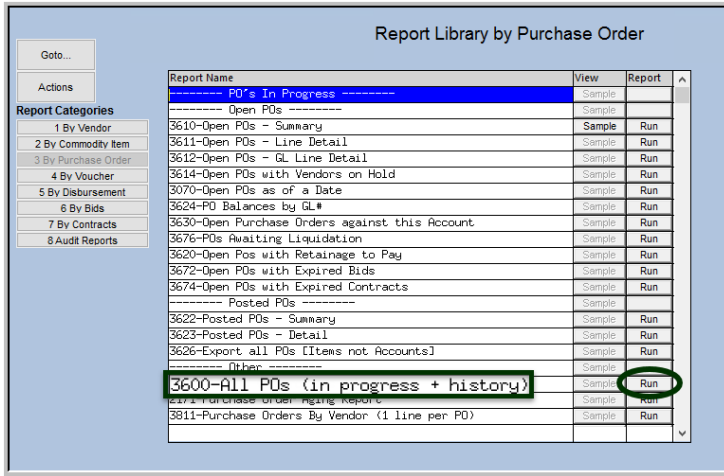
This document explains new product enhancements added to the **ADMINS Unified Community (AUC)** for Windows **PURCHASE ORDER** system.

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1 REPORTS



ADMINS corrected a sorting and totaling issue on report #3600–All POs (in progress + history). Run the report by selecting Purchase Orders ▶ Reports ▶ [3 By Purchase Order]; click on [Run].

1.1 #3600–All POs (in progress + history) [Fix]

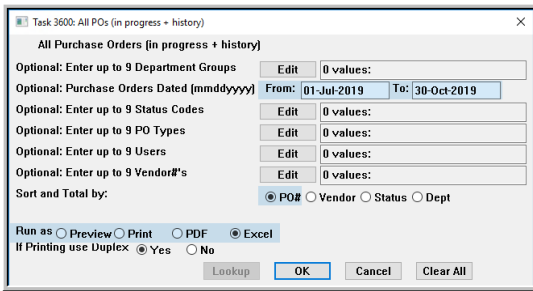


Figure 1 #3600 All POs (in progress + history) prompt

The prompt will save the last date range as entered by each user; several sorting and filtering options are available and the default sort is by Vendor #. Figure 1 shows the Sort and Total selections as PO#, for Purchase Orders dated 1 July 2019 through 30 October 2019, run as Excel®.

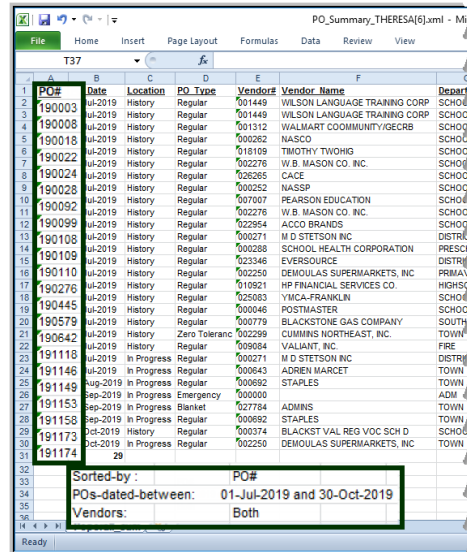
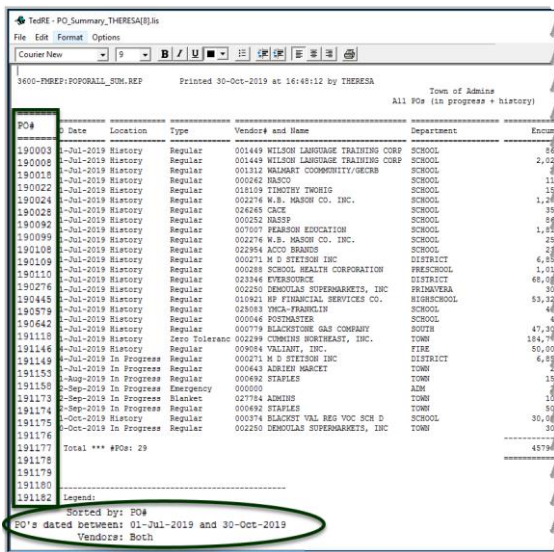


Figure 2 Report #3600 may be run as Print/Preview/PDF® or Excel® format



A	B	C	D	E	F	G	H	I	J	K	L
PO#	PO Date	Location	PO Type	Vendor#	Vendor Name	Department	Encumbered	Retained	Relieved	Balance	Status
191173	24-Jul-2019	2	Regular	009084	VALIANT, INC.	FIRE	50,000.00	0.00	50,000.00	0.00	Closed
191177	12-Sep-2019	In Progress	Emergency	000000		ADM	20.00	0.00	0.00	20.00	Correct Errors
191179	12-Sep-2019	In Progress	Regular	000892	STAPLES	TOWN	500.00	0.00	0.00	500.00	Correct Errors
191174	24-Jul-2019	In Progress	Regular	000271	M D STETSON INC	DISTRICT	6,852.53	0.00	0.00	6,852.53	Needs Supervisor Appr
191175	31-Jul-2019	In Progress	Regular	000643	ADREN MARCET	TOWN	25.00	0.00	0.00	25.00	Ready for Posting
191176	01-Aug-2019	In Progress	Regular	000892	STAPLES	TOWN	150.00	0.00	0.00	150.00	Ready for Posting
191178	12-Sep-2019	In Progress	Blanket	027784	ADMINS	TOWN	100.00	0.00	0.00	100.00	Ready for Posting
191182	30-Oct-2019	In Progress	Regular	002250	DEMOULAS SUPERMARKETS, INC	TOWN	300.00	0.00	0.00	300.00	Ready for Posting
190003	01-Jul-2019	History	Regular	001449	WILSON LANGUAGE TRAINING CORP	SCHOOL	867.00	0.00	0.00	867.00	Open
190018	01-Jul-2019	History	Regular	001312	WALMART COMMUNITY/CRCB	SCHOOL	70.98	0.00	0.00	70.98	Open
190024	01-Jul-2019	History	Regular	018109	TIMOTHY TWHIGH	SCHOOL	150.00	0.00	0.00	150.00	Open
190028	01-Jul-2019	History	Regular	002276	W.B. WASON CO. INC.	SCHOOL	1,254.80	0.00	0.00	1,254.80	Open
190092	01-Jul-2019	History	Regular	002695	CAKE	SCHOOL	350.00	0.00	0.00	350.00	Open
190099	01-Jul-2019	History	Regular	000252	NASSP	SCHOOL	865.00	0.00	770.00	95.00	Open
190108	01-Jul-2019	History	Regular	007007	PEARSON EDUCATION	SCHOOL	1,819.40	0.00	0.00	1,819.40	Open
190109	01-Jul-2019	History	Regular	002276	W.B. WASON CO. INC.	SCHOOL	259.96	0.00	0.00	259.96	Open
190110	01-Jul-2019	History	Regular	022954	ACCO BRANDS	SCHOOL	236.74	0.00	215.22	21.52	Open
190276	01-Jul-2019	History	Regular	000271	M D STETSON INC	DISTRICT	6,852.53	0.00	774.30	6,078.23	Open
190445	01-Jul-2019	History	Regular	000280	SCHOOL HEALTH CORPORATION	PRESCHOOL	1,014.84	0.00	0.00	1,014.84	Open
190579	01-Jul-2019	History	Regular	023346	EVERSOURCE	DISTRICT	68,000.00	0.00	19,879.72	48,120.28	Open
190642	01-Jul-2019	History	Regular	002250	DEMOULAS SUPERMARKETS, INC	PRIMAVERA	300.00	0.00	0.00	300.00	Open
191118	01-Jul-2019	History	Regular	010921	HP FINANCIAL SERVICES CO.	HIGHSCHOOL	53,327.74	0.00	0.00	53,327.74	Open
191146	01-Jul-2019	History	Regular	025563	YUCA-FRANKLIN	SCHOOL	420.00	0.00	0.00	420.00	Open
191149	01-Jul-2019	History	Regular	000046	POSTMASTER	SCHOOL	49.00	0.00	24.50	24.50	Open
191153	01-Jul-2019	History	Regular	000779	BLACKSTONE GAS COMPANY	SOUTH	47,300.00	0.00	12,659.69	34,640.31	Open
191158	01-Jul-2019	History	Zero Toleranc	002299	CUMMINS NORTHEAST, INC	TOWN	184,776.00	0.00	46,194.00	138,582.00	Open
191180	21-Oct-2019	History	Regular	000374	BLACKST VAL REG VOC SCH D	SCHOOL	30,000.00	225.00	2,775.00	27,225.00	Open
399,936.99							225.00	83,283.43	316,653.56		
457,996.93							225.00	133,395.84	324,601.09		

Figure 3 shows the report sorted by Status; each status (i.e., Closed, Correct Errors) is grouped with a total, the reports within the group are sorted by Purchase Order number.

Similar results are available sorted by Vendor or Department.

Whatever sort is chosen, within that selection, the records will be sorted by Purchase Order number.

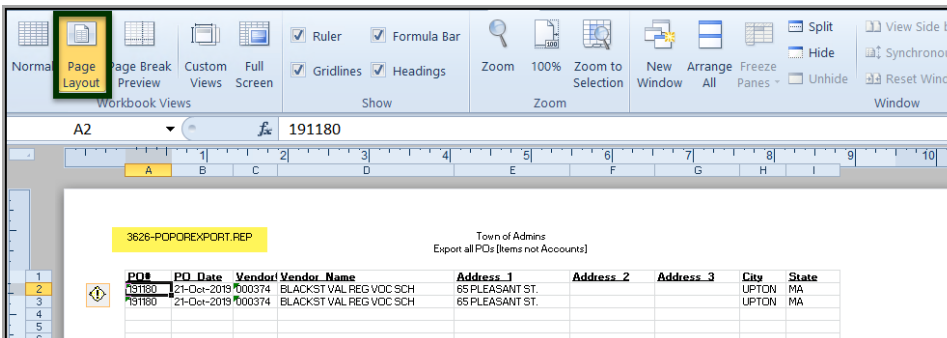
Figure 3 #3600 All POs (in progress + history) run sorted by status to Excel®

[ADM-AUC-PO-524]

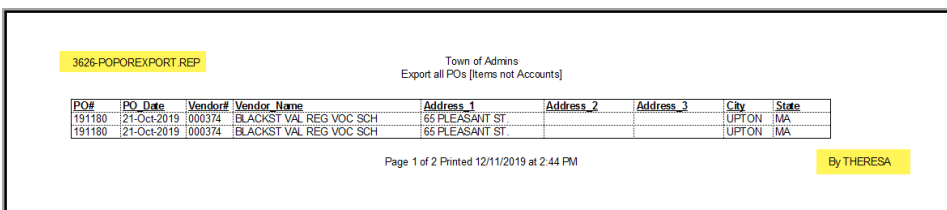
1.2 EXCEL® REPORTS [Enhancement]

Users frequently ask for assistance to re-run an Excel® report – and provide an image or photocopy sample that was produced around the same time last year. To help support@admins.com staff provide quicker answers, many AUC Excel® reports will now include the report number and name in the upper left corner of the report, similar to what is shown on reports run as Print/Preview/PDF®. ADMINS also now includes the username at the bottom right of the reports.

To see this information while working on the Excel® spreadsheet, select View ► Page Layout view.



An example is below; this information is also available on the preview or printed report.



[ADM-AUC-SY-8133]



2 QUERIES [Enhancement]

The **View All Purchase Orders** screen is accessed via **Purchasing ▶ Queries ▶ View All Purchase Orders**. Users with limited departmental access reported that the system “froze”, when, in fact, the system was reading hundreds of thousands of records to find the few purchase orders the user could access. **ADMINS** added messages to alert users when a large number of records is read without a match. The system will read 5000 records, and if the screen is not yet full (30 records will fit on a screen), will stop.

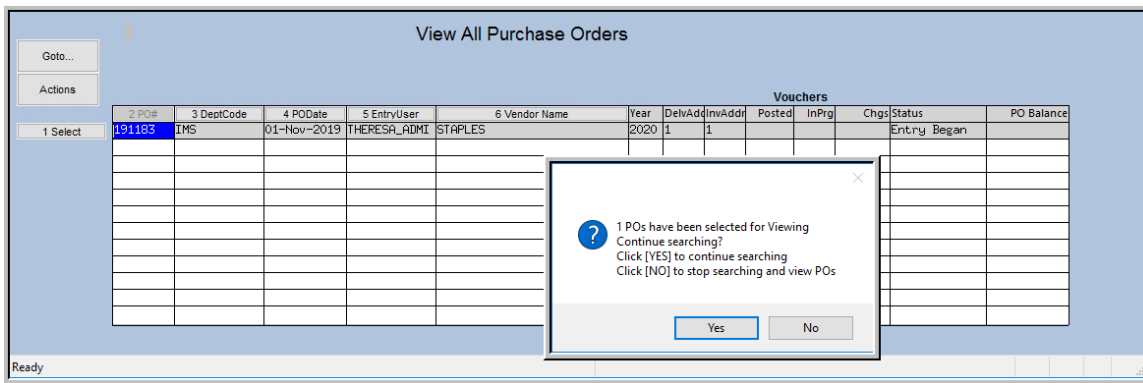


Figure 4 New message displayed to users with minimal departmental access

The system will pop up a message with the number of records currently selected with the options to either click **[Yes]** to continue searching or **[No]** to stop searching and view the current selection. These messages will allow users with only a few records to access their data more quickly, and not require them to wait until an entire screen of records is available. This will have no effect on users with broad access. The default is **[Yes]** to continue searching.

[ADM-AUC-PO-514]

3 PO ROLLOVER PROCESSING [Enhancement]

The PO Rollover process generates a report of the Purchase Orders to be rolled with Account Number Changes. Prior to the software update, item description exceeding 30 characters were truncated.

Line GL#	Original Account and Description	New Account and Description	Original Amt	Rem Balance
1	BOE COMMITMENT PY END 2018/20	1000-33000-57010-0000-00000-0000-000 EDUCATION CONTRIBUTION	582236.34	582236.34
*** Grand Total***			582,236.34	582,236.34

Figure 5 Before – Item Descriptions exceeding 30 characters were truncated

ADMINS changed the report to show the entire 80 characters:

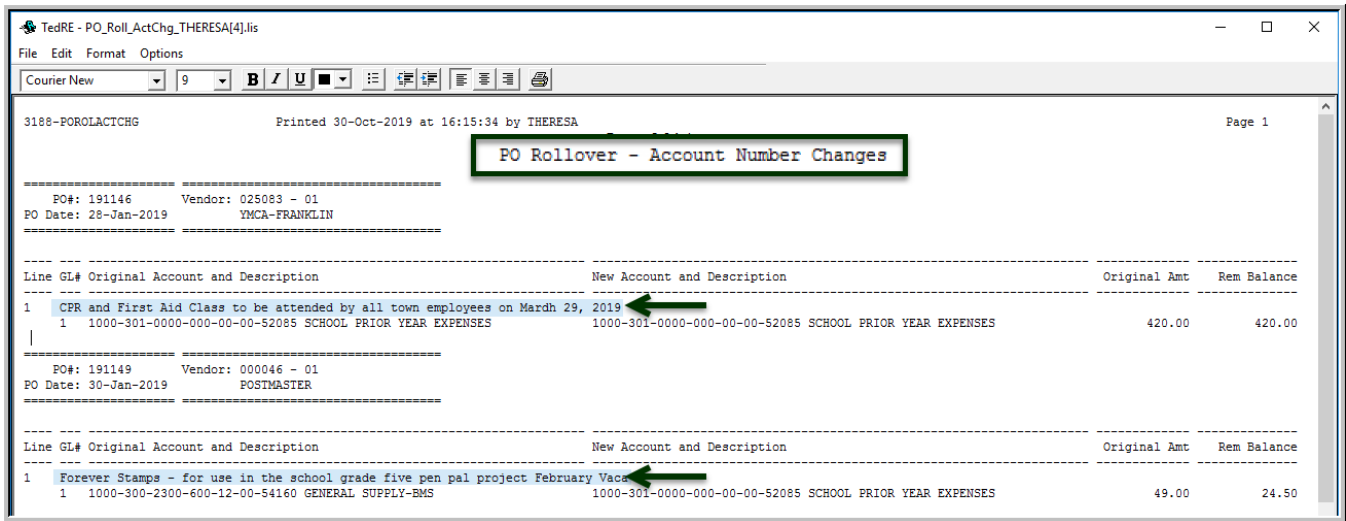
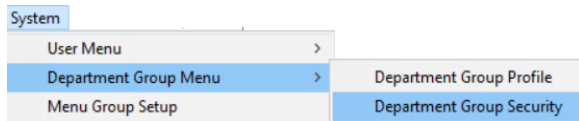


Figure 6 After – the full 80 characters will print

This enhancement was installed during the September software update and is mentioned here to document the change.

[ADM-AUC-PO-525]

4 DEPARTMENT GROUP SECURITY [ENHANCEMENT]



The **Department Group Security** screen controls access to departments on a per-user basis.

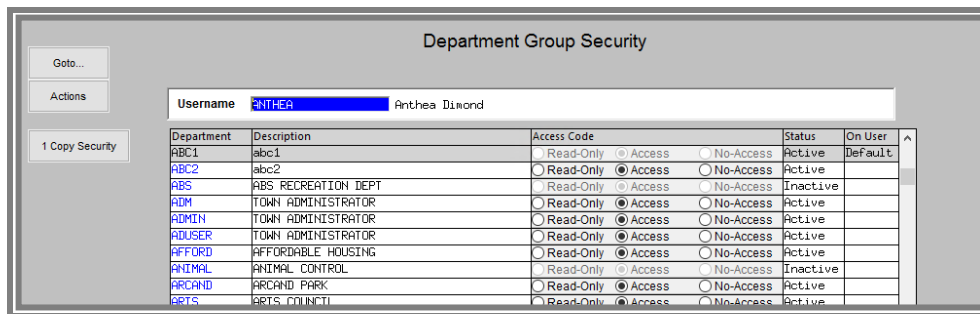


Figure 7 Before – the Department Group Security Screen without the [2 Set Access] button

ADMINS added a [2 Set Access] button to the **Department Group Security** screen to allow changing **ACTIVE** departments that are not the user's **Default** department. We do not allow the users default department to be changed on this screen to prevent a situation where a user would have access to no departments.



Note: if the User is inactive – the Set Access button will be grayed out. The user security may be copied to another user, but access cannot be changed on an inactive user.

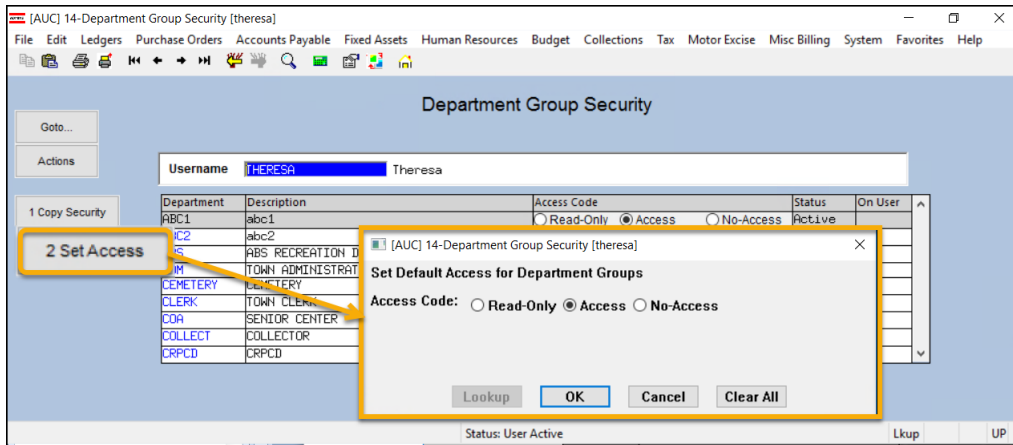
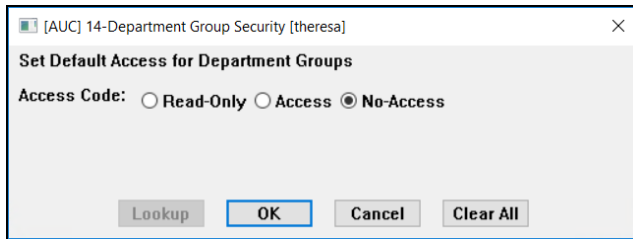


Figure 8 Using the [2 Set Access] button for a user on the Department Group Security screen



Click on [2 Set Access] to set the access for the user to **Read Only**, **Access**, or **No-Access**. Inactive departments will be ignored; the user’s default department will be ignored.

This process will only change **ACTIVE** departments that are not the users default department. In **Figure 9** the

highlighted lines will **not** change:

- 1 because it is the selected user’s default record
- 2 because the department is inactive.

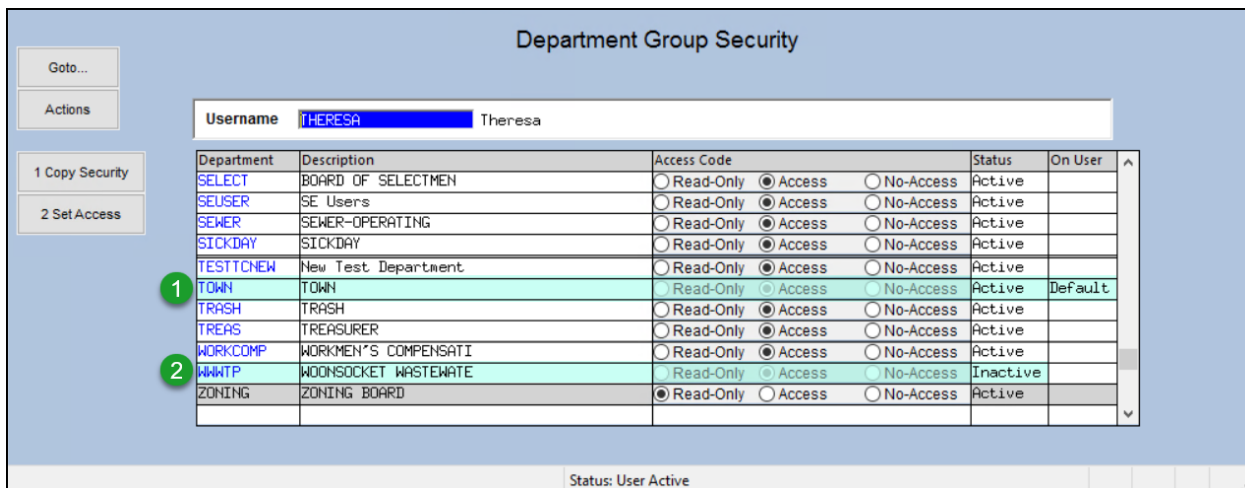


Figure 9 Department Group Security screen examples of what will and will not change

To change access for a user for an inactive department, first **activate** the department, change the user’s access, and **inactivate** the department again.

[ADM-AUC-SY-8123]



5 HELP REFERENCE LIBRARY

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

5.1 New or Updated Documents

- SYSTEM PO-1010 System Administration Kit [Updated]