



PURCHASE ORDERS

RELEASE NOTES – JUNE 2020

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

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1 CONTRACT REPORTS [ENHANCEMENT]

User defined fields are available on the [3 Addl Info] tab on the Contract Entry and Query screens.

The screenshot shows the 'Contract Query - Additional Information' screen. It features several tabs: '1 Lines (3)', '2 Details', '3 Addl Info', and '4 St...'. The '3 Addl Info' tab is active, showing 'Contract # 6' and 'Contract Additional Information Entry'. A callout box points to the '2 PO / AP' tab in the 'System Profile' section, with a text box stating 'Assign Field labels on the System Profile Table'. Below this, a table shows the mapping of user-defined fields to system fields:

Contracts User Defined	20 Characters	Dates
User Defined #1	Special Dept Code	Effective on
User Defined #2	Location Code	Expires on
User Defined #3	Notes	
User Defined #4	User Defined #4	
User Defined #5	User Defined #5	
User Defined #6	User Defined #6	

The first six fields are text fields that allow up to 20 alphanumeric places; the last two are date fields. The field labels are set on the **System ▶ Administrator ▶ System Profile ▶ [2 PO/AP]** tab.

AP/PO Report Library for Contracts

	View	Report
----- Contract's In Progress -----	Sample	
14610-In Progress Contracts - Summary	Sample	Run
14612-In Progress Contracts - Line Detail	Sample	Run
----- Open Contracts -----	Sample	
14622-Open Contracts - Summary	Sample	Run
14620-Open Contracts - Line Detail	Sample	Run
----- Posted Contracts -----	Sample	
14630-Contracts w/ POs and Vouchers	Sample	Run
14635-Posted Contracts - Summary	Sample	Run
14636-Posted Contracts - Detail	Sample	Run
----- More Contracting Reports -----	Sample	Run

Six reports were updated to include the eight user defined fields when **Run As ☉ Excel®**.

The Summary and Line Detail Contracts in Progress, Open Contracts, and Posted Contracts reports were all enhanced to include columns for each of the User Defined fields.

Before and after samples of the reports are shown below in Figure 3 through Figure 10. The new fields are **highlighted**.



1.1 Report 14610 In Progress Contracts – Summary

	A	B	C	D	E	F	G	H
	Contract#	Effective	Ending Date	Vendor#	Remit#	Name	Department	Contract Value
1	6			003736	01	ADVANCED DISPOSAL SERVICE	FIRE	
2								
3								
4							Grand Total:	

Figure 1 Before

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	Contract#	Effective	Ending Date	Vendor#	Remit#	Name	Department	Contract Value	Special Dept Code	Location Code	Notes	User Defined #4	User Defined #5	User Defined #6	Effective on	Expires on	
1	6			003736	01	ADVANCED DISPOSAL SERVICE	FIRE		DPW						6/17/2020	6/23/2020	
2																	
3																	
4							Grand Total:										

Figure 2 After

1.2 Report 14612 In Progress Contracts – Line Detail

	A	B	C	D	E	F	G	H	I	J	K	L
	Contract#	Effective	Ending Date	Vendor#	Name	Department	Line	Item Description	Qty	Price	Ext Amount	
1	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	1					
2	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	2					
3	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	3					
4	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	4					
5	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	5					
6	6			003736	ADVANCED DISPOSAL SERVICE	FIRE						
7											Total Contract#: 6	
8											*** Grand Total ***	
9												
10												

Figure 3 Before

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Contract#	Effective	Ending Date	Vendor#	Name	Department	Line	Item Description	Qty	Price	Ext Amount	Special Dept Code	Location Code	Notes	User Defined #4	User Defined #5	User Defined #6	Effective on	Expires on
1	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	1					DPW						6/17/2020	6/23/2020
2	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	2					DPW						6/17/2020	6/23/2020
3	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	3					DPW						6/17/2020	6/23/2020
4	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	4					DPW						6/17/2020	6/23/2020
5	6			003736	ADVANCED DISPOSAL SERVICE	FIRE	5					DPW						6/17/2020	6/23/2020
6	6			003736	ADVANCED DISPOSAL SERVICE	FIRE						DPW						6/17/2020	6/23/2020
7																			
8																			
9																			
10																			

Figure 4 After

1.3 Report 14622 Open Contracts – Summary

	A	B	C	D	E	F	G	H	I	J	K
	Contract#	Effective	Ending Date	Vendor#	Remit#	Name	Department	Contract Value	To_Encumber Balance	Retain_To_Pay Balance	Contract Balance
2	19-0361	7/1/2019	7/30/2021	002299	01	CUMMINS NORTHEAST, INC.	TOWN	184,776.00			138,582.00
3	20-001	9/10/2019	9/10/2020	001630	01	BLUE DIAMOND BUILDING CO	ADM	525,000.00	525,000.00		525,000.00
4											
5							Grand Total:	709,776.00	525,000.00		663,582.00
6											
7											
8											

Figure 5 Before

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Contract#	Effective	Ending Date	Vendor#	Remit#	Name	Department	Contract Value	To_Encumber Balance	Retain_To_Pay Balance	Contract Balance	Special Dept Code	Location Code	Notes	User Defined #4	User Defined #5	User Defined #6	Effective on	Expires on
2	19-0361	7/1/2019	7/30/2021	002299	01	CUMMINS NORTHEAST, INC.	TOWN	184,776.00			138,582.00	FIRE							
3	20-001	9/10/2019	9/10/2020	001630	01	BLUE DIAMOND BUILDING CO	ADM	525,000.00	525,000.00		525,000.00	POLICE							
4							Grand Total:	709,776.00	525,000.00		663,582.00								
5																			
6																			
7																			

Figure 6 After



1.4 Report 14620 Open Contracts – Line Detail

Contract#	Effective	Ending Date	Vendor#	Name	Department	Line	Item Description	Qty	Price	Ext Amount	To Encumber Balance	Retain To Pay Balance	Contract Balance
19-0361	01-Jul-2019	30-Jul-2021	002299	CUMMINS NORTHEAST, INC.	TOWN	1	temporary lease for library	12.00	7,699.00	92,388.00	0.00	0.00	69,291.00
19-0361	01-Jul-2019	30-Jul-2021	002299	CUMMINS NORTHEAST, INC.	TOWN	2	temporary lease for library	12.00	7,699.00	92,388.00	0.00	0.00	69,291.00
Contract Total 19-0361										184,776.00	0.00	0.00	138,582.00
20-001	10-Sep-2019	10-Sep-2020	001630	BLUE DIAMOND BUILDING CO	ADM	1	line 1 change	0.00	250,000.00	250,000.00	250,000.00	0.00	250,000.00
20-001	10-Sep-2019	10-Sep-2020	001630	BLUE DIAMOND BUILDING CO	ADM	2	line 2	0.00	250,000.00	250,000.00	250,000.00	0.00	250,000.00
20-001	10-Sep-2019	10-Sep-2020	001630	BLUE DIAMOND BUILDING CO	ADM	3	line 3	0.00	25,000.00	25,000.00	25,000.00	0.00	25,000.00
Contract Total 20-001										525,000.00	525,000.00	0.00	525,000.00
*** Grand Total ***										709,776.00	525,000.00	0.00	663,582.00

Figure 7 Before

Figure 8 After

1.5 Report 14635 Posted Contracts – Summary

Contract#	Effective	End Date	Vendor#	Name	Department	Value	Encumbered	Paid	Retained	Retained Paid	Balance
19-0361	01-Jul-2019	30-Jul-2021	002299	CUMMINS NORTHEAST, INC.	TOWN	184,776.00	184,776.00	46,194.00	0.00	0.00	138,582.00
20-001	10-Sep-2019	10-Sep-2020	001630	BLUE DIAMOND BUILDING CO	ADM	525,000.00	0.00	0.00	0.00	0.00	525,000.00
*** Grand Total ***						184,776.00	46,194.00	0.00	0.00	0.00	663,582.00

Figure 9 Before

Figure 10 After

1.6 Report 14636 Posted Contracts – Line Detail

Contract#	Effective	End Date	Vendor#	Name	Department	Value	Line#	Item Description	Qty	Qty Bal	Price	Ext Amount	Encumbered	Paid	Retained	Retained Paid	Balance
19-0361	01-Jul-2019	30-Jul-2021	002299	CUMMINS NORTHEAST, INC.	TOWN	184,776.00	1	temporary lease for library	12.00	0.00	7,699.00	92,388.00	92,388.00	23,097.00	0.00	0.00	69,291.00
19-0361	01-Jul-2019	30-Jul-2021	002299	CUMMINS NORTHEAST, INC.	TOWN	184,776.00	2	temporary lease for library	12.00	0.00	7,699.00	92,388.00	92,388.00	23,097.00	0.00	0.00	69,291.00
Total Contract												184,776.00	184,776.00	46,194.00	0.00	0.00	138,582.00
20-001	10-Sep-2019	10-Sep-2020	001630	BLUE DIAMOND BUILDING CO	ADM	525,000.00	1	line 1 change	0.00	0.00	250,000.00	250,000.00	0.00	0.00	0.00	0.00	250,000.00
20-001	10-Sep-2019	10-Sep-2020	001630	BLUE DIAMOND BUILDING CO	ADM	525,000.00	2	line 2	0.00	0.00	250,000.00	250,000.00	0.00	0.00	0.00	0.00	250,000.00
20-001	10-Sep-2019	10-Sep-2020	001630	BLUE DIAMOND BUILDING CO	ADM	525,000.00	3	line 3	0.00	0.00	25,000.00	25,000.00	0.00	0.00	0.00	0.00	25,000.00
Total Contract												525,000.00	0.00	0.00	0.00	0.00	525,000.00
Grand Total												709,776.00	184,776.00	46,194.00	0.00	0.00	663,582.00

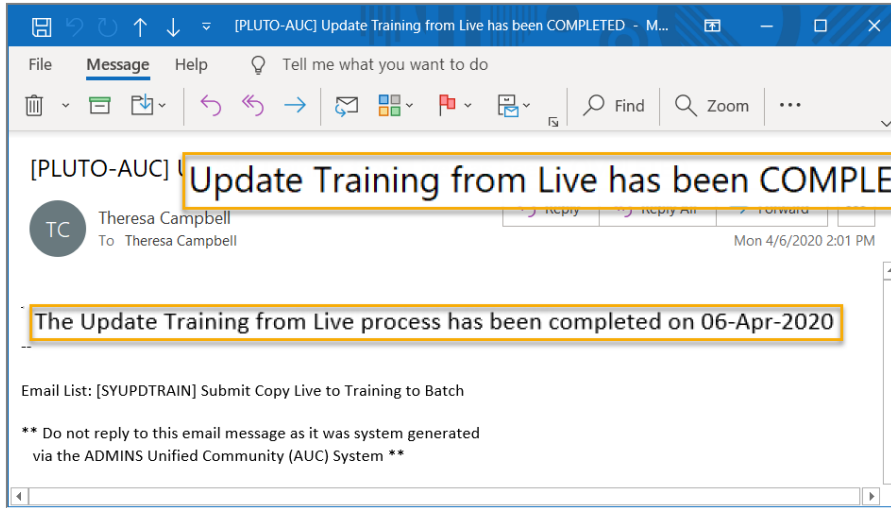
Figure 11 Before

Figure 12 After

[MDF-SUP-SAPLAUC-1036]



2 COPY LIVE TO TRAINING [ENHANCEMENT]



The process was enhanced to send an email to the members of the **SYUPDTRAIN** Distribution List on completion.

This change was installed on sites in April 2020 and is included here to document the change.

Figure 13 Email notification that the update of the training area is complete

Anyone submitting the process should check the **SYUPDTRAIN** Distribution List to make sure their username is in the **SYUPDTRAIN** list.

See [SY-175 Copy Live to Training \(Batch\)](#) for details on this feature.

[ADM-AUC-SY-8114]

3 HELP REFERENCE LIBRARY

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

3.1 New or Updated Documents

- FISCAL YEAR END PROCESSING PO-780 PO Rollovers PowerPoint® Overview [Updated]
- OTHER PO-923 Open, View, and Edit .CSV file for AUC Uploads [New]
- PO-993 Pivot Tables–Analyze AUC data in Excel [New]