

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

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1.

Merged Vendor History Query [Enhancement] 1

Accounts Payable	TAUC1 2585-Merge	d Vendor	History			
Enter Bills (Vouchers)	File Edit Ledgers Purchase	Orders Accou	ints Pavable Fixed Assets Human Resources	Budget Collec	tions 1	Tax Motor Excise Misc Billing System Favorites Help
Change Orders >	B B A A K + +	ы 🚝 🞬		-		
AP/PO Dashboard						
Liquidate Vouchers			Manual Ma	a da a Desta.		
Vendorr P Fiter Vendorr			Merged Ve	ndor Histo	ry	
Construction of the second sec	Goto		1: Merged From Vendors			
Commodity items > View Vendors	Date M	erged 🔼	2: Merged To Vendors			
Disbursements (Warran) > Vendors by Classification	Actions 24-Ser	-2008				
Bank Reconciliation Vendor Name Query			5			
Queries Vendor Name Search	rge	1 From		Merged To		
Reports	1-Vendor Search 2 pm V	endor Remit	Name 3	To Vendor R	emit	Name A
Tables Vendor History	01610	3 01	AMERICAN FUNDS	017251 0	2	GREAT AMERICAN PLAN ADMIN
Ventor Invoice Query	2-Print List 01613	01	HMERICHN FUNDS	017251 0	3	GREAT AMERICAN PLAN ADMIN
Merged Vendor History	01620	01	HIERICHY FUNDS	017251 0	4 E	CREAT AMERICAN PLAN ADMIN
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and a state of the	01656	01	AMERICAN FUNDS	017251 1	3	GREAT AMERICAN PLAN ADMIN
read and navigate.	01658	01	AMERICAN FUNDS	017251 1	4	GREAT AMERICAN PLAN ADMIN
-	01663	01	AMERICAN FUNDS	017251 1	5	GREAT AMERICAN PLAN ADMIN
	01666	01	AMERICAN FUNDS	017251 1	6	GREAT AMERICAN PLAN ADMIN
	01670	01	HMERICHN FUNDS	01/251 1	/	GREAT AMERICAN PLAN ADMIN
1. You can now search by the	01677	01	MERICAN FUNDS	01/251 1	8	GREAT AMERICAN PLAN ADMIN
	01605	01	MERICHA FUNDS	017251 1	9	CREAT AMERICAN PLAN ADMIN
"From Vendor" and the "To	01694	01	OMERICON FUNDS	017251 2	1	CREAT AMERICAN PLAN ADMIN
	01699	01	AMERICAN FUNDS	017251 2	2	GREAT AMERICAN PLAN ADMIN
Vendor" number when you	01703	01	AMERICAN FUNDS	017251 2	3	GREAT AMERICAN PLAN ADMIN
	01712	01	AMERICAN FUNDS	017251 2	4	GREAT AMERICAN PLAN ADMIN
look up on the Vendor	01713	01	AMERICAN FUNDS	017251 2	5	GREAT AMERICAN PLAN ADMIN
look up on the vehuor	01715	01	AMERICAN FUNDS	017251 2	6	GREAT AMERICAN PLAN ADMIN
Number	01719	01	AMERICAN FUNDS	017251 2	7	GREAT AMERICAN PLAN ADMIN
Number.						×
	1					

- 2. Changed the button description for easier navigation – now the button label will toggle between "Vendor Search" and "Date Changed".
- 3. The column labels cleary differentiate between the "From Vendor" and the "To Vendor". The "To Vendor" is the current vendor where all the data is merged.

Multiple vendor numbers can be merged to a single vendor number. Once merged, there is no way to "unmerge" vendors. Please see

[ADM-AUC-PO-650]





2 Department Group Selection on Contract Reports [Enhancement]

At the request of a customer, **ADMINS** updated reports on Friday, May 3, 2024, by adding an optional selection filter on "Department".

All other sites will get the new reports after the software update. The changes affected three Contract Reports, as explained in the sections below. To access the reports, from the menu, select:

E [AUC] 15910-AP/PO Rep File Edit Ledgers Pure E 🛍 🛱 🎒 🛱 ዞ 🗸	aort Library for Contracts [theresa] chase Orders Accounts Payable Fixed Assets Human Resources Budget ► → ₩ 🌿 🎬 🔍 📾 🛱 🛃 🗂	Collections	Tax M	otor
Goto	AP/PO Report Library	for Contr	acts	3
	Report Name	View	Report	Las
Actions	Contract's In Progress	Sample	1	
	14610-In Progress Contracts - Summary	Sample	Run	Ġ
	14612-In Progress Contracts - Line Detail	Sample	Run	90
	Open Contracts	Sample		
Report Categories	14622-Open Contracts - Summary	Sample	Run	Ç'
1 By Vendor	14620-Open Contracts - Line Detail	Sample	Run	<u>0</u> 9-
2 By Commodity Item	14851-Open Contracts set to Expire between	Sample	Run	09.
3 By Purchase Order	14810-Contracts with Expiring Insurance Certificates	Sample	Run	24
4 By Voucher	Posted Contracts	Sample		
5 By Disbursement	14630-Contracts w/ POs and Vouchers	Sample	Run	03-
6 By Bids	14635-Posted Contracts - Summary	Sample	Run	05
7 By Contracts	14636-Posted Contracts - Detail	Sample	Run	
8 Audit Reports	14640-Contract History Age Report	Sample	Run	05
	Other	Sample		
	14650-All Changes Orders for a Single Contract	Sample	Run	05
	14851-Open Contracts set to Expire 14810-Contracts with Expiring Ins	e betwee urance (en Certi	fica

2.1 Report 14851 Contract Expiration



Purchase Orders Reports Report Library [7 By Contracts]



A Contract, Spring TellESAU(2) of - Adobe Acrobate Rader (64-bb) Fac Latt. Yang, Nama Waday, Hala	-	0	×
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			^
14851-CONHISEXP.REP Town of Admins Open Contracts set to Expire between	Page 1		
Contracts to expire between 01-Jan-2024 and 31-Dec-2025 Contract# Department Group Vendor 8 FIRE 001833/01 ADMINS INC	Ending Date 30-Jun-2025		
Total # Contracts to Expire 1 Selection Legend: Department Group: FIRE Sorted By: Contract Ending Date			

The selection legend shows the department groups that were selected for the report.

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A	В	С	D	E
1 Contract#	Department_Group	Vendor	Ending Date	
2 8	FIRE	001833/01 ADMINS INC	6/30/2025	
3				
4	Total # Contracts to Expire		1	
5				
6				
7 Selection Legend:				
8				
9 Sorted By:	Contract Ending Date			_
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Added O Excel output to the "Run as" selections.

2.2 Report 14810 Expired Insurance Certificates

Added an optional Department	Task 14810: Contract	s with Expiring Insurance Certific	ates				×
Group selection on the prompt.	Active Contracts that will expire with or have a	s with Insurance Certificate nin XX Days (Module Contr Iready expired	s ol 14002)				
Click the edit button to select up	Optional: Enter up to	9 Department Groups 🔽	Edit 0 values'				
to nine department groups on	Sort						
which to report.	3010	۹	Expiration Date O Contrac	:t# ○ Vendor	Name		
They can be chosen from a lookup or typed directly.	Run as O Preview (If Printing use Duple	○ Print	oK Cancel	Clear All			
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	A	В	С	D	E	F	G
_	1			Effective	Ending	Insurance	
Added Excel output to the 	2 Contract#	Department_Group	Vendor	Date	Date	End-Date	
"P " I ···	3 insurance Certificates E	zxpired					
"Run as" selections.	5 8	EIRE	001833/01 ADMINS INC	4/1/2024	6/30/2025	5/1/2024	
	6	Total # Contract 1		in the de t	0.00.2020	0.112021	
	7						
	8						
	8						
	8 9 10						
	8 9 10 11 Selection Legend:						
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	8 9 90	Contract Ending Date					

Department Group: FIRE

2.3 Report 14630 Contracts with PO & Vouchers (Summary & Detail)

	Task 14810: Contracts with F	xpiring Insurance Certific	ates		X
	Active Contracts with that will expire within XX or base alread	Insurance Certificate Days (Module Contr	s ol 14002)		
	Ontional: Enter up to 4 De	nartment Groups	Edit 1 voluce: EIDE		
	Sort:	paranent creape	Europeration Date O Contract	# O Vender Name	
On	tional' Enter un	to 9 Denar	tment Grouns		
<u>v</u> p	Run as O Preview O Prin If Printing use Duplex @	t OPDF OEx Yes ONo		Cuil	
Optional: Enter up to 9 D	Department Groups		OK Cancel	Clear All	
FIBE	Fire Department		-		Click the Edit button
			экир		and select up to nine Department groups
		Department Group	Listing	×	from the lookup or
		Department	Description	Status Tof	enter them directly
Lookup OK	Cancel Clear All	ABC2 ABC2 ABS ADM ADMTN ADUSER AFFORD ANTMAL ARCAND ARCAND ARCSESSMENT ASSESSMENT ASSESSMENT ASSESSMENT ASSESSMENT ASSESSMENT ASSESSMENT	ABS RECREATION DEPT TOBA ADMINISTRATOR TOBA ADMINISTRATOR TOBA ADMINISTRATOR TOBA ADMINISTRATOR ATMAL CONTROL APPROPRILE HOUSING APPROPRIE APPROPRING APPROPRING APPROPRING APPROPRING APPROPRING APPROPRING APPROPRING APPROPRING APPROPRIATION APPROPRIME A		
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4630-FMREP:CONHIS	SPOVOU.REP Printec Ending Date Vendor No 30-Jun-2025 ADMINS II	BLENHT BULSER CAPINW CEPETERY I 03-May-2024 at Contra	AUGLIARY POLICE RUN HOL RUN HOL RUN HOL COPTIAL INVEST TRUST CEPTERY Find Search Car 17:00:59 by THERESA Town of Admins Town of Admins Department FIRE	ncel Help Eof	Page 1 Balance Contract Statu 100,000.00 Open
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Added an optional Department Group selection on the prompt.

Click the edit button to select up to nine department groups on which to report.

They can be chosen from a lookup or typed directly.

The selection legend shows the department groups that were selected for the report.

The PDF output is shown at left; the Excel output is below.

×		15-		N_History_POs_Vo	ouch_THERES	A(1).xml -	Excel			𝒫 Search									Tho: Theresa
F	ile	Home	Insert Pag	e Layout 🛛 For	mulas Dat	ta Revie	ew View H	lelp											
м ^с НЗ	16	~	$: \times \checkmark f_x$																
- 4		Α	В	С	D	E	F	G	Н	1	J	К	L	М	N	0	Р	Q	
1										Contract		Contract							
2	Con	tract#	Effective	Ending_Date	Vendor#	Remit#	Name	Department	Contract_Value	Balance	Contract_Status	Line	PO#_/_Voucher#	Encumbered	Paid	Retained	Retain_Paid	Status	
3	8		01-Apr-2024	30-Jun-2025	001833	01	ADMINS INC	FIRE	100,000.00	100,000.00	Open								
4												1	PO# 200970/1	28,000.00				Ready for Posting	
5													Contract Line	28,000.00				1	
6																			
7													Contract Total	28,000.00					
8																			
9																			
10																			
11	Sele	ction Le	gend:																
12																			
13	Dep	artment	Group: FIRE																
14																			
15																			

[ADM-AUC-PO-647]



3 Added Invoice Address to Report #3600 [Enhancement]

ADMINS added an invoice code column and an address column to report # 3600 All POs (in progress + history). To run the report, from the menu, select:

Report Name	View	Report
Actions PO's In Progress	Sample	
3650-In Progress POs - Summary	Sample	Run
3641-In Progress POs - w/ GL Budget Detail	Sample	Run
3640-In Progress POs - by Status/Approval Code	Sample	Run
leport Categories Open POs	Sample	
1 By Vendor 3610-Open POs - Summary	Sample	Run
2 By Commodity Item 3611-Open POs - Line Detail	Sample	Run
3 By Purchase Order 3612-Open POs - GL Line Detail	Sample	Run
4 By Voucher 3614-Open POs with Vendors on Hold	Sample	Run
5 By Disbursement 3070-Open POs as of a Date	Sample	Run
6 By Bids 3624-PO Balances by GL#	Sample	Run
7 By Contracts 3630-Open Purchase Orders against this Account	Sample	Run
8 Audit Reports 3676-POs Awaiting Liquidation (Cancellation Request)	Sample	Run
3677-POs Denied Liquidation request	Sample	Run
3620-Open Pos with Retainage to Pay	Sample	Run
3672-Open POs with Expired Bids	Sample	Run
3674-Open POs with Expired Contracts	Sample	Run
Posted POs	Sample	
3622-Posted POs - Summary	Sample	Run
3623-Posted POs - Detail	Sample	Run
3626-Export all POs [Items not Accounts]	Sample	Run
Other	Sample	
3600-All POs (in progress + history)	Sample	Run
2171-Purchase Order Aging Report	Sample	Run
381	Sample	Run
362 Uther	ample	Run
360 3600-All POs (in progress + histor	ru) jample	1000

Purchase Orders Reports [3 By Purchase Orders] # 3600 All POs (in progress + history)

A	в	С	D	E	F	G	н	1	J	к	L	М	N	0	Р
PO#	PO_Date	Location	PO_Type	Vendor#	Vendor_Name	Department	Encumbered	Retained	Relieved	Balance	Status	Entry_User	DCode	Delivery-Address-Name	
200967	A Jan-2024	In Progress	Regular	000000		ADM	0.00	0.00	0.00	0.00	Entry Began	WENDY	10	PRESCHOOL - STALL BROOK	
#POs:	1						0.00	0.00	0.00	0.00					
200968	23-Feb-2024	History	Regular	012369	GRIZZLY INDUSTR	FIRE	356,200.00	0.00	0.00	356,200.00	Open	ANTHEA	THALL	TOWN OF ADMINS	
#POs:	1						356,200.00	0.00	0.00	356,200.00					
Total:	2						356,200.00	0.00	0.00	356,200.00					
)	Sorted-by :		Vendor# then POr	#											
1	POs-dated-be	tween: 0101202	4 and 03012024												
2	Vendors:		Both												
3															
1															
5															
5															
7															

Figure 1 Before – only the delivery address was shown

A	2	- I X	$\sqrt{f_x}$ 20	00967													
	А	в	С	D	E	F	G	н	1	J	к	L	М	N	0	Р	Q
1	PO#	PO_Date	Location	PO_Type	Vendor#	Vendor_Name	Department	Encumbered	Retained	Relieved	Balance	Status	Entry_Use	r DCode	Delivery-Address	InvCode	Invoice-Address
2	200967	A Jan-2024	In Progress	Regular	000000		ADM	0.00	0.00	0.00	0.00	Entry Bega	IN WENDY	10	PRESCHOOL - STALL BROOM	10	IIIVOICE-Address
3	#POs:	1						0.00	0.00	0.00	0.00	1					PRESCHOOL - STALL BROC
4																	
5	200968	23-Feb-2024	History	Regular	012369	GRIZZLY INDUSTR	RFIRE	356,200.00	0.00	0.00	356,200.00	Open	ANTHEA	THALL	TOWN OF ADMINS	FIRE	
6	#POs:	1						356,200.00	0.00	0.00	356,200.00						
7																	
8	Total:	2	1					356,200.00	0.00	0.00	356,200.00	1					ADMINS FIRE DEPT
9																	
10		Sorted-by :		Vendor# then PO	#												
11		POs-dated-be	tween: 010	12024 and 030120	24												
12		Vendors:		Both													
13																	
14																	
15																	

Figure 2 After – the Invoice code and Address are shown in columns P and Q

[ADM-AUC-PO-649]

4 Screen Labels Changed from Department "Code" to "Group"

ADMINS changed "Dept Code" to "Dept Group" on the Entry screens to match the PO entry screen and the prompt. This affected Contract, PO, AP, and GL Report Selection (and job stream) entry screens. Anywhere it had "Dept Code" or "Department Code" became "Dept Group" or "Department Group".

ADMINS Unified Community **Purchase Orders**

[AUC] 1000-Maintain Chart of Accounts

This distinguishes a "department code" from a "department group". A department code is part of the chart of accounts. **Department Codes are** defined in the Account Elements table and used as a segment of the account.

A department group, as set up in the Department Group Profile screen, is a way to group users by department and set default values for addresses, approval paths, and so on.

The image shows the PO Query screen before and after.

Notice that only the label for the field is changed, not the data.

The example illustrates the change; this change impacted all the screens that previously used "Code" as a label instead of "Group".

Goto	Maintain Ch	art of Accounts	Last Changed AUCBATCH 20-Oct-2023 Last Trx in FY
Actions	FY 2025 Account 1000-135-0000-001-00-00-51000 Description SALARIES 1000 GEN 135 CHIEF	ERAL FUND	In this chart, the
1-Add Account	0000 001 GENE	RAL GOVERNMENT	second element
	00 00 51000 SA	LARIES	"135" is the
			Department Code
			Department Code.
1011015-0	Department Group Profile		
Edit Ledge	rs Purchase Orders Accounts Payable Fixed Assets Human Resources	Budget Collections Tax Motor Ex	cise Misc Billing System Favorites Help
8 6 5	м + + м 🦉 🐃 🔾 📾 📴 🛃 🕼		
	Department	Group Profile	
Goto	Dent Group ETMONES Description	ETNONCE DEETCE	
Actions		TINNEE OF THE	
	1 General 2 PO / AP 3 Collection	ns 4 Misc. Bill	
7 Add Dept			
9 Edit Lint	Purchase Order Defaults	Accounts Payable Default	S
	PO Type Regular Approval Path FINANCE_PO FINANCE_OFFICE_PO	AP Type P Pagent Approval Path FINANCE_AP	Voucher FINANCE OFFICE_AP
5 USEI LISI	Invoice Address 14 BILLING DEPT	CCard Approval FINANCE_AP	FINANCE OFFICE_AP
	Delivery Address 14 BILLING DEPT		
	Print PO# Prefix FIN- FIN-123456		
	Module Control 3015		
	Email POs to Departments during Print & Post Enail PO PDF		
	E Colte Jou/Delivery Address	0 Co to Approval I	lath
	6 Go to Approval Path	0 G0 t0 Approvar	au
ile Edit Led	gers Purchase Orders Accounts Payable Fixed Assets Human Reso	urces Budget Collections Tax N	Notor Excise Misc Billing System Favorites
b 🖻 🧧	би++) 🎇 🖷 🖓 🖬 🕼		
	P0 # 200951	- Posted ITRAINING	KFOR
Goto	Vendor Code 027497 01		Deliver To 10 ODMING MEMODITOL COLI
	OMOZON CODITIOL CEDVICEC Via Email DO Date	11 JUL - 2024 FY 2025	Invoice To 14 BTI I TNC DEPT



Dept Code MIDDLE

Ship Date 18-Sep-2023 Prevailing W

[ADM-AUC-PO-648]

J Internal Notes

on 30-Oct-2023

PO rolled over

by THERESA

1 Delivery Notes

BMS will order online

Login to the Training Area [Enhancement] 5

Actions

0 Line Balances

PO BOX 035184

98124-5184

SEATTLE

uо

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 <u>SY-175 Copy Live to Training</u> in the Help Reference Library for details.



To access the Training area, select the **O** Yes option before typing in the password. After entering the password, you cannot switch the radio button for this session.

(The default is **O 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 **O** 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]



6 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:



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.

Ledgers Help R	eference Library	
Reference Card	View Send Last Run Date Run Time	
G -100 Finance User Help Documents Index	View Fmail 04-Sec-2023 (09:47:50.87	
ACCOUNT MAINTENANCE		
GL-120 Account Elements	View Email Second 24.46	
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Sending Reference via Email		
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SL-260 Back Table	View Email 15-1-1-2021 14:25-46 65	
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JOURNAL ENTRY	AUC] 27000-Ledgers Help Reference Library [theresa] X	
GL-270 Enter One - Time Journal Entries	View Email 15-Febr	
GL-280 Budget Transfer Journals	View Email 15-Jul	
GL-290 Enter Recurring Journal Entries	View Email 15-Jul:	
GL-300 Journal Entry Notes	View Email 15-Jul	
GL-310 Upload Journal Entry	View Email 05-Dec-	
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Run as ○ Preview ○ Print ④ If Printing use Duplex ⊚ Yes) PDF O No Lookup OK Cancel Clear All	

[ADM-AUC-SY-8331]