PURCHASE ORDERS

RELEASE NOTES – MARCH 2020

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

CONTENTS

1   REMOVING ATTACHMENTS [Reminder]

Remove attachments to in-progress **purchase orders only** on the **Purchase Order ▶ [Q Attachments]** entry screen.
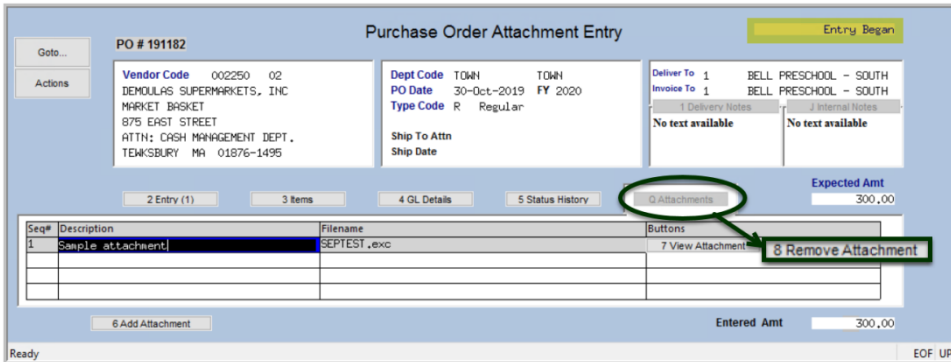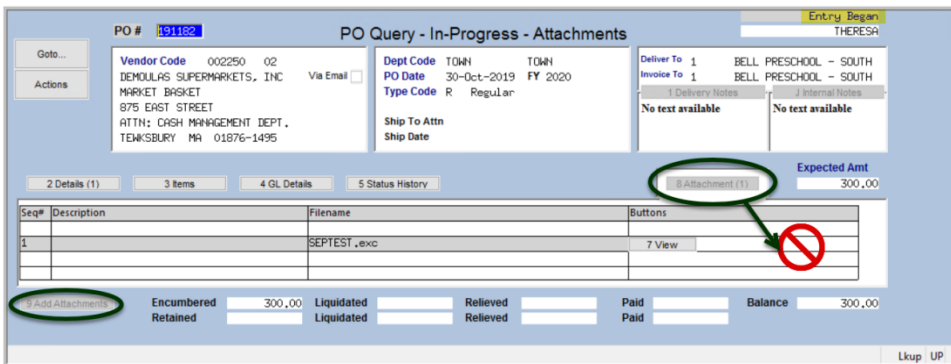

Figure 1 Remove attachments to in-progress purchase orders on the Purchase Order ▶ [Q Attachments] entry screen *only*

If the purchase order is still **in-progress**, (see list), the attachment can be removed *only* in the **Purchase Order Entry** screen.

In Progress Status:
Entry Began
Approvals
Disapproved
Ready to Post

Figure 2 Query screen –purchase order is in progress; neither [8 Remove] nor [3 Add Attachments] button is available

Remove attachments to *posted* purchase orders (open or closed) using the **Purchase Orders ▶ Queries ▶ View All Vouchers (Bills) ▶ [1 Select] ▶ [Q Attachments]** tab.
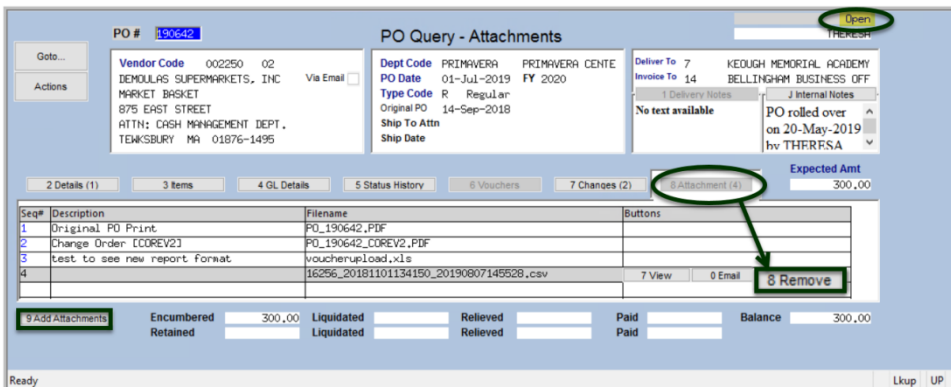

Figure 3 Removing an attachment on the Purchase Order Query screen

1.1 Exceptions

Some sites prohibit the removal of attachments from posted purchase orders (in either **Open** or **Closed** status) via module control **#3040**. If the value is set to **"N"**, the **[8 Remove Attachment]** button will be grayed out.
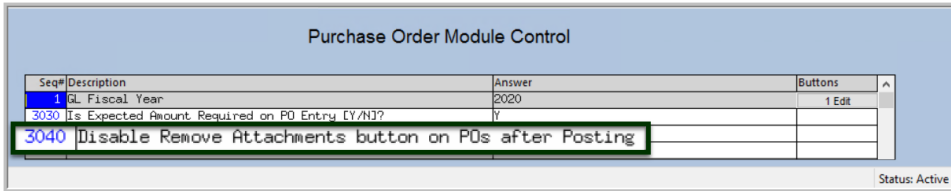
Figure 4 Select Purchase Orders ▶ Module Maintenance ▶ Purchase Order Module Control to set the value on #3040
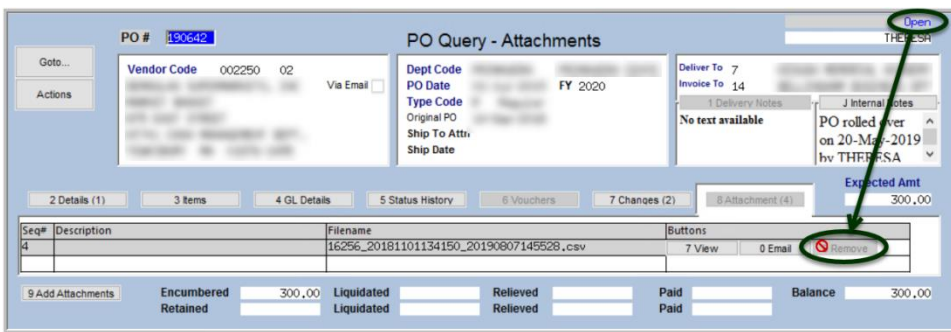
[ADM-AUC-PO-531]

2   REPORTS ▶ [Enhancement]

ADMINS added a new **"Entry User" column** that corresponds to the optional **"Enter up to 9 Users"** filter used to run the **#3600 All Purchase Orders (in progress + history) Report**
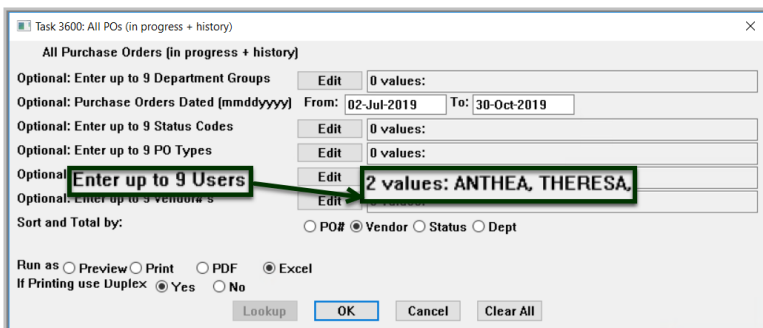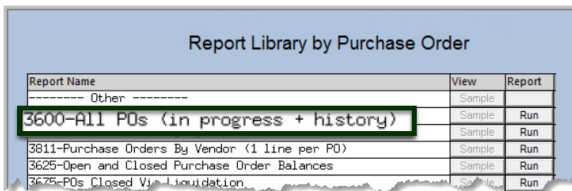
The new **"Entry User"** column was added to the **Excel®** output; there is not enough space to include it on the **Print/Preview/PDF®** page.

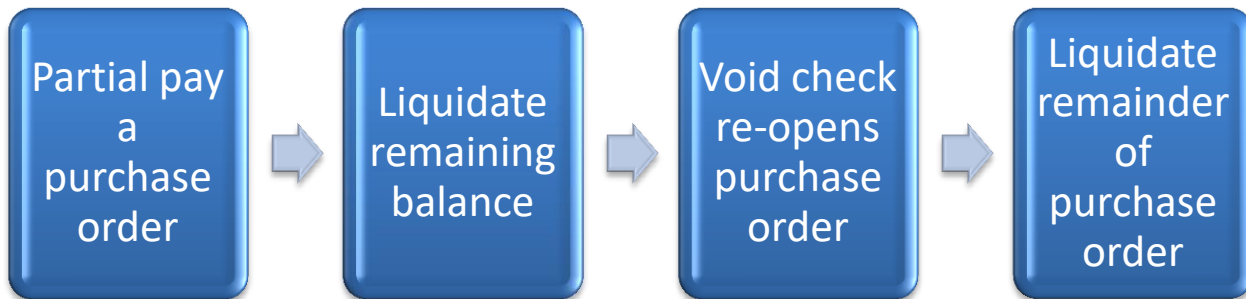|	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	PO#	PO_Date	Location	PO_Type	Vendor#	Vendor_Name	Department	Encumbered	Retained	Relieved	Balance	Status	Entry_User	
2	191177	12-Sep-2019	In Progress	Emergency	000000		ADM	20.00	0.00	0.00	20.00	Correct Errors	ANTHEA	
3	#POs:		1					20.00	0.00	0.00	20.00			
4														
5	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	THERESA	
6	#POs:		1					6,852.53	0.00	0.00	6,852.53			
7														
8	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	THERESA	
9	#POs:		1					30,000.00	225.00	2,775.00	27,225.00			
10														
11	191175	31-Jul-2019	In Progress	Regular	000643	ADRIEN MARCET	TOWN	25.00	0.00	0.00	25.00	Ready for Posting	THERESA	
12	#POs:		1					25.00	0.00	0.00	25.00			
13														
14	191176	01-Aug-2019	In Progress	Regular	000692	STAPLES	TOWN	150.00	0.00	0.00	150.00	Ready for Posting	THERESA	
15	191179	12-Sep-2019	In Progress	Regular	000692	STAPLES	TOWN	500.00	0.00	0.00	500.00	Correct Errors	THERESA	
16	#POs:		2					650.00	0.00	0.00	650.00			
17														
18	191182	30-Oct-2019	In Progress	Regular	002250	DEMOULAS SUPERMARKETS, INC	TOWN	300.00	0.00	0.00	300.00	Entry Began	THERESA	
19	#POs:		1					300.00	0.00	0.00	300.00			
20														
21	191173	24-Jul-2019	History	Regular	009084	VALIANT, INC.	FIRE	50,000.00	0.00	50,000.00	0.00	Closed	ANTHEA	
22	#POs:		1					50,000.00	0.00	50,000.00	0.00			
23														
24	191178	12-Sep-2019	In Progress	Blanket	027784	ADMINS	TOWN	100.00	0.00	0.00	100.00	Ready for Posting	THERESA	
25	#POs:		1					100.00	0.00	0.00	100.00			
26														
27	Total:		9					87,947.53	225.00	52,775.00	35,172.53			
28														
29		Sorted-by :			Vendor# then PO#									
30		POs-dated-between:			02-Jul-2019 and 30-Oct-2019									
31		Entered-By:		ANTHEA										
32		Entered-By:		THERESA										
33		Vendors:			Both									
34														

Figure 5 #3600 All Purchase Orders (in progress & history) report Run As ⊙ Excel®

[ADM-AUC-PO-530]

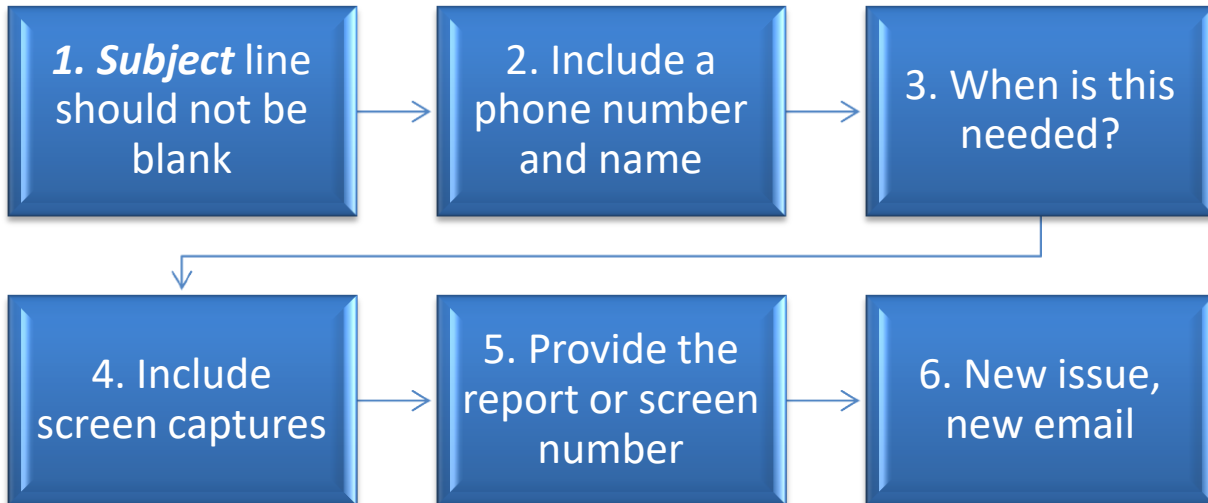# 3 VOIDS AND PURCHASE ORDER LIQUIDATIONS

ADMINS corrected an issue with the calculation of amounts available for liquidation. Now, when a partially paid purchase order is liquidated, and then a check is voided that cancels the voucher and re-encumbers the amount on the purchase order, the correct amount will be available for liquidation.

[ADM-AUC-PO-532]

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4   WANT FASTER RESPONSE ON SUPPORT REQUESTS?

|		
1. Subject line should not be blank	2. Include a phone number and name	3. When is this needed?
4. Include screen captures	5. Provide the report or screen number	6. New issue, new email

To improve the user experience when emailing support@admins.com for assistance, please include the following information on the email:

1. A *Subject:* line should briefly describe the request – for example, *Subject:* **Timesheet Entry Screen help needed**, or *Subject:* **Posting Disbursements – need assistance**.

2. Include your **full name** and **contact information**, including the **best phone number** to use when support staff call you.

3. How critical is the request? Is it *urgent*, as in trying to make a **4PM deadline for a bank ACH file**? If it is for the next time, let us know the next time the process will be run.

4. We love **pictures** – they are worth a thousand words–include screenshots when relevant.

5. We love words, too, so describe the problem, and include a **report number** or **screen number** if known.

6. Start a **new email for a new issue**. Use **Reply All** to include the entire support team and allow seamless escalation for complex requests.

5 COPY LIVE TO TRAINING [ENHANCEMENT]
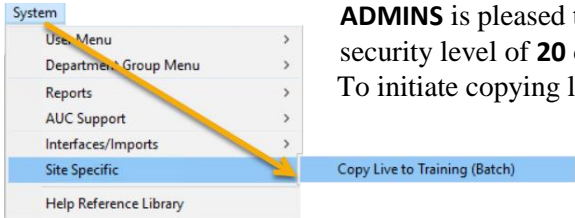
ADMINS is pleased to offer this new feature. Now, users with a security level of **20** can initiate a copy of live data to training. To initiate copying live to training, select:

System ▶ Site Specific ▶ Copy Live to Training (Batch)

This process will refresh the training module, so verify with other department heads that they are not in the middle of doing any important testing.

Read the instructions in the **SY–175 Copy Live to Training (Batch)** document in the **Help Reference Library**.

[ADM-AUC-SY-8114]

6 HELP REFERENCE LIBRARY

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

6.1 New or Updated Documents

- SYSTEM   PO–1010 System Administration Kit   [Updated]