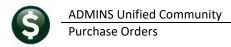




This document explains new product enhancements added to the ADMINS Unified Community (AUC) for Windows PURCHASE ORDER system.

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# 1 Site Specific Error Checks – PO Change Orders [Enhancement]

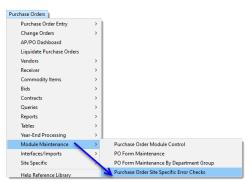
**ADMINS** enhanced the error checking for Purchase Order Change Orders. When a PO change order is error checked – it now uses both the PO and POCHG site specific error check codes.

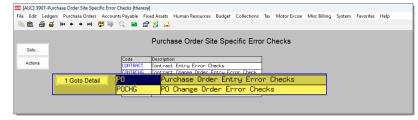
So for example it will recheck if a vendor is on hold when doing a change order; because Sequence # 1 on the **PO** site specific error check has the radio button set to a **O** Hard Error. There are only two entries on the PO Change Order Error Checks, #1 requires a Change Reason to be Entered, and #2 Sends Email depending on the \$ amount of the change. By including all the PO checks, the system will identify error conditions that ensued since the original PO was posted.

This feature was included during the September 2023 Software update and is mentioned here to document the change.

To set up the site specific error checks, from the menu, select:

#### Purchase Orders Module Maintenance Purchase Order Site Specific Error Checks





This shows the 18 site specific **PO** error checks, and the two **POCHG** PO Change Order error checks.

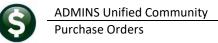
Site specific error checking allows each site to decide how best to treat conditions identified when checking a PO or a PO Change Order.

Now, when checking a PO Change Order, all of the **PO** (Purchase Order Entry Error Checks) site specific errors will be checked as well as the **POCHG** (Purchase OrderChange Order Error Checks).

| Actions Task Code PO                       | Purchase Order Entry Erro         | or Checks    |         |
|--|-----------------------------------|--------------|---------|
| eq#Description                             | Action Code                       | Value        | Buttons |
| . Vendor On Hold                           | ◯ Warning                         | sage         | 1 Edit  |
| 2 Remit Address Type not PD                | Warning O Hard Error O No Mes     | sage         |         |
| 4 Acct Different Item Acct                 | Warning O Hard Error O No Mes     | sage         |         |
| 5 Allow ship date to be blank              | Warning O Hard Error O No Mes     |              |         |
| 5 Binks Required on PO over \$             | 🔾 Warning 🔹 🔿 Hard Error 💿 No Mes | sage 4999.99 |         |
| 7 Allow use of Vendors without FID# on fil | Warning O Hard Error O No Mes     | sage         |         |
| B Allow Personal Services Accounts         | ◯ Warning                         | sage         |         |
| Allow Asset Account Types                  | ○ Warning ● Hard Error ○ No Mes   | sage         |         |
| 10 Allow Liability Account Types           | 🔾 Warning 💿 Hard Error 🔾 No Mes   | sage         |         |
| 11 Allow Fund Equity Account Types         | Warning O Hard Error O No Mes     | sage         |         |
| 12 Allow Expenditure Account Types         | ○ Warning ○ Hard Error ● No Mes   | sage         |         |
| 13 Allow Revenue Account Types             | Warning O Hard Error O No Mes     | sage         |         |
| 14 Allow Blanket PO Type                   | ○ Warning ○ Hard Error ● No Mes   | sage         |         |
| 15 Allow Emergency PO Type                 | ○ Warning ○ Hard Error ● No Mes   | sage         |         |
| 16 Allow Regular PO Type                   | OWarning OHard Error  No Mes      | sage         |         |
| 17 Allow Zero Tolerance PO Type            | ○ Warning ○ Hard Error            | sage         |         |
| 18 PO not in Current Fiscal Year           | Warning Hard Error O No Mes       | sage         |         |

| Goto |            |                       |             | Site | Specific    | Error Cheo   | :ks          |         |         |
|------|------------|-----------------------|-------------|------|-------------|--------------|--------------|---------|---------|
| Act  | tions      | Task Code             | POCHG       | P0   | Change      | Order Err    | or Checks    |         |         |
| Seq# | Descriptio | on                    |             |      | Action Code |              |              | Value   | Buttons |
| 1    | Require    | Change Reason to be   | Entered     |      | Warning     | O Hard Error | O No Message |         | 1 Edit  |
| 2    | Send En    | ail when PO under 🛊 / | ′chg over ≉ |      | ○ Warning   | O Hard Error | No Message   | 5000.00 |         |
|      |            |                       |             |      |             |              |              |         |         |

[ADM-AUC-PO-641]



# 2 Report #3675 POs Closed Via Liquidation [Enhancement]

**ADMINS** added the Original PO Date to this report to answer the user question:

"Can I run a report showing all the POs that have been liquidated this fiscal year? And - can I run a report just showing FY23 POs that were liquidated in FY24?

To run this report, from the menu, select:

#### Purchase Orders ▶ Reports ▶ Report Library ▶ [3 By Purchase Order] ▶ {Page Down} #3675 POs Closed Via Liquidation

Running the report provides a list of the POs liquidated within the fiscal year, and adding the Original PO Date column, provides an easy to filter column to isolate only the FY2023 Purchase Orders.

Running this report to Excel® provides an easy way to further restrict the list by using the Excel® "Filter" feature.

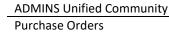
If the date of the Original PO is not the same as the current date, the Original PO date will be shown in column "D". If the dates match, the Original PO Date will not be repeated in Column D.

This helps to highlight POs that were rolled over, which is the only way a date on a PO can be changed.

| 🏧 [AUC] 2970-Rep  | ort Library by Purchase Order<br>Human Resources Bu | dget Collections Tax Mo | otor Excise Misc Billing System | Favorites Help |
|-------------------|---|-------------------------|---------------------------------|----------------|
| ®® @ € ₩ ◆        | + н 🚝 🐃 🔍 🗰 🗃 🛃 🗂                                   |                         |                                 |                |
| Goto              | Report Library by I                                 | Purchase Order          |                                 |                |
|                   | Report Name   | View Report             | Run Date Run Time               | ~              |
| Actions           | 3675-POs Closed Via Liquidation                     | Sar Run                 |                                 |                |
|                   | 3603-PO Statistics Report                           | Sample Run              | -May-2022 10:24:51.11           |                |
|                   | 3286-Purchase Order Receiver Work In Progress       |                         | 11-Nov-2022 15:17:50.83         |                |
| Report Categories | 3287-Punchase Order Receiver Check Report           | Sample Run              | 11-Nov-2022 15:24:25.42         |                |
| 1 By Vendor       |   |                         |                                 |                |
| 20                |   |                         |                                 |                |
| 3 By Purchase Or  | der   |                         |                                 |                |
| 5 By Disbursement |   |                         |                                 |                |
| 6 By Bids         |   |                         |                                 |                |
| 7 By Contracts    |   |                         |                                 |                |
| 8 Audit Reports   |   |                         |                                 |                |
|                   |   |                         |                                 |                |
|                   |   |                         |                                 |                |
|                   |   |                         |                                 |                |
|                   |   |                         |                                 |                |

| Task 3675: POs Closed Via Liquidation   | × |
|---|---|
| POs Closed Via Liquidation  |   |
| Optional: Purchase Orders Dated (mmddyyy) From: To:   |   |
| Optional: Enter up to 9 Department Groups Edit 0 values:  |   |
| Optional: Liquidated By User  |   |
| Run as O Preview O Print O PDf Excel<br>If Printing use Duplex O Yes No<br>Lookup OK Cancel Clear All |   |

| 8      | ile Home | ( <sup>2</sup> ~ ₹ PO_Closed_V | a_Liquidation_ | THERESA[2].xml - Ex<br>Data Review | cel<br>View Hel |                            | 𝒫 Search          |               |
|--------|----------|--------------------------------|----------------|------------------------------------|-----------------|----------------------------|-------------------|---------------|
|        |          | $: \times \sqrt{f_x}$          | romulas        | Data                               | view riei       | 4                          |                   |               |
|        | А        | В                              | С              | Original                           | E               | F                          | G                 | н             |
| 1<br>2 | PO#      | Dept_Group                     | PO_Date        | PO_Date                            | ndor#           | Name                       | Liquidated_on     | Liquidated_By |
| 3      | 198403   | DISTRICT                       | 7/13/2022      |                                    | 641             | 385 SOLAR LLC              | 7/13/2022         | LUANN         |
| 4      | 197671   | SPED                           | 7/1/2022       | 0/00/0000                          | 014             | N.E. CTR FOR CHILDREN      | 8/2/2022          | ANTHEA        |
| 5      | 197867   | SUPT_OFF                       | 7/1/2022       | 3/22/2022                          | 246             | MA ASS                     | 0/0/0000          | ANTUCA        |
| 6      | 196456   | SPED                           | 7/1/2022       | 5/3/2022                           | 734             | GLORIA If the DO D         | ate is not the    | como oc       |
| 7      | 198205   | SPED                           | 7/1/2022       |                                    | 633             | ASSABE IT LITE POL         | ate is not the    | same as       |
| 8      | 198236   | DIPIETRO                       | 7/1/2022       | 8/19/2021                          | 209             | INSECT the Origina         | I PO Date, the    | Original      |
| 9      | 198624   | SPED                           | 8/8/2022       |                                    | 417             | MEETIN                     | in PO Date, the   | eongina       |
| 10     | 198342   | SPED                           | 7/7/2022       |                                    | 394             | SHARO PO Date of           | column will sł    | now the       |
| 11     | 198132   | DIPIETRO                       | 7/1/2022       |                                    | 058             | LAKESH                     |                   |               |
| 12     | 198375   | STALLBROOK                     | 7/11/2022      |                                    | 483             | AMAZOI Ori                 | original PO date. |               |
| 13     | 198251   | DIPIETRO                       | 7/1/2022       |                                    | 348             | CURRIC                     | <u> </u>          |               |
| 14     | 197933   | CURRICULUM                     | 7/1/2022       |                                    | 888             | MHE RECEIVABLES LLC        | 9/7/2022          | ANTHEA        |
| 15     | 198133   | DIPIETRO                       | 7/1/2022       |                                    | 393             | PATHS PROGRAM, LLC         | 9/7/2022          | LUANN         |
| 16     | 198223   | HIGHSCHOOL                     | 7/1/2022       |                                    | 483             | AMAZON CAPITAL SERVICES    | 9/7/2022          | LUANN         |
| 17     | 198790   | FIRE                           | 9/6/2022       |                                    | 437             | MA FIREFIGHTING ACADEMY TH |                   | THERESA       |
| 18     | 198565   | ATHLETICS                      | 8/2/2022       |                                    | 241             | EZ FLEX LLC                | 9/13/2022         | LUANN         |
| 19     | 197932   | CURRICULUM                     | 7/1/2022       | 5/19/2022                          | 888             | MHE RECEIVABLES LLC        | 9/14/2022         | THERESA       |
| 20     | 198012   | CURRICULUM                     | 7/1/2022       | 5/19/2022                          | 888             | MHE RECEIVABLES LLC        | 9/14/2022         | THERESA       |
| 21     | 198561   | SCHMAINT                       | 7/29/2022      |                                    | 677             | QUINN PLUMBING & HEATING   | 9/14/2022         | LUANN         |
| 22     | 198131   | SPED                           | 7/1/2022       | 0/22/2022                          | 022611          | ADAPTIVEMALL.COM           | 9/23/2022         | LUANN         |
| 23     | 198268   | ATHLETICS                      | 7/3/2022       |                                    | 027312          | TRI-VALLEY LEAGUE          | 9/26/2022         | LUANN         |



Once the data is displayed in Excel<sup>®</sup>, select all the data, then sort by the Original PO Date column.

|   | А     | В          |                |        |
|---|-------|------------|----------------|--------|
| 1 |       | •          | 3 Origina      | al 🔽 ) |
| 2 | PO#   | Dept Group | ) Da           |        |
| 3 | 23156 | DISTRICT   | 8/16/200 PO Da | te y   |
| 4 | 22682 | DIPIETRO   | 8/13/2007      | 00235  |
| 5 | 23382 | MIDDLE     | 8/27/2007      | 000490 |

| 3675-POLI | SCTO ' KRb   |               |              |        | own of Admins<br>sed Via Liquidation |             | Page 67       |
|-----------|--------------|---------------|--------------|--------|--------------------------------------|-------------|---------------|
|           |              |               | Original==== |        |                                      |             |               |
| PO#       | Dept Group   | PO Date       | PO Date      | Vendor |                                      | Liquidated  | Ву            |
|           |              |               |              |        |                                      |             |               |
| 199992    | SPED         | 11-Apr-2023   |              | 000189 | BICO                                 | 30-Jun-2023 | DDUBOIS       |
| 200091    | HIGHSCHOOL   | 10-May-2023   |              | 028191 | CROWN TROPHY                         | 30-Jun-2023 | DDUBOIS       |
| 200223    | DISTRICT     | 13-Jun-2023   |              | 004300 | ENCUMBERED VENDOR                    | 30-Jun-2023 | JREBELO       |
| 200333    | CURRICULUM   | 27-Jun-2023   |              | 028192 | JENNIFER DOWD                        | 30-Jun-2023 | CHALEYHIGGINS |
| 200327    | SCHMAINT     | 01-Jul-2023   |              | 027430 | ICS FIRE SYSTEMS, INC                | 03-Jul-2023 | DDUBOIS       |
| 200384    | TECHNOLOGY   | 06-Jul-2023   |              | 003154 | CTS SERVICES INC.                    | 06-Jul-2023 | DDUBOIS       |
| 200348    | DIPIETRO     | 01-Jul-2023   |              | 004828 | DISCOUNT SCHOOL SUPPLY               | 24-Jul-2023 | DDUBOIS       |
| 200449    | MIDDLE       | 12-Jul-2023   |              | 005916 | WEST MUSIC                           | 27-Jul-2023 | DDUBOIS       |
| 200470    | MIDDLE       | 13-Jul-2023   |              | 008141 | SCHOOL NURSE SUPPLY, INC.            | 31-Jul-2023 | DDUBOIS       |
| 200538    | CURRICULUM   | 21-Jul-2023   |              | 000434 |                                      | 31-Jul-2023 | CHALEYHIGGINS |
| 200272    | FIRE         | 01-Jul-2023   | 22-Jun-2023  | 005301 | FIREMATIC SUPPLY CO., INC.           | 07-Sep-2023 | TGRIFFIN      |
| 200286    |              | 01-Jul-2023   | 26-Jun-2023  | 032507 | SUPERIOR TRADEMARK INC.              | 07-Sep-2023 | TGRIFFIN      |
| 200964    | TOWN         | 20-Oct-2023   |              | 032868 | DROP SUPPORT LLC                     | 20-Oct-2023 | THERESA       |
| 200965    | TOWN         | 20-Oct-2023   |              | 032868 | DROP SUPPORT LLC                     | 30-Jun-2024 | THERESA       |
|           | *** # Liquid | ated PO's: 3, | 512          |        |                                      |             |               |
|           | Legend :     |               |              |        |                                      |             |               |

The report can also be Run As PDF<sup>®</sup> and will show the Original PO Date column but will not provide the filtering options.

[ADM-AUC-PO-646]

[Updated]

[Updated]

## 3 Help Reference Library New & Updated Content

System

SY-170 System Administration Requirements Kit

### 3.1 New & Updated Content on ADMINS.com

#### SY-170 System Administration Requirements Kit

We are adding content all the time so check back often; we also send out a "Featured Video of the Month" email.