



PURCHASE ORDERS

RELEASE NOTES – SEPTEMBER 2017

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

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1. AP/PO DASHBOARD [FIX]

Record locking occurred when a voucher or purchase order were in use but selected from the dashboard.

Now a message will be displayed and the user will be directed the query screen instead of the entry screen. If the voucher is not editable, the message and branching to the query screen will also occur.

[MDF-SUP-SAPLAUC-719]

2. VENDORS–BID E-MAIL [New]

A new field has been added to the **Enter Vendors** and **View Vendors** screens to allow the entry / display of an E-mail address used for bids. See section 2.4 of the **PO-520 Bids Entry** document in the **PO Help Reference Library** for details on how this E-mail address is used in the Bids process.

The **Enter Vendors** screen has been updated to include the **Bid E-mail** address field:

Figure 1 Before Figure 2 After Enter Vendors – field for BID E-mail Address

The change also appears on the read-only **View Vendors** ▶ **[9 E-mails]** tab:

Figure 3 View Vendors ▶[9 E-mails] Tab shows Bid E-mail Address field

[ADM-AUC-AP-856]



3. BIDS

3.1. Tab for Vendor E-Mail [New]

All the screens in the **Bid Entry** process have been changed to insert the new **Vendor E-mail** tab—a single screen is shown here as an example; more comprehensive information is in the updated **PO–520 Bids Entry** document.

1. New Tab for **[3 Vendor E-mail]**
2. Changes to the shortcut number or letter (“accelerator keys”) on all tabs to accommodate the newly inserted **[3 Vendor E-mail]** tab.

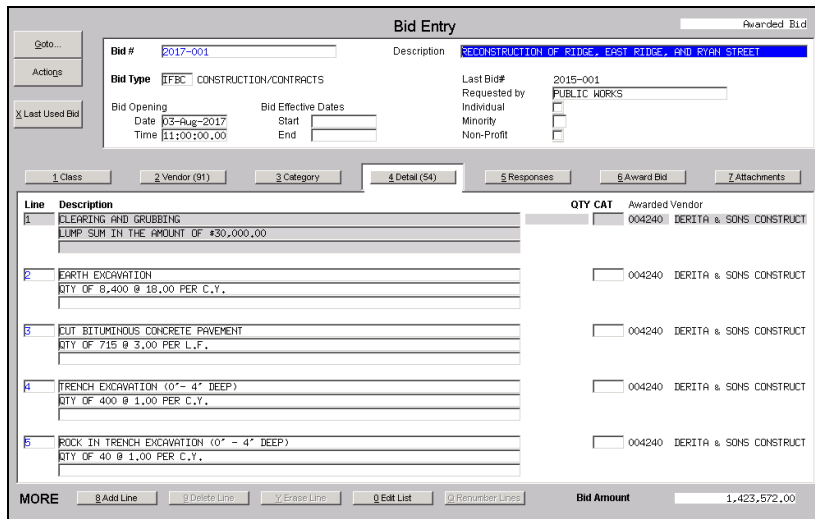


Figure 4 Before – Bid Entry screen without the Vendor E-mail tab

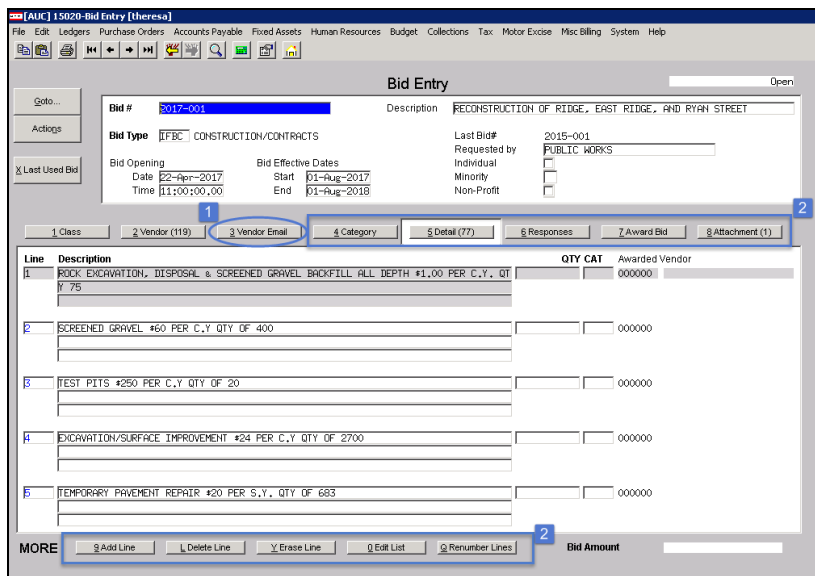


Figure 5 Bid Entry screen with Vendor E-Mail tab and re-numbered accelerator keys

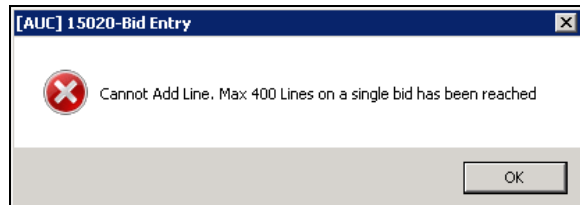
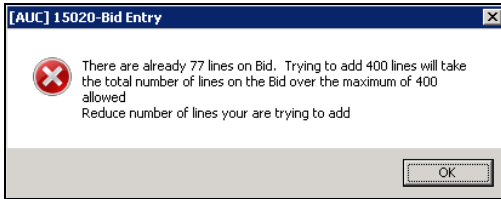
[ADM-AUC-BID-6]



3.2. Maximum of 400 Lines for a Bid

There is a maximum of 400 lines per bid. If adding a number of lines will cause the number of lines to exceed 400, this message box will be displayed.

If the bid is at the 400 line maximum, and the **[9 Add Line]** button is used, this message box will be displayed.



[ADM-AUC-PO-450]

4. CHANGE ORDERS –CHECKING ACCESS TO GL ACCOUNT [FIX]

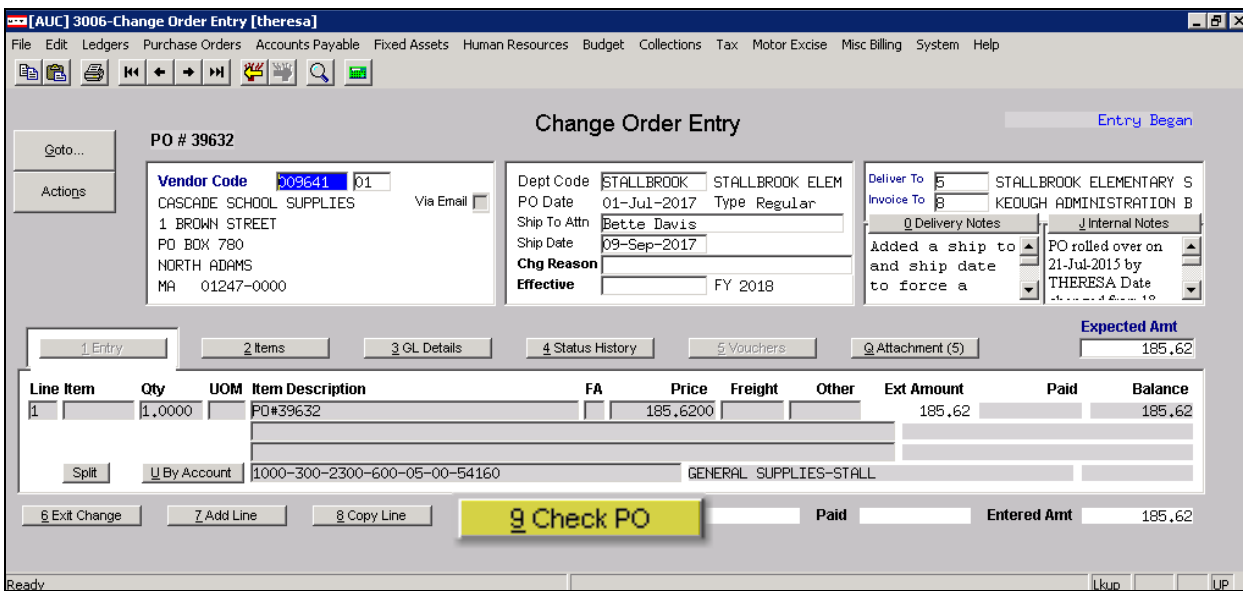
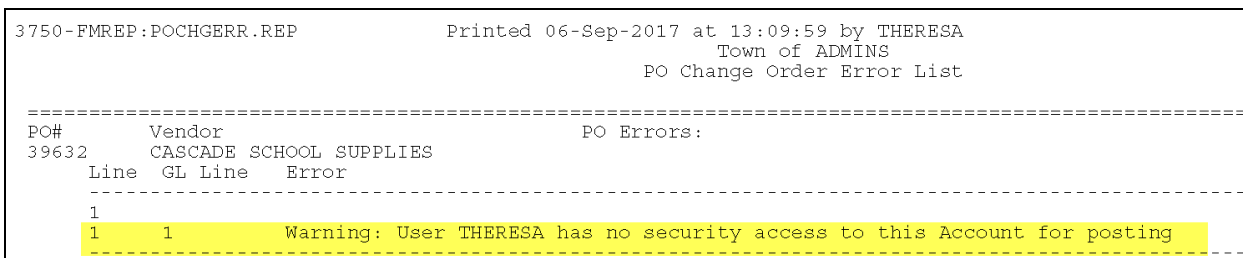


Figure 6 Check PO in the Change Order Entry produces an Error List identifying security access preventing posting. Error checking was added to the **[Check PO]** button in the Change Order screen that will issue a **Warning Report** when a user attempts to enter a change order without having security access to the posting account. The error is only a **Warning** because there may be someone else in the organization with access to the account who will subsequently post the change order.





The system will next prompt the user to release the change order. If the user referenced on this error list tries to **Post** the change order, a **No Purchase Orders selected to Post at this time–Check User has access to Vendors, Departments and all GL Accounts on Change Orders at Ready to Post** will be displayed.

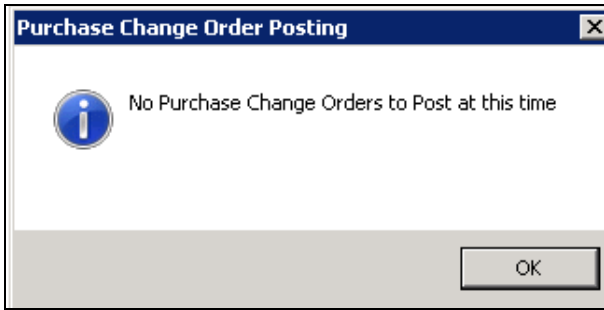


Figure 7 Before–no advice on why posting not offered

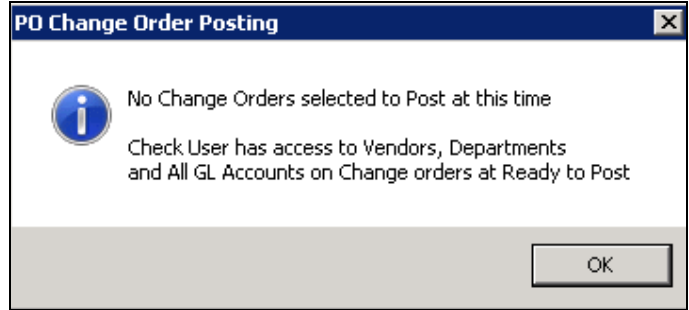


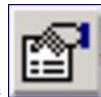
Figure 8 After–Advice offered if posting not available

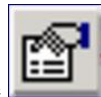
[ADM-AUC-PO-451]

5. QUICK REPORT SELECTOR [NEW]

ADMINS is pleased to announce a new system-wide feature available across all AUC modules.

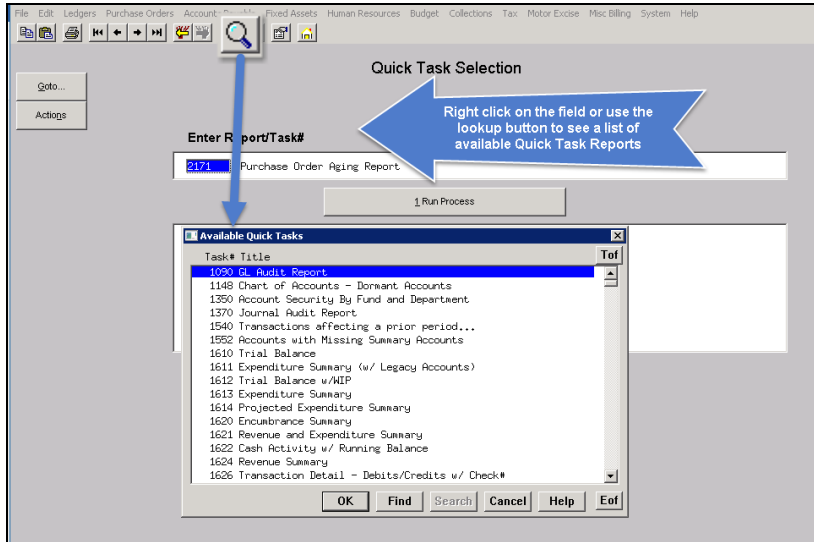
A new toolbar button has been added to AUC. This feature will allow a user to run any report in AUC quickly from any module rather than having to go to the report library for each module.



From any screen, click the  toolbar button and type in the report# as displayed on the top left hand corner of the report and click **Run Report**. For example, the 2171 report shown below was run in August.

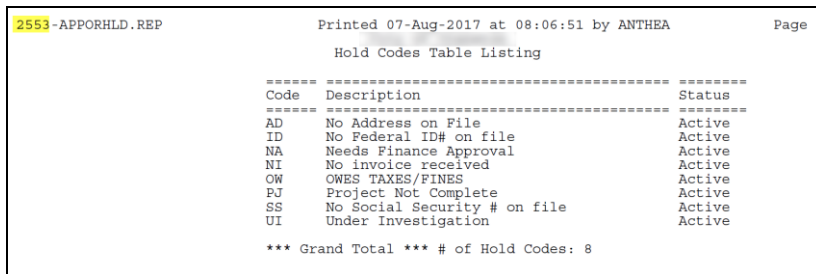
2171-POPORAGERPT.REP		Aug-2017 at 12:46:34 by THERESA		Page 1				
Purchase Order Aging Report								
Detail Purchase Order Aging Report Sorted by Vendor Number								
PO#	PO Date	Vendor Name	Department	Under 30 Days	31-60 Days	61-90 Days	Over 90 Days	Total
3202731	02-Jul-2015	000133 AAA MOBILE WAREHOUSING	1400				180.00	180.00
Vendor Total							180.00	180.00
3204969	15-Mar-2016	000222 ANDERSON MOTORS	1907				79.41	79.41
Vendor Total							79.41	79.41
3204038	16-Nov-2015	000306 ADMINS INC	1116				42,500.00	42,500.00
3204491	12-Jan-2016	000306 ADMINS INC	1116				29,160.00	29,160.00
3204492	12-Jan-2016	000306 ADMINS INC	1116				23,280.00	23,280.00
3204493	12-Jan-2016	000306 ADMINS INC	1116				43,260.00	43,260.00
Vendor Total							138,200.00	138,200.00

To re-run the report, use the new button on the toolbar and type in 2171. If you do not know the report #, open a report lookup window by either a right-click of the mouse on the **Enter Report/Task #** field or by clicking on the magnifying glass lookup button to select a report. The name of the report will also be displayed to allow the user to confirm the selection. Click on the report and then click on the **[OK]** button.

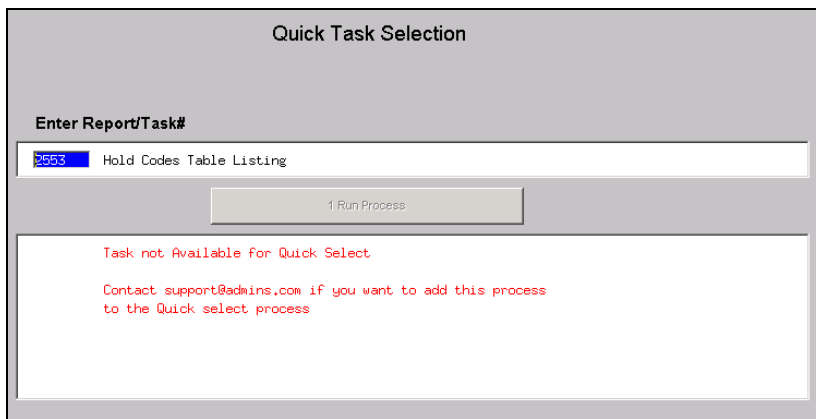


This process checks if you have permission to run the report. If you don't have permission you will see the following message:

You dont have permission to run this process
Contact your system admin to grant you access
or support@admins.com



In some cases, the report will not be available for the Quick Select button. Follow the instructions to request adding a report.



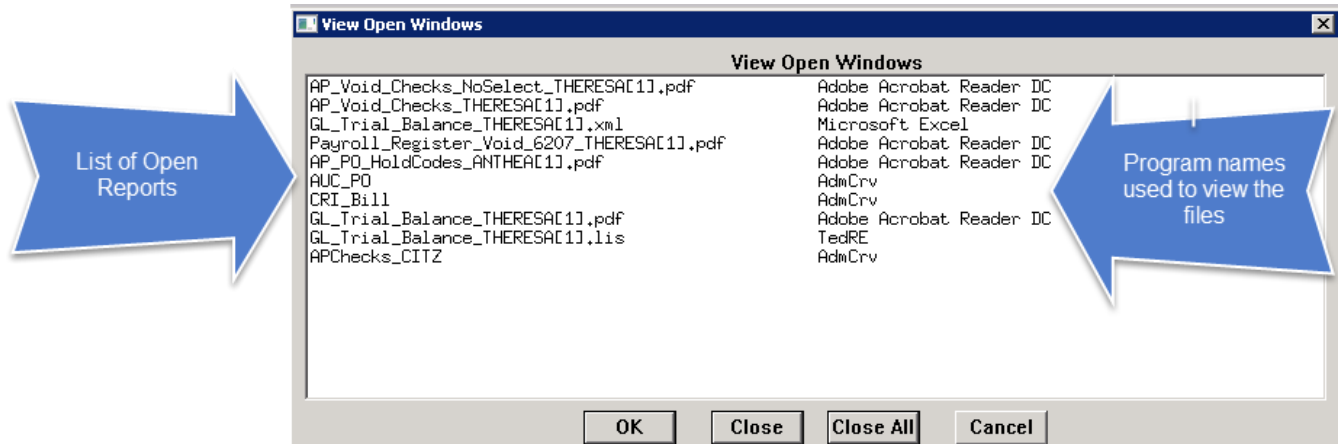
[ADM-AUC-SY-8020]

6. NEW BUTTON TO SHOW “HIDDEN” REPORTS [NEW-V9.2]


Some users notified ADMINS that reports become “hidden” behind the screen. Other users reported that they are trying to do a bill re-print and get an error because they already have a bill re-print open. To show all reports open in AUC and maintain the security of a restricted desktop, a new button is introduced with this update.



The new Toolbar button will display a **View Open Windows** screen, and allow the user to select or close a report(s) or window.



- Select Process** Use your mouse to select the report/process you want to View/Close
- OK** Click **[OK]** to bring that process to the front & closes the **View Open Windows** screen
- Close** Click **[Close]** to close the selected process & close the **View Open Windows** screen
- Close All** Click **[Close All]** to close all open processes (the AUC application will remain open)
- Cancel** Click **[Cancel]** to exit the **View Open Windows** screen and do nothing

Once any selection is made, the **View Open Windows** screen will no longer be displayed. To re-display the View Open Windows list, click again on the new button. . *Note: This is only available to our ADMINS V9.2 Sites*

[ADM-AUC-SY-8022]

7. CRYSTAL REPORT TITLES UPDATED [NEW]

To allow users to identify which crystal report is listed in the **View Open Windows** screen described in section 6, titles were added to all crystal reports. This change may be noticed when displaying checks, bills and other reports in the **ADMINS Crystal Reports Viewer (AdmCrv)** window prior to printing. The upper right corner of the window will now show the report title and the **AdmCrv** text.



Figure 9 Before



Figure 10 After

[ADM-AUC-CRYSTAL-104]



8. EMAIL USERS [NEW]

From **any** module, select **Module Maintenance** ▶ **Email Users**. This screen allows the entry of non-AUC user email addresses so that persons with a valid email address may receive reports from AUC.

Username	Name	Email Address	Alternate Email Address	Use Alternate Email
ABCDEF	test user			<input type="radio"/> Yes <input checked="" type="radio"/> No
TCATHOME	Theresa at home	campbellt189@gmail.com		<input type="radio"/> Yes <input checked="" type="radio"/> No
TEST	test testing	test@admins.com		<input type="radio"/> Yes <input checked="" type="radio"/> No

Buttons: 1 Add User, 2 Delete User, 3 Edit List, 4 Send Test Email

The **[1 Add User]** button presents a prompt. Prior to the software update, the prompt asked for neither an email address nor an alternate email address.

Figure 11 Before

Figure 12 After—Optional Email Address Entry

Now, users may enter the email address via the new prompt, or enter the email addresses directly on the screen once the Username and Name have been added via the prompt.



Note: if entering an alternate email address in the prompt, the alternate will be selected for use. That may be changed by selecting the “No” radio button on the Email Users screen for that entry.

More information regarding this screen is available in the **Accounts Payable** ▶ **Help Reference Library** ▶ **AP-865 External E-mail Addresses**.

[ADM-AUC-SY-8028]

9. SCREEN DELAY [Fix]

Some sites with large data sets experienced a delay when viewing screens using scroll bars. The scroll bars were removed from multi-record screens to improve performance.

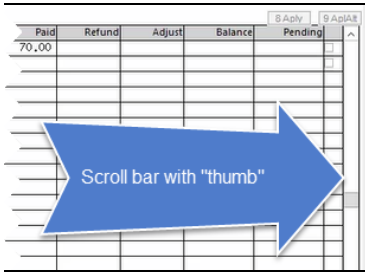


Figure 13 Before

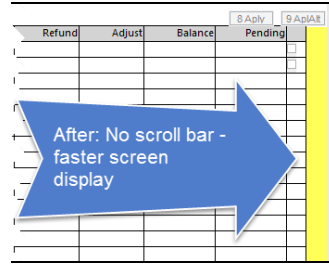


Figure 14 After

[ADM-AUC-RC-8369]

10. HELP REFERENCE LIBRARY

10.1. New or Updated Documentation

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

- CONTRACTS/BIDS PO-100 User Help Documents Index [Updated]
- OTHER PO-420 Bids Entry [Updated]
- PO-965 External E-mail Addresses [New]
- PO-995 Change AUC Screen Size [New]
- PO-1000 The Most Effective Way to Contact Support [New]

[ADM-AUC-BID-6]