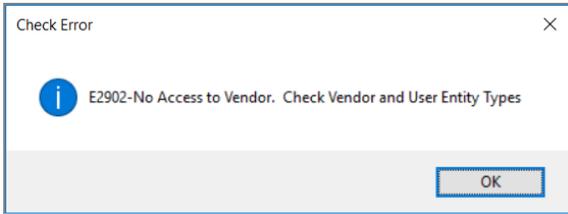# PURCHASE ORDERS

RELEASE NOTES – SEPTEMBER 2020

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

CONTENTS

1   USERS AND VENDOR ACCESS [Fix]

ADMINS fixed an issue with a user being unable to liquidate their own purchase order because the Vendor had been set to a different entity after the PO was opened.

Each user in the system has an entry on the **[3 PO/AP]** tab of the **System ▶ User Menu ▶ User Profile** screen defining A/P and PO access to either the ⊙ **Town** users, ⊙ **School** users, or ⊙ **Both.**

Figure 1 This user is set to ⊙ Both

The access to the vendor is set on the **[3 Classification]** tab of the **Enter Vendors** screen. The vendor is available to either the ⊙ **Town** users, the ⊙ **School** users, or ⊙ **Both**.
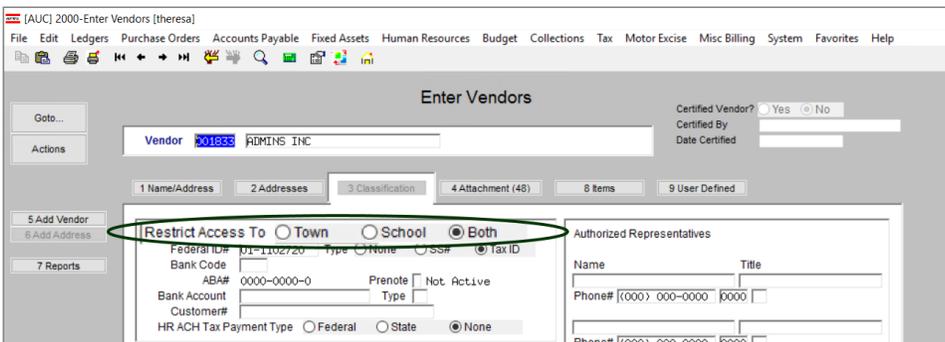

Figure 2 This vendor is set to ⊙ Both

Table 1 Vendor and User Access

User Access	Vendor Access	Result
Both	Both	No error – user has access to the vendor
Either Town or School	Both	No error – user has access to the vendor
Town	Town	No error – user has access to the vendor
Town	School	Error – user will not have access to the vendor
School	School	No error – user has access to the vendor
School	Town	Error – user will not have access to the vendor

Sites use this radio button to segregate activity for vendors that are used by both the town and school users. The town may use Staples vendor #75, but the school uses Staples vendor #36. Users with access to only the School will see only School POs; Town users will see only Town POs. This is in effect for entry, approvals, posting, change orders, and liquidations.
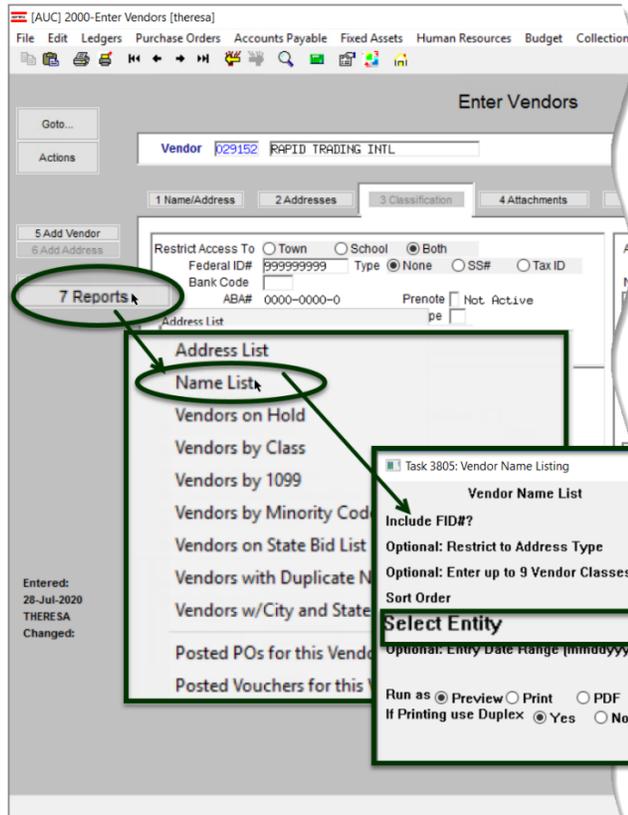
[ADM-AUC-PO-538]

2   REPORTS

ADMINS fixed some vendor reports to filter the information properly when selecting on entity. These reports are printed from either the **Enter Vendors** or the **View Vendors** screen. Select

Purchase Orders ▶ Enter Vendors ▶ [7 Reports].

The list of changed reports is below:

Report #	Report name
3800	Address List
3805	Name List

[ADM-AUC-AP-1029]

3   QUERIES

ADMINS changed the way the drilldown and subsequent lookup will work for checks with multiple vouchers and or purchase orders for different departments.

3.1 Vendor Check History [Enhancement]

Each user in **AUC** is assigned a *default* department group (and may be granted access to other department groups).

Users are assigned **Department Group Security** for each department, marked either ⊙**Read-Only**, ⊙**Access**, or ⊙**No Access**. In the example, the user "Theresa" is assigned access to departments as follows: **No Access** to the **FIRE** department, access to all the other departments. The default access is to **"TOWN"**.

The vendor check history screen was changed to display meta-data on drilldown and enhanced with hover text to help users with limited department access understand how the system displays or restricts information.
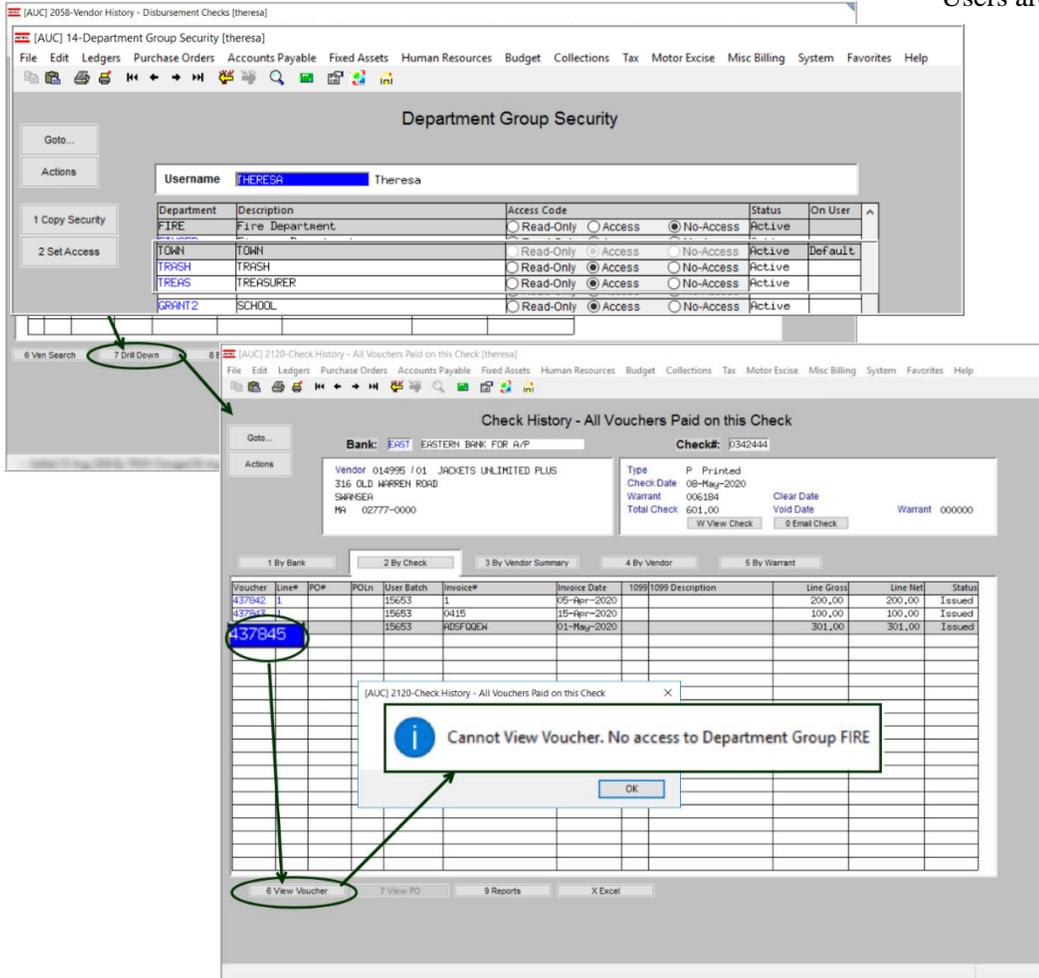
Figure 3 Vendor History ▶ [Disbursement Checks] ▶ [Drill Down] to Check History screen

In **AUC**, multiple vouchers may be paid on a single vendor check. The vouchers may be created by any user from any department. Users set as **"No-Access"** are restricted from viewing *details of other department's vouchers*. Prior to the software update, a user with limited access would drill down to a selected check, e.g., # 0342444 shown in **Figure 3**Error! Reference source not found.**,** and instead of seeing check # 0342444, would be taken to the next check in sequence belonging to a department for which the user had either **"Read Access"** or **"Access"**.

Purchase Orders ▶ Queries ▶ Vendor History ▶ [Disbursements]

With the software update, the user will see a list of the voucher payments made on the selected check. If the vouchers are not from a department for which the user has access, the system will now display an information message *"Cannot View Voucher. No access to Department Group FIRE"*.

Figure 4 Attempting to view a purchase order for which the user has no access

Similar controls were implemented for Purchase Orders on the **[2 By Check]** tab of the Check History screen.

If the purchase order is from a department for which the user has **"No Access"**, the system will now display a message:

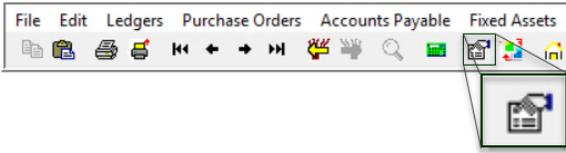"Cannot View Purchase Order. No access to Department Group SPED".

Hover over each voucher number to display the voucher department group and purchase order department group (if a purchase order was used). The hover text is available on the **[4 By Vendor]** tab as well.

[ADM-AUC-AP-1039]

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4   QUICK REPORT SELECTOR [ENHANCEMENT]

The **Quick Report/Task Selector** button is in the toolbar on all **AUC** screens. This feature allows a user to run any report in **AUC** quickly from any module instead of going to the report library for each module. Read **SY–117 Quick Report Selector** in the Help Reference Library for details on how to use this feature.
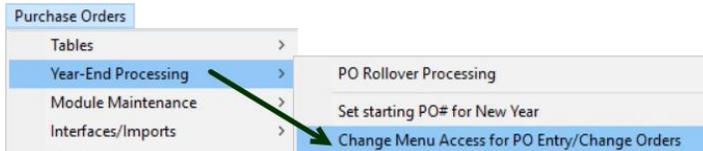
[ADM-AUC-DOC-183]

# 5   YEAR END PROCESSING – PO Rollovers [Enhancements]

ADMINS made changes affecting the PO Rollover process.

5.1   Turn Off Access to Purchase Orders [Fix]

ADMINS closed a loophole that allowed users to circumvent the year end access restrictions from purchase orders.

Users will no longer be able to click on the **[Actions]** button to work on purchase orders when the access is temporarily restricted at year end.

The options to select the PO Entry or PO Release from the Actions button will not be available
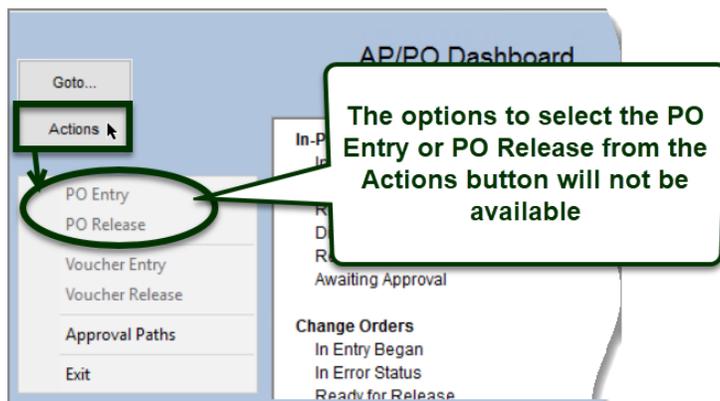
[ADM-AUC-AP-1021]

5.2 Email Open PO Listings [Enhancement]

The **[Email Open Po Listings]** step now includes the message text in the body of the email and offers a third format option (**PDF®**) for the **Open Purchase Order Listing** attachment. This was a customer requested enhancement to allow those working remotely to access the information more readily. Here is an example for purchase orders rolling at year end:

Figure 5 Before – Report Layout options for "Standard Format" or "Excel®"

Figure 6 Added a new option to send the report attachment as PDF® format
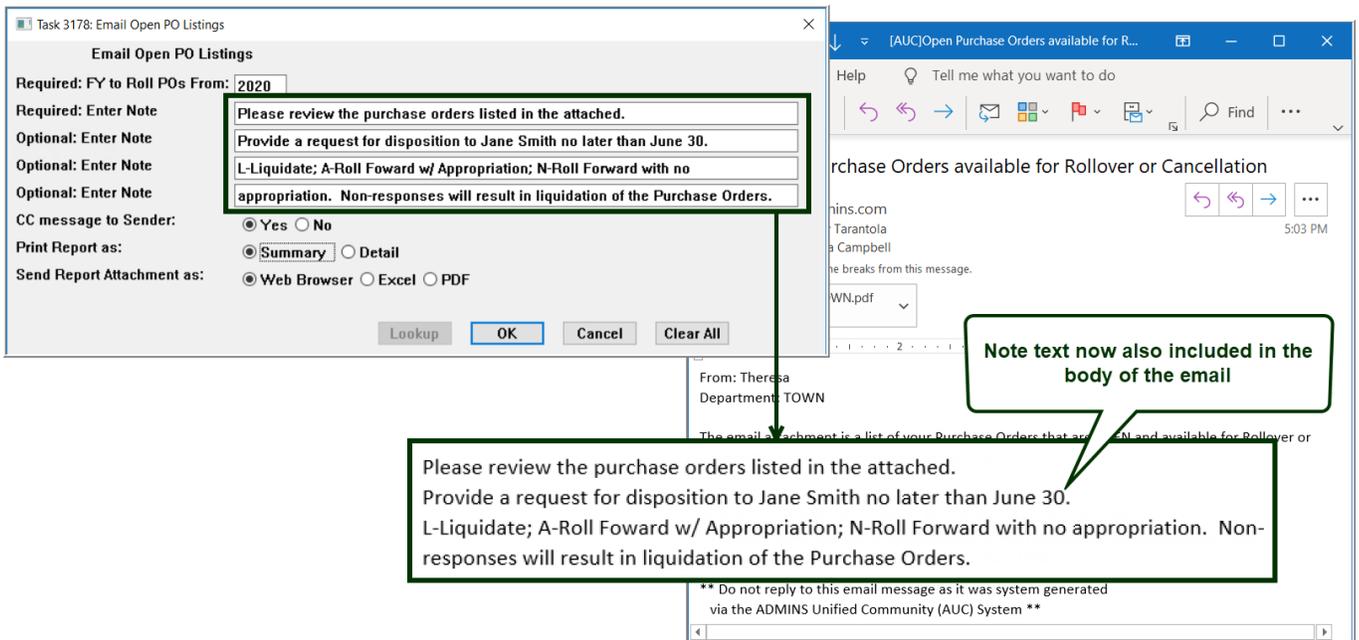
Figure 7 The body of the email now contains the four notes fields as entered on the prompt
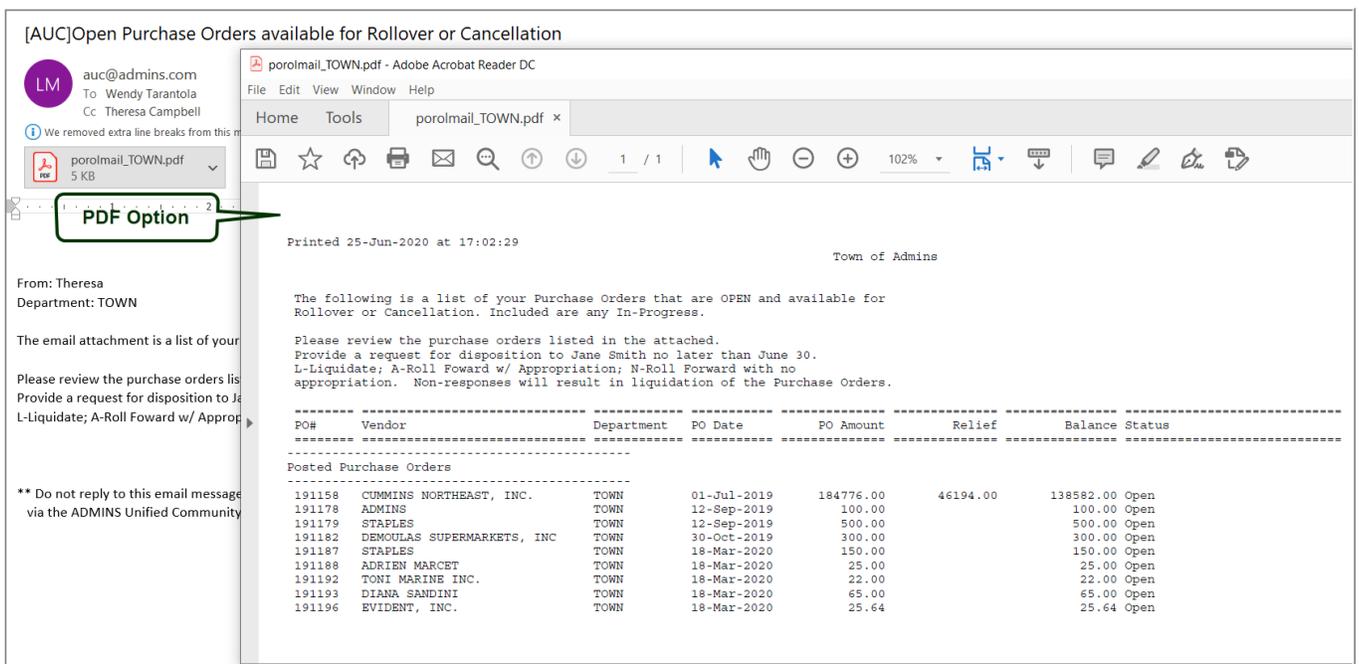

Figure 8 PDF® option selected

Each of the three formats will include the notes in the body of the email; open the attachment to view the list of purchase orders.
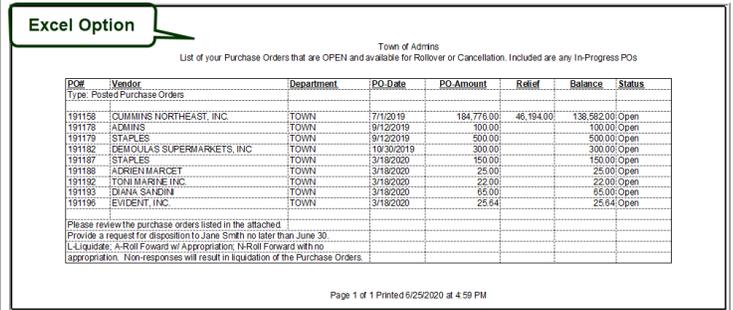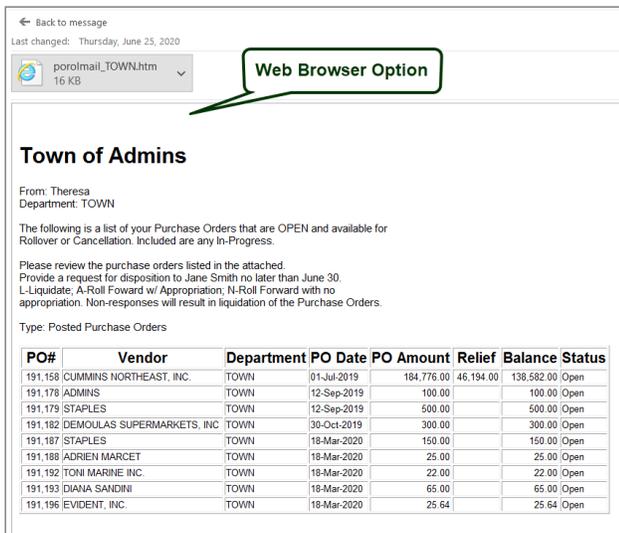
Figure 9 The original Web Browser (used to be called "Standard Format") and Excel® options are shown above

[ADM-AUC-PO-536]

5.3   Attachment Step Run as a Scheduled Task Overnight [Enhancement]

The **[Post Rollovers]** attachment step will trigger a scheduled task to run overnight. This will free up the user and session for other tasks. On completion of the task, an email will be sent to the members of the **POROLBST Email Distribution List**.

[ADM-AUC-PO-542]

5.3.1   PORLBST Email Distribution List [Enhancement]

To notify user(s) that the attachments step is complete, add the email address to the **POROLBST Email Distribution List**. Learn about **Email Distribution Lists** in the **Help Reference Library** in document **PO–960 Email Distribution Lists**
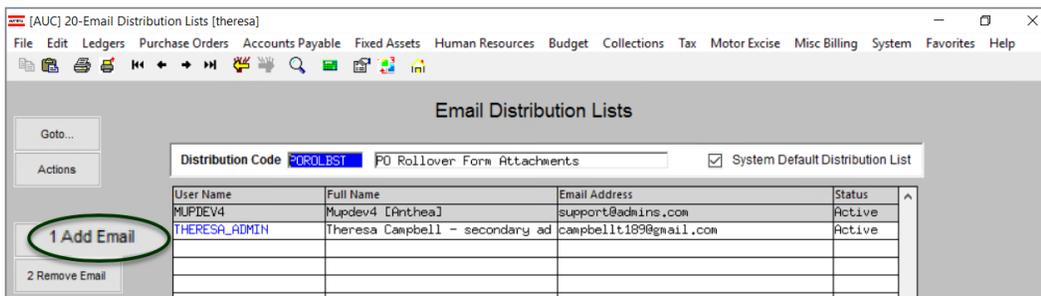

Figure 10 The POROLBST Email Distribution List
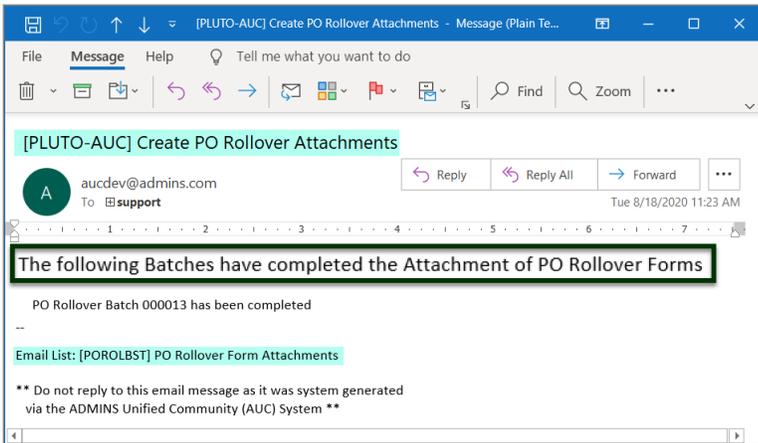
An example of the email is shown in **Figure 11**:

Figure 11 Sample Email Notification that the Attachments step is complete

[ADM-AUC-PO-542]

5.4 Retainage in Change Order History for POs that are Rolled [Fix]

ADMINS corrected the **PO Rollover** process to include the Retainage % or Retainage Amount fields in the Rollover selection files. This did not affect the PO itself but did affect the Change order history records used for reporting.

Figure 12 Before – the retainage percentage *was not carried* to the new purchase order and showed as a change

Figure 13 The rollover does not change the retainage %

[ADM-AUC-PO-519]

6 CHANGE / SET AUC PASSWORDS [ENHANCEMENT]

ADMINS added a **[Reset Password]** button on the login screen that allows users to reset their own **AUC** passwords. The feature requires an email address on the user profile for the user account.
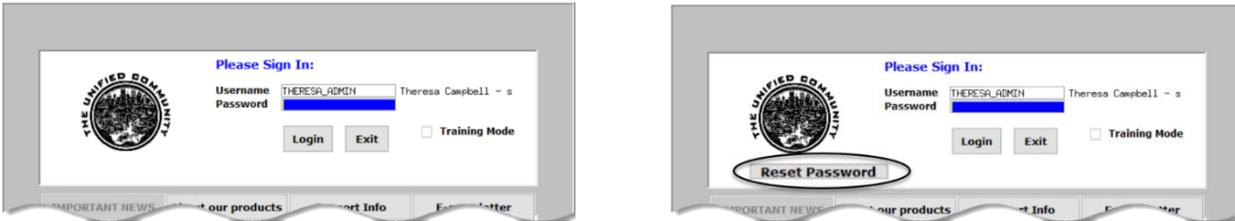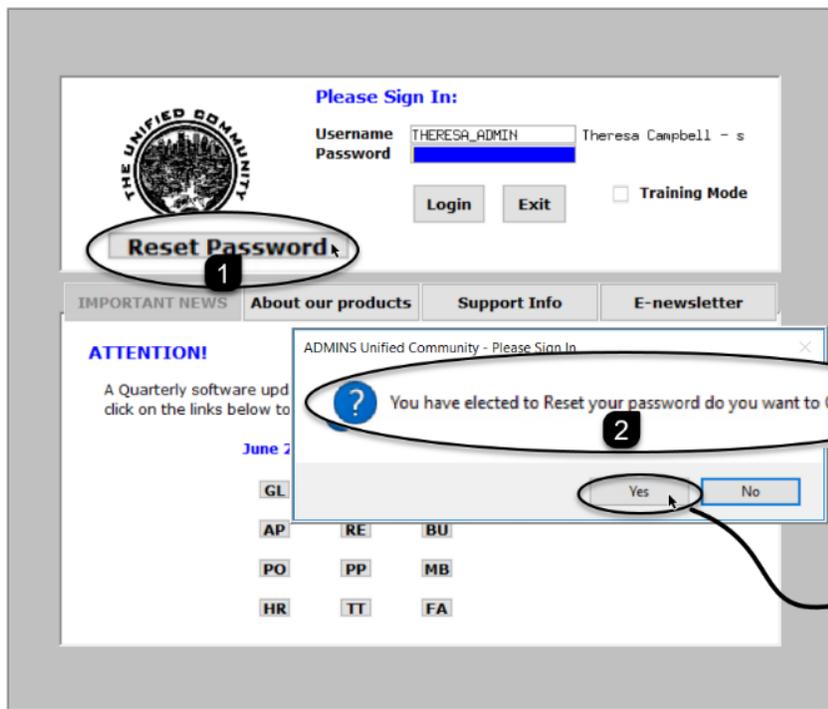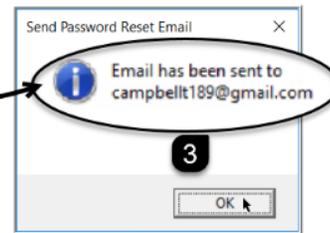

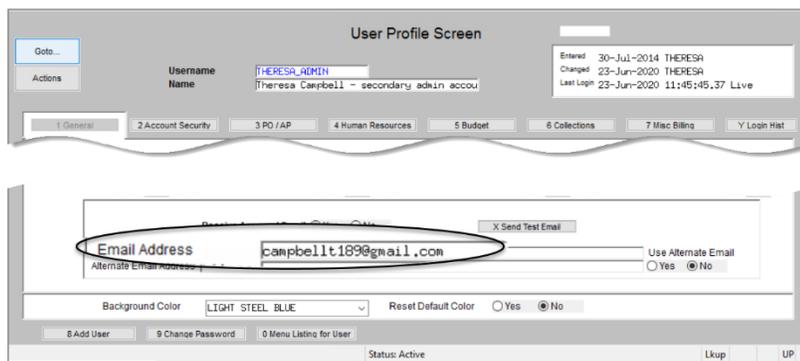**Figure 14 Before and After – the new Reset Password button on the login screen**

Use this feature if the password is forgotten.

1.   Click the **Reset Password** button to initiate setting a new password.

2.   Click **[Yes]** to the **"You have elected to Reset your password do you want to Continue?"** prompt.

3. Click **[OK]** to the popup showing where the email has been sent.

The email will be sent to the email address on the contact tab of the user profile table. The prompt will show which email address will be used. Check the email account for the new password for **AUC**.
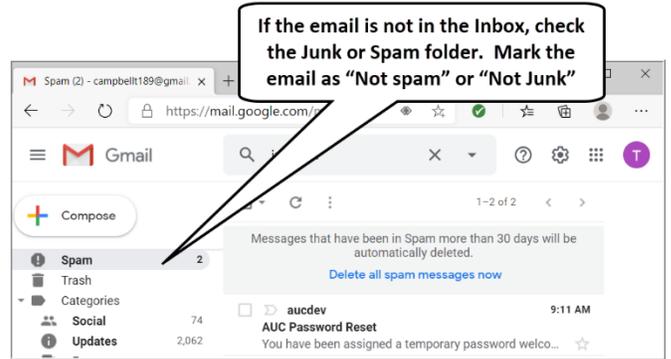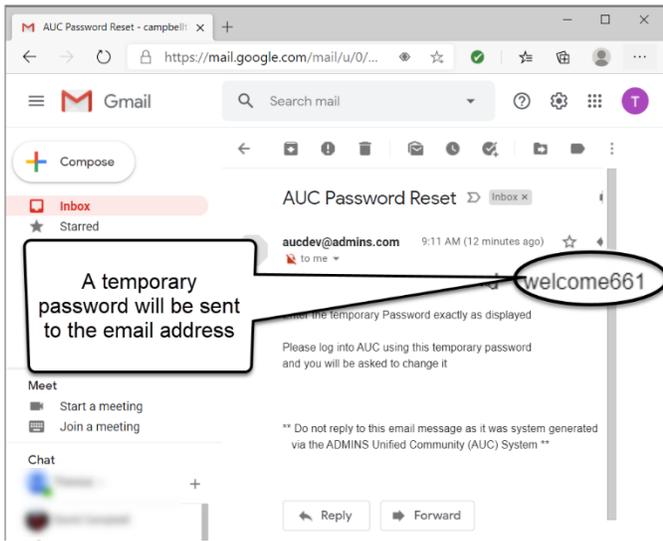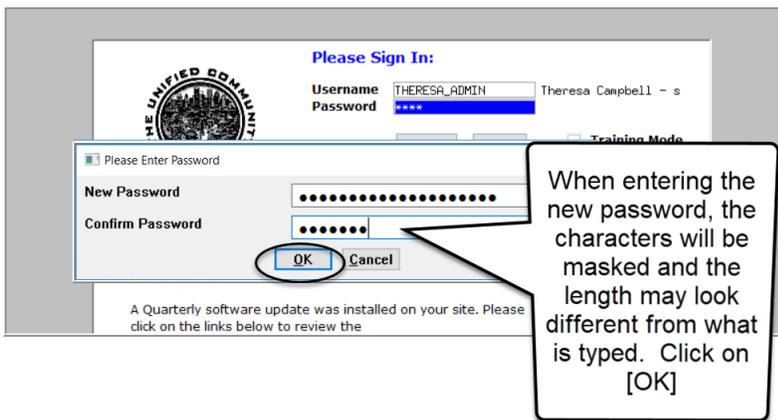
Figure 15 Set up email addresses for AUC users

Figure 16 Sample email sent with temporary password

Figure 17 Entering a new password

If the email is not found in the inbox, check the spam or junk folder. Use the password in the email exactly as shown (case sensitive). The system will immediately prompt for a new password.

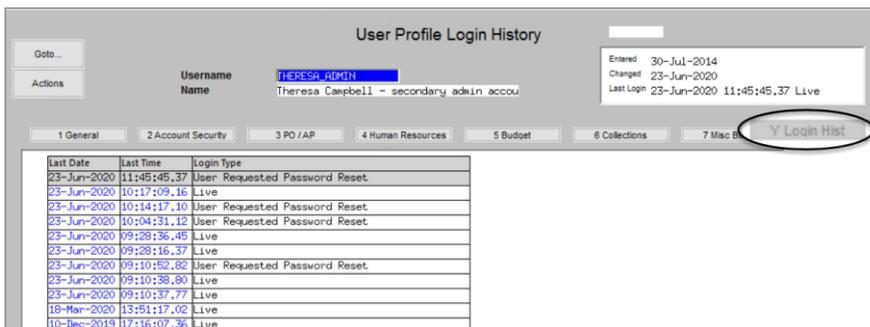Type a new password and confirm the new password.

Figure 18 Login History Screen for super-users

The super-user on the site may view the **User Profile ▶ [Y Login History]** tab to see logon and password reset activity.

If the user profile does not have an email set up, the system will display this message. Contact the super user on your site or **ADMINS** to add an email address to the user profile.

If no email should be associated with the username, contact support@admins.com to reset the password.

[ADM-AUC-SY-8130]

6.1 New Message on Password Errors [Enhancement]

ADMINS changed the invalid password message to reflect the availability of the Reset Password button and to let users know that they may try again after five minutes.
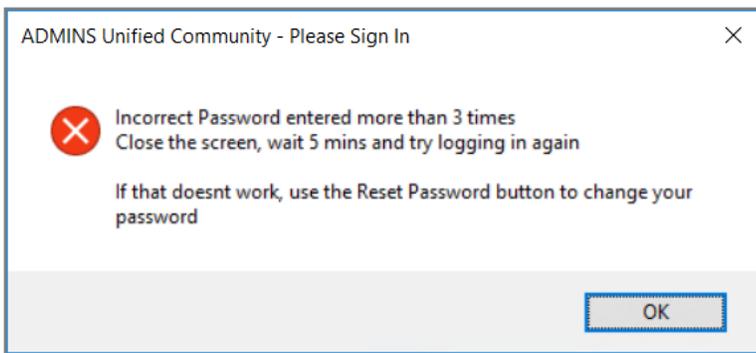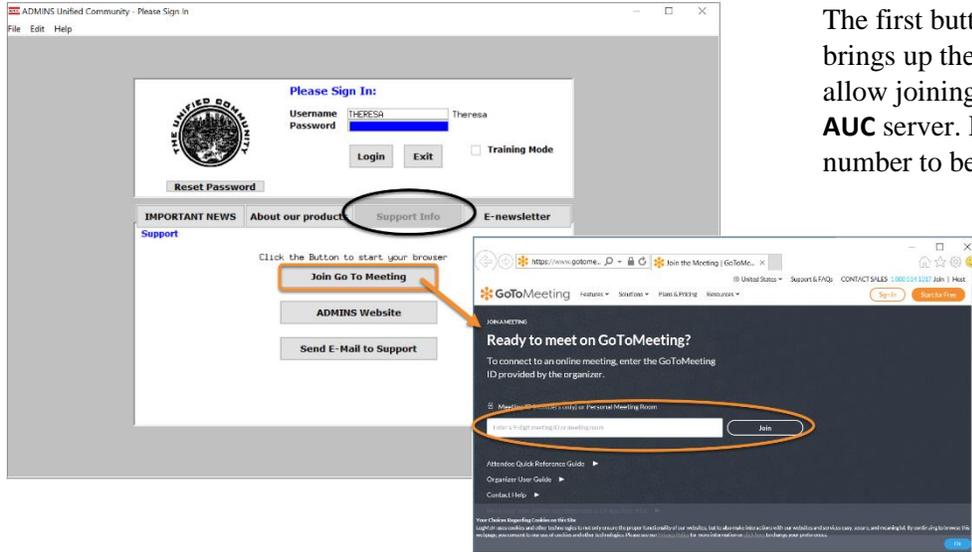
Figure 19 New Incorrect Password message

[ADM-AUC-SY-8159]

7 LOGIN SCREEN SUPPORT INFO TAB [ENHANCEMENT]

Many users only use this screen to log in – but there are other features available. Click on the **[Support Info]** tab. There are 3 buttons on this screen to easily join a **Go To Meeting**, access the **ADMINS** website or email **ADMINS** support.
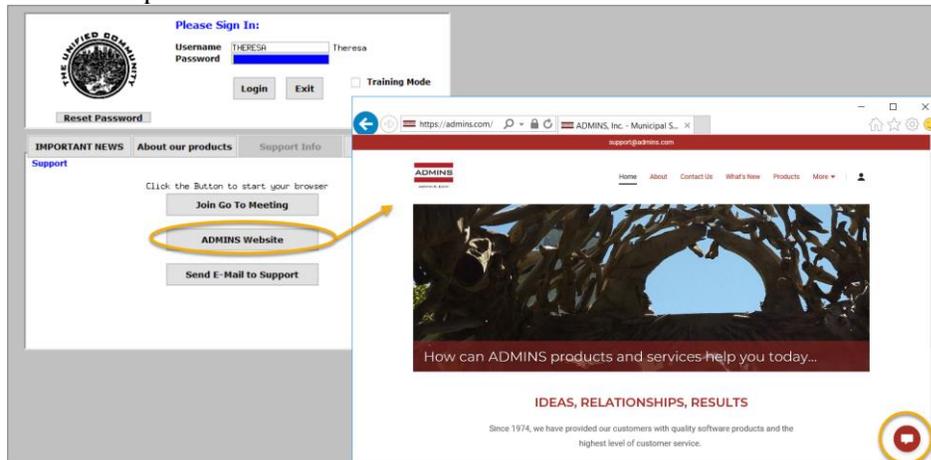
7.1   [Join Go To Meeting]

The first button, **[Join Go To Meeting]**, brings up the **GoToMeeting** website, to allow joining a **GoToMeeting** from the **AUC** server. Enter the nine-digit meeting number to be joined to the meeting.

7.2   [ADMINS Website]

The second button will bring up the **ADMINS** website home screen. Access news, release notes, webinars, and selected help documents here.
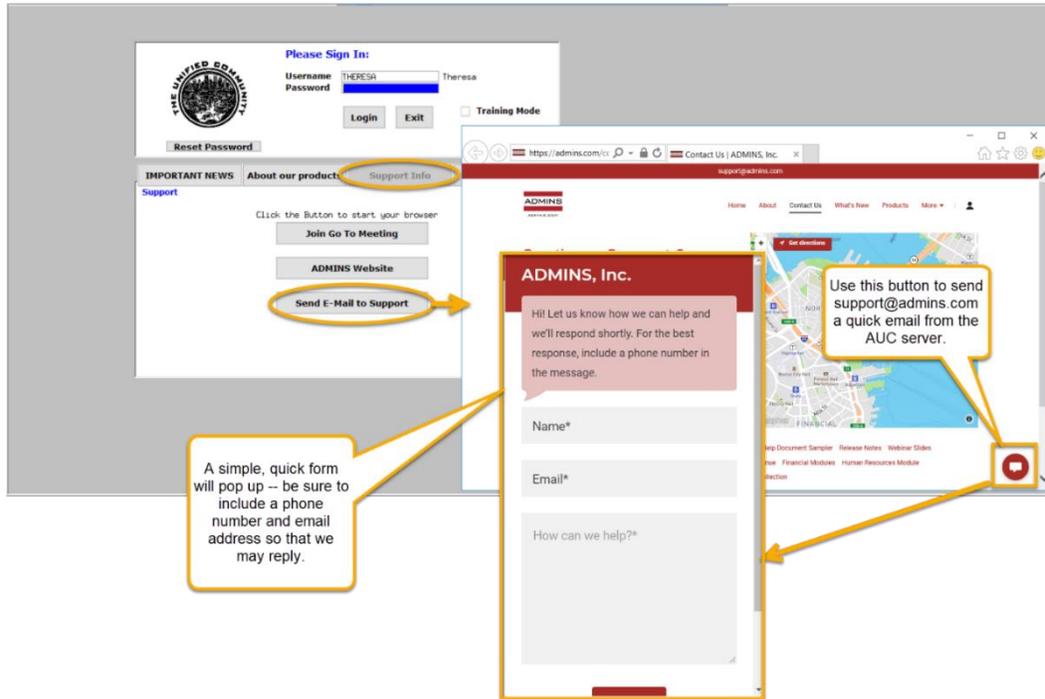
7.3   [Send E-Mail to Support]

The third button opens the **ADMINS "Contact Us"** page to instantly send an email to **ADMINS** support. Every

page on the website has the button to allow emailing support instantly.

<div align="right">[ADM-AUC-SY-8154]</div>

8   HELP REFERENCE LIBRARY

In addition to the following new or updated documents added to the Help Reference Library, the **"SYSTEM"** sections of each library were standardized for the help documents that are not specific to the module. See the "SYSTEM" bullet below for an example.

8.1   New or Updated Documents

- -------TOP LEVEL-------   PO–100 Help Documents Index   [Updated]
- YEAR END PROCESSING   PO–790 Turn off Access to Purchase Orders   [Updated]
- SYSTEM   SY–117 Quick Report Selector   [New]
                                            SY–145 Reset Password   [New]