

RELEASE INUTES - SEPTEIVIDER 2020

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

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# 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.** 

			User Profile	Screen						
Goto Actions	Username Name	THERESA Theresa	Enter Chang Last L	Entered 07-Sep-2009 MUPDEV1 Changed 29-Jun-2020 THERESA LastLogin 14-Jul-2020 15:46:57.56 Live						
1 Gene	aral 2 Account Security	3 PO / AP	4 Human Resources	5 Budget	6 Collect	ions	7 Misc Billing	Y Login Hist		
Allow Ad	ss for AP/PO Vendors Id Vendors on the Fly Tes	O Town	⊖ School	VenderRequests	() Yes	● No				

#### Figure 1 This user is set to <a>O</a> 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  $\odot$  Town users, the  $\odot$  School users, or  $\odot$  Both.

[AUC] 2000-Enter Ven	dors [theresa]					
File Edit Ledgers Pr	urchase Orders Accounts Payable	Fixed Assets Human Resources	Budget Collection	ns Tax Motor Excise	Misc Billing System	Favorites Help
lin 😰 🚭 🗧 нч	+ + м 🖑 👾 🔍 🖬	🖻 🛃 🔒				
Goto		Enter \	/endors	Cer	rtified Vendor? Yes	) No
Actions	Vendor 001833 ADMINS IN	IC		Dat	te Certified	
	1 Name/Address 2 Addresse	s 3 Classification 4 Atta	achment (48)	8 items 9 Us	er Defined	
6 Add Address	Restrict Access To OT	own 🔿 School 💿 E	Both	Authorized Represental	tives	
7 Reports	Federal ID# D1=1102720 Bank Code ABA# 0000-0000- Bank Account Customer# HR ACH Tax Payment Type	- Type ONone OSS# -0 Prenote Not. Act.: Type OFederal OState ON	Tax ID     Ive     F one     F	Name Phone# (000) 000-0		



#### **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:

E (AUC) 2000-Enter V File Edit Ledgers	Vendors [theresa] Purchase Orders Accounts Payable Fixed Assets Human Resources Budget Collection 바소 + + 바 M M 일을 이 모두 편 같은 수	<b>Report #</b>	Report name
	Enter Vendors	3805	Name List
Actions	Vendor 029152 RAPID TRADING INTL		
	1 Name/Address 2 Addresses 3 Classification 4 Attachments		
5 Add Vendor 6 Add Address 7 Reports	Restrict Access To O Town O School O Both Federal ID# 999999999 Type O None O SS# O Tax ID Bank Code ABA# 0000-000-0 Prenote Not Active		
	Address List Name List Vendors on Hold		
	Vendors by Class		×
	Vendors by Minority Code		
	Vendors on State Bid List Optional: Restrict to Address Type	○Yes	
Entered:	Vendors with Duplicate N Optional: Enter up to 9 Vendor Classes	Edit 0 values:	
28-Jul-2020 THERESA	Vendors w/City and State Select Entity	Vendor# O Sort Name O Vendor	Class O Zip Code
Changed:	Posted POs for this Vendo	yj From: 10:	) School () Both
	Posted Vouchers for this \ Run as ● Preview ○ Print ○ PDF If Printing use Duplex ● Yes ○ No	○ CSV ○ Excel	
		Lookup OK Cancel	Clear All

[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).



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 3Error! 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".



3010			Check	History - All Vo	achers Faid off this C			
	Bank	EAST EA	ISTERN BANK FOR A	/P	Check#: 033749	98		
kctions	Vendor PO BOX WILBRAH MA 01	023263 /01 1000 AM 095-0000	VAN POOL TRANSPO	ORTATION	Type P Printed Check Date 15-Aug-2018 Warrant 006043 Total Check 38287,00 W View Check	Clear Date Void Date 0 Email Check	Warrant	000000
1 By Bar		2 By Check	3 By Ven	dor Summary	4 By Vendor 5 B	y Warrant		
cher Line#	PO# POLn	User Batch	Invoice#	Invoice Date	1099 1099 Description	Line Gross	Line Net	Status
399 4	47987 2	15388	61805108	02-Jun-2018		650,00	650.00	Issued
399 5	47191 1	15388	61805108	02-Jun-2018		2310,00	2310,00	Issued
399 6	47191 2	15 [AUC] 2	120-Check History - A	II Vouchers Paid on this (	Check ×	1584.00	1584.00	Issued
399 7	47192 1	15				0740_00	2310,00	Issued
399 8	47559 1	15					00,00	Issued
399 9	47190 1	11 (	Cannot \	View Purchase O	rder. No access to Depa	artment Group SP	ED Y	Issued
599 I	48339 1	15						Issued
599 11	485559 2	15		1			00.00	Issued
400 1	47189 1	15		1		1000.00	3700.00	Issued
	47195 1	15			OK	1820,00	1820,00	TSSNed
100 2	47987	15				390,00	390,00	Issued
400 2 400 3	14/26/ 2	15368	61806107	22-Jun-2018		325,00	325,00	ISSUED
00 2 100 3 100 4	47404 4	15588	61806107	22-Jun-2018		2100,00	2100,00	Issued
00 2 100 3 100 4 100 5	47191 1	45700	100 1 H H H H H H	22-Jun-2018	L	1440.00	1440,00	Issued
00 2 100 3 100 4 100 5 100 6	47191 1 47191 2	15388	640000407	00 1		14/0.00	14/0.00	issued
00 2 00 3 00 4 00 5 00 6 00 7	47191 1 47191 2 47192 1	15388 15388	61806107	22-Jun-2018		4.470.00	4.470.00	
400 2 400 3 400 4 400 5 400 6 400 6 400 7 400 8	47191 1 47191 2 47192 1 47190 1	15388 15388 15388	61806107 61806107 61806107	22-Jun-2018 22-Jun-2018		1470.00	1470.00	Issued
100         2           100         3           100         4           100         5           100         6           100         7           100         8           100         9	47191 1 47191 2 47192 1 47192 1 47190 1 48339 1	15388 15388 15388 15388	61806107 618/6107 618/6107 6/806107	22-Jun-2018 22-Jun-2018 22-Jun-2018		1470.00 2480.00	1470.00 2480.00	Issued

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".

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



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.

Coto	Check History - by Vend	or in Chec	k Date O	rder		
0010	Vendor: 023263					
Actions	VAN POOL TRANSPORTATION PO BOX 1000 WILBRAHAM NA 01055-0000					
1 By Bank	2 By Check 3 By Vendor Summary 4 By	Vendor	5 By V	Varrant	Inv Date	elView
1 By Bank	2 By Check 3 By Vender Summary 4 By te Type Warrant Vouch# Line POP Total Check 2018 Portude Vouch# Line POP Total Check	Vendor	5 By 1 Line Net 3145,00	Varrant Invoice# 61805108	Inv Date	e View
1 By Bank ck# Check Da 7498 15-Aug- 7498 15-Aug-	28v Check 38v Vender Summary 48v te Type Warran 700 UCh# Line POIF relat Check 2018 Pprinted 206043 \$29399 1 47189 1 00	Vendor Line Gross 3145.00 2860.00	5 By V Line Net 3145,00 2860,00	Varrant Invoice# 61805108 61805108	inv Date 02=Jun=2018 02=Jun=2018	e View W Check
1 By Bank ck# Check Dz 7498 15-Aug- 7498 15-Aug- 7498 15-Aug-	2 8v Check 3 8v Vender Summerv 4 8v te Type Warrant VOUCH# Line PO# cotal Check 2018 Printed V6043 ¥29399 1 47189 1 00 2019 Printed V6043	Vendor Line Gross 3145.00 2860.00 520.00	5 Bv V Line Net 3145,00 2860,00 520,00	Varrant Invoice# 61805108 61805108 61805108	Inv Date 02-Jun-2018 02-Jun-2018 02-Jun-2018	e View W Check
1 By Bank ck# Check Dz 7498 15-Aug 7498 15-Aug 7498 15-Aug 7498 15-Aug	2 8v Check 3 8v Verder Summary 4 8v te Type Warrant 70 UCh* Line POF cela Check 2018 Printed W6043 223393 1 47189 1 00 2019 Printed Check 3 Voucher Dept Group SPED 00 2019 Printed States 1 2010 Popt 6 1 2010 SPED 00	Vendor Line Gross 3145.00 2860.00 520.00 650.00	5 By V Line Net 3145,00 2860,00 520,00 650,00	Varrant Invoice# 61805108 61805108 61805108 61805108	Inv Date 02-Jun-2018 02-Jun-2018 02-Jun-2018 02-Jun-2018	e View W Check
1 By Bank ck# Check Dz 7498 15-Aug 7498 15-Aug 7498 15-Aug 7498 15-Aug 7498 15-Aug	28v Check 38v Verder Summary 48v te Type Warrant VOUCh# Line POIP total Check 2018 Printed 2018 Printed V6043 Voucher Dept Group SPED 2019 Printed Wood 3 PO Dept Group SPED 2019 Printed Wood 3 PO Dept Group SPED 2010 Pointed Wood 3 PO Dept	Vendor Line Gross 3145.00 2860.00 520.00 650.00 2310.00	5 By V Line Net 3145,00 2860,00 520,00 650,00 2310,00	Varrant 61805108 61805108 61805108 61805108 61805108 61805108	Inv Date 02-Jun-2018 02-Jun-2018 02-Jun-2018 02-Jun-2018 02-Jun-2018	e View W Check

[ADM-AUC-AP-1039]

# **4 QUICK REPORT SELECTOR [ENHANCEMENT]**

File	Edit	Le	Ledgers		ircha	ase (	Orders	A	ccou	nts Pay	able	Fixed Assets
	h 🔒 🍯 🧉		<b>H4</b>	٠	+	H	4	WW	0	-	P 3 6	
												r

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.

[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**<sup>®</sup>) 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:



🔳 Task 3178: Email Open PO Listings		
Email Open PO Listir	ngs	
Required: FY to Roll POs From:	2019	
Required: Enter Note	abcdefg	
Optional: Enter Note		
Optional: Enter Note		
Optional: Enter Note		
CC message to Sender:	● Yes ○ No	
Print Report as:	● Summary O Detail	Before - two
Report Layout:	O Standard Format   Excel	options for the
		report layout
	Lookup OK	Cancel Clear All

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

Image: Task 3178: Email Open PO Listings       X         Email Open PO Listings       Email Open PO Listings         Required: FY to Roll POs From:       2020         Required: Enter Note       Please review the purchase orders listed in the attached.         Optional: Enter Note       Provide a request for disposition to Jane Smith no later than June 30.         Optional: Enter Note       Provide a request for disposition to Jane Smith no later than June 30.         Optional: Enter Note       L-Liquidate; A-Roll Foward w/ Appropriation; N-Roll Forward with no         Optional: Enter Note       appropriation. Non-responses will result in liquidation of the Purchase Orders.         CC message to Sender:       Image: Optial         Print Report as:       Summary Optial         Send Report Attachment as:       Summary Optial         Lookup       OK       Cancel			
Email Open PO Listings         Required: FY to Roll POs From:       2020         Required: Enter Note       Please review the purchase orders listed in the attached.         Optional: Enter Note       Provide a request for disposition to Jane Smith no later than June 30.         Optional: Enter Note       L-Liquidate; A-Roll Foward w/ Appropriation; N-Roll Forward with no         Optional: Enter Note       appropriation. Non-responses will result in liquidation of the Purchase Orders.         CC message to Sender:       Image: Summary Content in the State of the Purchase Orders.         Print Report as:       Summary Option         Send Report Attachment as:       Summary Option         Lookup       OK       Cancel	Task 3178: Email Open PO Listings		$\times$
Required: FY to Roll POs From:       2020         Required: Enter Note       Please review the purchase orders listed in the attached.         Optional: Enter Note       Provide a request for disposition to Jane Smith no later than June 30.         Optional: Enter Note       L-Liquidate; A-Roll Foward w/ Appropriation; N-Roll Forward with no         Optional: Enter Note       appropriation. Non-responses will result in liquidation of the Purchase Orders.         CC message to Sender:       Image: Content of the Purchase Orders.         Print Report as:       Image: Content of the Purchase Orders.         Send Report Attachment as:       Image: Content of the Purchase Orders.         Lookup       OK       Cancel	Email Open PO Listir	ngs	
Required: Enter Note       Please review the purchase orders listed in the attached.         Optional: Enter Note       Provide a request for disposition to Jane Smith no later than June 30.         Optional: Enter Note       L-Liquidate; A-Roll Foward w/ Appropriation; N-Roll Forward with no         Optional: Enter Note       appropriation. Non-responses will result in liquidation of the Purchase Orders.         CC message to Sender:       Image: Comparison of the Purchase Orders.         Print Report as:       Summary Option         Send Report Attachment as:       Image: Comparison of the Purchase Orders.         Lookup       OK         Cancel       Clear All	Required: FY to Roll POs From:	2020	
Optional: Enter Note       Provide a request for disposition to Jane Smith no later than June 30.         Optional: Enter Note       L-Liquidate; A-Roll Foward w/ Appropriation; N-Roll Forward with no         Optional: Enter Note       appropriation. Non-responses will result in liquidation of the Purchase Orders.         CC message to Sender:       • Yes • No         Print Report as:       Summary • Detail         Send Report Attachment as:       • Web Browser • Excel • PDF • Option         Lookup       OK       Cancel	Required: Enter Note	Please review the purchase orders listed in the attached.	
Optional: Enter Note       L-Liquidate; A-Roll Foward w/ Appropriation; N-Roll Forward with no         Optional: Enter Note       appropriation. Non-responses will result in liquidation of the Purchase Orders.         CC message to Sender:       Image: Comparison of the Purchase Orders.         Print Report as:       Image: Optional of the Purchase Orders.         Send Report Attachment as:       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of the Purchase Orders.       Image: Option of the Purchase Orders.         Image: Option of th	Optional: Enter Note	Provide a request for disposition to Jane Smith no later than June 30.	
Optional: Enter Note       appropriation. Non-responses will result in liquidation of the Purchase Orders.         CC message to Sender:          • Yes O No         • Summary Operail         • Web Browser O Excel • PDF         • Option         Lookup OK Cancel Clear All	Optional: Enter Note	L-Liquidate; A-Roll Foward w/ Appropriation; N-Roll Forward with no	
CC message to Sender: Print Report as: Send Report Attachment as: Web Browser O Excel O PDF Option Lookup OK Cancel Clear All	Optional: Enter Note	appropriation. Non-responses will result in liquidation of the Purchase Orders.	
Print Report as: Send Report Attachment as:	CC message to Sender:	● Yes ○ No	
Send Report Attachment as: O Web Browser O Excel  PDF Option Lookup OK Cancel Clear All	Print Report as:	©Summary O Detail	
Lookup OK Cancel Clear All	Send Report Attachment as:	O Web Browser O Excel  PDF Option	
Lookup OK Cancel Clear All			
		Lookup OK Cancel Clear All	

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

[AUC]Open Purchase Orde	ers available fo	r Rollover or Cancellation						
	🤌 porolmail_TOWI	N.pdf - Adobe Acrobat Reader DC						
LM To Wendy Taraptola	File Edit View	Window Help						
Cc Theresa Campbell	Lienee Teel							
We removed extra line breaks from this n	Home 100	poroimail_10wiN.pdf ×						
porolmail_TOWN.pdf		P 🖶 🖂 🔍 🗇	↓ 1 / 1	• 🖑		*		Ón 🕑
PDF Option 2								
	Printed 2	5-Jun-2020 at 17:02:29						
					Town of Ad	imins		
From: Theresa								
Department: TOWN	Rollover	owing is a list of your Purch or Cancellation. Included an	nase Orders that re any In-Progre	ss.	avallable for			
The email attachment is a list of your	Please r	eview the purchase orders lis	sted in the atta	ached.				
	Provide L-Liquid	a request for disposition to ate: A-Roll Foward w/ Approp	Jane Smith no 1 riation: N-Roll	later than June Forward with n	30.			
Please review the purchase orders lis	appropri	ation. Non-responses will re	esult in liquida	ation of the Pu	rchase Orders.			
Provide a request for disposition to J	a							
L-Liquidate; A-Roll Foward w/ Approp	▶ PO#	Vendor	Department	PO Date	PO Amount	Relief	Balance Status	
	Posted Pu	rchase Orders						
** Do not ronly to this amail massage				01 701 0010	104776 00	463.04.00	120500 00 0000	
via the ADMINS Unified Community	191158	ADMINS NORTHEAST, INC.	TOWN	12-Sep-2019	100.00	46194.00	100.00 Open	
via trie Abivilius onnieu community	191179	STAPLES	TOWN	12-Sep-2019	500.00		500.00 Open	
	191182	DEMOULAS SUPERMARKETS, INC	TOWN	30-Oct-2019	300.00		300.00 Open	
	191187	STAPLES	TOWN	18-Mar-2020	150.00		150.00 Open	
	191188	ADRIEN MARCET	TOWN	18-Mar-2020	25.00		25.00 Open	
	191192	TONI MARINE INC.	TOWN	18-Mar-2020	22.00		22.00 Open	
	191193	FUIDENT INC	TOWN	18-Mar-2020	25.64		25.64 Open	
	191190	212201, 100.	1040	10-PRI-2020	20.04		20.04 Open	
<u> </u>								

Figure 8 PDF<sup>®</sup> 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.

	ADMIN	IS Uni	fied Cor	nmunity	,					Rel	ease N	otes	– Ver	sion 20
9	Purcha	se Orc	lers									Se	ptem	ber 202
🗲 Back to messag	ge													
st changed: Thurs	sday, June 25, 2020													
porolmail 16 KB	I_TOWN.htm ~	Web	Browser C	ption										
Town of	f Admins													
From: Theresa	WN													
The following is a	a list of your Purchase Ord	lers that are OF	PEN and available for	or				<u> </u>						
Rollover of Carlo	ellation. Included are any i	n-Progress.				Excel Op	tion							
Please review the Provide a request	e purchase orders listed in t for disposition to Jane S	n the attached. mith no later tha	an June 30.					List of your Purchase Order	s that are OPEN and	Town of Ada available for Ro	mins llover or Cancellation	Included are	any In-Progress	POs
L-Liquidate; A-Ro	I Foward w/ Appropriation	n; N-Roll Forwa	rd with no											
appropriation. No	ri-responses will result in	ilquidation of th	e Fuichase Orders			PO# Type: Po	Vendo sted Purc	r hase Orders	Department	PO-Date	PO-Amount	Relief	Balance	Status
Type: Posted Pur	rchase Orders					101150	0.000	INC NORTHEAST INC	TOWAL	7/1/20.10	104 776 00	46 40 4 00	100 500 00	0.00
DO."		<b>D</b> (				191158	ADMIN	ING NORTHEAST, ING.	TOWN	9/12/2019	104,770.00	40, 194,00	100.00	Open
P0#	vendor	Departme	ent PO Date P	O Amount Re	let Balance Status	191179	STAPL	ES	TOWN	9/12/2019	500.00		500.00	Open
191,158 CUMMIN	IS NORTHEAST, INC.	TOWN	01-Jul-2019	184,776.00 46,1	4.00 138,582.00 Open	191182	STAPL	UDAS SUPERMARKETS, INC.	TOWN	3/18/2020	300.00		300.00	Open
191,178 ADMINS	;	TOWN	12-Sep-2019	100.00	100.00 Open	191188	ADRIE	NMARCET	TOWN	3/18/2020	25.00		25.00	Open
191,179 STAPLE	S	TOWN	12-Sep-2019	500.00	500.00 Open	191192	TONI	ARINE INC.	TOWN	3/18/2020	22.00		22.00	Open
191 182 DEMOU				200.00	000.00	191196	EVIDE	NT, INC.	TOWN	3/18/2020	25.64	+	00.00	
	LAS SUPERMARKETS, INC	TOWN	30-Oct-2019	300.00	300.00 Open						L0.01		25.64	Open
191,187 STAPLE	LAS SUPERMARKETS, INC	TOWN	30-Oct-2019 18-Mar-2020	150.00	150.00 Open			water and any Raked in the state of the			20.01		25.64	Open
191,187 STAPLE 191,188 ADRIEN	LAS SUPERMARKETS, INC S MARCET	TOWN TOWN TOWN	30-Oct-2019 18-Mar-2020 18-Mar-2020	150.00	300.00 Open 150.00 Open 25.00 Open	Please r Provide	eview the a request	purchase orders listed in the attached. for disposition to Jane Smith no later th	an June 30		2004		25.64	Open
191,187 STAPLE 191,188 ADRIEN 191,192 TONI MA	LAS SUPERMARKETS, INC S MARCET ARINE INC.	TOWN TOWN TOWN	30-Oct-2019 18-Mar-2020 18-Mar-2020 18-Mar-2020	150.00 25.00 22.00	300.00 Open 150.00 Open 25.00 Open 22.00 Open	Please r Provide L-Liquid:	i eview the a request ate; A-Rol	purchase orders listed in the attached for disposition to Jane Smith no later th Foward w/ Appropriation; N-Roll Forwa	an June 30. ard with no				25.64	Open
191,187 STAPLE 191,188 ADRIEN 191,192 TONI MA 191,193 DIANA S	LAS SUPERMARKETS, INC S MARCET ARINE INC. SANDINI	TOWN TOWN TOWN TOWN	30-Oct-2019 18-Mar-2020 18-Mar-2020 18-Mar-2020 18-Mar-2020	25.00 22.00 65.00	300.00 Open 150.00 Open 25.00 Open 22.00 Open 65.00 Open	Please r Provide L-Liquid appropri	i a request ate; A-Rol ation, No	purchase orders listed in the attached. for disposition to Jane Smith no later th Foward w/ Appropriation; N-Roll Forwan- n-responses will result in liquidation of t	an June 30. ard with no he Purchase Orders				25.64	Dpen
191,187 STAPLE 191,188 ADRIEN 191,192 TONI MA 191,193 DIANA S 191,195 EVIDEN	LAS SUPERMARKETS, INC S MARCET ARINE INC. SANDINI T. INC	TOWN TOWN TOWN TOWN TOWN	30-Oct-2019 18-Mar-2020 18-Mar-2020 18-Mar-2020 18-Mar-2020 18-Mar-2020 18-Mar-2020	300.00 150.00 25.00 22.00 65.00 25.64	300.00 Open 150.00 Open 25.00 Open 22.00 Open 65.00 Open 25.64 Open	Please r Provide L-Liquid appropri	eview the a request ste; A-Rol ation. No	purchase orders listed in the attached. for disposition to Jane Smith no later th Foward w/ Appropriation, N-Roll Forwa n-responses will result in liquidation of t	an June 30. ard with no he Purchase Orders				25.64	Dpen

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

n Lists [theresa]				- 0	×
se Orders Accounts Paya	ble Fixed Assets Human Resources B	udget Collections Tax Motor Excise Misc	Billing System	Favorites H	elp
+ м 🕊 🞬 🔍 н	🖬 😭 🛃 🔒				
	Email Distribu	tion Lists			
Distribution Code POROL	BST PO Rollover Form Attachme	nts 🛛 🖓 System Default I	Distribution List		
User Name	Full Name	Email Address	Status 🔨		
IUPDEV4	Mupdev4 [Anthea]	support@admins.com	Active		
THERESA_ADMIN	Theresa Campbell - secondary ad	campbellt1890gmail.com	Active		
	Auss (unress) se Orders Accounts Payal → → W W W Q 1 Distribution Code POROL Jser Name 10PDEV4 IFERESR_ADMIN	Itss (interes) se Orders Accounts Payable Fixed Assets Human Resources B + H K W W Q I E I Assets Human Resources B Email Distribution Code COCLEST PO Rollover Form Attachme Jser Name Full Name IUPDEV4 Mupdev4 [Anthea] HERESA_ADMIN Theresa Campbell - secondary ad	Itase (interest) se Orders Accounts Payable Fixed Assets Human Resources Budget Collections Tax Motor Excise Miscl + H K W C Email Distribution Lists Distribution Code COCLEST PO Rollover Form Attachments System Default I Jser Name Full Name Email Address UPDEV4 Mupdev4 EAntheal SupportBadmins.com HERESA_ROMIN Theresa Campbell - secondary ad campbell1898gmail.com	Liss (interes)         se Orders Accounts Payable Fixed Assets Human Resources Budget Collections Tax Motor Excise Misc Billing System         + >>         W	Itsis (inderesa) se Orders Accounts Payable Fixed Assets Human Resources Budget Collections Tax Motor Excise Misc Billing System Favorites H + → ₩ ఈ ₩ Q ■ @ 2

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]

Release Notes – Version 20.3

September 2020

### 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.

	Change Seq#: 1 Date: 01-Jul-2019 Tim	me: 19:10:12.02 User:
PO#: 195385 PO Date: 03-May-2019 Line G/L Field Name	Vendor: 051421-01 AMBIENT TEMPERATURE CORP. Dept: CITY	PO Rollover affected retainage
Change Reason Effective Date PO Date	Rollover to New Fiscal Year 2 5.00	01-Jul-2019 01-Jul-2019 01-Jul-2019
Internal Note	8:	P0 rolled over on 19-Jul-2019 by Date changed from 03-Mey-2019 to 01-Jul-2019 FF changed from 2019 to 2020 Account was changed from 132-637-830-0000-000-703-2019-0000 to 320-637-8303-0000-0000-703-2019-0000 At rollover P0 amount = 630,000.00 Uedd Rollover Method N
~ ~ -		

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

- TedRE - PO_Change_Order_History_THERESA[1].lis -				
File Edit Forma	t Options			
Courier New	• 9 • B /			
3032-POCHGHISE	EDT.REP F	Frinted 17-Aug-2020 at 12:46:11 by THERESA City of ALMINS Change Order History Report	Page 1	
		Change Seg#: 2 Date: 01-Jul-2021 Time: 12:45:	23.08 User: IHERESA	
PO#: 20 PO Date: 17	00016 7-Aug-2020	Vendor: 001191-01 NEW CONCEPT SUPPLY Dept: TOWN	PO Rollover did not affect retainage	
Line G/L	Field Name	Old Value	New Value	
1 1	Change Reason Effective Date PO Date Account	Rollover to New Fiscal Year 17-Aug-2020 0200-750-0000-007-00-00-59222	01-Jul-2021 01-Jul-2021 0200-000-0000-000-00-00-59222 Bal €81,000.00	
	Internal Notes:		PO rolled over on 17-Aug-2020 by THERESA Date changed from 17-Aug-2020 to 01-011-2021 FY changed from 2021 to 2022 Account was changed from 0200-750-0000-000-0-00-95922 At rollover PO amount = 100,000.00 Pellef = 19,000.00 Used Rollover Method A	

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	Please Sign Username Password our products a 14 Before and After	Login Exit	heress Caspbell - s Training Mode	Reset Pass ton on the login scr	Please Sign In: Username Password Legin Exit Training Mode word our products Info for ar reen	
	Reset Passwo	Please Sig Username Password	n In: THERESA_ADMIN Login Exit	Campbell - s Training Mode	Use this feature if the passw forgotten. 1. Click the <b>Reset P</b> button to initiate setting a n	/ord is assword ew password.
	IMPORTANT NEWS About ATTENTION! A Quarterly software upd click on the links below to June 2	ADMINS Unified	Support Info I Community - Please Sign In u have elected to Reset your p. 2	assword do you want to Co	2. Click <b>[Yes]</b> to the " elected to Reset you do you want to ( prompt.	You have ur password Continue?"
	GL AP PO HR	RE PP TT	BU MB FA	s No	Send Password Reset Email × Email has been sent to campbellt189@gmail.com	<b>[OK]</b> to the popup showing where the email has been sent.
Goto Actions	Username [HERES] Name [Therese 2 Account Security 3 PO / AP	User Pro AIMIN Cambell - secondary 4 Human Resources	file Screen adkin accod 5 Budget 6 Colectons	2014 THERESA 2020 THERESA 2020 11:45:45.37 Live 7 Mac Billing Y Login Hat	The email will be sent to address on the contact tab user profile table. The pro- show which email addres used. Check the email acc	the email of the ompt will s will be count for

	Descine the million ONe X Send Test Email	
Email Address	s campbellt1890gmail.com	Use Alternate Email

Figure 15 Set up email addresses for AUC users

the new password for AUC.





Figure 16 Sample email sent with temporary password





If the email is not in the Inbox, check

the Junk or Spam folder. Mark the

email as "Not spam" or "Not Junk"

Messages that have been in Spam more than 30 days will be

automatically deleted

You have been assigned a temporary password welco...

Delete all spam messages n

🖌 🖒

? 🔅 🏭

9:11 AM

1-2 of 2 < >

M Spam (2) - campbellt189@gmail × +

\equiv M Gmail

- Compose

K Social

Spam

TrashCategories

Updates

→ ひ 🔒 https://mail.google.com/p

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0

C

D aucdev AUC Password Reset

 $\leftarrow$ 

Type a new password and confirm the new password.





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

Figure 18 Login History Screen for super-users



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 <a href="support@admins.com">support@admins.com</a> to reset the password.

ADMINS	Unified Community - Please Sign In	×
8	Password cannot be reset as your user profile doesnt have an email address setup Contact Support to reset your password and update your email address	
	ОК	]

[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]



## 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.

Please Sign In: Username THERESA Password Login Exit	ssa ] Training Mode () () () = https://admin.com/cr. P @ C) = contact US	ADMINS Inc. ×
About our product Support Info Support Click the Batton to start your browser Join Ge To Meeting ADMINIS Website Send E-Hail to Support A simple, quick form will pop up - be sure to include a phone number and email address so that we may reply.	ADMINS, Inc. Hill Let us know how we can help and we'll respond shortly. For the best response, include a phone number in the message. Name* Email* How can we help?*	Anoma de la content de la cont

[ADM-AUC-SY-8154]

## 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

٠	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]