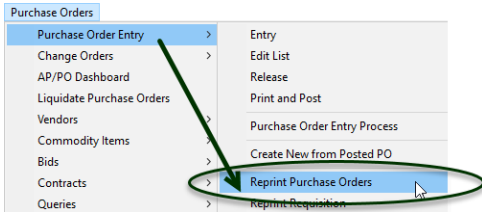# PURCHASE ORDERS

RELEASE NOTES – SEPTEMBER 2022

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

CONTENTS

1   Reprint Purchase Orders (POs) Screen [Enhancement]

ADMINS encourages reprinting POs via the attachments on the PO query screen.

There are circumstances that require re-printing several POs at a time (e.g., if the POs did not print when the posting was done due to operator error or a printer failure). Before the software update, selecting POs from the lookup did not advance the cursor to the next field.

To access the Reprint PO screen, from the menu, select:

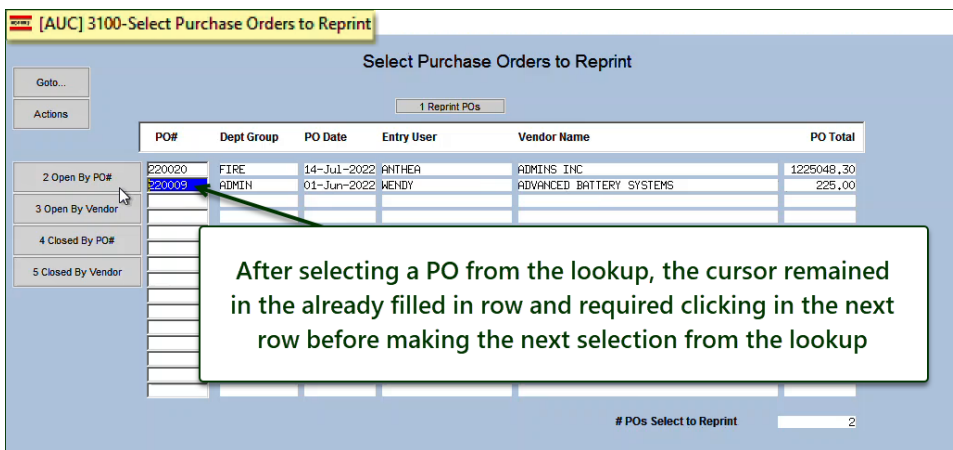**Purchase Orders ▸ Purchase Order Entry ▸ Reprint Purchase Orders**

Figure 1 Before – the cursor remained on the same row after making the selection
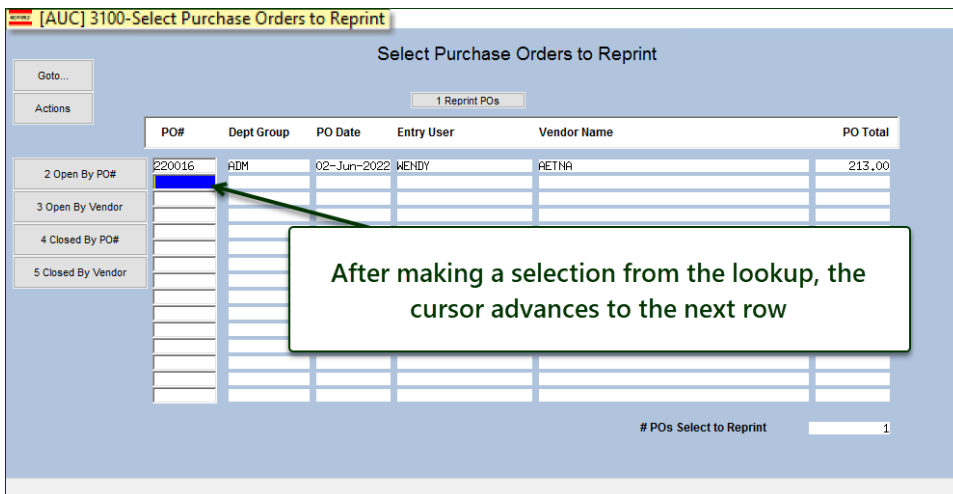

Figure 2 After – the cursor advances to the next row when a selection is made from the lookup

[ADM-AUC-PO-618]

2 Change Orders Selection Screen [Enhancement]

ADMINS improved the use of the change order selection screen. Before the software update, entering a **PO #** required clicking the **[2 PO #]** column header button. Now it is selected and active on entering the screen. To access the screen, from the menu select:

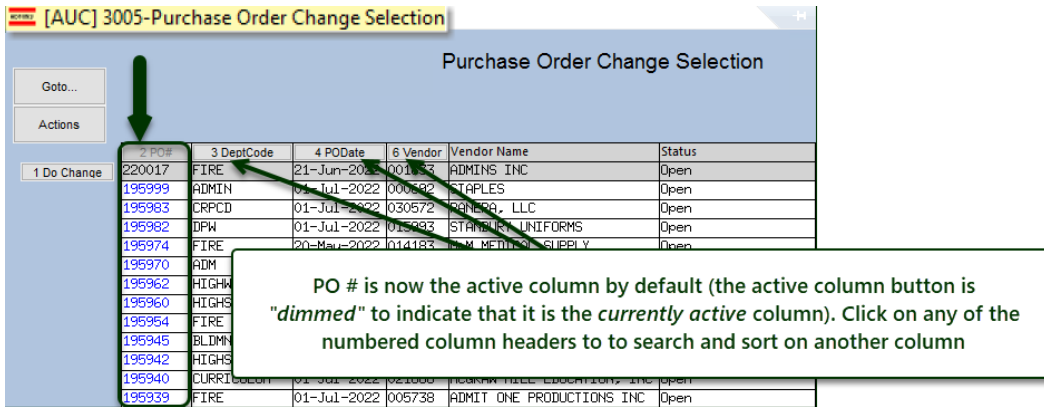**PO ▶ Change Orders ▶ Change Order Entry**

Figure 3 PO Change Order Selection Screen now has the PO# column selected by default

Page up or down to view the POs available for changes or enter the PO # in the column to bring the desired PO to the top of the screen.

[ADM-AUC-PO-603]

3 Vendors

ADMINS added a document that describes how to upload vendors from a spreadsheet, updated the Enter Vendors Help Reference document, and made a cosmetic change to the **[3 Classification]** tab of the Enter Vendors screen.

3.1 [3 Classification Tab]

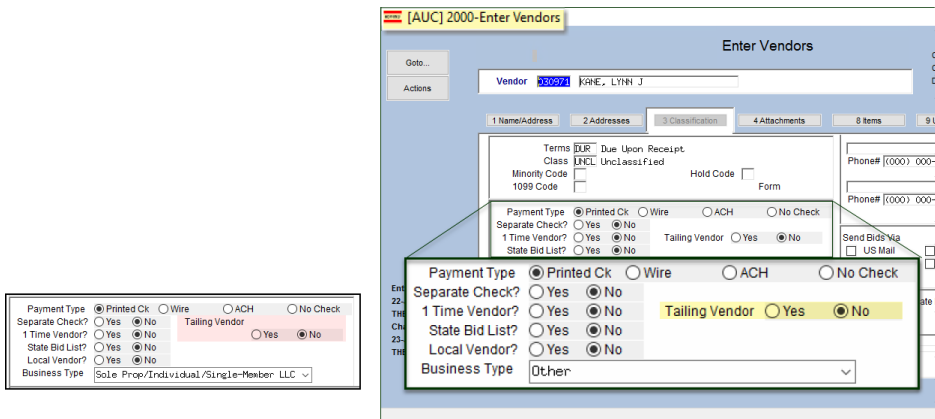**Accounts Payable ▶ Vendors ▶ Enter Vendors**

Figure 4 Before & After – Tailing vendor label is aligned with radio buttons

[ADM-AUC-AP-1172]

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4 PO Approval Signature Images

Purchase Orders can be signed electronically, using signature images in combination with approval path table. The signatures are included when printing the purchase orders. This saves time and eliminates the need to move paper POs between requisitioners and approvers. Some sites have dozens of departments, with multiple signatures needed for each department.

Purchase Orders ▶ Module Maintenance ▶ PO Form Maintenance by Department
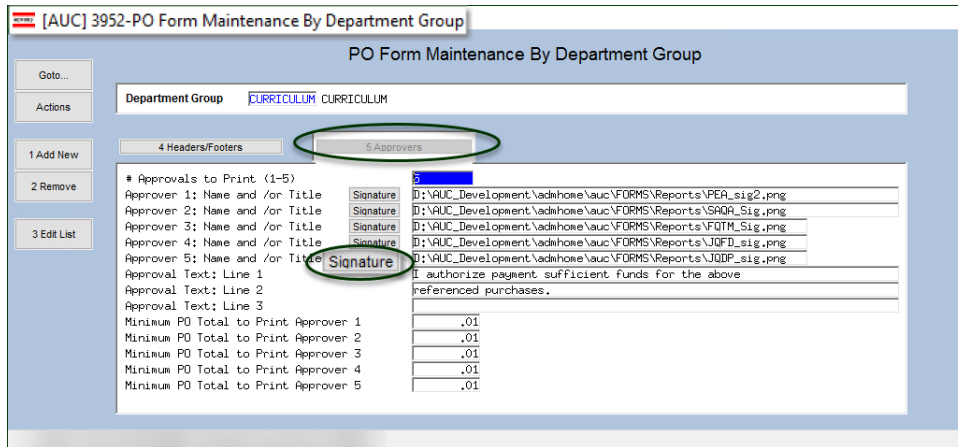
To make it easier to set up the signatures in the **PO Form Maintenance by Department Group** table, a button is available for each of the five signatures to allow selecting the signature image file from Windows Explorer.

Click on the **[Signature]** button for the approval level and select the signature image in the list.

The default signature location is in the auc\FORMS\Reports directory (**ADMINS** recommends keeping signatures in this directory.) If the signatures are stored in another location, be certain that it is a location available to the AUC Application. The signatures should not be stored on a user workstation or PC.
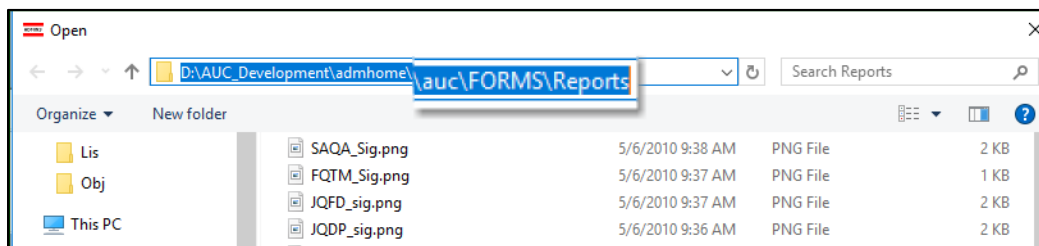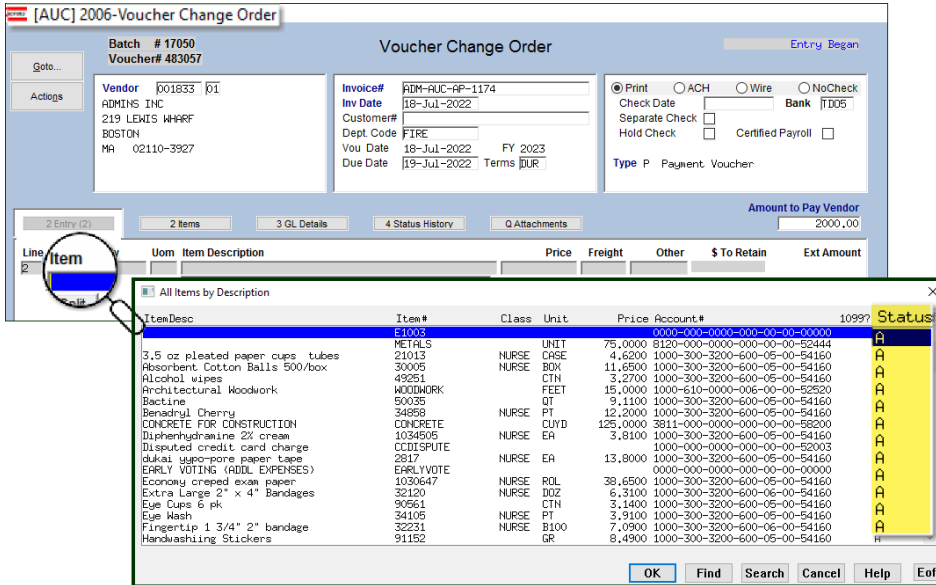

[ADM-AUC-PO-490]

5 PO Cancellation Report

If there were denials, the list of cancellation requests on the report was incomplete. **ADMINS** fixed the report. For details on this process, read **PO–242 Purchase Order Liquidation Requests / Denials** in the Help Reference Library

[ADM-AUC-PO-604]

6 Using Commodity Items [Enhancement]

Commodity Items are used to simplify data entry of purchase orders and makes analyzing purchasing history much easier.

Before the software update, inactive commodity items were included in the lookup used on the purchase order entry and purchase order change order entry screens.

If a user selected an inactive item, the system would pop up a message and not allow it to be used.

ADMINS now lists only active items in the lookup. This applies to Voucher Entry, Voucher Change Order Entry, Purchase Order Entry, and Purchase Order Change Entry.

[ADM-AUC-AP-1066]

7 Reports ▶ ADMINS Report Generator [Enhancement]

ADMINS added a new template for reporting on **Open Purchase Order History**. To use this new template, from the menu, select:
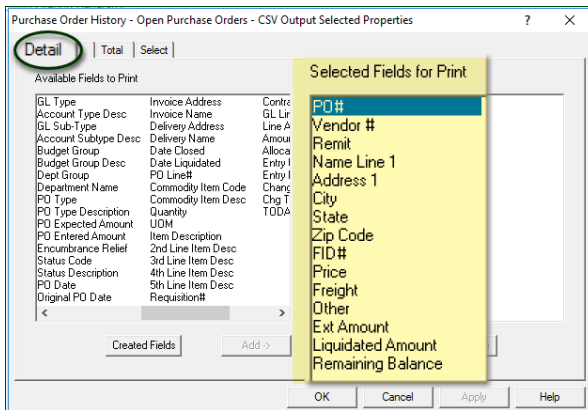
Purchase Orders ▶ Reports ▶ ADMINS Report Generator ▶ Purchase Order History ▶ PO History – Open POs
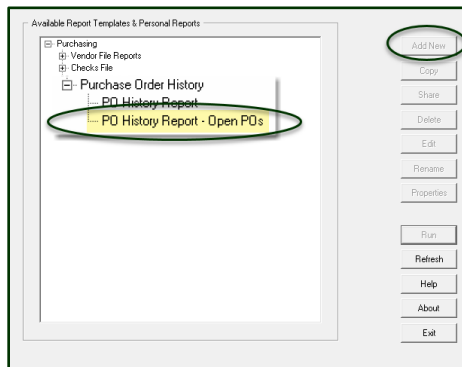
One way to use this report is shown below; the template can be adapted to suit specific needs. Select any of the fields; choose the sort order, filter, and totals.

This report can be specified to "run as" XML or as a .CSV file, which will be displayed in the **Excel®** application.

If one "run as" method is selected, and the other is needed, create another report.

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Click on **[Add New]** to customize the report; this allows choosing fields, sort order, and making selections to filter the report.

Selected the desired fields from the Detail tab.

In this example, the fields PO#, Vendor #, Remit, Name Line 1, Address 1, City, State, Zip Code, FID#, Price, Freight, Other, Ext Amount, Liquidated Amount, and Remaining Balance are selected.
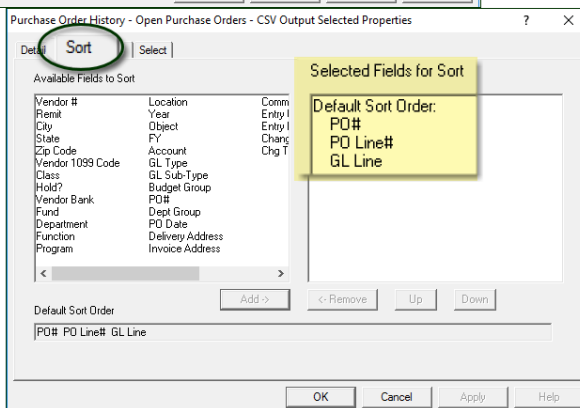
Click on the Sort tab and choose how the report will be sorted. This sort order is by PO Number, PO Line Number, and PO GL Line number. That happens to be the default sort; other options are available – sort the report by Vendor, City, or any field in the report.
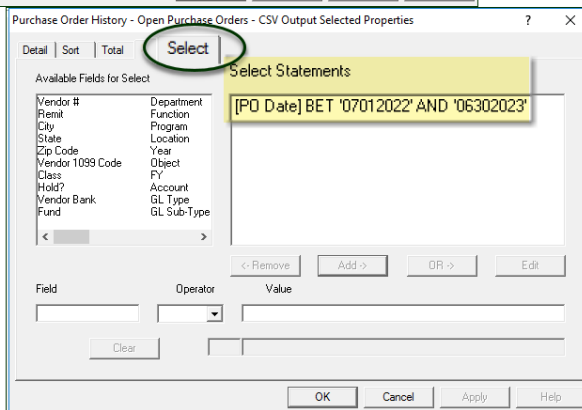
Click on the Select tab to enter a date range – this date range restricts the POs to Fiscal Year 2023 by selecting PO Date between 07012023 and 06302023.

Click on OK and the system will ask if you want to run the report. The first time, make the selection to run as .csv or .xml.

The resulting report looks like this:

(columns D and E are intentionally obscured to protect identity and preserve privacy):

Figure 5 The PO History Report – Open POs – one way to use this report from the ADMINS Report Generator

[ADM-AUC-PO-617]

8 PO Rollovers [Fix]

ADMINS updated the process to handle situations involving liquidations of vouchers attached to POs, and liquidation of PO lines. These situations seldom occur but must be handled properly during the rollover.

8.1 Account Changes Report

The liquidated amount was included in the calculation of the balance to roll amount but was already included in the relieved amount field. This was corrected and now the correct balance to roll will be shown on the report.

8.2 Liquidation Posting Report

The Liquidation Posting report was sometimes incorrect *(if there were prior line liquidations, they were being included in the liquidation amount report)*. Now, only the remaining available balance will be shown on the Liquidation Posting report.

[ADM-AUC-PO-616]

9 Help Reference Library

Added the following new or updated documents to the Help Reference Library and content to **ADMINS**.com.

9.1 New or Updated Documents

| Vendors | PO–310 Add & Maintain Vendors | [Updated] |
| Interfaces/Imports | PO–805 Upload Vendors from a Spreadsheet | [New] |

9.2 New or Updated Web Content

PO–310 Add and Maintain Vendors	[Updated]
PO–805 Upload Vendors from a Spreadsheet	[New]
Introduction to AUC [7:00]	[New]
Optimizing the PDF® Viewer [3:37]	[New]
Quick Task Selection [2:11]	[New]
Reprinting Reports [4:20]	[Updated]

To allow customers instant access to training videos and documents, the ADMINS.com website no longer requires registration to access the Videos and Quick Tips and Release Notes content.

We also restructured the help documents index page to make it more compact to allow easier access from mobile devices.