



SY-150 MANAGING EMAIL LISTS

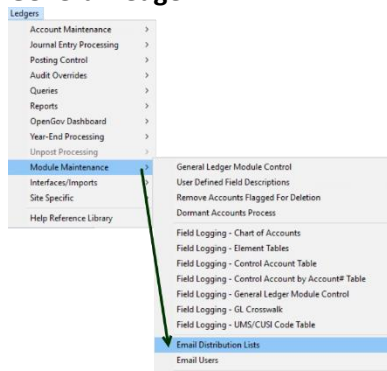
Email communication is used throughout the **ADMINS Unified Community (AUC)** application suite to send messages, reminders, reports and other information. While the **ADMINS Support** staff creates the default system email distributions lists, each site may add and remove users from any list. Create new site-specific lists, add, edit and/or remove names from various lists as requirements change.

To access the email distribution list table, click on the **Module Maintenance** option under any of the AUC modules available on the pull-down menus. If **Module Maintenance** is not available, please contact the local System Administrator to review access and security settings.

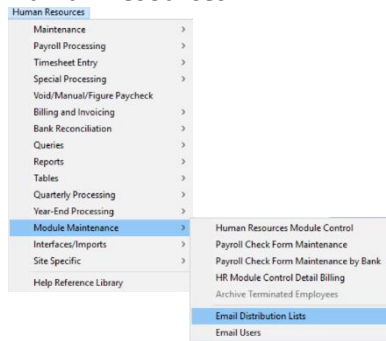
Module Maintenance ▶ Email Distribution Lists

Here are some examples of how to access this table (just a few; the lists are available for most modules):

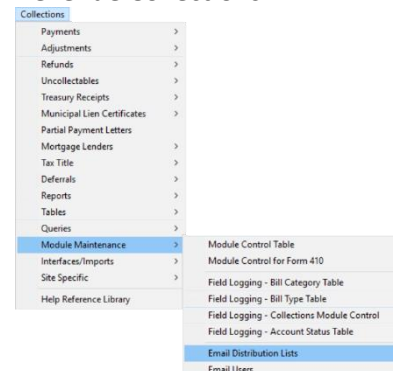
General Ledger



Human Resources

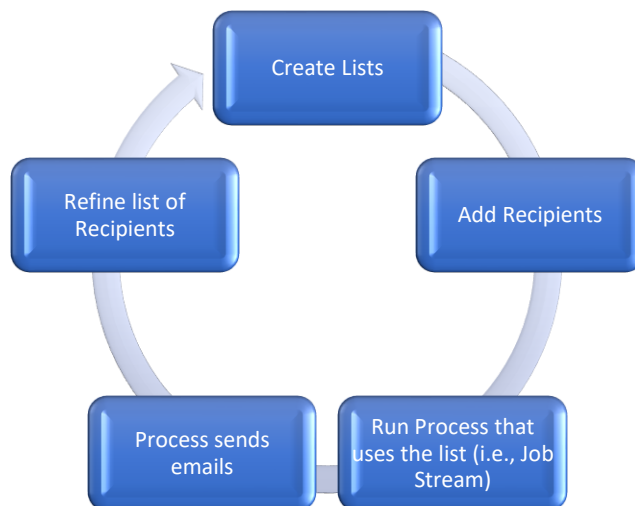


Revenue Collections



WHERE ARE THESE EMAIL LISTS USED?

Email lists used in AUC are listed in Section 10 below. This is not intended to be a comprehensive list. As requirements evolve, additional lists will be added. A complete list as of March 2021 is included; for an up-to-date list that includes *site-specific* lists, run the [Edit List] on the **Email Distribution List Maintenance** Screen as shown in section 5 below.



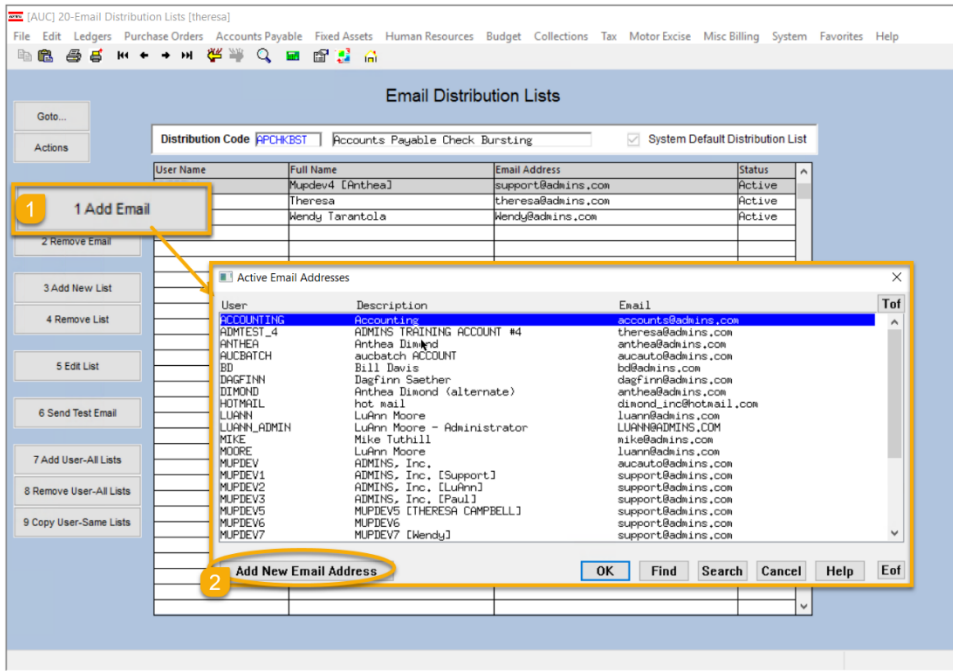


1 ADD ADDITIONAL NAMES TO AN EXISTING List

1 Add Email

To iteratively add an unlimited number of names onto a single email distribution list, navigate to the list by selecting it from the lookup or typing the list name in the **Distribution Code** field. Click on the **[1_Add Email]** button. There are two methods available as shown in Figure 1.

Method 1: If the name is in the list, select it and click on **[OK]**. The username will appear in the grid.



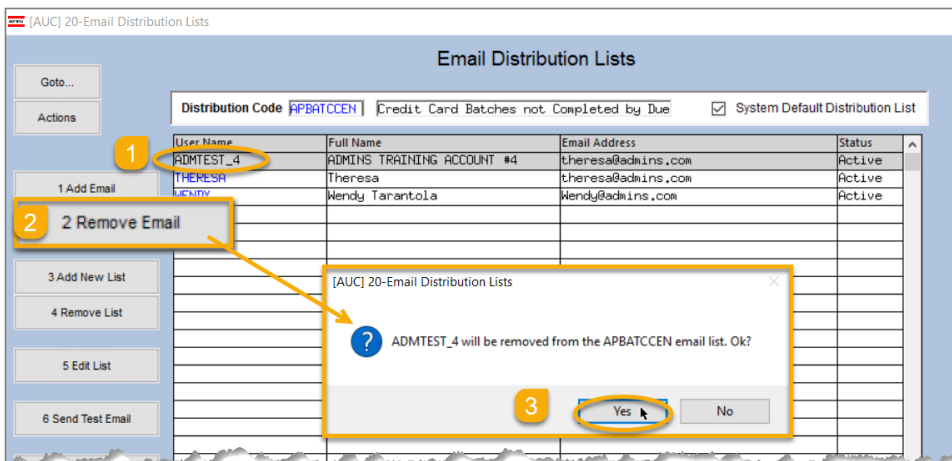
Method 2: If the name is not in the list, add it to the picklist by clicking on the **[Add New Email Address]** button. This allows adding an email address for someone who is not a user of the **AUC** System and does not have credentials to log in to the system. For example, the Finance Committee or Select Board may not use the system but still need to receive reports from **AUC** on a regular basis.

Figure 1 Add a user to an existing email distribution list

This allows automating that function without having to create an account. See **SY-155 Email Users** for more information on **non-AUC** email addresses.

2 REMOVE AN EMAIL

2 Remove Email



Highlight the username to be removed and click the **[2 Remove Email]** button; click **[Yes]** on the resulting prompt to confirm the removal. The username will be removed from the currently selected list. In this example, user **ADMTEST_4** is removed from the **APBATCCEN** email list.



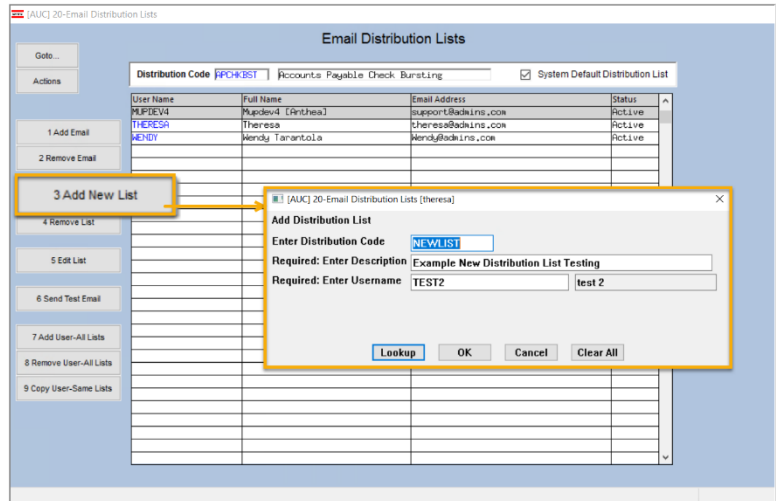
3 ADD NEW LIST 3 Add New List

To add a new list, click the pushbutton called **[3 Add New List]**.

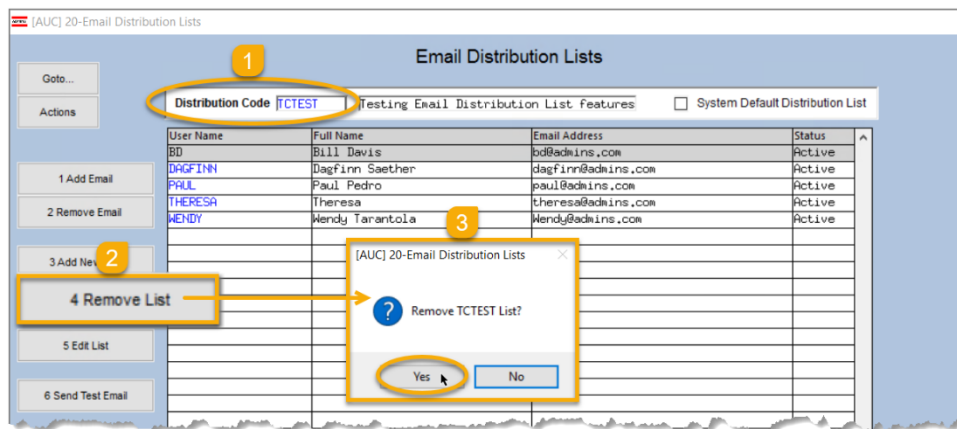
Provide a **“distribution code”**. This can contain up to ten places and include only letters, numbers, and an underscore (no spaces).

Type in a **“description”**. Provide a description that will identify the list for a specific purpose or group.

Enter or select at least **one username** for the list. Supply the **AUC Username**, or the email username, not the email address. If the name is not known, click on the **[Lookup]** button to select from a picklist.

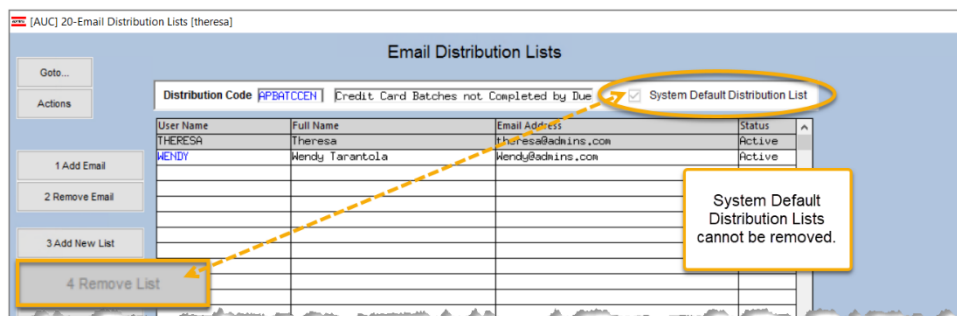


4 REMOVE AN EMAIL LIST 4 Remove List



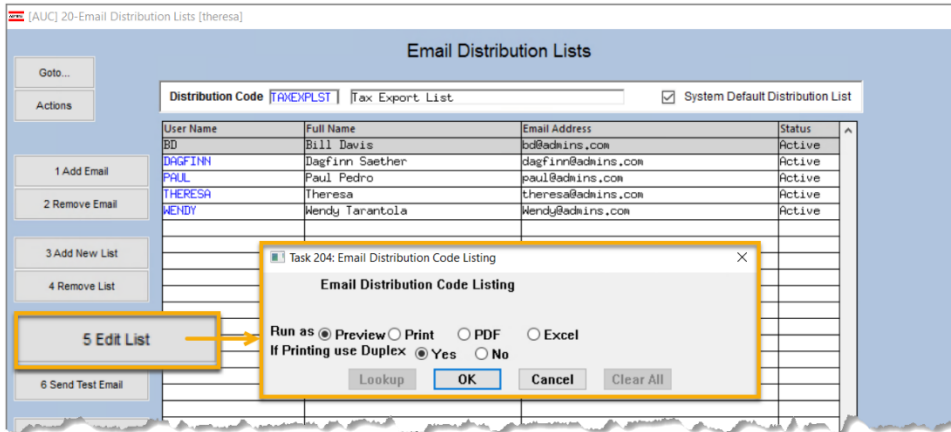
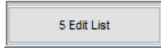
Use the **[4 Remove List]** button to remove a list from the system.

A **“ System Default Distribution List”** cannot be removed.





5 EDIT LIST



Use the **[5 Edit List]** button to produce a report of the email distribution lists available on site.

The report may be run as Preview/Print/PDF® or Excel®. The Preview/Print/PDF® and Excel® versions are shown; the Excel® version provides the

ability to sort and filter the results.

TedRE - EmailDist_204_THERESA[2].iis

204-SYREP:SYEMDIST.REP Printed 17-Feb-2021 at 10:56:17 by THERESA
City of ADMINS
Email Distribution Code Listing

Dist Code	Description	User Name	Full Name	Email Address	Default	Status
APBATCCEN	Credit Card Batches not Completed by Due	THERESA	Theresa	theresa@admins.com	Yes	A
		WENDY	Wendy Tarantola	Wendy@admins.com	Yes	A
APCHKBST	Accounts Payable Check Bursting	THERESA	Theresa	theresa@admins.com	Yes	A
		WENDY	Wendy Tarantola	Wendy@admins.com	Yes	A
APPOAUDIT	Monthly: AP/PO Audit Reports	MUPDEV2	ADMINS, Inc. [LuAnn]	support@admins.com	Yes	A
		THERESA	Theresa	theresa@admins.com	Yes	A
		WENDY	Wendy Tarantola	Wendy@admins.com	Yes	A
BIDCLOSE	Bids Closing in next week	THERESA	Theresa	theresa@admins.com	Yes	A
		WENDY	Wendy Tarantola	Wendy@admins.com	Yes	A
BROKENATT	Broken Attachments List	MUPDEV2	ADMINS, Inc. [LuAnn]	support@admins.com	Yes	A
		THERESA	Theresa	theresa@admins.com	Yes	A
		WENDY	Wendy Tarantola	Wendy@admins.com	Yes	A

EmailDist_204_THERESA[5].xml - Excel

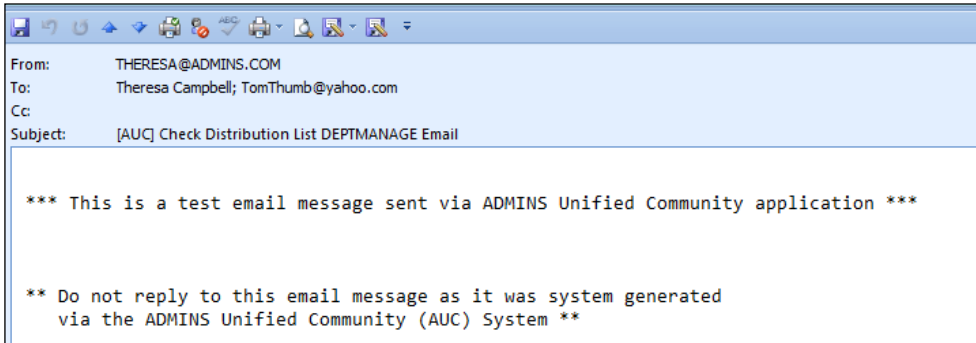
	A	B	C	D	E	F	G	H
	Email List	Description	User Name	Full Name	Email Address	Default	Status	
2	APBATCCEN	Credit Card Batches not Completed by Due	THERESA	Theresa	theresa@admins.com	Yes	A	
3			WENDY	Wendy Tarantola	Wendy@admins.com	Yes	A	
20	APPOAUDIT	Monthly: AP/PO Audit Reports	MUPDEV2	ADMINS, Inc. [LuAnn]	support@admins.com	Yes	A	
21			THERESA	Theresa	theresa@admins.com	Yes	A	
22			WENDY	Wendy Tarantola	Wendy@admins.com	Yes	A	
36	BROKENATT	Broken Attachments List	MUPDEV2	ADMINS, Inc. [LuAnn]	support@admins.com	Yes	A	
37			THERESA	Theresa	theresa@admins.com	Yes	A	
38			WENDY	Wendy Tarantola	Wendy@admins.com	Yes	A	
40	BUDGET	Budget List	MUPDEV1	ADMINS, Inc. [Support]	support@admins.com	No	A	
41			THERESA	Theresa	theresa@admins.com	No	A	
42			WENDY	Wendy Tarantola	Wendy@admins.com	No	A	



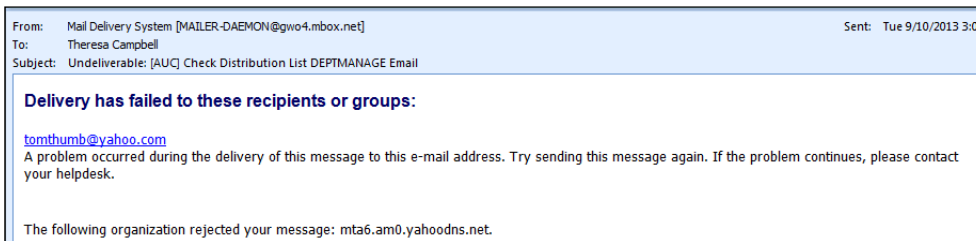
6 TEST EMAIL

6 Send Test Email

To test the validity of the e-mail addresses prior to using your list, click on the [6 Send Test Email] button. An e-mail similar to this will be sent:

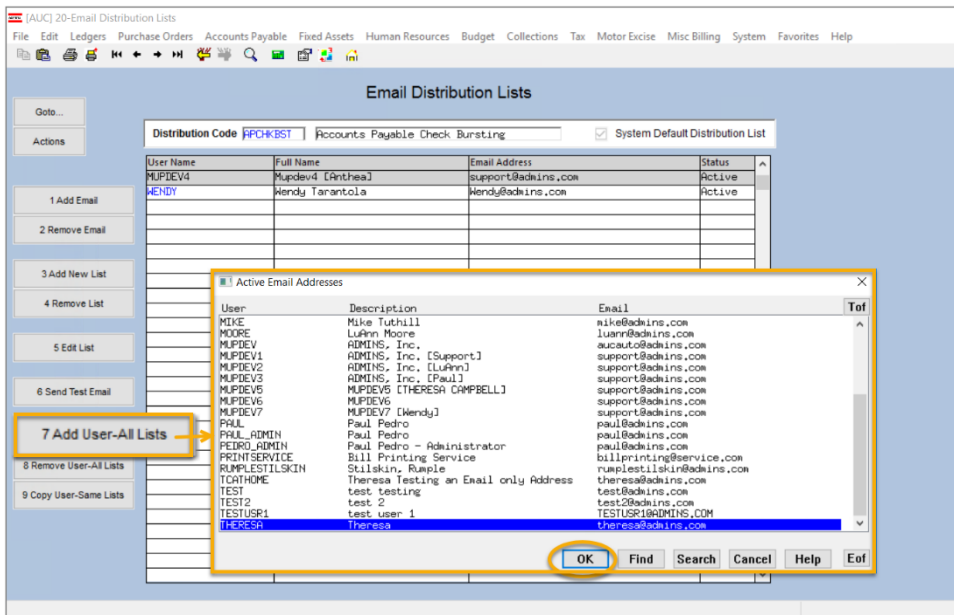


Invalid e-mail addresses will be identified with a failure message, such as this one:



7 ADD USER – ALL LISTS

7 Add User-All Lists



A user may need to receive all emails issued from the system; typically, this would be a “Super User” or a local system administrator.

To add the user at once to all existing email lists, click the [7 Add User-All Lists] button. Select the user from the pick list.

This feature does not offer the [Add New Email Address] option.



8 REMOVE A NAME FROM ALL EMAIL LISTS

8 Remove User-All Lists

The screenshot shows the 'Email Distribution Lists' interface. A table lists users: RUMPLESTILSKIN, THERESA, and WENDY. A dialog box titled 'Delete User From All Distribution Lists' is open, with 'RUMPLESTILSKIN' entered in the 'Required: Enter Username' field. The 'OK' button is highlighted with a yellow circle. A yellow box highlights the '8 Remove User-All Lists' action in the left sidebar.

To remove a user from all email distribution lists (for example, due to termination of employment), click on **[8_Remove User All Lists]**.

This will remove the username from the email distribution lists only; it will not remove or inactivate the user's **AUC** credentials.

9 COPY A USER TO THE SAME LISTS

9 Copy User-Same Lists

The screenshot shows the 'Email Distribution Lists' interface. A table lists users: BD, DAGFINN, PAUL, THERESA, and WENDY. A dialog box titled 'Copy New User to Lists of Current User' is open, with 'BD' entered in the 'Required: Enter FROM Username' field and 'LUANN' entered in the 'Required: Enter TO Username' field. The 'OK' button is highlighted with a yellow circle. A yellow box highlights the '9 Copy User-Same Lists' action in the left sidebar. A second screenshot below shows the updated table with 'LUANN' added to the list.

If a user, LuAnn, is replacing another user, BD, the new user LuAnn may be added to all the lists on which BD is currently included. (Do this first before removing BD from all lists.)

The existing user is the **FROM** username and the new user is the **TO** username.

This feature may also be used to copy a new hire to all lists to which the rest of the team members belong.



10 Alphabetical List of Email Distribution Lists

This is not a comprehensive list as sites may add site-specific lists for unique needs – for example, a finance director may set up lists that will be used by the report job stream each month to supply revenue and expenditure reports to department managers. Any site-specific lists are maintained by the “Super User” or system administrator on each site.



Review these lists to ensure that the right users are notified for each process.

Table 1 System Default Email Distribution Lists

List Name	Description	Module	Frequency	Notifies recipients that:
APCHKBST	Accounts Payable Check Bursting	AP	Once or twice daily	Check images are attached and available to view. Each site can vary.
APCLOTMP	Closed Recurring Vouchers	AP	Weekly	A recurring voucher is closed due to the “end date” being reached
APINPRO	In-Progress Vouchers	AP	Weekly	Vouchers are in progress prior to being posted. In-progress can mean any status prior to posting – in entry began or in approvals.
APOLDCHG	Voucher Change Order > 4 days	AP	Weekly	Voucher change orders have been in progress for more than four days
APPOAUDIT	AP/PO Audit Reports	AP	Monthly	Audit reports of accounts payable or purchase orders that have errors
CHKOVRBUD	Recheck Budget Override	AP	Daily	Purchase orders or Accounts Payable vouchers that needed override are re-checked. If there is now money available, it will move the PO/Voucher from Budget override to the next approval level.
DISBURSE	Email Vendor Discount Expired	AP	Daily	The vendor discount is expiring on an accounts payable disbursement
DISCOUNTS	AP Warrants about to expire	AP	Daily	AP Warrants expire four days after they are created.
ERROR_AP	Check AP Form Maintenance Table	AP	Daily	There is an error or omission on the Accounts Payable check form table
REFUNDS	Voucher Refund Upload	AP	As needed	AP ▶ Interface/Imports ▶ Create Refund Vouchers Lists the new AP batch and all the vouchers created in that batch when the process is complete.
VENDFLY	New Vendor created on the Fly	AP	As needed	A user created a vendor on the fly (sent to users who manage the vendor file)
CONCLOSE	Contract reaching Expiration	CON	Daily & Weekly	A contract is nearing the expiration date



List Name	Description	Module	Frequency	Notifies recipients that:
CROSSWALK	Errors in Crosswalk File	GL	Daily	A mismatch exists between accounts in the crosswalk file used for interfacing with legacy or non-AUC systems exists
CTRTABCHK	Control Table Error Check	GL	Weekly	Errors exist in the GL Control Table
CTRTABEMTY	Funds with Empty Control Table	GL	Weekly	There are funds with no entires in the General Ledger Control Table
DELACTEOD	Delete Accounts End Of Day Process	GL	As needed	Accounts were deleted via the delete accounts flagged for deletion process
GLOPNGOVEX	Create OpenGov Exports in Batch	GL	As needed	Lists details of the OpenGov export
GLPOST	Overnight GL Posting Reports	GL	As needed	Sites that post overnight to the general ledger are sent the posting reports
GLREMBAL	Recalculate Remaining Balances	GL	Daily; runs as needed	If any account types in the general ledger have changed, the system will recalculate remaining balances and issue a report
GLSHAD	Email on Check of GL Shadow File	GL	Monthly	Usually this report is only sent to support@admins.com to resolve issues with the shadow posting file of work in progress
GLUNPST	Unposted GL Entries	GL	Weekly	Any unposted general ledger entries
GLYEAREND	Create New Fiscal Year	GL	As needed	The new fiscal year process was run in batch to completion
HR1095BST	HR Attaching 1095 Forms to Employees	HR	As needed	The 1095C forms are attached to the employee records for viewing, etc.
HR1099RBST	HR Attaching 1099R to Employees	HR	As needed	The 1099R forms are attached to the pensioner records for viewing, etc.
HRAUDIT	HR Audit Reports	HR	Weekly	There are errors on the various HR tables
HRCHKBST	HR Payroll Bursting Checks/DD Advices	HR	Once or twice Daily	Attachments are complete for the most recent payroll warrant. Schedule can vary.
HRW2BST	HR Attaching W2 to Employees	HR	Yearly/As Needed	The W2 forms are attached to the employee records for viewing, etc.
JEINPRO	In-Progress Journal Entries	GL	Weekly	Journal Entries in progress
PERTAB12	Period Table < 12 Periods	GL	Weekly	There are funds in the period table with less than 12 periods
MB_3PARTY	Misc Billing Export to 3rd Party	MB	On Demand – when export step is run	If MB is setup to create export files for 3 rd parties, the export file is emailed as a ZIP.



List Name	Description	Module	Frequency	Notifies recipients that:
MBBILPST	Misc Invoice Billing	MB	On Demand – when posting step is run	Subscription Billing has been posted
MBDLYACT	Misc Bill Daily Check of Srv Type Accts	MB	Daily	The Service type accounts table was checked for errors
BROKENATT	Broken Attachments List	Multiple	Weekly	Some attachment files are missing. If user-supplied attachments are missing it is usually due to an invalid location being used when the attachments are made. The site system administrator should provide guidance to the users. System generated attachments (check copies, tax forms) reported as missing should be reviewed by ADMINS .
MEABTWAV	ME waiver on full abatement	MVE Tax	On demand	A waiver was provided on full abatement of motor vehicle excise tax
MECOMPST	ME Commitment Posting Email	MVE Tax	As needed	The motor vehicle excise tax commitment was posted
MELOCKCOMM	Lock Motor Excise Commitment	MVE Tax	As needed	The motor vehicle excise tax commitment was locked by the assessor and released to the collector
METAXBLOCK	Motor Excise Tax Blocks RIMS [CRI]	MVE Tax	Daily	Cranston, RI tax blocks
ERROR_PO	Check PO Form Maintenance Table	PO	Daily	There is an error or omission on the Accounts Payable check form table
POINPRO	In-Progress POs	PO	Weekly	Of the list of in progress purchase orders
POLIQUID	Request Cancellation of PO	PO	As needed	A user initiated a request for liquidation. (Mostly used at year end to cancel POs that will not be used.)
PONEWATT	Attachments added to Open POs < # days	PO	As needed	Purchase Order attachments were added to open purchase orders after a stated number of days
POOLDCHG	PO Change Order > 4 days	PO	Weekly	Purchase Order change orders have been in entry began for more than four days
POROLBST	PO Rollover Form Attachments	PO	Annually	Purchase Orders that were rolled over are now available as attachments
POROLOVR	Year End PO Rollovers	PO	Annually	The Purchase Order rollover process was run
PPDEMPRT	Personal Property Demand Print Service	PP Tax	Annually; may be run more frequently	Personal Property demands file for 3rd party print service location



List Name	Description	Module	Frequency	Notifies recipients that:
PPPRINT	PPPRINT Email Distribution List	PP Tax	Quarterly	The Personal Property bills have printed
COLLECT	Daily Email of Unposted Collection Batch	RC	Daily	Collection batches are unposted
DAILYBAL	Collections Daily Balance Location Email	RC	Daily	The location of the Daily Balance file for sending on to the 3rd party payment processors (includes the counts of how many Real Estate bills, etc., are selected)
RCGLREP	Collections GL Reports	RC	Daily	The revenue collections general ledger reports.
RCPRJBAL	Balance Projection Report	RC	Weekly	The balance projections are calculated and sent. (used in selected sites)
RCREMTAX	CRI - Remove Old Tax Year Processing	RC	Annually	Cranston, RI - The remove oldest year process was run and is complete. (sent to collections and finance).
RCREMTAXGL	CRI - Remove Old Tax Years for Finance	RC	Annually	Cranston, RI - The remove oldest year process was run. Reports of balances for bills removed is sent to this list.
TRHISCHK	TR Duplicate History Check	RC	Daily	There are duplicate transactions in the Treasury Receipts batches
DEM_3PARTY	Real Estate Demand 3rd Party File	RE Tax	When demands are run	Attaches a file of demands for 3rd party processing
DEM_ESCROW	Real Estate Demand Escrow File	RE Tax	When demands are run	Attaches a file of escrow amounts for 3rd party demands
DEM_ONLINE	Demands Online Vendor	RE Tax	When demands are run	Attaches a file of demands for 3rd party processors
REDEMPRT	Real Estate Demands Print Service	RE Tax	When demands are run	The Real Estate demand file for the 3rd party print service location
REESCROW	REESCROW Email Distribution List	RE Tax	On request, when bills are run	The Real Estate Escrow file was run and the file is attached (some sites run bills 2x year, some 4x)
REPRINT	REPRINT Email Distribution List	RE Tax	Quarterly	The Real Estate bills were printed
RELTOCOLL	RELEASE TO TAX COLLECTOR	RE & PP Tax	As needed	The commitment was released to the tax collector
ERROR_SY	Check SY Form Maintenance Table	SY	Daily	There is an error or omission on the System Form Maintenance table
SCHTSK	Scheduled Tasks	SY	Quarterly or semi-annually	If any of the Real Estate processes are run in Batch, the process is complete



List Name	Description	Module	Frequency	Notifies recipients that:
SUPPORT	Admins Support List	SY	As needed	A process is complete. (used in multiple processes)
SWDONE	Software Update Complete	SY	Quarterly	The software update is completed on each site.
SYABNO	SY Abnormal Term Notification	SY	As needed	ADMINS use only – this list is used to report notices of abnormal terminations to support so that issues may be quickly identified and resolved
SYSADM	SY Admin (Support & Site Sys Adm)	SY	As needed	ADMINS use only
SYUBTOAUC	Upload Utilities to AUC	SY	Daily	The values from the utility billing system are incorporated into AUC to be used on MLCs. (for selected sites)
SYUPDTRAIN	Submit Copy Live to Training in Batch	SY	As needed	The request to copy live to training was submitted and will be run; also works to notify if the copy live to training was cancelled and / or completed
TTDIST	Tax Taking Distribution List	TT	As needed	The tax taking was run