



SYSTEM (ALL MODULES)

RELEASE NOTES – DECEMBER 2018

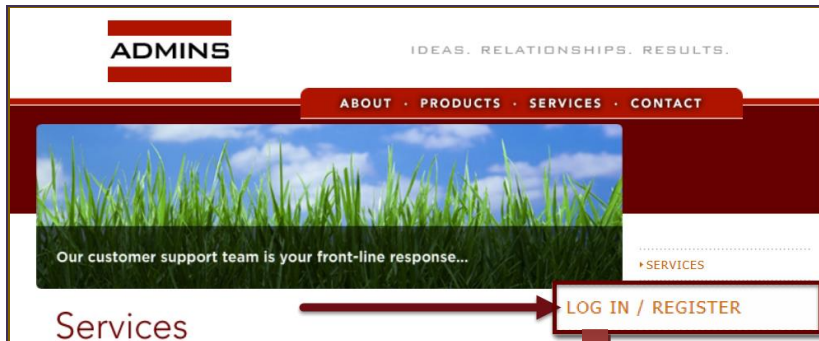
This document explains new product enhancements added to the ADMINS Unified Community for Windows **SYSTEM LIBRARY**.

CONTENTS

1	TRAINING MATERIALS AVAILABLE ON ADMINS.COM	2
2	LOGIN SCREEN CHANGE	3
3	USER MENU ▶ USER PROFILE ▶ RESTRICTED DESKTOP USER [NEW]	3
4	LEDGERS ▶ QUERIES ▶ USER ACCOUNT SECURITY [ENHANCED]	3
5	REPLACING A BANK/INACTIVATING A BANK CODE [INSTRUCTIONS]	4
5.1	Bank Codes Table	4
5.2	User Profile Screen (Multiple Tabs per User).....	5
5.2.1	User Profile Screen ▶ [3 PO/AP] Tab.....	5
5.2.2	User Profile Screen ▶ [4 Human Resources] Tab	5
5.2.3	User Profile Screen ▶ [6 Collections] Tab	5
5.2.4	User Profile Screen ▶ [7 Misc Billing] Tab	6
5.3	System ▶ Department Group Profile Tab.....	6
5.4	Module Control #2010 for AP Voucher Batches	6
5.5	Module Control #4003 for Treasury Collections Batches	6
5.6	Module Control #11002–Default Bank for Miscellaneous Billing	7
5.7	Module Control #6002–Default Bank for Human Resources.....	7
6	FILTERED LOOKUPS FOR USERNAME AND DEPARTMENTS [ENHANCED]	7
6.1	System ▶ User Menu ▶ User Profile ▶ Username Lookups [Enhanced]	7
6.1.1	Department Group Lookups for Each User [Enhanced]	9
6.2	System ▶ Department Group Menu ▶ Department Group Profile	11
6.2.1	Activate an Inactive Department or User [Instructions]	11
7	LOCKED RECORD SCREEN [ENHANCEMENT]	12
8	HELP REFERENCE LIBRARY	13
8.1	New or Updated Documentation	13
8.1.1	Accounts Payable.....	13
8.1.2	Budget	13
8.1.3	Fixed Assets	13
8.1.4	Human Resources.....	14
8.1.5	Ledgers	14
8.1.6	Miscellaneous Billing	14
8.1.7	Motor Vehicle Excise	14
8.1.8	Purchase Order	14
8.1.9	Property Tax	14
8.1.10	Revenue Collections & Tax Title.....	14
8.1.11	System.....	15



1 TRAINING MATERIALS AVAILABLE ON ADMINS.COM



There are a number of brief videos that demonstrate using the **ADMINS Unified Community (AUC)** for Windows modules. Select **Services** ► **Log In/Register**. The link will take you to the Login screen; if you have already registered, log in using your email address and the password supplied when you registered.

The login form is titled 'Login' and contains the following fields and buttons:

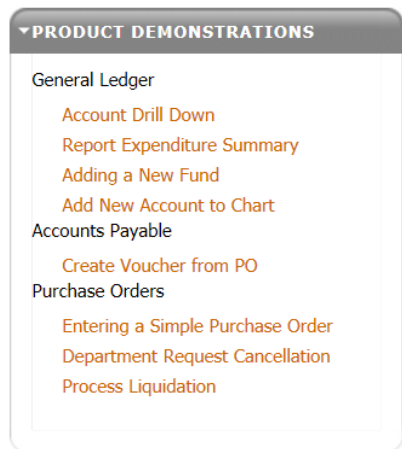
- Username:
- Password:
- SUBMIT** button
- Text: Support services are restricted to registered ADMINS users. Sign up below to request registration. We will contact you with further information.
- Registration fields:
 - First Name: (required)
 - Last Name: (required)
 - Organization: (required)
 - Email: (required)
 - Address:
 - Address 2:
 - City:
 - State:
 - Zip:
 - Phone:
 - Fax:
 - Additional Info:
- SUBMIT** button

Registration is quick and easy and **ADMINS** will **NEVER** sell your contact information or provide it to any third party.

Use this link to go directly to the product demonstrations: <http://www.admins.com/Pr1v8/customer-demos.asp>. These are intended for use only by **ADMINS** customers; please do not share them with third parties.

Customer Tools

Welcome to our Customer tools page. You will find to come.





2 LOGIN SCREEN CHANGE

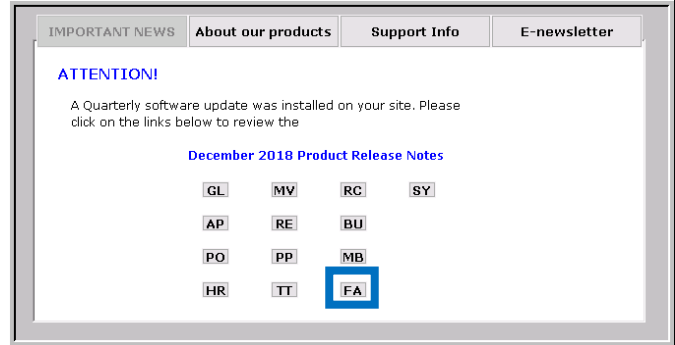
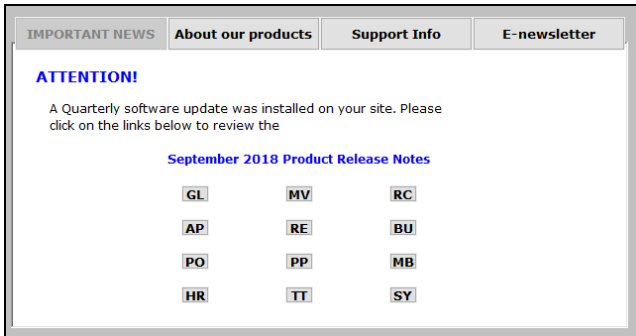
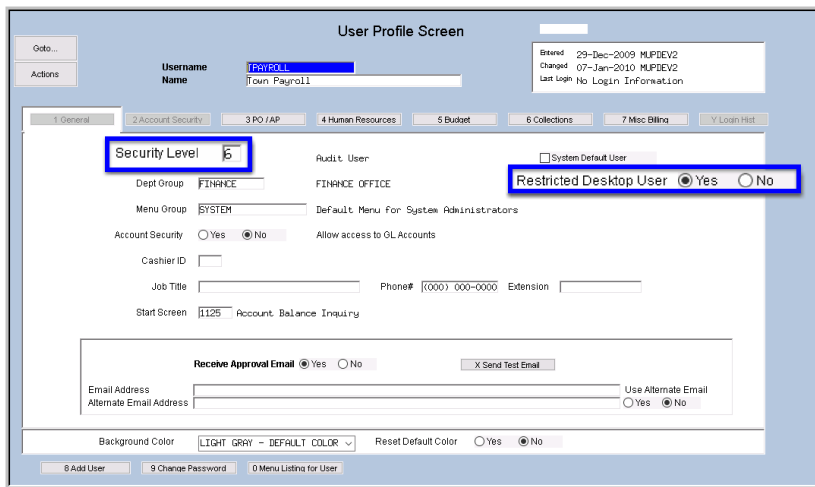


Figure 1 Before & After – home screen now lists Fixed Assets (FA) Product Release Notes

[ADM-AUC-SY-8079]

3 USER MENU ▶ USER PROFILE ▶ Restricted Desktop User [New]



ADMINS added a **Restricted Desktop User** radio button to the **System ▶ User Menu ▶ User Profile** screen.

This button should be set to **“YES”** for all users that are **not** security level 99. Only users with a security level of 99 may change this setting.

ADMINS will run a process on all sites during the software update that will set all users to **“YES”**. In addition, new users will default to **“YES”**.

[ADM-AUC-SY-8077]

4 LEDGERS ▶ Queries ▶ User Account Security [Enhanced]

When checking security for a user, the system was not finding the username based on a partial search and instead would display the message **“E13-Invalid or Inactive User”**. This was corrected. Now the system will display the next user – for example, if the username being sought is **“LuAnn”**, and **“Lu”** is entered in the username box, the **LuAnn** record will be displayed. A partial search term will display the correct record.

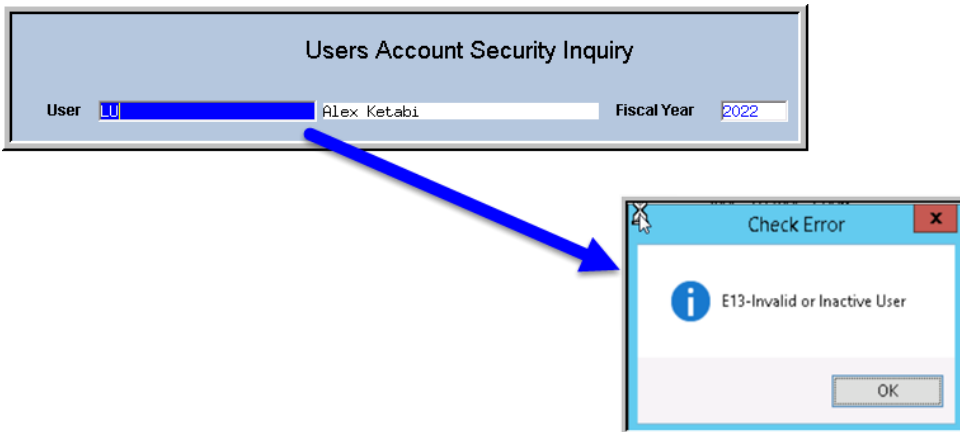


Figure 2 Before - error message when a partial search was entered

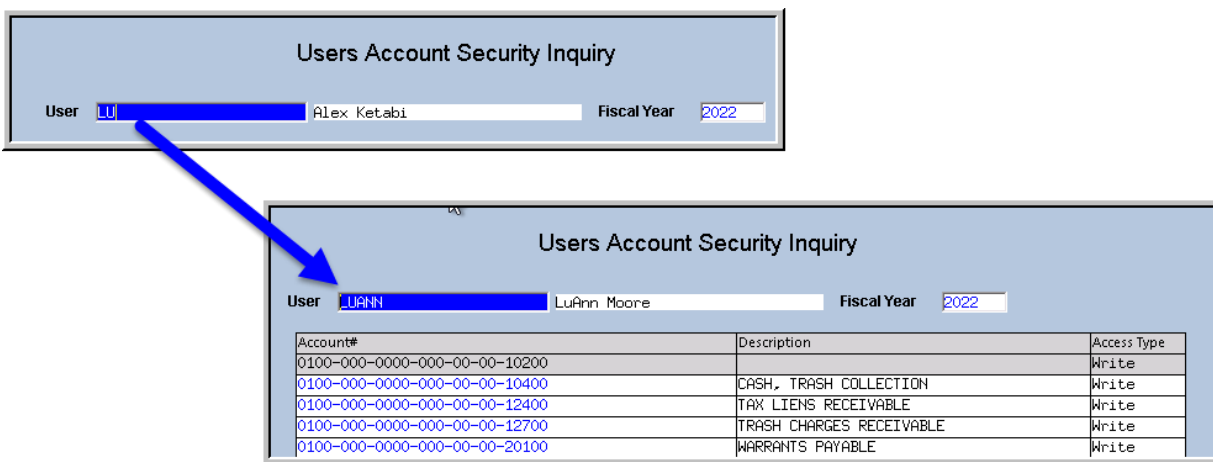


Figure 3 After – the system will match on a partial name entered and present the desired record

[ADM-AUC-GL-8312]

5 REPLACING A BANK/INACTIVATING A BANK CODE [Instructions]

To inactivate a bank code, for example when changing to a new bank, go to **Ledgers ▶ Account Maintenance ▶ Bank Codes**, select the code for the bank to inactivate, and select **Actions ▶ Inactivate Bank**.

5.1 Bank Codes Table

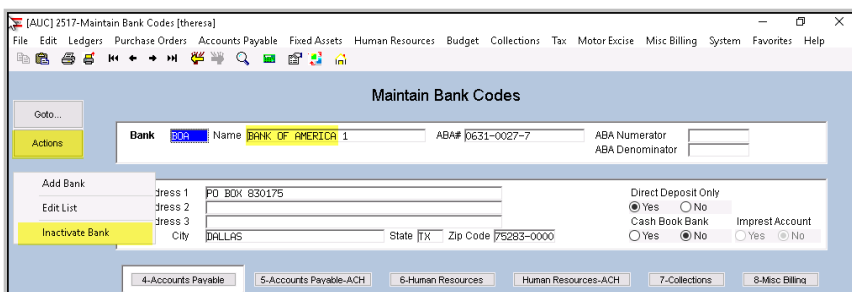




Figure 4 Inactivate a bank on the Bank Code table

5.2 User Profile Screen (Multiple Tabs per User)

Go to the **System** ▶ **User Menu** ▶ **User Profile** ▶ to set the Default Bank for users to something other than the old bank: *(If there is no bank on the user, leave it blank so that it will “fall through” and use the system default).*

5.2.1 User Profile Screen ▶ [3 PO/AP] Tab

The screenshot shows the 'User Profile Screen' for user 'THERESA'. The '3 PO / AP' tab is selected. Under 'Accounts Payable Defaults', the 'Default Bank' is set to 'EAST BANK'. Other settings include 'Access for AP/PO Vendors' set to 'Both' and 'Accept New Vendor Requests' set to 'No'.

Figure 5 Accounts Payable default bank for each user on the User Profile screen

5.2.2 User Profile Screen ▶ [4 Human Resources] Tab

The screenshot shows the 'User Profile Screen' for user 'THERESA'. The '4 Human Resources' tab is selected. Under 'Human Resource Defaults', the 'Default Bank' is set to 'PAYR PAYROLL - CITIZENS BANK'. Other settings include 'Contact Information' and 'Personal Information' both set to 'Yes'.

Figure 6 Human Resources default bank per user

5.2.3 User Profile Screen ▶ [6 Collections] Tab

The screenshot shows the 'User Profile Screen' for user 'THERESA'. The '6 Collections' tab is selected. Under 'Collection Defaults', the 'Default Bank' is set to 'BOA'. Other settings include 'Restrict User to process their own batches ONLY' set to 'No' and 'Batch Entry screen - Set button to' set to 'Submit'.

Figure 7 Collections Tab on the User Profile screen



5.2.4 User Profile Screen ▶ [7 Misc Billing] Tab

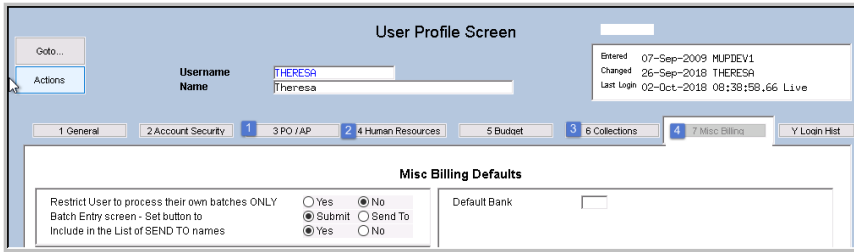


Figure 8 Miscellaneous Billing default bank for each user on the User Profile screen

5.3 System ▶ Department Group Profile Tab

System ▶ Department Group Profile ▶ Collections (for any departments that do Treasury Receipts Imports) Treasury Receipts Import Defaults section:

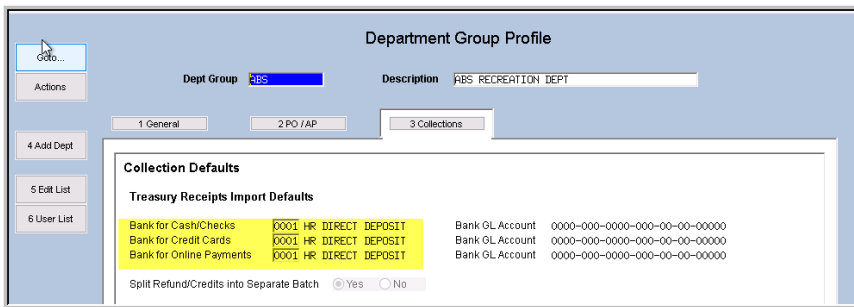


Figure 9 [3 Collections] tab has three options–Cash/Checks, Credit Cards, and Online Payments

5.4 Module Control #2010 for AP Voucher Batches

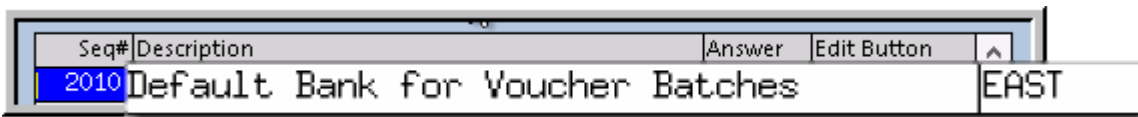


Figure 10 Accounts Payable ▶ Module Maintenance ▶ Module Control

5.5 Module Control #4003 for Treasury Collections Batches



Figure 11 Collections ▶ Module Maintenance ▶ Module Control



5.6 Module Control #11002–Default Bank for Miscellaneous Billing

Seq#	Description	Answer
11002	Default Bank Code	BOA

Figure 12 Miscellaneous Billing ▶ Module Maintenance ▶ Module Control

5.7 Module Control #6002–Default Bank for Human Resources

Seq#	Description	Answer
6002	Default HR Bank	PAYR

[ADM-AUC-DOC-156]

6 FILTERED LOOKUPS FOR USERNAME AND DEPARTMENTS [Enhanced]

ADMIINS added filtering to allow searches on usernames and departments to be restricted to “All”, only “Active”, or only “Inactive”. This preserves flexibility and offers more rapid retrieval of the user or department name by restricting the list to just the required data.

6.1 System ▶ User Menu ▶ User Profile ▶ Username Lookups [Enhanced]

The screenshot shows the 'User Profile Screen' with a search window open. The search window displays a list of users with columns for User, Name, DeptGroup, MenuGroup, Security, Status, and Tof. The list includes users like PAUL, PAUL_ADMIN, PAULP, PIECHAM, ROSCOE, SALLY-TEST, SCHOOLBUDGET, SHARON, and SUE. The search window also has buttons for OK, Find, Search, Cancel, Help, and Eof.

Figure 13 Before - only one lookup which showed all users–“Active” and “Inactive” with no filter

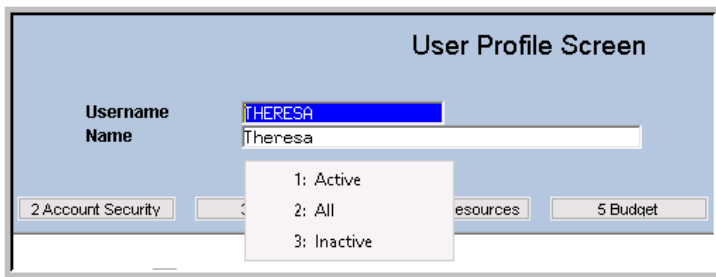


Figure 14 After – lookup on User Name may be filtered to select only “Active”, “All” or only “Inactive” users

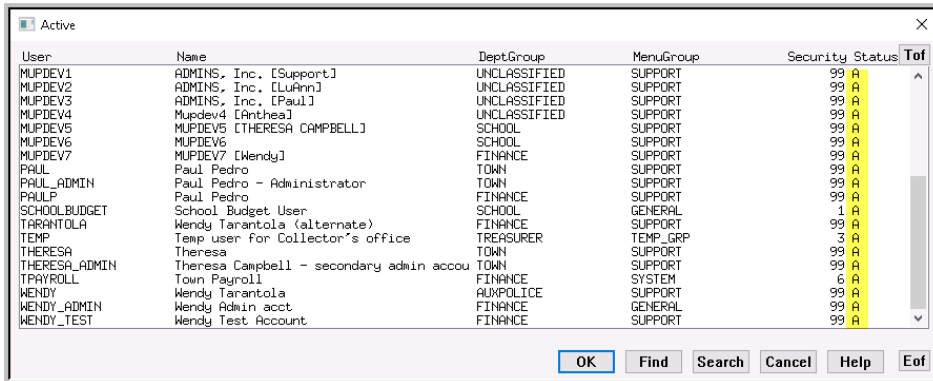


Figure 15 Only Active Users are listed when “1 Active” is selected from the lookup menu

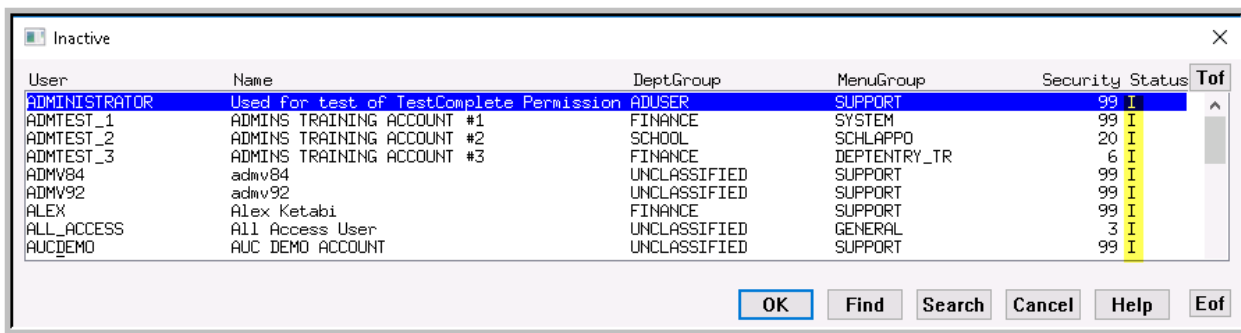


Figure 16 Only Inactive Users are listed when “3 Inactive” is selected

The Super-User may want to view inactive users when creating an account for a returning employee or when on-boarding a brand new employee to ensure that a username is not re-used. This also allows the Super-User (those with privilege level of 20) a quick view of the number of inactive users on the system.



6.1.1 Department Group Lookups for Each User [Enhanced]

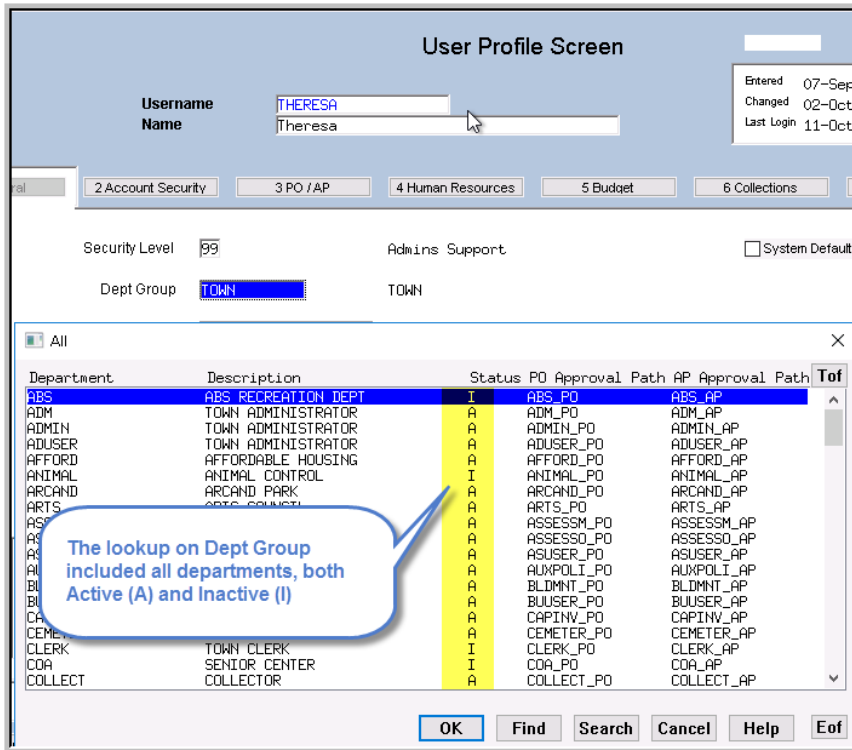


Figure 17 Before – The lookup had no filter and would display all department groups, both Active (A) and Inactive (I)

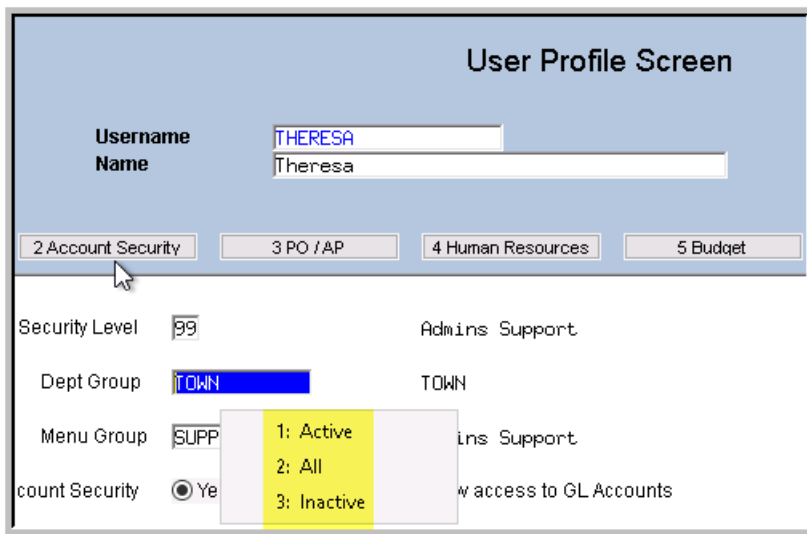


Figure 18 After – The Department group lookup now filters for Active, All, or Inactive Department groups



User Profile Screen

Entered 07
Changed 02
Last Login 11

Username: THERESA
Name: Theresa

2 Account Security | 3 PO / AP | 4 Human Resources | 5 Budget | 6 Collections

Security Level: 99 | Admins Support: System D

Dept Group: TOWN | TOWN

Active

Department	Description	Status	PO Approval Path	AP Approval Path
ADM	TOWN ADMINISTRATOR	A	ADM_PO	ADM_AP
ADMIN	TOWN ADMINISTRATOR	A	ADMIN_PO	ADMIN_AP
ADUSER	TOWN ADMINISTRATOR	A	ADUSER_PO	ADUSER_AP
AFFORD	AFFORDABLE HOUSING	A	AFFORD_PO	AFFORD_AP
ARCAND	ARCAND PARK	A	ARCAND_PO	ARCAND_AP
ARTS	ARTS COUNCIL	A	ARTS_PO	ARTS_AP
ASSESSMENT	ASSESSMENT	A	ASSESSM_PO	ASSESSM_AP
ASSESSORS	ASSESSORS	A	ASSESSO_PO	ASSESSO_AP
ASUSER	ASSESSORS	A	ASUSER_PO	ASUSER_AP

Figure 19 Only Active department groups



The system will not allow a user to be assigned to an inactive or invalid department. The full list is available to allow the super-user to see that the department is inactive and re-activate the department if necessary, using the Department Group Profile screen in section 6.2

User Profile Screen

Entered 07-Sep
Changed 02-Oct
Last Login 11-Oct

Username: THERESA
Name: Theresa

2 Account Security | 3 PO / AP | 4 Human Resources | 5 Budget | 6 Collections

Security Level: 99 | Admins Support: System Default

Dept Group: TOWN | TOWN

Inactive

Department	Description	Status	PO Approval Path	AP Approval Path
ABS	ABS RECREATION DEPT	I	ABS_PO	ABS_AP
ANIMAL	ANIMAL CONTROL	I	ANIMAL_PO	ANIMAL_AP
CLERK	TOWN CLERK	I	CLERK_PO	CLERK_AP
COR	SENIOR CENTER	I	COR_PO	COR_AP

1 CLERK | TOWN CLERK

SUPPORT | Admins | Check Error

Yes No | Allow

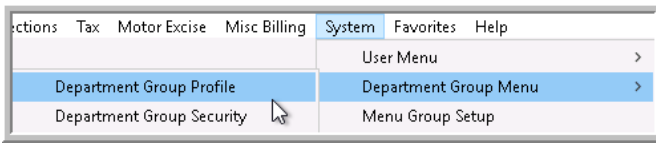
2 E1-Invalid or Inactive Department Group

2520 AP/PO Dashboard | OK

Figure 20 Error message when trying to assign a user to an "Inactive" Department Groups



6.2 System ▶ Department Group Menu ▶ Department Group Profile



A similar feature is available on the **Department Group Profile** screen.

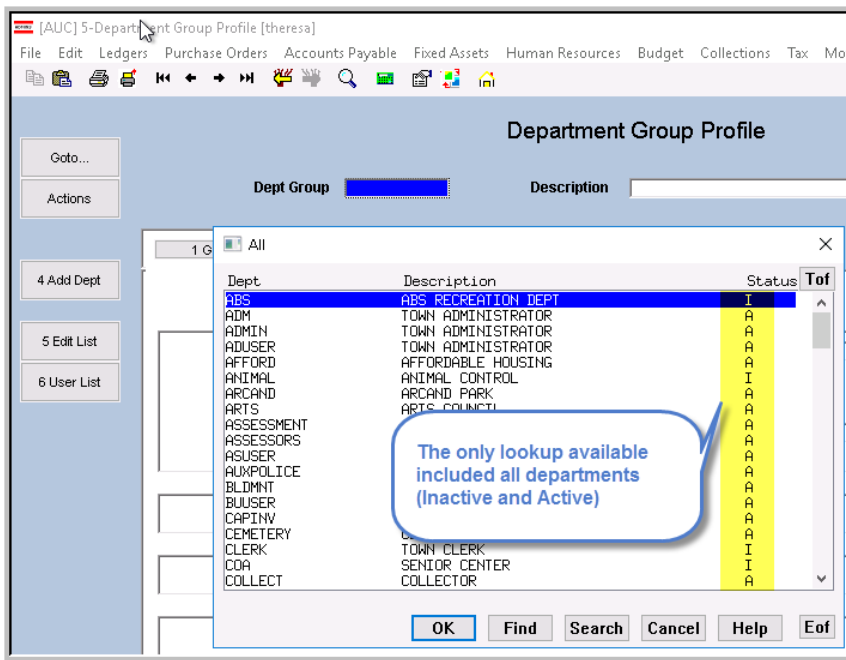


Figure 21 Before - Filtering was not offered on the lookup

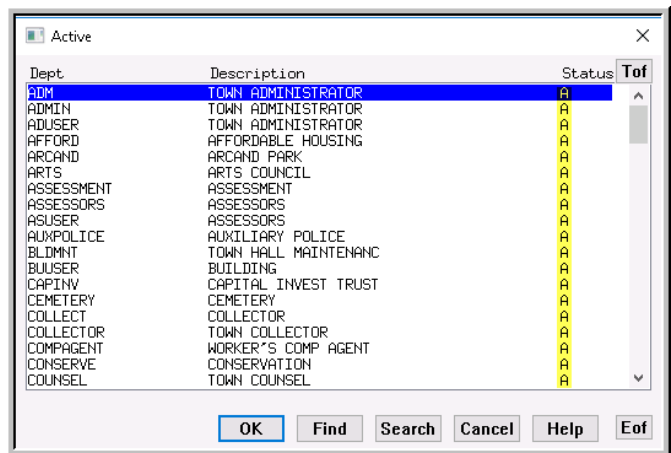
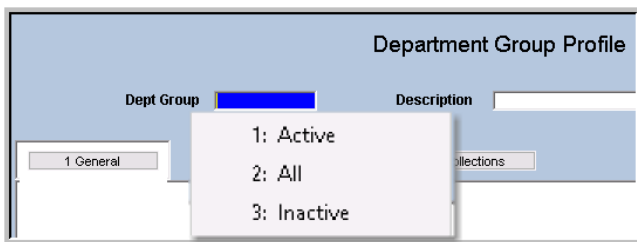


Figure 22 After - list may be restricted to “1. Active”, “2. All”, or “3. Inactive” departments – “1 Active” is shown

6.2.1 Activate an Inactive Department or User [Instructions]

To reactivate an inactive user or department, select the record and click on **[Actions] ▶ [Activate Dept]** or **[Activate User]**. The method for each is illustrated in Figure 23 below.

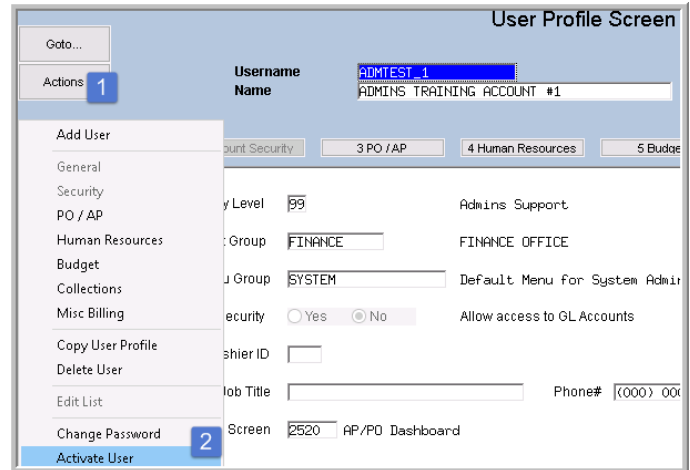
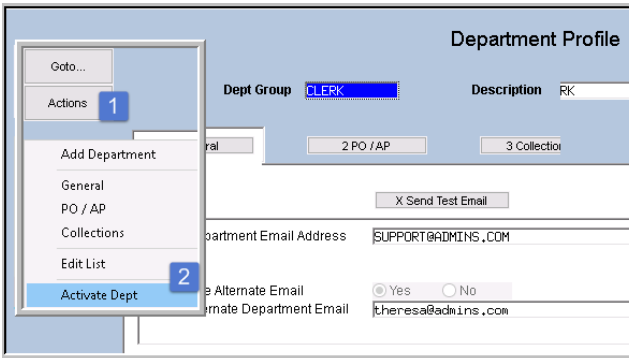


Figure 23 Activate an Inactive Department or User

[ADM-AUC-SY-8072]

7 LOCKED RECORD SCREEN [Enhancement]

ADMINS introduced a new screen with the last software update that would bring a user to a “just visiting” screen in the event that a record was locked. The screen was enhanced with this software update to include a full menu bar selection to allow the user to readily access another screen while waiting for the other user to exit. See the highlighted areas in the illustrations in Figure 24 and Figure 25 below.

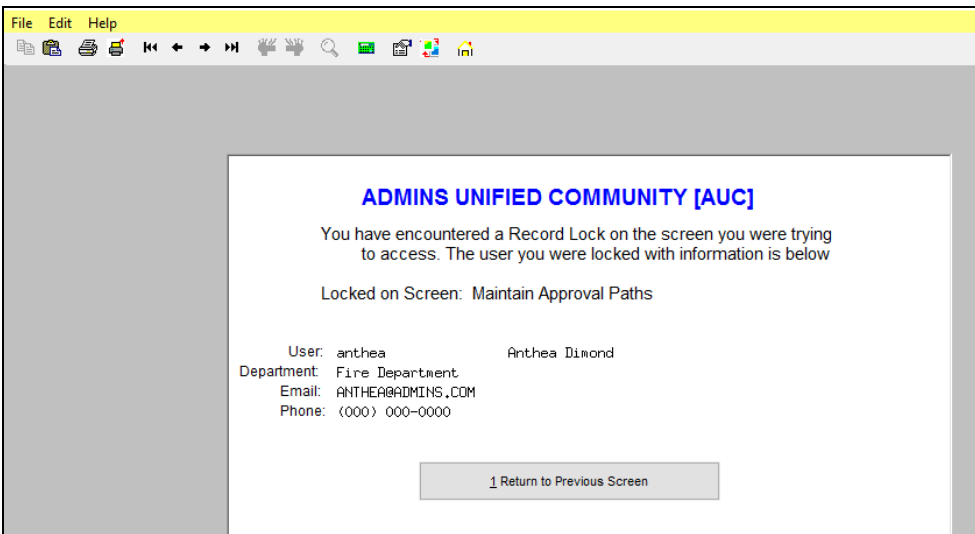


Figure 24 Before – only File, Edit and Help menus available on the File menu

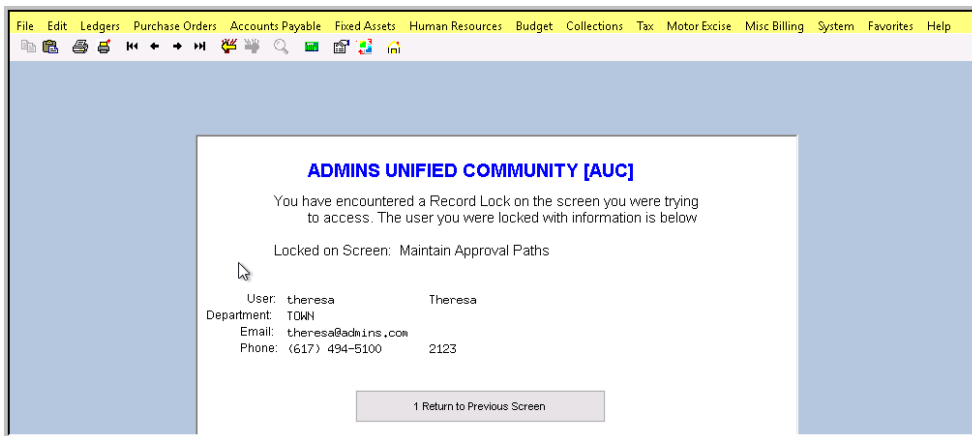


Figure 25 After – The full site menu (menus will vary by municipality) – this sample shows all of the AUC modules

[ADM-AUC-SY-8071]

8 HELP REFERENCE LIBRARY

8.1 New or Updated Documentation

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

8.1.1 Accounts Payable

- DISBURSEMENTS AP–210 Implementing a New Bank Account [Updated]
- AP–250 Void Processing [Updated]
- YEAR END PROCESSING AP–710 1099 Processing [Updated]
- AP–720 Year End Processing Slides [Updated]
- INTERFACES AP–980 Upload Vouchers–Spreadsheet [Updated]
- SYSTEM AP–1110 System Administration Kit [Updated]

8.1.2 Budget

- SITE SPECIFIC BU–160 Bellingham, MA Departmental Budget Entry Guide [New]
- SYSTEM BU–320 System Administration Kit [Updated]

8.1.3 Fixed Assets

- PROCESSING FA–200 Acquiring Fixed Assets [Updated]
- FA–210 Disposing of Fixed Assets [Updated]
- FA–220 Asset Changes [Updated]
- FA–230 Depreciation Process [Updated]
- MAINTENANCE FA–330 Asset Maintenance [Updated]
- REPORTS FA–510 Asset Reports [Updated]
- FA–520 Depreciation Reports [Updated]
- TABLES FA–610 Fixed Asset Tables [Updated]



8.1.4 Human Resources

- REPORTS HR–590 Employee Reports [New]
- YEAR END HR–630 W2 Year End Training Slides [Updated]
HR–640 IRS Instructions for Forms W2 [Updated]
HR–660 IRS Instructions for Forms 1099–R [Updated]
HR–670 1099–R Slides [Updated]
HR–680 Instructions for Forms 1094C & 1095C [Updated]
HR–760 ACA Webinar Slides [Updated]
- SITE SPECIFIC HR–1007 Danvers, MA CrewSense® Import Instructions [New]
- SYSTEM HR–1110 System Administration Kit [Updated]

8.1.5 Ledgers

- YEAR END PROCESSING GL–723 Copy Accounts Changing Fiscal Year (OnLine) [New]
- SYSTEM GL–1310 System Administration Kit [Updated]

8.1.6 Miscellaneous Billing

- OTHER MB–610 System Administration Kit [Updated]

8.1.7 Motor Vehicle Excise

- SYSTEM ME–410 System Administration Kit [Updated]

8.1.8 Purchase Order

- TEMPLATES PO–830 Upload Vendors Template [Repaired Link]
- SYSTEM PO–1010 System Administration Kit [Updated]

8.1.9 Property Tax

- SYSTEM RE–770 System Administration Kit [Updated]

8.1.10 Revenue Collections & Tax Title

- OTHER RC–910 Refunds [Updated]
- TABLES RC–1510 Implementing a New Bank Account [Updated & New to this Library]



• SYSTEM

RC-1910 System Administration Kit

[Updated]

8.1.11 System

Requirement	Note
Remote Desktop Services Session Limits	<p>We recommend that you implement the following RDP settings to address idle sessions on the application server.</p> <ul style="list-style-type: none"> • After 2 hours, disconnect the idle session. • After 1 hour, logoff the disconnected session. • Server 2016—do not disconnect the idle session; after 2 hours log off the idle session <p>This ensures that idle resources are properly terminated from the server after a maximum period of 3 hours.</p> <p>For Server 2008 environments, this is found in <i>Remote Desktop Session Host Configuration</i>. For Server 2012 environments, this is found in <i>Remote Desktop Session Host Configuration</i>.</p>

The **ADMINS UNIFIED COMMUNITY (AUC) System Administration Kit** was updated. Section 4.1 has advice specific to idle sessions on System 2016 servers; Section 4.2 has a new section on creating an **AUCBATCH** account for running scheduled tasks. Section 11, Appendix B was revised to remove references to specific **VPN** products.

Figure 26 Section 4.1 from the System Administration Kit

4.2. USER ACCOUNTS - FOR ADMINS SUPPORT STAFF		
<p>In order for ADMINS, Inc. to provide installation, training and support services the following must be configured on the server before installation begins.</p> <p>It is recommended that these accounts be established as local (not domain) users and that the passwords be configured to <i>not expire</i>.</p>		
Requirement	Purpose	Note
Create the following user accounts on the application server:	To be used by ADMINS, Inc. to provide installation, training and support services.	To be configured by Customer
MUPDEV1 MUPDEV2 MUPDEV3 MUPDEV5	Remote access to these accounts must be available such that all support staff may log on to the AUC server simultaneously to ensure that Customers receive highly responsive support. If a Customer does not comply with this requirement, support will be delayed.	
MUPDEV4	Configure this account to have Administrator privileges to the application server.	To be configured by Customer
AUCBATCH	Configure this account to have Administrator privileges to the application server. This account must be able to create and run scheduled tasks.	To be configured by Customer

Figure 27 Section 4.2 of the System Administration Kit



11. APPENDIX B – VIRTUAL PRIVATE NETWORKS (VPN) AND AUC

The AUC server may be accessed via a number of VPNs. ADMINS strongly encourages customers to employ virtual private networks to ensure the safety and integrity of mission critical data.

ADMINS makes no recommendation that a particular VPN be deployed.

AUC will run on physical or virtual servers.

Figure 28 Appendix B of the System Administration Kit

- SYSTEM

SY-170 System Administration Kit

[Revised]