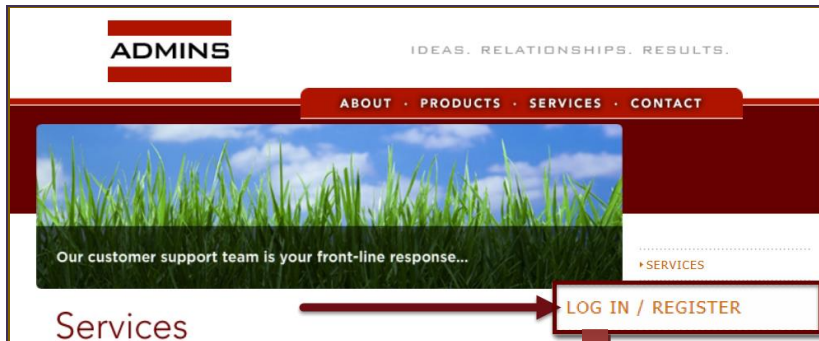# SYSTEM (ALL MODULES)

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

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.

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.

Property of ADMINS, Inc. No unauthorized use, distribution or reproduction permitted.

Page 2 of 16
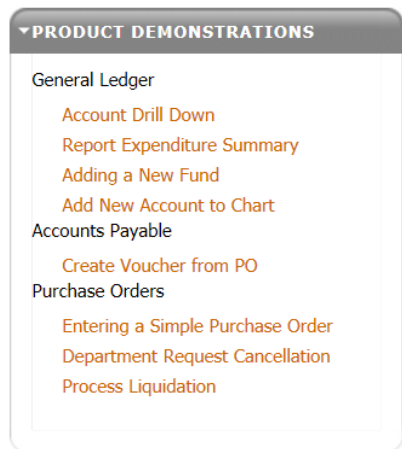
2 LOGIN SCREEN CHANGE
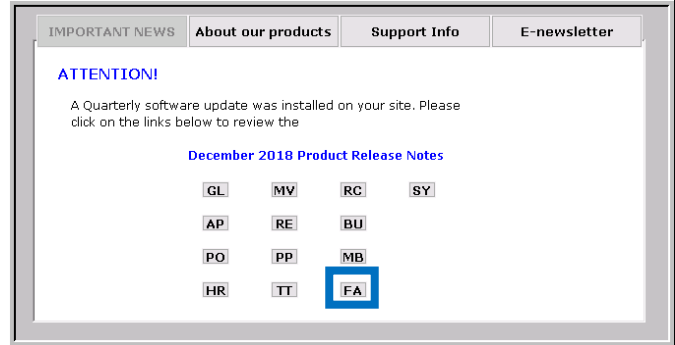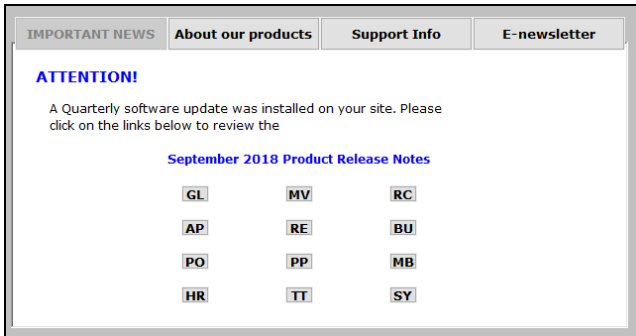
Figure 1 Before & After – home screen now lists Fixed Assets (FA) Product Release Notes

[ADM-AUC-SY-8079]

3 USER MENU ▶ USER PROFILE ▶ Restricted Desktop User [New]
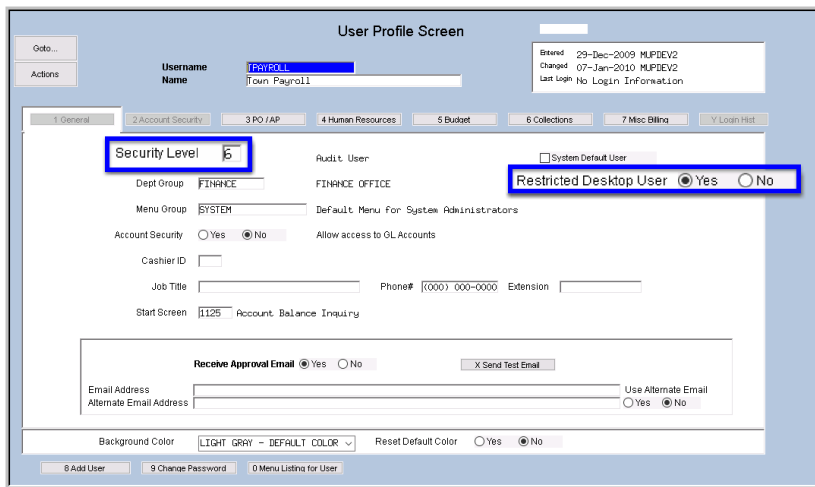
ADMINS added a **Restricted Desktop User** radio button to the **System ▶ User Menu ▶ User Profile** screen.

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.
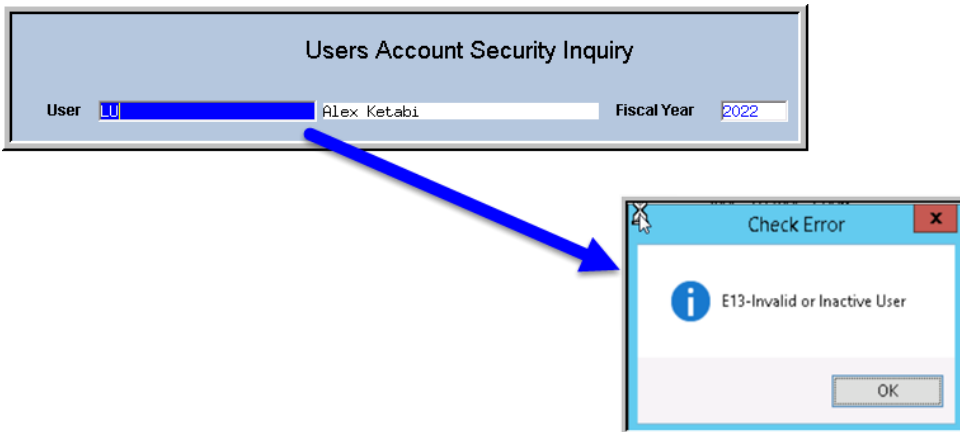
Figure 2 Before - error message when a partial search was entered
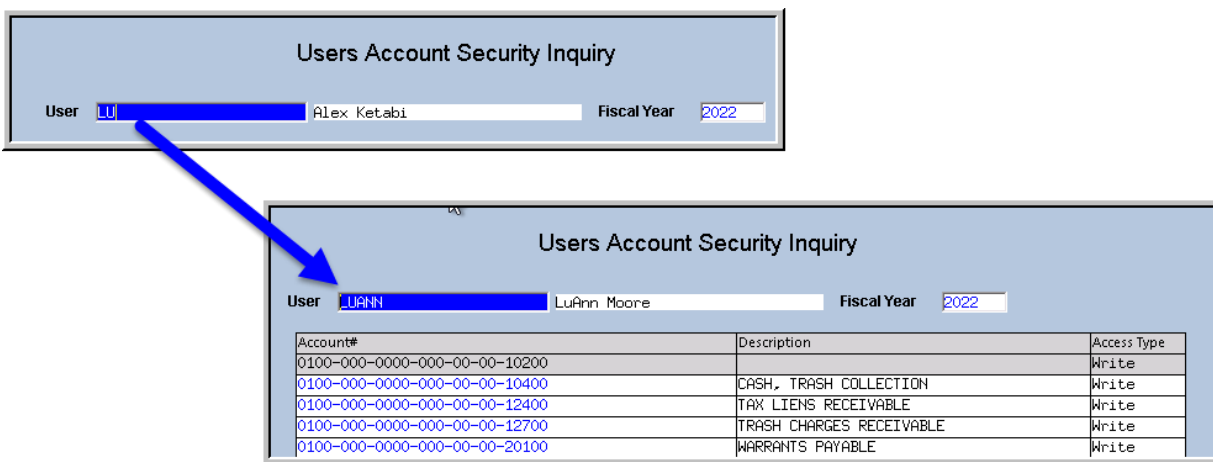
Figure 3 After – the system will match on a partial name entered and present the desired record

[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
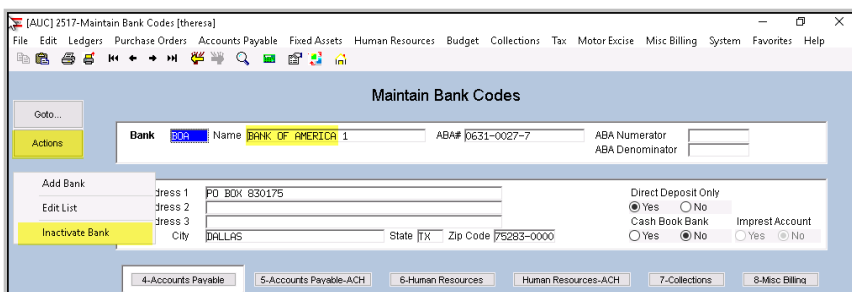
Figure 4 Inactivate a bank on the Bank Code table

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

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

5.2.2   User Profile Screen ▶ [4 Human Resources] Tab

Figure 6 Human Resources default bank per user

5.2.3   User Profile Screen ▶ [6 Collections] Tab

Figure 7 Collections Tab on the User Profile screen

5.2.4   User Profile Screen ▶ [7 Misc Billing] Tab
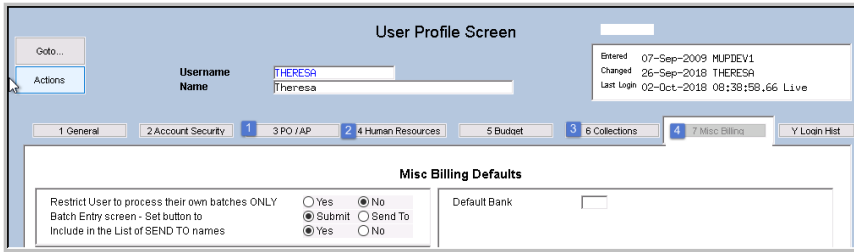
Figure 8 Miscellaneous Billing default bank for each user on the User Profile screen

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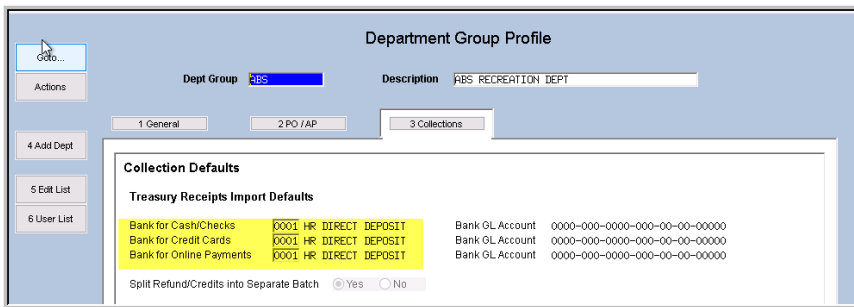
Figure 9 [3 Collections] tab has three options–Cash/Checks, Credit Cards, and Online Payments

5.4 Module Control #2010 for AP Voucher Batches
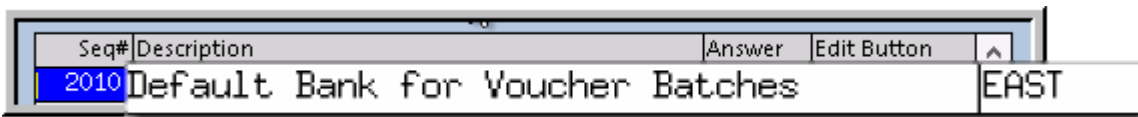
Figure 10 Accounts Payable ▶ Module Maintenance ▶ Module Control

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]

ADMINS 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]

Figure 13 Before - only one lookup which showed all users–"Active" and "Inactive" with no filter
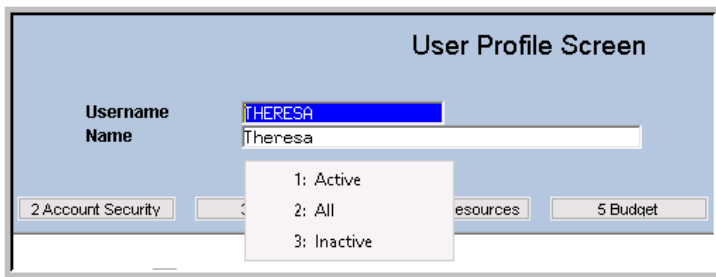
Figure 14 After – lookup on User Name may be filtered to select only "Active", "All" or only "Inactive" users
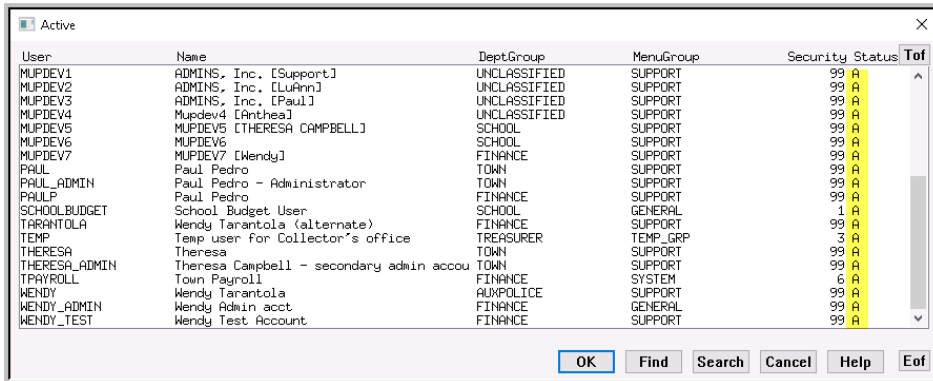
Figure 15 Only Active Users are listed when "1 Active" is selected from the lookup menu
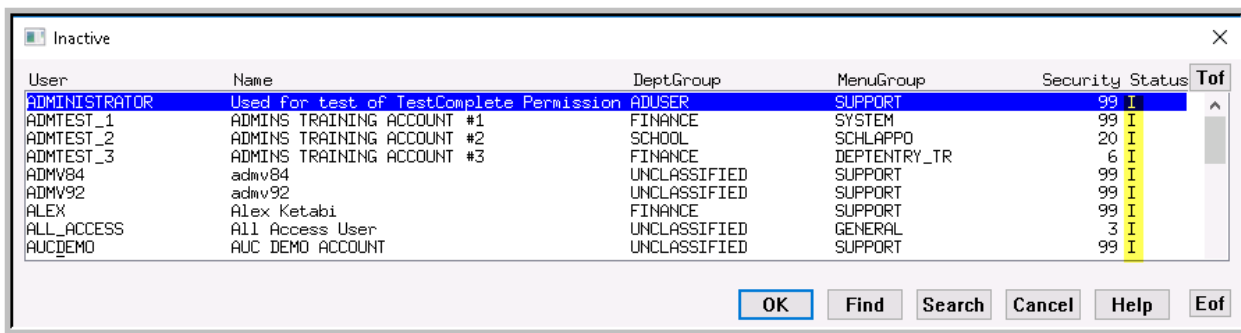
Figure 16 Only Inactive Users are listed when "3 Inactive" is selected

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]
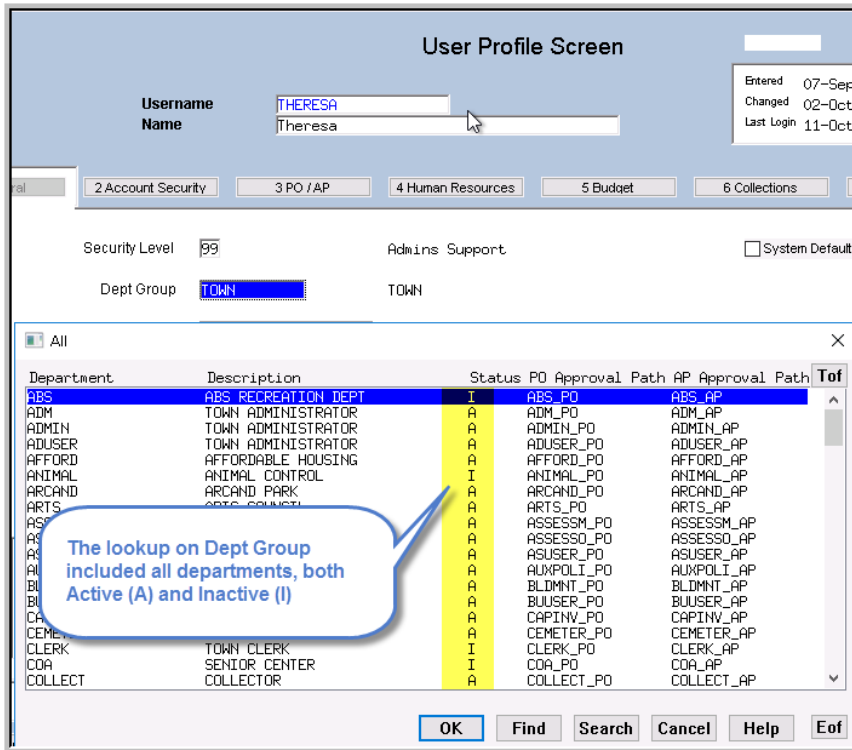
Figure 17 Before – The lookup had no filter and would display all department groups, both Active (A) and Inactive (I)
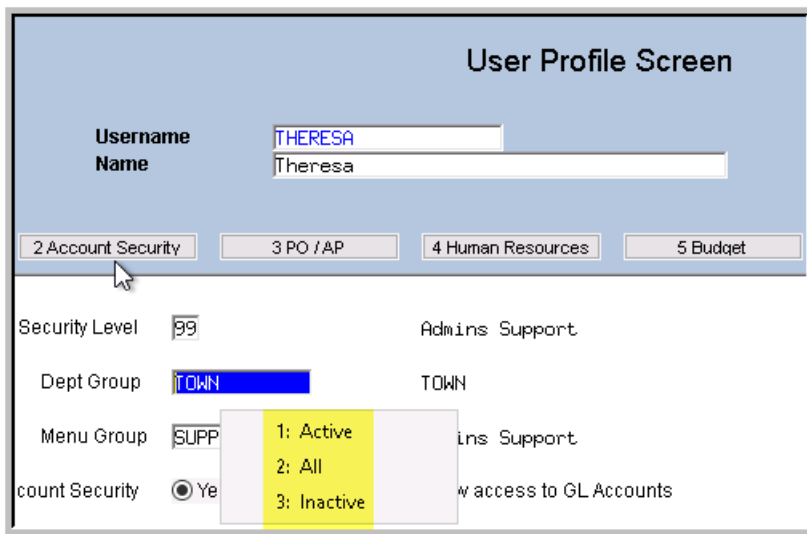
Figure 18 After – The Department group lookup now filters for Active, All, or Inactive Department groups

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

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

6.2 System ▶ Department Group Menu ▶ Department Group Profile
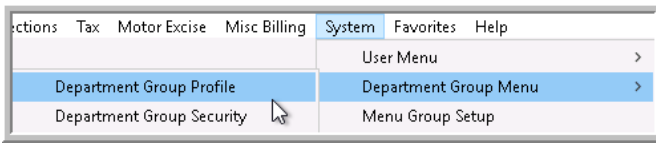
A similar feature is available on the **Department Group Profile** screen.
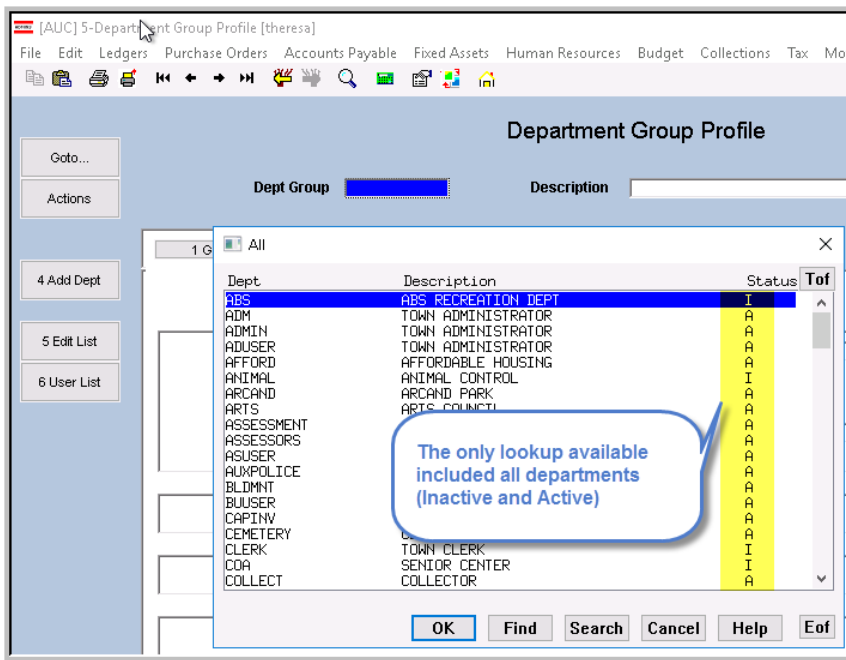
Figure 21 Before - Filtering was not offered on the lookup
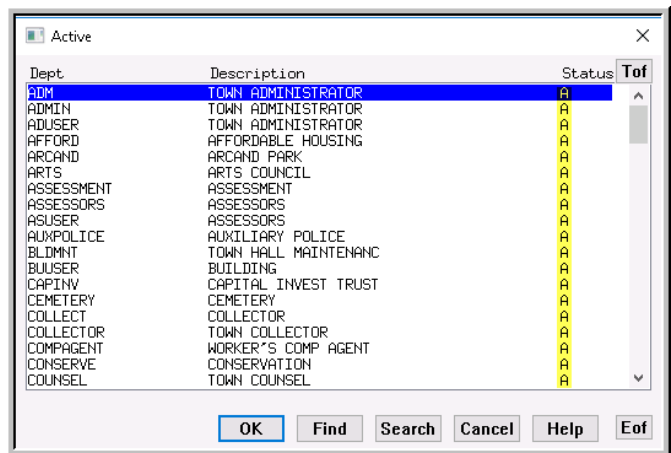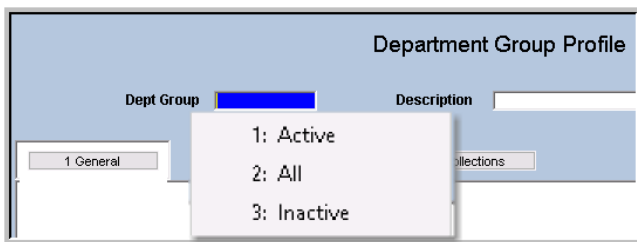
Figure 22 After - list may be restricted to "1. Active", "2. All", or "3. Inactive" departments – "1 Active" is shown

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.
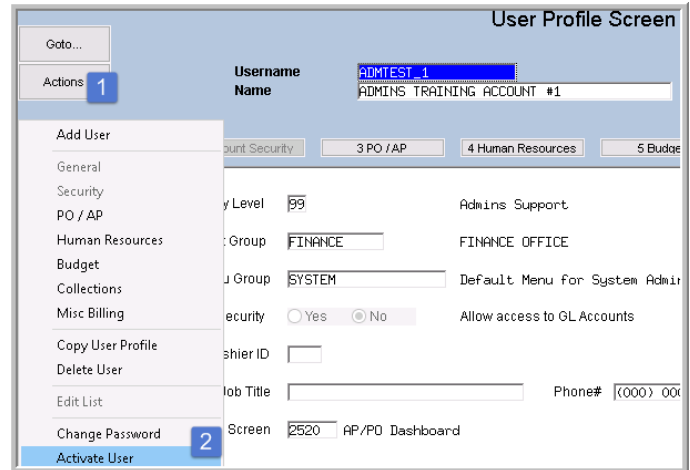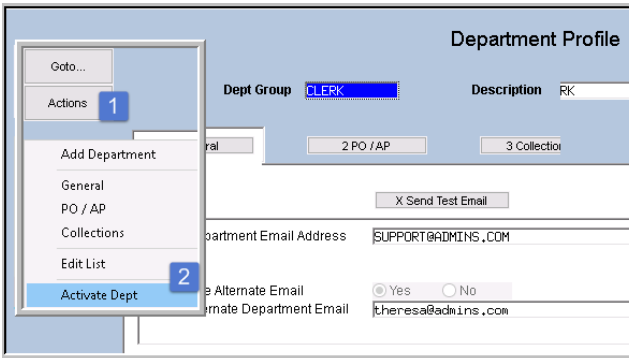
Figure 23 Activate an Inactive Department or User

[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 24and Figure 25 below.
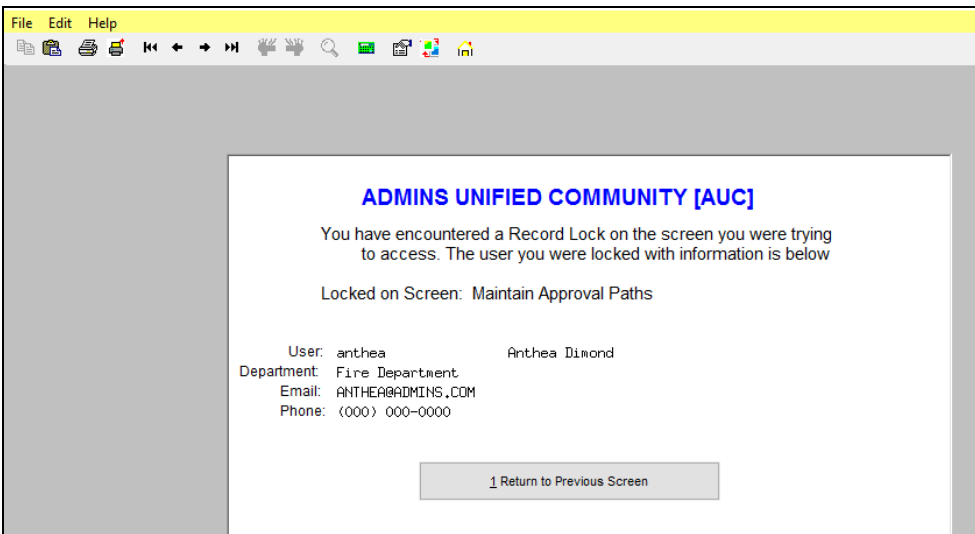
Figure 24 Before – only File, Edit and Help menus available on the File menu
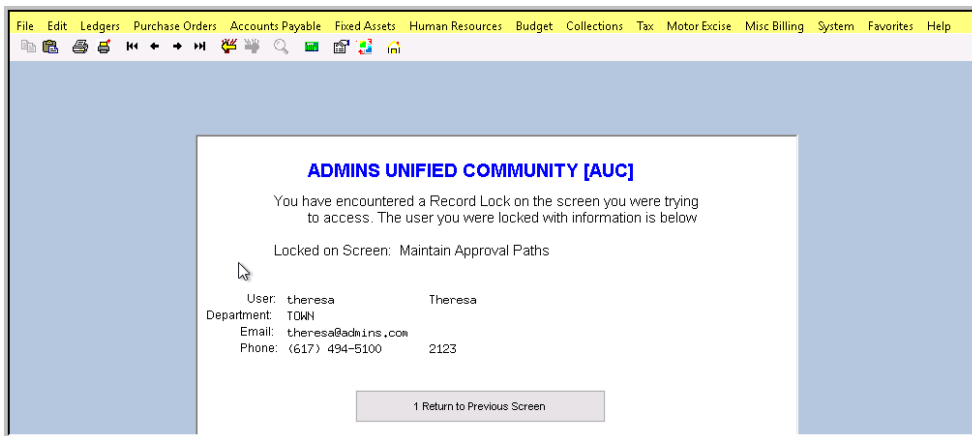
Figure 25 After – The full site menu (menus will vary by municipality) – this sample shows all of the AUC modules

[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	We recommend that you implement the following RDP settings to address idle sessions on the application server. • 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 This ensures that idle resources are properly terminated from the server after a maximum period of 3 hours. For Server 2008 environments, this is found in *Remote Desktop Session Host Configuration*. For Server 2012 environments, this is found in *Remote Desktop Session Host Configuration*.

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

In order for ADMINS, Inc. to provide installation, training and support services the following must be configured on the server before installation begins.

It is recommended that these accounts be established as local (not domain) users and that the passwords be configured to *not expire*.

Requirement	Purpose	Note
Create the following user accounts on the application server: MUPDEV1 MUPDEV2 MUPDEV3 MUPDEV5	To be used by ADMINS, Inc. to provide installation, training and support services. 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.	To be configured by Customer
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]