



SYSTEM (ALL MODULES)

RELEASE NOTES – JUNE 2018

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

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1. REVIEW AND INACTIVATE USERS [Information]

The super user on each site should regularly review the list of active AUC users to ensure that only currently employed users with a need to use the system are active users on the system. To begin, run the report described in section 2 to identify candidates to inactivate.

To inactivate a user, select **System ▶ User Menu ▶ User Profile** and type in the username or select it from the lookup. Then select **[Actions] ▶ Inactivate User**.

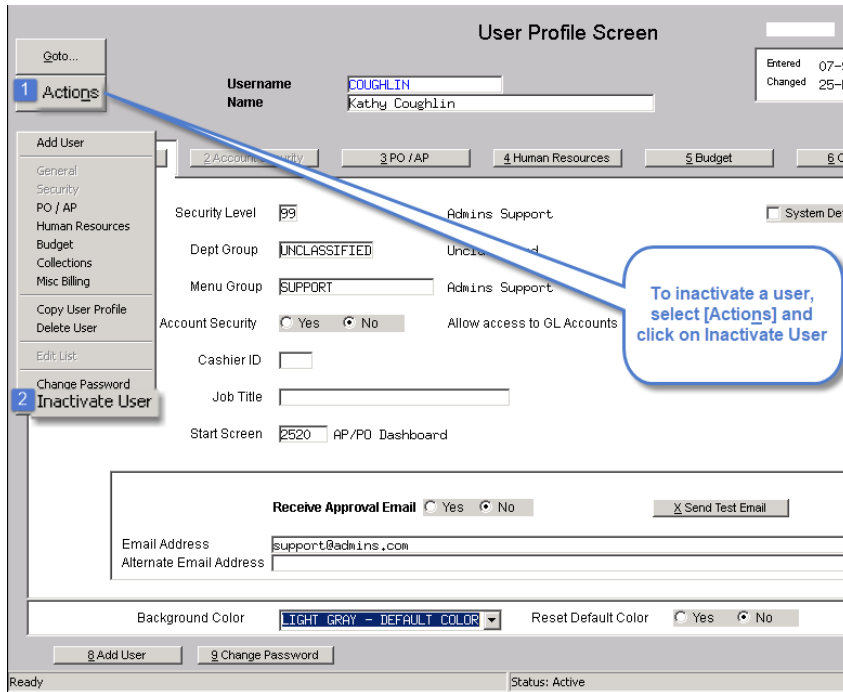


Figure 1 Inactivate a User (this is a toggle – the same method is used to Activate an Inactive User)

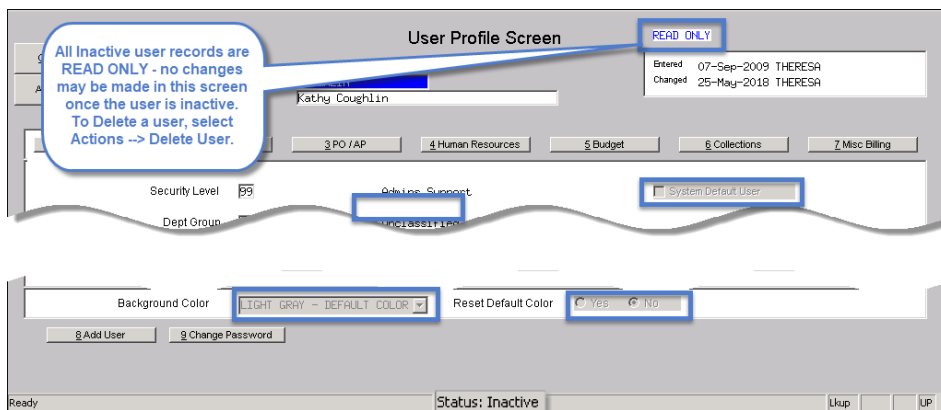


Figure 2 Inactive users show up as “READ ONLY” and the record may not be altered without activating the user

Users with no batches or approval paths assigned to them may subsequently be deleted. Many sites find it helpful to keep a user’s record inactive (without deleting it) until someone new assumes the role and responsibility. Then the “copy defaults from an existing user option” may be used to replicate access.

[ADM-AUC-SY-8085]



2. REPORTS – MENU LISTING FOR ACTIVE USERS [Enhancement]

You can now enter a Task ID when listing the available menus for active users. Select **System ▶ Reports ▶ Menu Listing for Active Users**.

Task 39: Menu Listing for Active Users

Menu Listing for Active Users

Optional: Enter Username

Optional: Restrict to Module

Include Hidden/Grey Menu Items Yes No

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

Buttons: Lookup, OK, Cancel, Clear All

Figure 3 Before: No filter by Task ID

This filter will allow the super user to create a list of all users able to perform a particular task within AUC and will assist the super user in ensuring that the right users have the access they need. This report also lists any currently active users in AUC and may be used as part of a regular review of users who should be inactivated due to a change in position or termination from employment.

Task 39: Menu Listing for Active Users

Menu Listing for Active Users

Optional: Enter Username

Optional: Restrict to Module

Include Hidden/Grey Menu Items Yes No

Optional: Enter Task ID

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

Buttons: Lookup, OK, Cancel, Clear All

Figure 4 After: Optional Filter by Task ID

[ADM-AUC-SY-8046]

3. APPROVAL PATH REPORTS & FILES [FIX]

Some early adopters of AUC had established “pre-purchase order” approvals – and the users would appear on the approval entry screen and on reports. This “pre-purchase order” approval was not used and was removed from the entry screens.

2501-APPORPATH.REP Printed 23-Apr-2018 at 11:12:57 by MUPDEV5 Page 219
City of
Approval Path Edit Report

Approval Path: SCHOOL_AP School_AP

Description	Minimum	Primary	Secondary	Tertiary
Budget Override				
Purchasing				
Audit	50000.00			
Finance				
FO Change Order	% 10.00			
AP Change Order	% 10.00			
Pre-PO Approvals		Dave	Marianne	

Figure 5 Approval Path Edit Report showing Pre-PO Approvals



Super users were unable to remove some inactive usernames from the user profile screen due to the names remaining on some approval paths, for example, “Dave” and “Marianne” on the report above. ADMINS updated the [Actions ▶ Replace User] and [Actions ▶ Remove User] features on the approval table to include those “pre-purchase order” approvals fields. Now the fields will be cleared out when a user is replaced or removed from the Accounts Payable ▶ Tables ▶ Maintain Approval Paths screen.

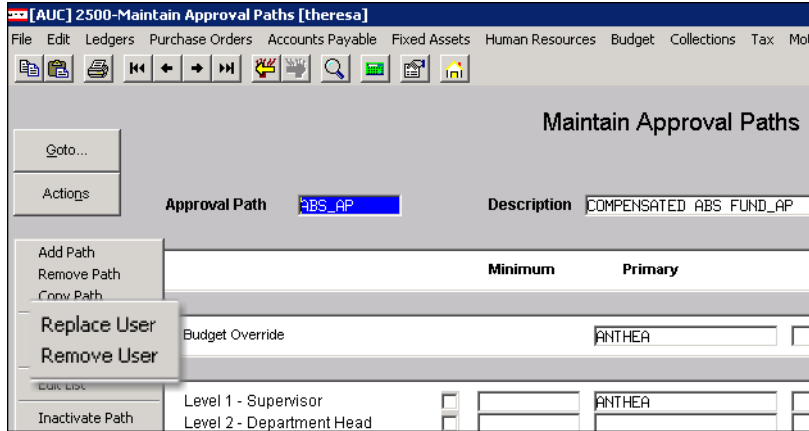


Figure 6 The Actions ▶ Replace User and Remove User feature

The report will still show the Pre-PO Approvals in the event that there are any usernames remaining and to allow the option to re-instate the feature at a later date.

[ADM-AUC-SY-8052]

4. HELP REFERENCE LIBRARY

4.1. New or Updated Documentation

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

4.1.1. Accounts Payable

- OTHER AP-885 How to Exit from AUC [New]
- AP-890 The Best Way to Contact Support [New]

4.1.2. Budget

- OTHER GL-250 How to Exit from AUC [New]
- GL-260 The Best Way to Contact Support [New]

4.1.3. Fixed Assets

- PROCESSING FA-110 Fixed Assets Overview [New]
- FA-200 Acquiring Fixed Assets [New]
- FA-210 Disposing of Fixed Assets [New]
- FA-220 Asset Changes [New]
- FA-230 Depreciation Process [New]
- MAINTENANCE FA-330 Asset Maintenance [New]
- FA-340 Module Maintenance [New]



- REPORTS
 - FA–510 Asset Reports [New]
 - FA–520 Depreciation Reports [New]
 - FA–520 Other Reports [New]
- TABLES
 - FA–610 Fixed Asset Tables [New]
- TEMPLATES
 - FA–650 Upload Fixed Assets Acquisition Template [New]
- OTHER
 - FA–720 I Forgot to Print My Reports... [New]
 - FA–730 Email Distribution Lists [New]
 - FA–740 Menu and Toolbar Tips [New]
 - FA–760 How to Exit from AUC [New]
 - FA–765 The Best Way to Contact Support [New]

4.1.4. Human Resources

- YEAR END PROCESSING
 - HR–610 Fiscal Year End–Split Payroll PowerPoint® Slides [Updated]
- OTHER
 - HR–910 How to Exit from AUC [New]
 - HR–920 The Best Way to Contact Support [New]

4.1.5. Ledgers

- OTHER
 - GL-1280 How to Exit from AUC [New]
 - GL-1295 The Best Way to Contact Support [New]

4.1.6. Miscellaneous Billing

- OTHER
 - MB–550-How to Exit from AUC [New]
 - MB–560-The Best Way to Contact Support [New]

4.1.7. Motor Vehicle Excise

- OTHER
 - ME–370 How to Exit from AUC [New]
 - ME–380 The Best Way to Contact Support [New]

4.1.8. Purchase Order

- YEAR END PROCESSING
 - PO–780 PO Rollovers PowerPoint® Presentation Slides [Updated]
- OTHER
 - PO–990 How to Exit from AUC [New]
 - PO–995 The Best Way to Contact Support [New]

4.1.9. Real Estate Tax

- ABATEMENTS
 - RE–540 Abatement Rescission [Re-Installed]
- OTHER
 - RE–760 How to Exit from AUC [New]
 - RE–765 The Best Way to Contact Support [New]

4.1.10. Revenue Collections

- OTHER
 - RC–1870 How to Exit from AUC [New]
 - RC–1880 The Best Way to Contact Support [New]

4.1.11. System/All Modules

- OTHER
 - SY–190 How to Exit from AUC [New]
 - SY–200 The Best Way to Contact Support [New]