SYSTEM (ALL MODULES)

RELEASE NOTES – JUNE 2019

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

CONTENTS

Anytime this symbol is used in the release notes, it indicates that the feature is "locked" and limited for use by "Super-Users" with a minimum security level of 20.

1   USER MENU ▶ User Profile Screen

Prior to the software update, users were limited to retrieving only output files that were created under their own user name.

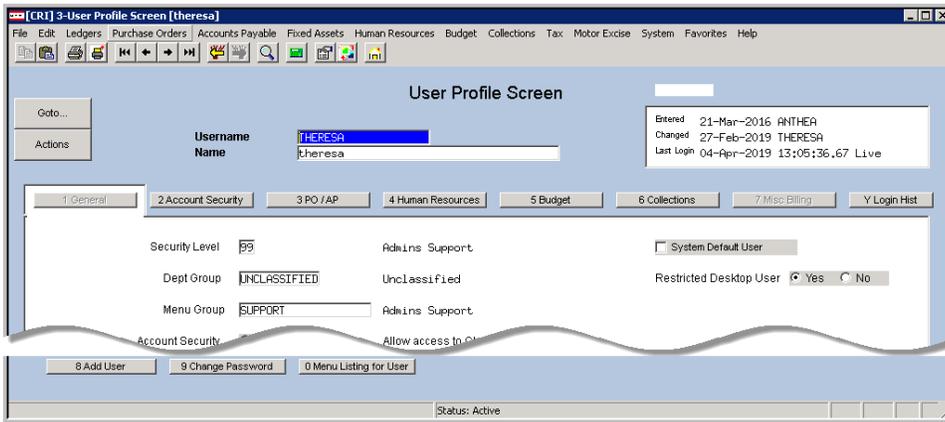## 1.1   [1 General] Override Username Restrictions [Enhancement]

Figure 1 Before – User Profile Screen

ADMINS added a new **Override Username Restriction Radio Button** on the user profile screen that allows **"Super Users"** (Security Level 20) to open other users' output via the **Reports ▶ Retrieve Output Files** menu.
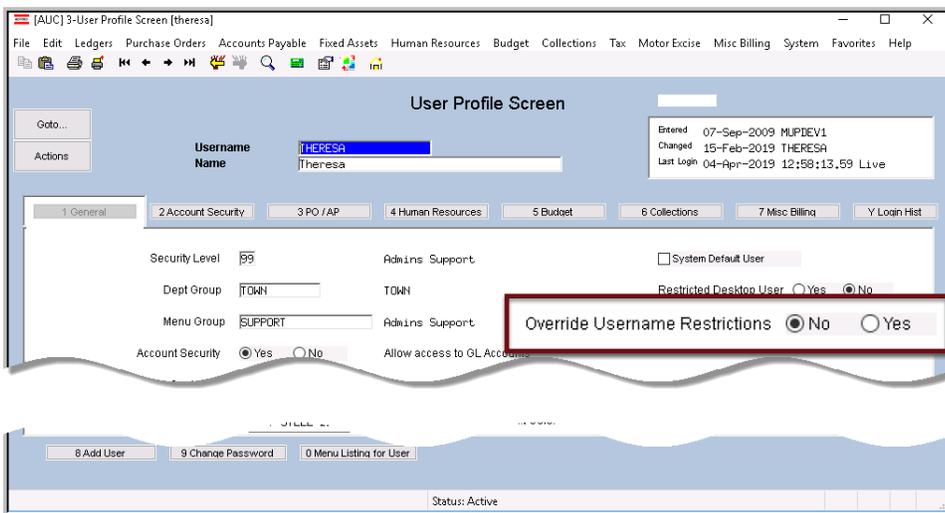
Figure 2 After – User Profile Screen with Override Username Restrictions Radio Button

Check the **"Yes"** radio button for each user who is to be granted the privilege. **"No"** is the default. This privilege is restricted to users with a minimum **Security Level of 20**.
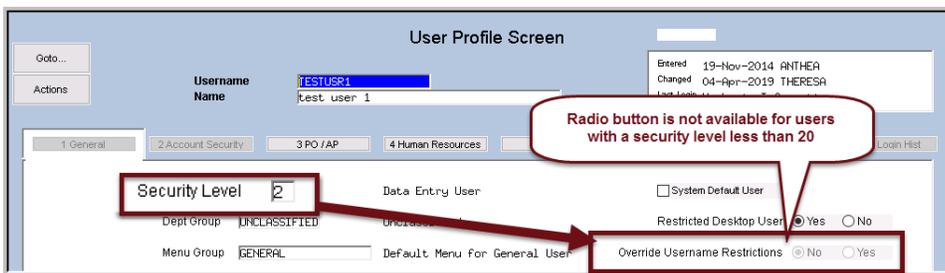
Figure 3 Feature is only available to users with a minimum Security Level of 20

The radio button will not be accessible on the screen for users with security levels lower than **20**.

See **Figure 3.**

Exercise care when granting this access to avoid unintended consequences – opening all files means accessing <mark>*any and all existing reports created by any user from any module*</mark>**; this bypasses** ADMINS **departmental and account security.**
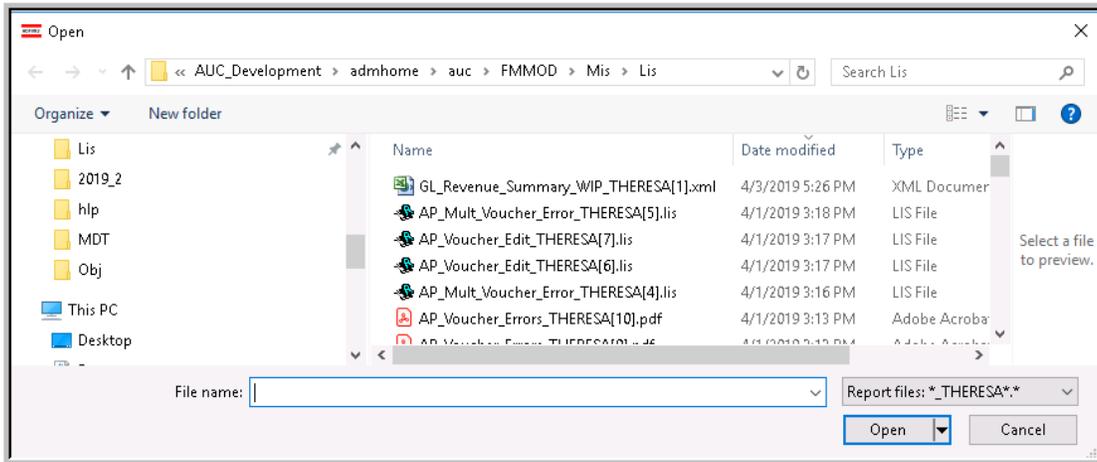
Figure 4 Retrieve Output Files presents only files matching the username "THERESA"

"Super Users" with the override restriction set to **"Yes"** may enter an asterisk in the filename field; as shown in **Figure 5**, now all files are listed and may be selected for viewing:

Figure 5 Enter an asterisk * in the File Name field to view all files – the user "Theresa" may now view files created by the users "LuAnn" and "Anthea"

[ADM-AUC-SY-8096]

2 [3 PO/AP] Print & Post Purchase Orders Radio Button [Enhancement]

Figure 6 Print & Post POs radio button is ghosted if PO #s are not suppressed

2.1 Users with Print & Post POs Privilege
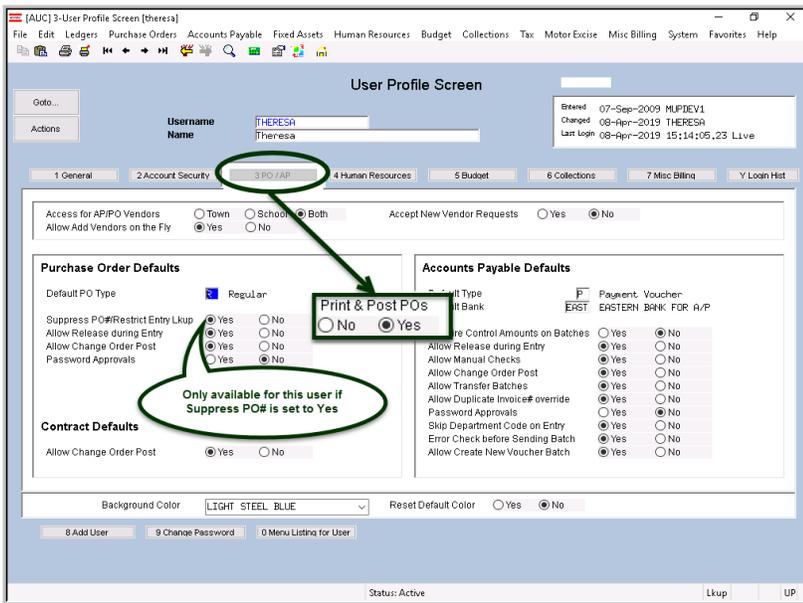
Figure 7 New Print & Post POs" [Yes/No] Radio button

Figure 8 Menu Group/User Menu Maintenance

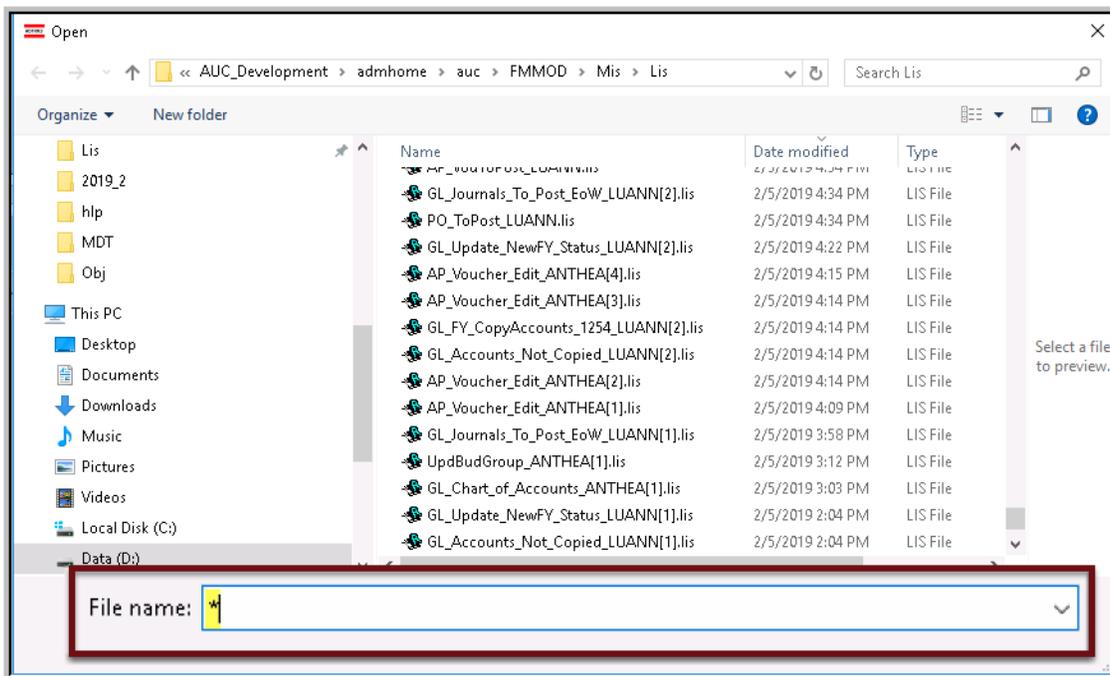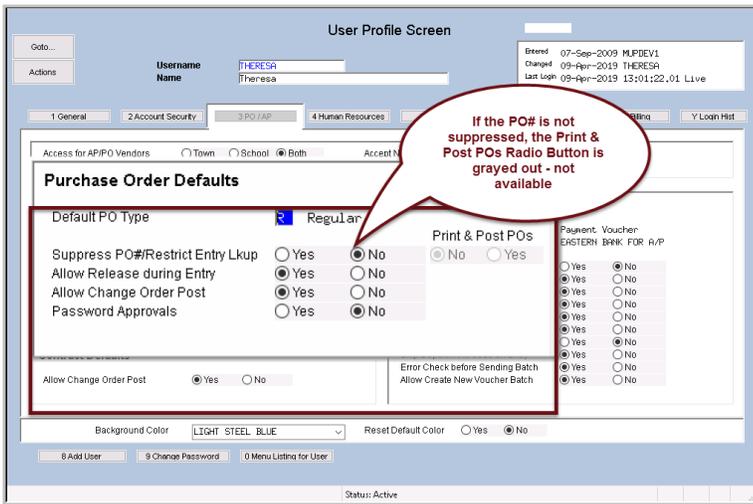**The [3 PO/AP]** has a new **"Print & Post POs" [Yes/No]** Radio button. This button is only available if a user is restricted from knowing **Purchase Order (PO)** numbers during data entry.

PO numbers are revealed once the **PO** is approved and ready for posting. **PO** entry users with the radio button set to **"Y"** may print and post **POs** once they are approved.

This feature allows sites to maintain *centralized control* over spending, and use *decentralized data entry* and printing, without requiring additional printing and distribution by the central business office.

Check the menu security to ensure that the **"Print and Post"** menu option is available. The menu group for each user is set on the **[1 General]** tab of the User Profile screen.

Once the menu Group is known, select **System ▶ Menu Maintenance ▶ Menu Group/User Menu Maintenance.** Check that the menu group's **Purchase Orders ▶ Purchase Order Entry ▶Print and Post** is set to **"Display"** as shown in **Figure 8**.

2.2 Users without Print & Post POs Privilege

If the user profile screen has the **"Print & Post POs" [Yes/No]** Radio button set to **[No]**, and the user tries to print and post, the system will display an error message indicating that the user does not have privileges to print and post **POs.**
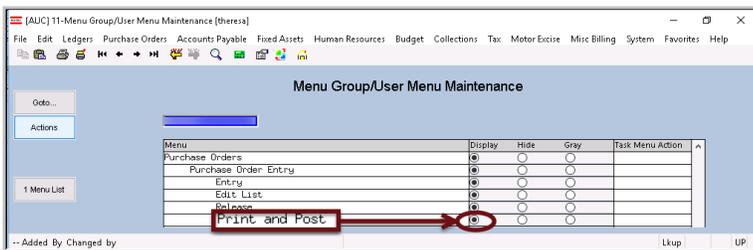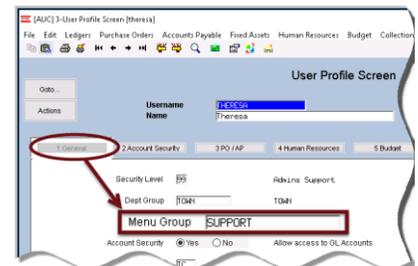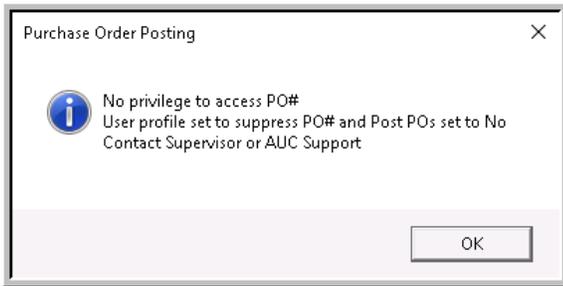
[ADM-AUC-PO-502]

2.3 [2 Account Security] ▶[Go To Main Security] [Enhancement]

The **[Actions]** ▶ **[Copy User Security]** on the **Maintain Account Security** screen is designed to *copy a user's account security setup to another user.* The task was renamed from **"Copy User"** to **"Copy User Security"** to clarify the intended use of the feature. The lookup heading was changed to clarify that the selected user will be copied **"To".**
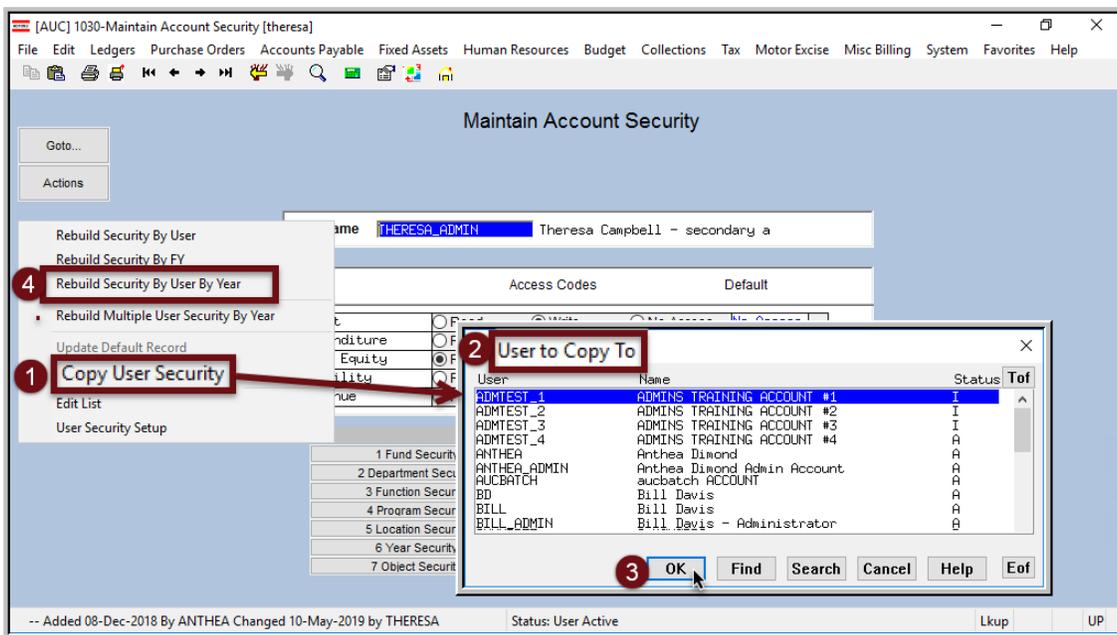
Figure 9 Maintain Account Security Screen ▶ Actions ▶ Copy User Security

First select the user to *Copy From* on the screen–then click **[Actions]** ▶ **[Copy User Security].** The system will present a list of users; select the *User to Copy To*. In the example shown, the user **THERESA_ADMIN** is shown on the screen, this is the user security to *Copy From.* The user **ADMTEST_1** is the user to *User to Copy To.*

After copying, remember to Rebuild Security by User by Year to make the change effective.

[ADM-AUC-GL-8348]

2.4 [Y Login Hist] Tab ▶[9 Login Report] [Fix]

The **[9 Login Report]** on the **[Y Login History]** tab provides a report of a user's login history. Prior to the software update, the report was not producing results when run with the optional date filters. **ADMINS** corrected this and the optional filtering will work properly.
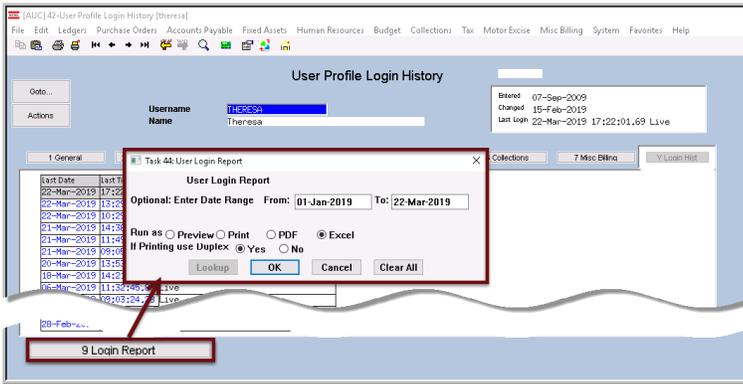
[ADM-AUC-SY-8105]

3   MAINTAIN USER FAVORITES SCREEN [New]

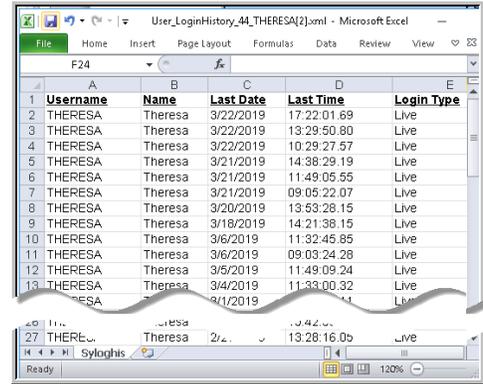Select **Favorites ▶ Maintain User Favorites** to access this screen. **ADMINS** added the ability to **[3 Copy Favorites]** setup to another user, to **[4 Clear All Favorites],** and to report on the favorites using the **[5 Edit List]** button. Users with a minimum of **security level 20** are considered **"Super-Users"** and- will be able to review and update users that are a security level 20 and below.
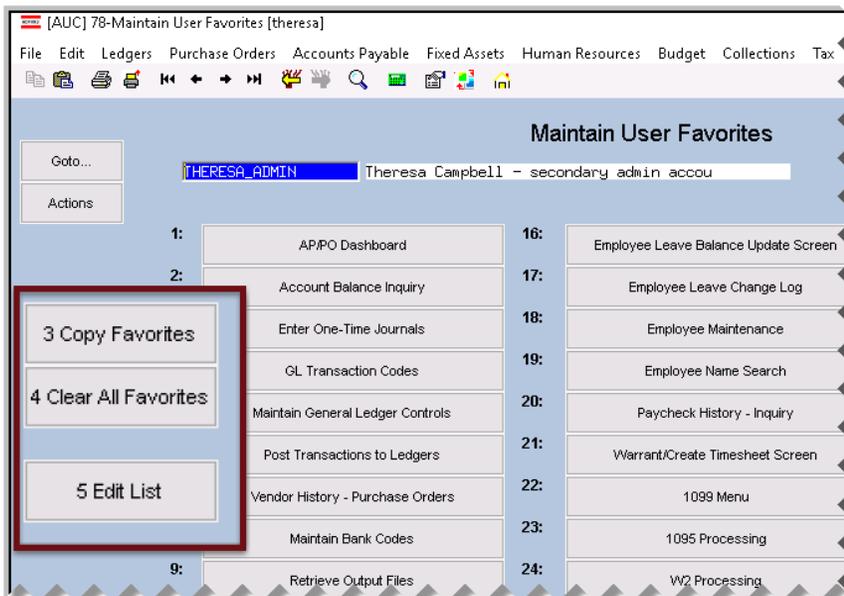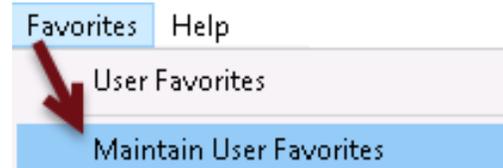
This screen is reserved for "Super Users" with a minimum security level of 20.

See the SY–115 Favorites document in the Help Reference Library for details

3.1 Using the [3 Copy Favorites] button

Selecting the **[3 Copy Favorites]** button will display a prompt. There are two entries required; the *"FROM Username"* is an existing user **"BILL"** with the Favorites screen setup; the *"TO Username"* is the new user **"TPAYROLL"** for whom the set is being copied. The usernames may be entered directly or selected from the **[Lookup].**
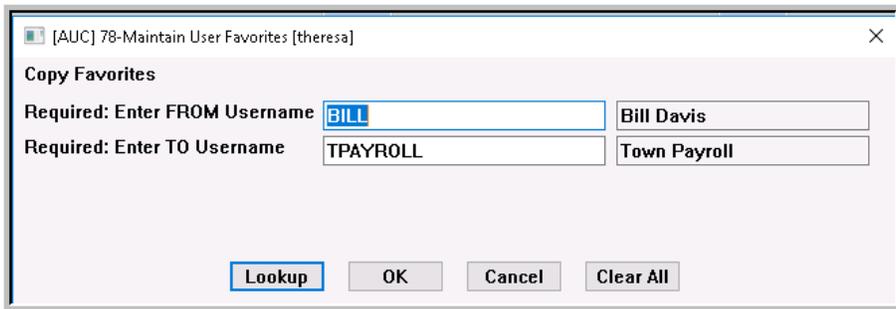
The **"Super-User"** on each site may tailor access for users with similar job responsibilities. The **[3 Copy Favorites]** feature may be used when setting up a new **AUC** user who is assuming the role of a former employee.
This will also be helpful for occasional users of the system, as it will allow the **"Super-User"** to focus the start screen on just the relevant tasks. (See the **SY–115 Favorites** document in the Help Reference Library for details).

3.2 Wipe the slate using the [4 Clear All Favorites] button

If making more than a few deletions from the screen, it may be quicker to clear all the favorites and start fresh. When using the **[4 Clear All Favorites]** button, the system will present a prompt to confirm the intent. Click **[Yes]** to continue; click **[No]** to leave the favorites screen as-is. The default is **[No].**
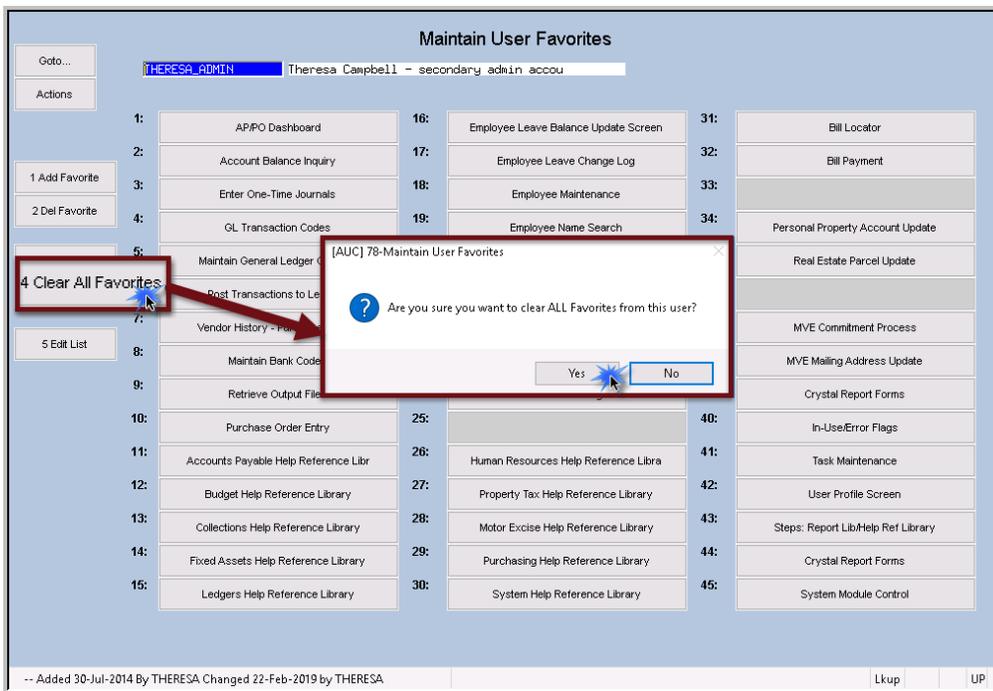
3.3   Report on the Current User's Favorites using the [5 Edit List] button
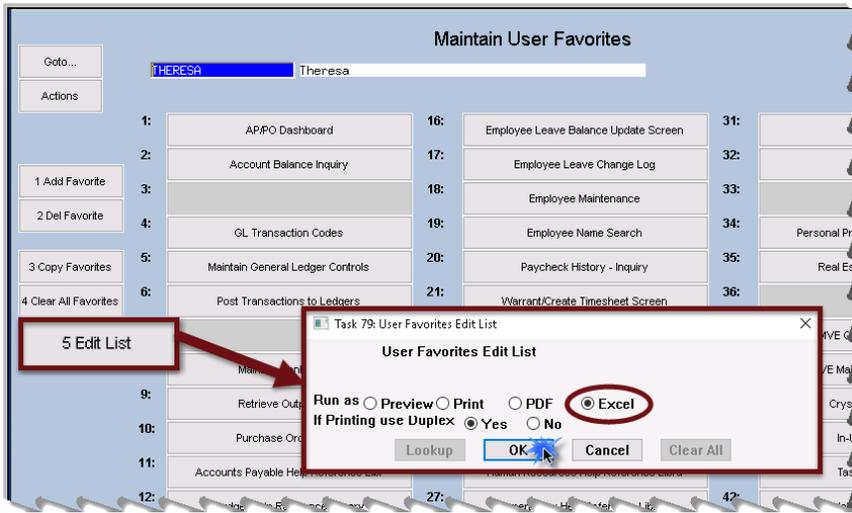
ADMINS also added a report that may be printed and used as a guide when setting up favorites.

Select **[5 Edit List]** to run the report; the report will be produced for the current user.

Figure 10 Report on Favorites Setup using the [5 Edit List] button

Figure 11 Sample edit list run to excel shows entries in each slot

Blank slots are available to be used or to provide spacing on the screen for readability – in **Figure 11,** slots 3, 7, 25, 33 and 36 are empty and ready for use.

[ADM-AUC-SY-8100]

4   DISTRIBUTION LIST EMAILS [Enhancement]

ADMINS uses dozens of distribution lists to notify designated users of a variety of system events. The lists are set up in the **Module Maintenance ▶ Email Distribution Lists** for each Module.

Figure 12 System generated email identifies the Distribution List [Name] and Description
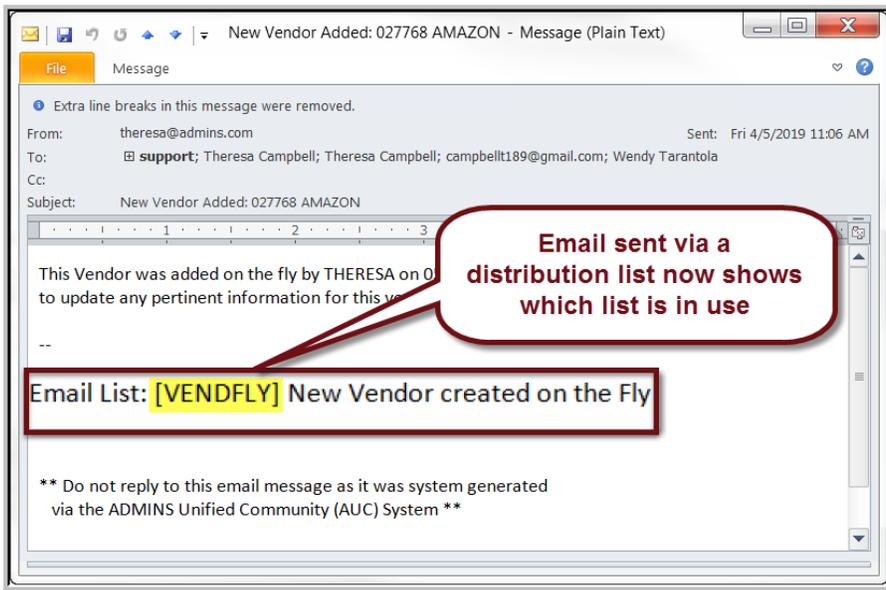
The **Email List Name** and **Description** is now included in the body of the email to identify the origin of the email.

This will be helpful information when users are receiving emails but are not sure where the email originates or why a particular user is receiving the information.

In the above example, the **Email Distribution List** named **"VENDFLY"** was used by the system to notify users that a new vendor was created. If the distribution needs to change, the list may be edited. Detailed instructions are available in the Help Reference Library for each module, for example, **SY–150 Email Distribution Lists.**

[ADM-AUC-SY-8102]

5   IMPORTANT REMINDERS

5.1   One Session Per Username

Users who log in to the server more than once under the same username cause record locks and errors. System Managers are encouraged to adhere to the guidelines as written in the **SY–170 System Administration Kit.** Section **4.1.1** addresses restricting users to a single connection to the server for their user name. This will help prevent unintended

consequences, saving users and system managers valuable time.

[ADM-AUC-DOC-166]

If users need a second session on the server, create a second **Windows®** username and **AUC** username. Contact support@admins.com for assistance or questions regarding this.

5.2 Redirected Local Printers Not Recommended

Re-directed printers brought up as part of the **Remote Desktop Connection (RDP)** are neither supported nor recommended for use with the application. ADMINS recommends that all printers used be installed as printers on the AUC server. See section **3.5.2** in the **SY–170 System Administration** document in the Help Reference Library.

[ADM-AUC-DOC-166]

6 REPORTS

ADMINS reinstated the progress bar feature that indicates a report is running.

[ADM-AUC-SY-8093]

6.1 Email Reports

The support team frequently receives emails containing *scanned* images of **ADMINS** reports (we love pictures!). Any **ADMINS** report may be emailed via the **Reports ▶ Retrieve Output** function. This saves time and paper (no need for printing) and ensures accuracy when sending reports spanning multiple pages to *support@admins.com*. There is a document, **SY–160 I forgot to print my reports**, that gives instructions on how to use the **Reports ▶ Retrieve Output Files** feature to email reports.

[ADM-AUC-DOC-166]

7 EXCEL® TEMPLATES [Fix]

ADMINS provides **Excel®** spreadsheets used for a variety of upload purposes. Prior to the software update, when accessing a template, if a user tried to open a second copy of the template, the process terminated, bringing the user to the support page.
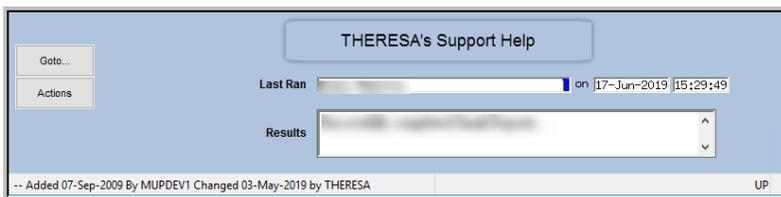
Figure 13 Before – if the template was already open, process brought the user to the support page
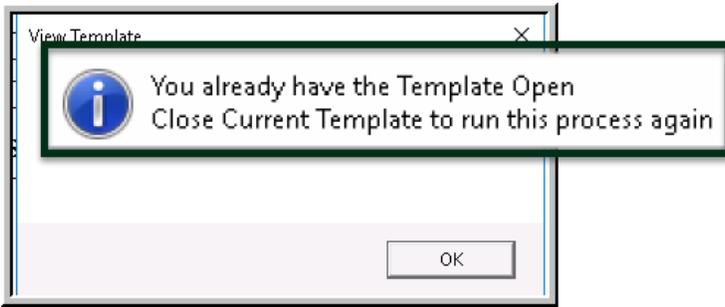
Figure 14 After – message instructing the user to close the open template prior to running the process again

Changes affected templates available by selecting **System ▶ Help Reference Library**:
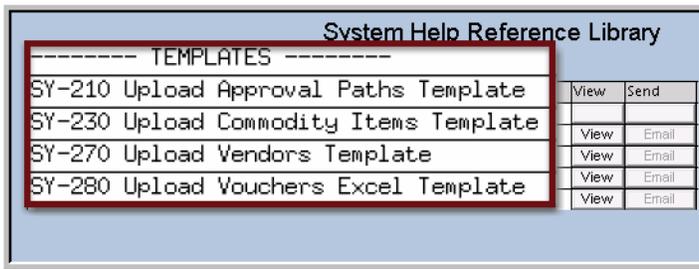
SY–210 Upload Approval Paths Template
SY–230 Upload Commodity Items Template
SY–270 Upload Vendors Template
SY–280 Upload Vouchers Excel Template

[TOC-SUP-SAPLAUC-2966]

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

•	OTHER	AP–867 Favorites Screen	[Updated]
•	TEMPLATES	AP–910 Upload Vouchers Excel Template	[Updated]
		AP–920 Approval Paths Template	[Updated]
		AP–930 Commodity Items Template	[Updated]
		AP–940 Vendors Template	[Updated]
•	INTERFACES/IMPORTS	AP–980 Upload Vouchers – Spreadsheet	[Updated]

8.1.2   Budget

•	OTHER	BU–215 Favorites Screen	[Updated]

8.1.3   Fixed Assets

•	OTHER	FA–715 Favorites Screen	[Updated]
•	TEMPLATES	FA–650 Upload Fixed Assets Acquisition Template	[Updated]

8.1.4 Human Resources

- YEAR END PROCESSING   HR–610 Fiscal Year End Split Payroll   [Updated]
                                 HR–770 ACA & Non-Employee Participants   [New]
- OTHER   HR–770 Favorites Screen   [Updated]

8.1.5 Ledgers

- ACCOUNT MAINTENANCE   GL–255 Upload Crosswalk Accounts   [New]
- REPORTS   GL–610 Reports   [Updated]
- YEAR END PROCESSING   GL–722 Create New Year Overnight in Batch   [Updated]
- TEMPLATES   GL–1110 Upload Allocation Codes Template   [Updated]
                                 GL–1120 Upload Chart of Accounts Template   [Updated]
                                 GL–1130 Upload Journal Entries Template   [Updated]
                                 GL–1135 Upload Accounts to Crosswalk Template   [New]
- OTHER   GL–1225 Favorites Screen   [Updated]

8.1.6 Miscellaneous Billing

- OTHER   MB–535 Favorites Screen   [Updated]

8.1.7 Motor Vehicle Excise

- SITE SPECIFIC   ME–250 Cranston, RI Motor Vehicle Excise Tax Billing [Updated]
- OTHER   ME–325 Favorites Screen   [Updated]

8.1.8 Purchase Order

- PURCHASE ORDER ENTRY   PO–105 Purchase Order Types   [New]
- TEMPLATES   PO–810 Approval Paths Template   [Updated]
                                 PO–820 Commodity Items Template   [Updated]
                                 PO–830 Vendors Template   [Updated]
- OTHER   PO–915 Favorites Screen   [Updated]

8.1.9 Property Tax

- BILLING   RE–350 Q1 Tax Balancing Template   [Updated]
                                 RE–370 Q2 Balancing Template   [Updated]
                                 RE–390 Q3 Balancing Template   [Updated]
- TEMPLATES   RE–650 Upload Real Estate Sales History Template   [Updated]
                                 RE–655 Upload Liens Template   [Updated]
- OTHER   RE–715 Favorites Screen   [Updated]

8.1.10 Revenue Collections & Tax Title

- TEMPLATES   RC–1220 Upload Treasury Receipt Codes Template   [Updated]

- SITE SPECIFIC   RC–1760 Cranston, RI Tax Sale Process   [Updated]
- OTHER   RC–1815 Favorites Screen   [Updated]

8.1.11   System

- SYSTEM (all modules)   SY–115 Favorites   [Updated]
                                   SY–160 I forgot to print my reports   [Updated]
                                   SY–170 System Administration Kit   [Updated]