SYSTEM (ALL MODULES)

RELEASE NOTES – SEPTEMBER 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   COPY ACCOUNT SECURITY [Enhancement]

ADMINS continues to enhance the *copy user security* process. The commands require a **"FROM"** and **"TO"** user to clarify the intent. In addition, once the copy command has finished, the **"TO"** user's security will be **automatically rebuilt** for a single year. Only active usernames are eligible to be the **"FROM"** or **"TO"** user – inactive users are neither found in the lookups, nor entered directly. If the security must be copied from an inactive user, activate the user prior to the copy. There are now two options when copying account security:

1. **Copy (add-on) User Security**
2. **Copy (replace) User Security**

Which one should be used? If additional access is required for the "TO" user, then use the Copy (add on). If trying to restrict or reduce the current access for the "TO" user, use the Copy (replace), selecting a "FROM" user with a more suitable set of account access.
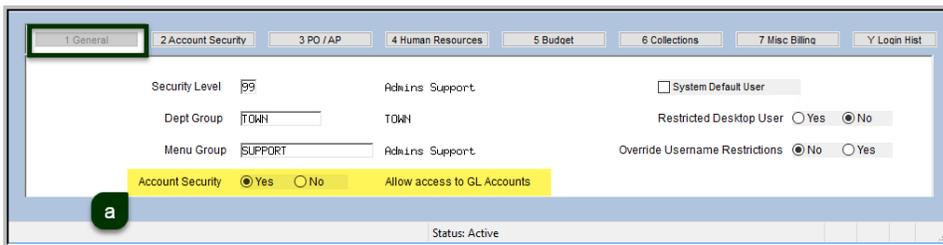
1.1   Prerequisites for the Users

Figure 1 The [1 General] Tab Account Security radio button must be set to ⦿ Yes for both FROM & TO

Select the **User Profile ▶ Account Security** to access the **[Go to Main Security]** button.
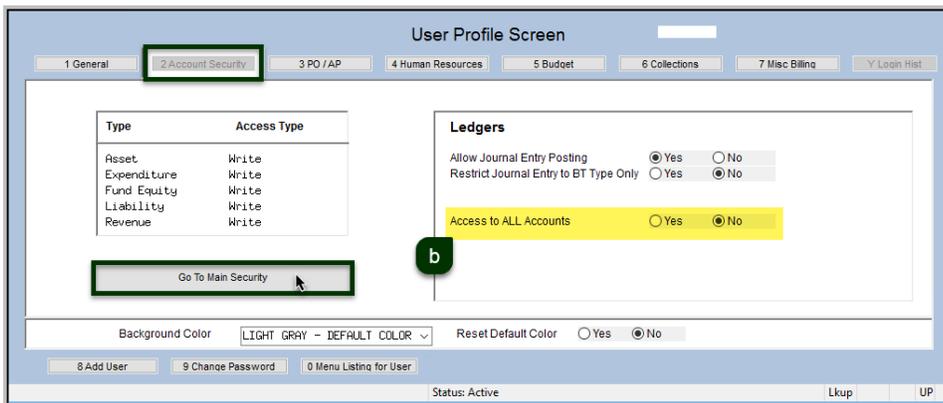

Figure 2 the [2 Account Security] Tab "Access to All Accounts" radio button must be set to ⦿ No for both FROM & TO

Click on the **[Actions]** button to select from the menu of options:

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Figure 3 Before & After – Maintain Account Security screen has enhanced selections under the [Actions] button

The options are described in detail in sections **1.2** and **1.3;** run the **User Security Setup Report** .before running the copy command to use in comparing the results.

1.2 Copy (add-on) User Security

This process will add the current account security **FROM** one user **TO** another. The new prompt requires a **"FROM"** and **"TO"** username.
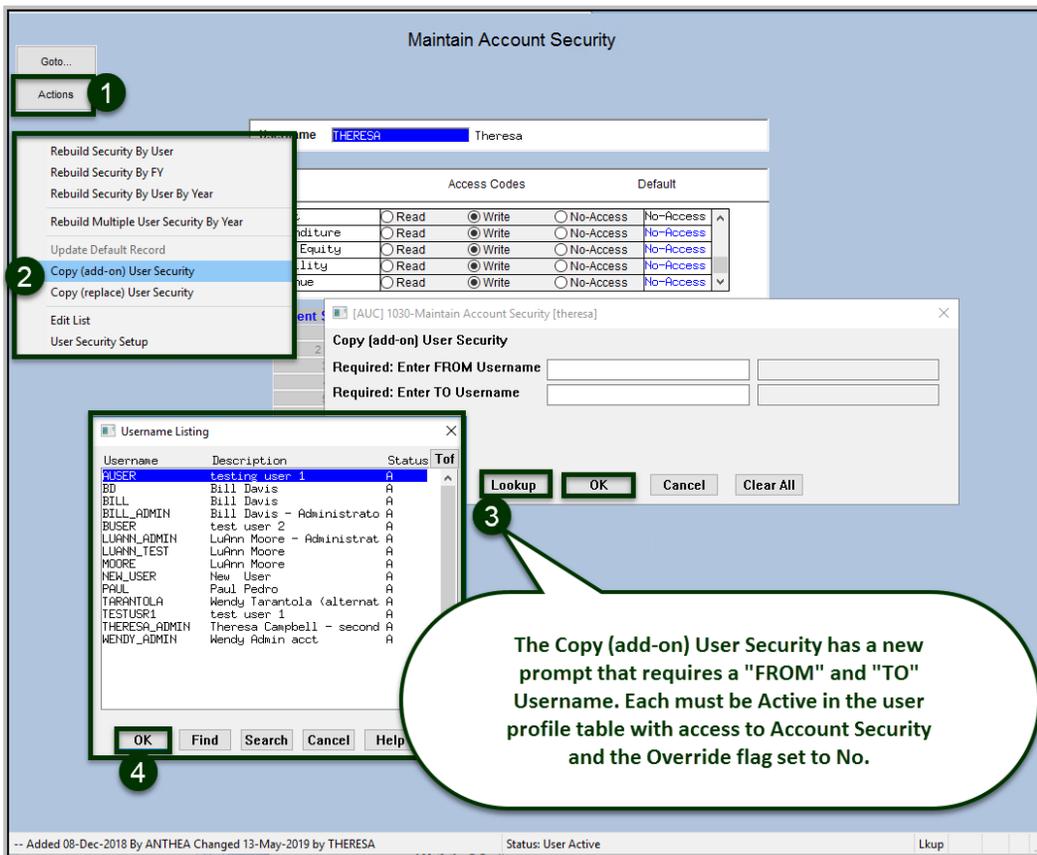
Click on **[Lookup]** to select a **FROM** username (or enter the Username directly, if known)

Repeat for the **"TO"** Username

Selecting from the lookup in both fields prevents selecting an ineligible username for the copy **FROM** or **TO**.

Figure 4 The new prompt for the Copy (add on) User Security process

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1.2.1   System Messages

If the usernames do not meet the stated criteria, that is, **Active users**, with **Access to GL Accounts**, but **without the Account Security Override**, then the process will pop up error messages. The invalid entry will be cleared from the field so that a different selection may be made.
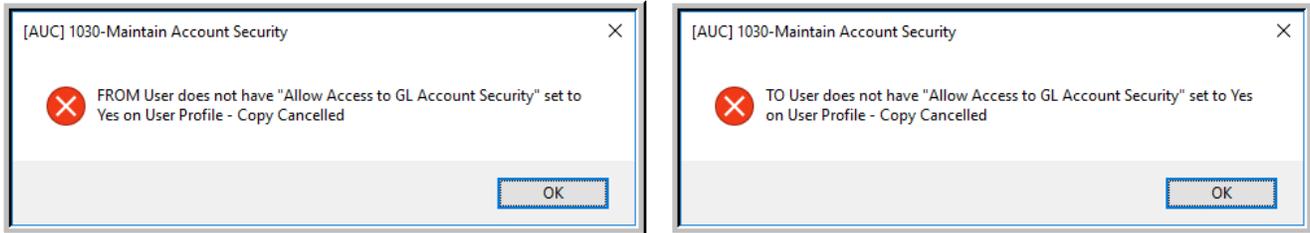
[AUC] 1030-Maintain Account Security

❌ FROM User does not have "Allow Access to GL Account Security" set to Yes on User Profile - Copy Cancelled

OK

[AUC] 1030-Maintain Account Security

❌ TO User does not have "Allow Access to GL Account Security" set to Yes on User Profile - Copy Cancelled

OK

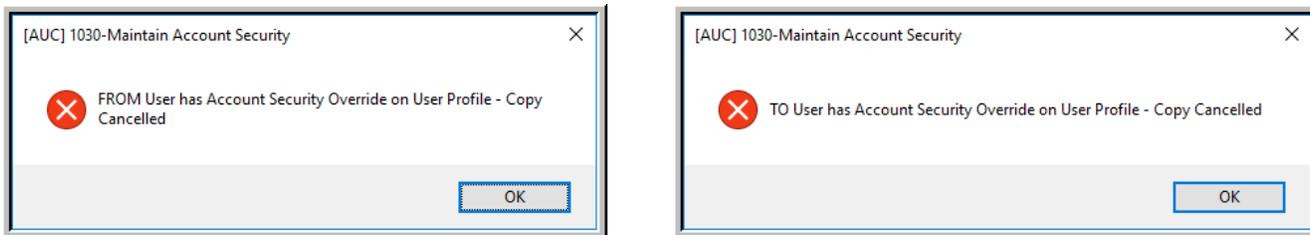**Figure 5 The Allow Access to GL Account Security error message refers to the [1 General] tab shown in Figure 1**

[AUC] 1030-Maintain Account Security

❌ FROM User has Account Security Override on User Profile - Copy Cancelled

OK

[AUC] 1030-Maintain Account Security

❌ TO User has Account Security Override on User Profile - Copy Cancelled

OK

Figure 6 Account Security *Override* error message refers to the [2 Account Security] Tab shown in Figure 2

Task 1036: Rebuild Account Security for a User and Year

Rebuild Account Security for a User and Year

Required: Enter Fiscal Year 2020

Lookup   OK   Cancel   Clear All

If both usernames meet all the requirements, the copy will proceed. On completion, the system will display the prompt shown in Error! Reference source not found. and the fiscal year will be rebuilt for the **"TO"** user. This ensures that the changes will be effective immediately on completion of the command.

Figure 7 Rebuild Account Security for a User and Year will automatically prompt for the year once the copy is complete

1.2.2   Checking Results

Running the **Actions ▶ User Security Setup Report** (item #3 in Figure 3) before & after the copy shows the results.

Figure 8 After the Copy (add-on) process is run, the TESTUSR1 has access to the additional funds

1.3 Copy (replace) User Security

This process will copy the account security **FROM** one user **TO** another. The prompt requires a **FROM** and **TO** username. The account security for **NEW_USER** will *completely replace* the account security of **TESTUSR1**; any existing security access for will be deleted from the file, and be replaced by the copied security access.
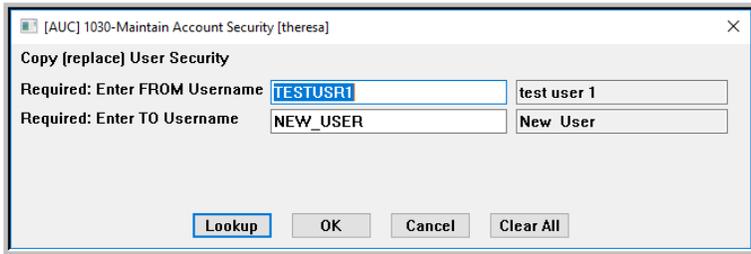
Click on **[Lookup]** to select the Username to be copied **"FROM"** (or enter the Username directly, if known)

Repeat for the **"TO"** Username

Figure 9 The Copy (replace) User Security

1.3.1   System Messages

If the usernames do not meet the stated criteria, that is, **Active users**, with **Access to GL Accounts**, but **without the Account Security Override**, then the process will pop up error messages. The invalid entry will be cleared from the field so that a different selection may be made. The error messages are shown in **section 1.2.1**.

If both the **FROM** and **TO** usernames meet all the requirements, the copy will proceed. On completion, the system will display the prompt shown in **Figure 10** for the fiscal year to be rebuilt for the **"TO"** user so that the changes will be *effective immediately on completion of the command*.

Figure 10 Rebuild Account Security for a User and Year will automatically prompt for the year once the copy is complete

1.3.2   Checking Results

In the example shown in **Figure 11**, **NEW_USER** had too much access, so a **Copy (replace)** was done. The result is that the **Write** access for the highlighted funds was replaced with **Read** access.

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Figure 11 After the Copy (add-on) process is run, the TESTUSR1 has access to the additional funds

Running the **Actions ▶ User Security Setup Report** before and after the copy shows the results.

[ADM-AUC-GL-8348]

2   DEPARTMENT GROUP PROFILE

New departments are created by selecting **System ▶ Department Group Menu ▶ Department Group Profile ▶ [4 Add Dept]**, which creates a record in the **Department Group Security Table**. Prior to the software update, when adding a new department, the Security for the new Department Group was set to ⊙ **No Access**, even for the user creating the department.

Figure 12 Adding a new department group

Figure 13 Before – the new department was set to ⊙ No Access for all users, including the creator of the department code
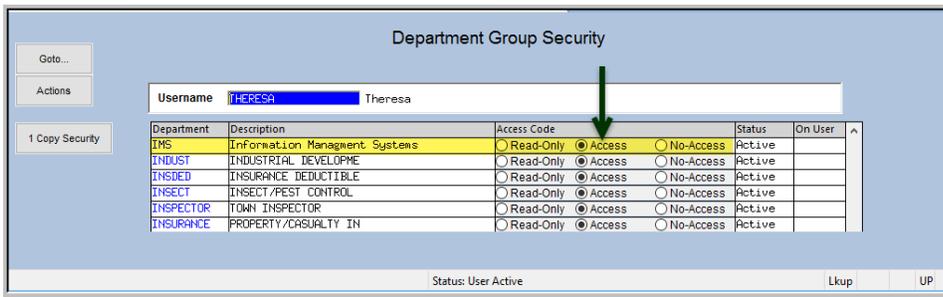
Now, the department is set to ⊙ **Access** for the user creating the new department. All other users are set to ⊙ **No Access** on creation. That may be changed by the super user.

Figure 14 After – the new department is set to ⊙ Access for the creator of the department code

[ADM-AUC-SY-8117]

2.1 DEPARTMENT GROUP SECURITY

The account security process has been enhanced to allow for one or more "power users" to have access to **ALL** Department Groups without manually managing the security tables each time a new department is added.

2.1.1 "Power User" Department Access for AP/PO

Currently, if a new **Department Group** is needed, the record is first added to the **Department Group** table:
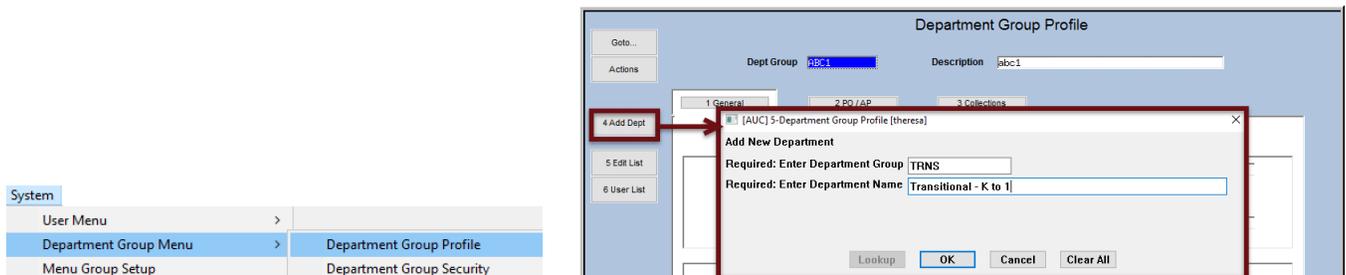
Then the "Power User" will grant access to that group to each applicable user account:
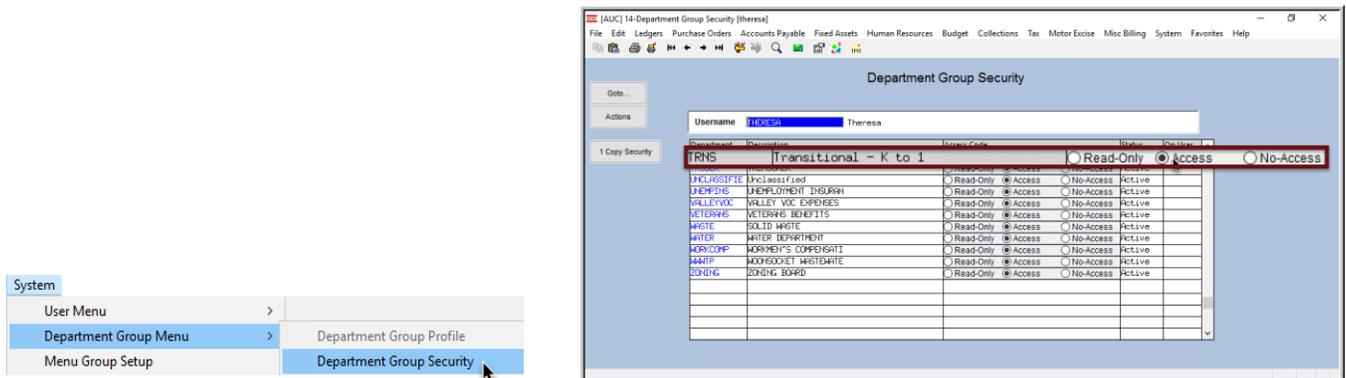
All user names specified in **Module Control #45** (see **Figure 15**) will be added to all Department groups automatically during the "weekly rebuild" of the account security features. For most sites, the weekly rebuild runs on Sunday.

This means that if new Department Groups are added to the system on Tuesday and Wednesday, they will not be automatically added to the "power users" until the weekly process runs on Sunday. If immediate access to those groups is needed, then set the access manually.
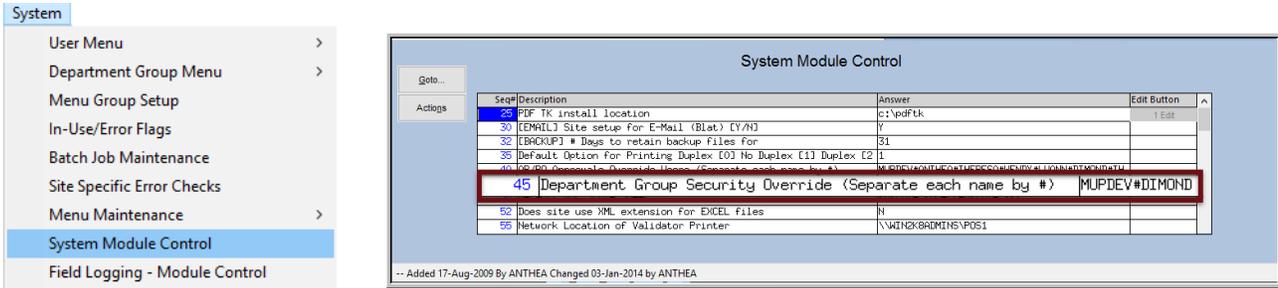
Figure 15 Module Control Table parameter #45

[ADM-AUC-SY-7987]

3   USING THE TRAINING AREA

To enter training mode, at the log in screen,
1. click on the training mode checkbox,
2. enter the password:
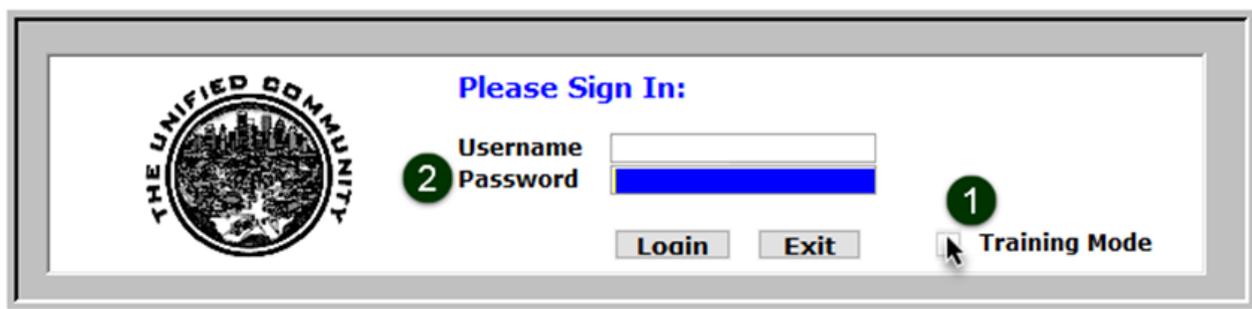
To have the training area updated, send an email to *support@admins.com*.

[ADM-AUC-DOC-173]

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

- DISBURSEMENTS   AP–210 Implementing a New Bank Account   [Updated]
- OTHER   AP–805 Training Mode   [New]
- SYSTEM   AP–1110 System Administration Kit   [Updated]

4.1.2   Budget

- OTHER   BU–200 Training Mode   [New]
- SYSTEM   BU–320 System Administration Kit   [Updated]

4.1.3   Fixed Assets

- OTHER   FA–705 Training Mode   [Updated]
- SYSTEM   FA–820 System Administration Kit   [Updated]

4.1.4   Human Resources

- PAYROLL PROCESSING   HR–335 No-Time Warrant   [New]
- SPECIAL PROCESSING   HR–430 Manual Checks   [Updated]
- TABLES   HR–599 Implementing a New Bank Account   [Updated]
- SYSTEM   HR–815 Training Mode   [New]
                                 HR–850 Module Control   [Updated]
                                 HR–1110 System Administration Kit   [Updated]

4.1.5   Ledgers

- ACCOUNT MAINTENANCE   GL–205 Copy User Account Security   [New]
                                 GL–260 Implementing a New Bank Account   [Updated]
- YEAR END PROCESSING   GL–722 Create New Year Overnight in Batch   [Updated]
- OTHER   GL–1215 Training Mode   [New]
- SYSTEM (all modules)   GL–1310 System Administration Kit   [Updated]

4.1.6   Miscellaneous Billing

- OTHER   MB–515 Training Mode   [Updated]
- SYSTEM   MB–610 System Administration Kit   [Updated]

4.1.7   Motor Vehicle Excise

- OTHER   ME–305 Training Mode   [Updated]
- SYSTEM   ME–410 System Administration Kit   [Updated]

4.1.8   Purchase Order

- OTHER   PO–925 Training Mode   [Updated]
- SYSTEM   PO–1010 System Administration Kit   [Updated]

4.1.9   Property Tax

- OTHER   RE–725 Training Mode   [Updated]
- SYSTEM   RE–770 System Administration Kit   [Updated]

4.1.10   Revenue Collections & Tax Title

- OTHER   RC–1835 Training Mode   [Updated]
- SYSTEM   RC–1910 System Administration Kit   [Updated]

4.1.11   System

- SYSTEM   SY–125 Training Mode   [New]
                               SY–170 System Administration Kit   [Updated]
                               SY–185 Copy Account Security   [New]