



SYSTEM (ALL MODULES)

RELEASE NOTES – SEPTEMBER 2021

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

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1 COPY SELECTED MODULES FROM LIVE TO TRAINING [Enhancement]

“Super Users” can initiate a copy of the live data to the training account. When copying live to training, if **Tax** or **Motor Excise** is selected - it will automatically copy collections as well. Even if the radio button for collections is set to **No**, the **Revenue Collections** module will be copied.

System ▶ Site Specific ▶ Copy Live to Training (Batch) ▶ Submit Copy Live to Training

Task 152: Submit Copy Live to Training

Submit Copy Live to Training

Copy Ledgers/Purchasing/Accounts Payable Yes No

Copy Fixed Assets Yes No

Copy Human Resources Yes No

Copy Budget Yes No

Copy Collections (including Tax Title) Yes No

Copy Tax Yes No

Copy Motor Excise Yes No

Copy Misc. Billing Yes No

Lookup OK Cancel Clear All

Even if the Radio button is set to **No**, Collections will be copied when selecting Tax or Motor Excise.

The Update Training from Live process was submitted on 21-Jun-2021 By THERESA and will Copy Data Files from Live to Training Account at 8:00 PM

The Follow Modules will be copied as requested

Ledgers/Purchasing/Accounts Payable	No
Fixed Assets	No
Human Resources	No
Budget	No
Collections (including Tax Title)	Yes
Tax (RE/PP/SE)	Yes
Motor Vehicle	Yes
Miscellaneous Billing	Yes

If you submitted this process in Error, Click Unsubmit step

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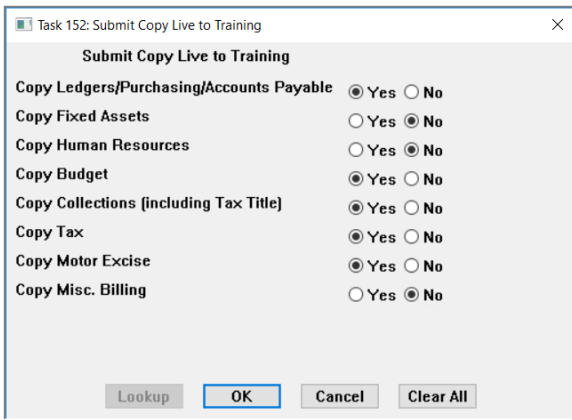
Email List: [SYUPDTRAIN] Submit Copy Live to Training in Batch

The email sent to the SYUPDTRAIN distribution list will reflect the selections, and include collections if Tax or Motor Excise is selected for copying

[ADM-AUC-SY-8201]



1.1 Copy Live to Training – Selections Saved for Each User [Enhancement]



Sites can have multiple users authorized to copy live to training. Unique settings will be saved for each user running the command.

For example, the HR Manager will only be interested in copying Human Resources each time. With the software update, settings will be saved, and the same selections will be presented with any subsequent request by the user to **Submit Copy Live to Training**

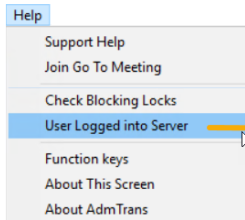
The Tax Collector may also be authorized to run the command, and their settings will be saved for them.

[ADM-AUC-SY-8203]

2 SHOW USERS LOGGED ON TO THE SERVER [Enhancement]

ADMINS added a new command, available for “Superusers” (a user security level of 20 or greater) to show who is logged into the server. This helps the superuser to identify users who are not logging off the server or who may be having trouble and need assistance.

Help ► User Logged into Server



- The command produces a list of all the users logged into the AUC server.
1. The user running the command is identified with the > symbol preceding the user name.
 2. A user who disconnected without logging out of AUC will show as **Disc** in the STATE column;
 3. Users will show IDLE TIME in minutes if there has been no activity.
 4. The logon date and time is shown in the rightmost column.

A user with privileges can be logged into the server without being logged into AUC.

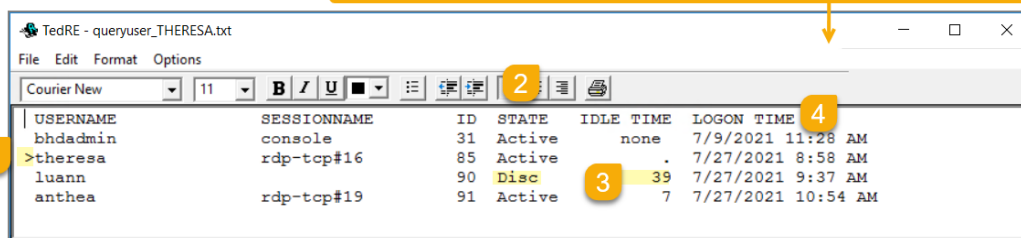


Figure 1 Running the new Users Logged onto the Server command



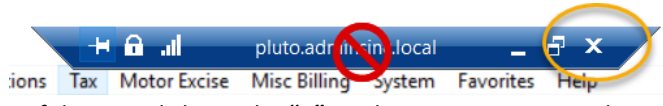
This command will show ALL users logged into the server, not just those logged into AUC

1. The username preceded by the > symbol identifies the user running this command.¹

¹ If the Session Name is CONSOLE, this is the system user and should be ignored.



- The **STATE** will show **Disc** for Disconnected; this indicates the user did not **exit from AUC** prior to disconnecting from the server. This can happen if the network connection is interrupted, or if the user clicks on the “X” on the RDP connection. The server is also set up to disconnect a session if it is idle for an extended period. (ADMINS does not recommend clicking on the “X” – instead exit from AUC according to the instructions in **SY-190 Exiting from the AUC System.**)
- If **IDLE TIME** shows a number, the user has not interacted with the session for that number of minutes. If **IDLE TIME** shows a “.”, the user is currently active on the server.
- The **LOGON TIME** shows the date and time the user initiated the session.



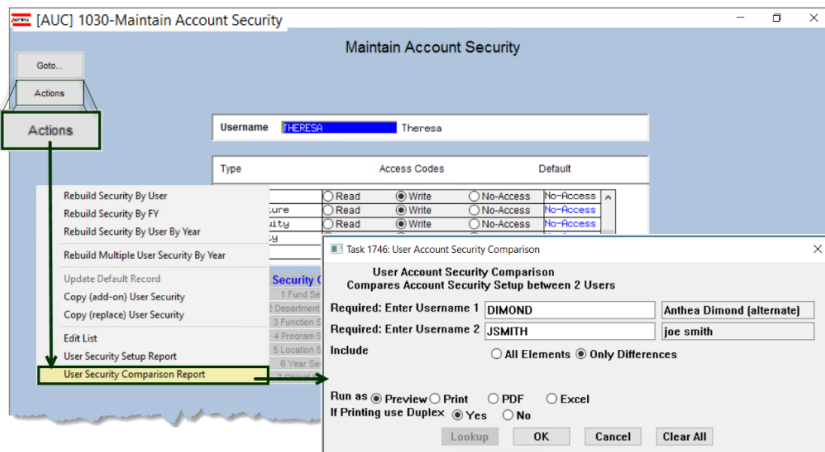
[ADM-AUC-SY-8211]

3 REPORT COMPARING USER ACCESS TO ELEMENTS [Enhancement]

The “Superuser” on site can copy a user’s security access to another user, which can be more efficient than starting from nothing when adding a new user. ADMINS added a report to allow comparing the account security of two different users for each account element. The report will show the first account segment, and compare access for all values, then the 2nd account segment, comparing all values, and so forth. Run the report by selecting:

System ▶ User Menu ▶ User Profile ▶ [2 Account Security] ▶ [Actions]

Select “**User Security Comparison Report**” from the resulting menu. The prompt will look like this:



The lookup on usernames will exclude users with override element security (access to all accounts).

The **required fields** are for the two usernames to be compared; the report can include either:

- “**All Elements**” or
- “**Only Differences**”.

The report can be “**Run as**” Preview/Print/PDF® or Excel®.

Figure 2 Running the User Security Comparison Report

The system will detect if the same user is selected in both fields and pop up an error message; the process will also prevent comparing any user that has override element security (access to all accounts) to another user.

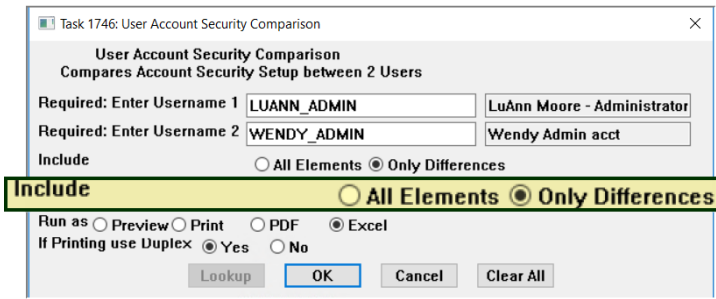
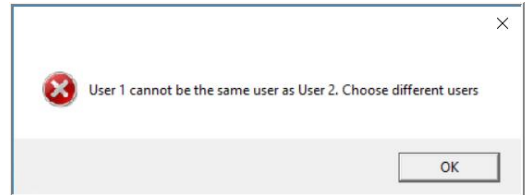
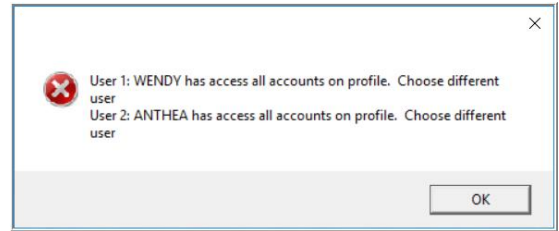


Figure 3 Comparing LUANN_ADMIN to WENDY_ADMIN



The report is particularly useful in identifying the differences in Account element security by selecting the **Include** **Only Differences** radio button.

In the example, the differences are identified – for five **Funds** WENDY_ADMIN has “No Access”; LUANN_ADMIN has “Write Access” to those five funds.

Type	Fund	Element	Description	User-1 WENDY_ADMIN	User-2 LUANN_ADMIN	Different
		2000	SPECIAL REVENUE	No Access	Write	Yes
		2030	SCHOOL SECURITY 2013 GRANT	No Access	Write	Yes
		2070	BIG YELLOW SCH BUS (MA CULT CNCL GRTS)	No Access	Write	Yes
		2095	SPED RESERVE C.40 S.13E	No Access	Write	Yes
		2120	SCHOOL SPECIAL ASSISTANCE	No Access	Write	Yes
Department		001	GENERAL GOVERNMENT	Read	Write	Yes
		002	PUBLIC SAFETY	Read	Write	Yes
		003	EDUCATION	Read	Write	Yes
		004	PUBLIC WORKS	Read	Write	Yes
		005	HUMAN SERVICES	Read	Write	Yes
		006	CULTURE AND RECREATION	Read	Write	Yes
		007	INTEREST ON LONG TERM DEBT	Read	Write	Yes
		008	INTERGOVERNMENTAL	Read	Write	Yes
		009	MISCELLANEOUS	Read	Write	Yes
		010	JUDGEMENTS/AWARDS	Read	Write	Yes

Figure 4 The User Security Comparison Report showing Only Differences Run as Excel®

There are ten **Departments** where WENDY_ADMIN has “Read” access, and LUANN_ADMIN has “Write” Access.

If other account segments are different, they will be shown on the report.

[ADM-AUC-GL-8456]

4 DEPARTMENT GROUP SECURITY

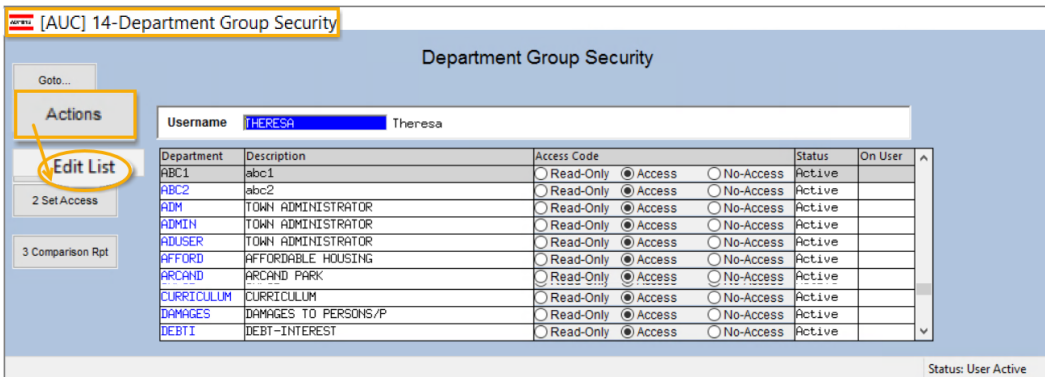
ADMINS made several improvements to the department group security screen.

4.1 Profile Edit List [Enhancements]

ADMINS made two changes to the [Edit List] to make it easier to get information on a given department or user. To run the **Department Group Security Edit List**, select:



System ▶ Department Group Menu ▶ Department Group Security ▶ [Actions] ▶ [Edit List]



4.1.1 Added “Run as” Excel® Option to Allow Filtering [Enhancement]

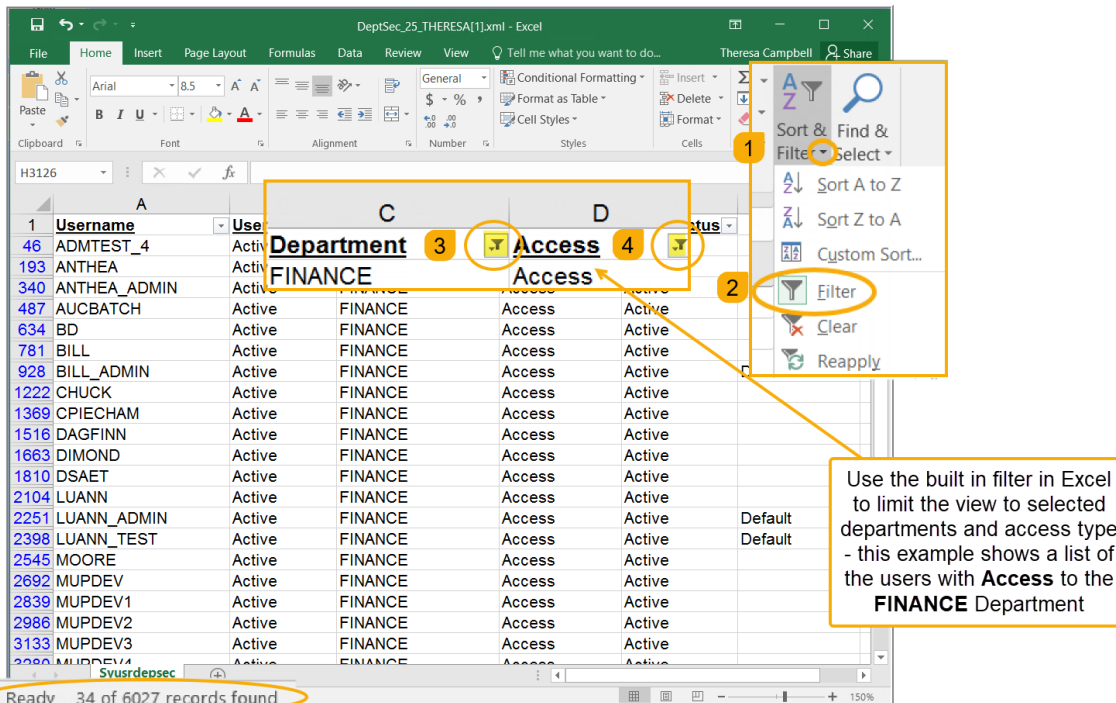
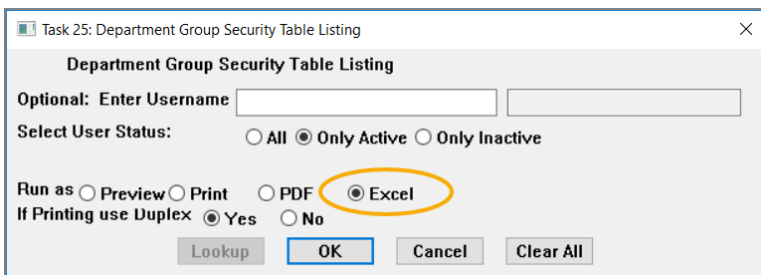


Figure 5 Edit List Run as Excel® using filtering to show the 34 records that meet the department access criteria

Running as Excel® provides filtering on any column. Filtering on Department and Access is shown in Figure 5 .

[ADM-AUC-SY-8204]



4.1.2 Added Columns and Re-formatted the Report [Enhancement]

25-SYREP:SYUSRDEPSEC.REP Printed 06-Jul-2021 at 16:13:56 by [redacted] Page 1

Department Group Security Table Listing

Username	Department	Access	Status
[redacted]	ARTSCULTUR	No-Access	A
[redacted]	BOE	No-Access	A
[redacted]	CENTRALCOM	No-Access	A
[redacted]	COMMON	No-Access	A
[redacted]	COMPUTERS	No-Access	A
[redacted]	CONSUMER	No-Access	A
[redacted]	DEPARTMENT	No-Access	A
[redacted]	DTSTATE	No-Access	A
[redacted]	ECD	Access	A
[redacted]	ECD_GRANTS	Access	A
[redacted]	EDUCATION	No-Access	A
[redacted]	ELECTRIC	No-Access	A

Figure 6 Before –username repeated on every line, & neither Department Status nor Default on User was shown

Prior to the software update, the report provided no information on the department status or the default department for the user. Now, more information is provided in an easier to read format.

City of ADMINS
Department Group Security Table Listing

1		2			
Username	Status	Department	Access	Department Status	On User
WENDY	Active	ABC1	Access	Active	
		ABC2	Access	Active	
		ABS	Access	Inactive	3
		ADM	Access	Active	Default
		ADMIN	Access	Active	
		ADUSER	Access	Active	
		AFFORD	Access	Active	
		ANIMAL	Access	Inactive	
		ARCAND	Access	Active	
		ARTS	Access	Active	
		ASSESSMENT	Access	Inactive	
		ASSESSORS	Access	Active	
		ASUSER	Access	Active	
		UNCLASSIFIED	Access	Active	
UNEMPINS	Access	Active			
VALLEYVOC	Access	Active			
VETERANS	Access	Active			
WASTE	Access	Active			
WATER	Access	Active			
WORKCOMP	Access	Active			
WWWIP	Access	Inactive			
ZONING	Access	Active			
147 Departments for WENDY			Read Access		
			No-Access		
			Access		147
*** Grand Total ***			1 Users		147 Departments

Figure 7 The username is shown only at the top of each page, & Department Status & Default “On User” columns added

[ADM-AUC-SY-8204]



4.2 Department Group Security Screen Only Shows Active Departments

Prior to the software update, the Department Group Security Screen listed all departments, both Active and Inactive. The Inactive departments could not be selected on the screen– the radio buttons were grayed out. Now, only “ACTIVE” department groups will be available on the Department Group Security screen to assign access to users.

System ▶ Department Group Menu ▶ Department Group Security

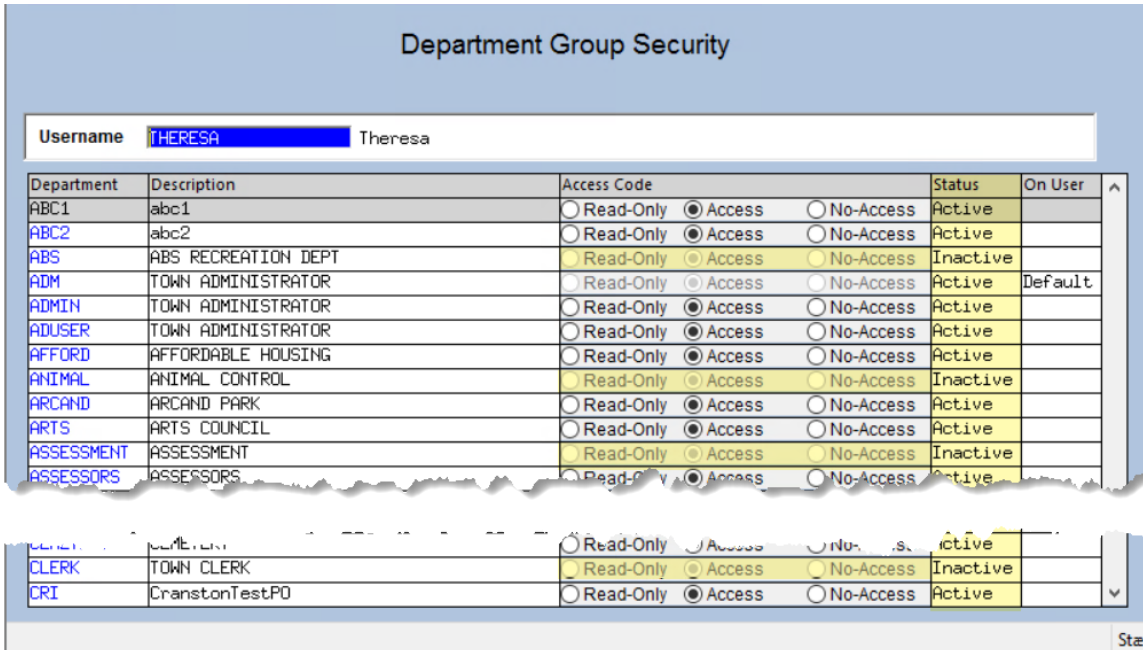


Figure 8 Before – Inactive departments were shown on the screen

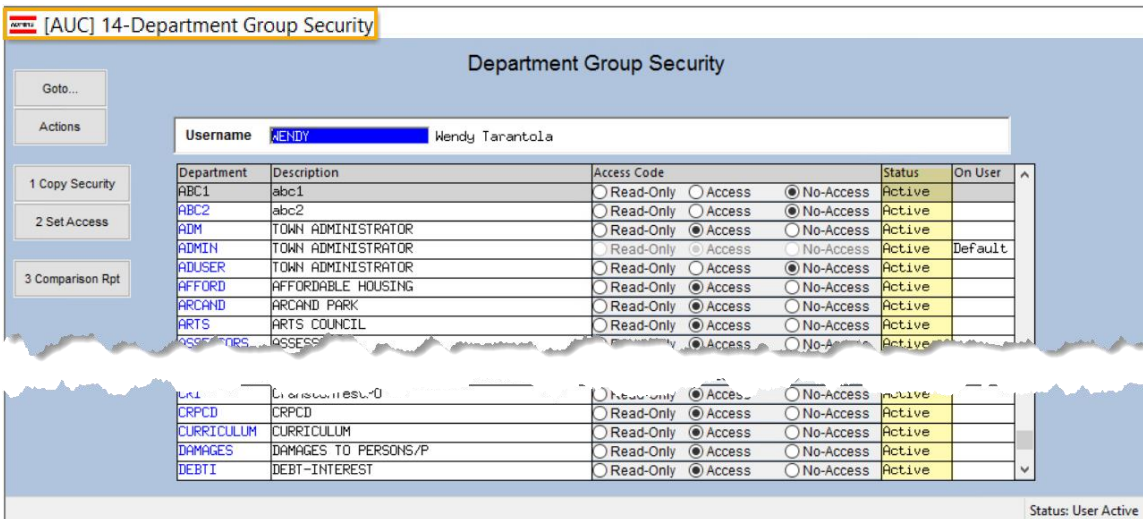


Figure 9 After – only Active departments are shown on the screen

As sites change departments, add new departments, and inactivate departments, the department group security screen can become cluttered with inactive departments. By suppressing the display of inactive dept groups, it will be easier to assign access on the screen.

[ADM-AUC-SY-8216]



4.3 Department Security Comparison Report [Enhancement]

System ▶ Department Group Menu ▶ Department Group Security ▶ [3 Comparison Rpt]

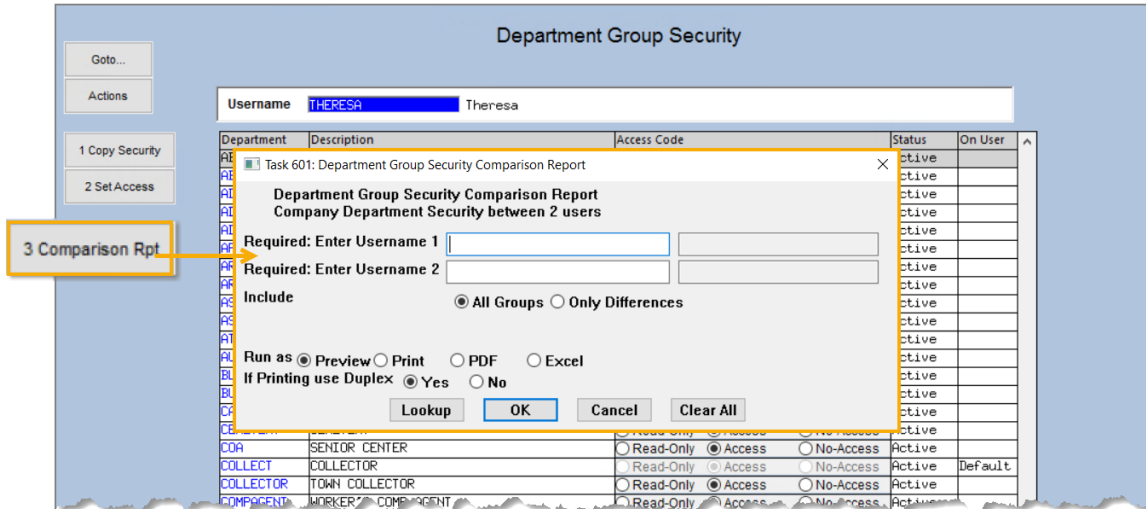


Figure 10 The Comparison report requires two usernames to be entered

The usernames can be selected from a lookup or entered directly. Run the report to **Include** **All Groups** or to only show groups where the users do not have the same access by selecting **Include** **Only Differences**.

TedRE - Department_Security_Comparison_601

601-SYREP:SYDEPSECCOMP.REP Printed 21-Sep-2021 at 15:11:57 by THERESA City of ADMINS Page 1
Department Group Security Comparison Report

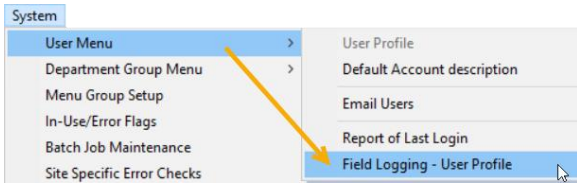
Department	Description	User 1	User 2	Different
		JSMITH	Default ADMINISTRATOR	Default Different
ABC1	abc1	No Access	Access	Yes
ABC2	abc2	No Access	Access	Yes
ADM	TOWN ADMINISTRATOR	No Access	Access	Yes
ADMIN	TOWN ADMINISTRATOR	No Access	Access	Yes
ADUSER	TOWN ADMINISTRATOR	No Access	Access	Yes
AFFORD	AFFORDABLE HOUSING	No Access	Access	Default
ARCAND	ARCAND PARK	No Access	Access	Yes
ARTS	ARTS COUNCIL	No Access	Access	Yes
ASSESSORS	ASSESSORS	No Access	Access	Yes
ASUSER	ASSESSORS	No Access	Access	Yes
ATHLETICS	ATHLETICS	No Access	No Access	Yes
AUXPOLICE	AUXILIARY POLICE	No Access	Access	Yes
BLDMNT	TOWN HALL MAINTENANC	No Access	Access	Yes
BUUSER	BUILDING	No Access	Access	Yes

1. Username 1’s access is listed – possible values are either **“Access”** or **“No Access”**
2. Username 2’s access is listed – possible values are either **“Access”** or **“No Access”**
3. If **“Yes”** is in the **“Different”** column, the user’s access is not the same
4. The column will show **“Default”** on the line that is the default department for the username
5. If the **access is the same** for each username, there will be **no entry** in the **Different** column

[ADM-AUC-SY-8215]



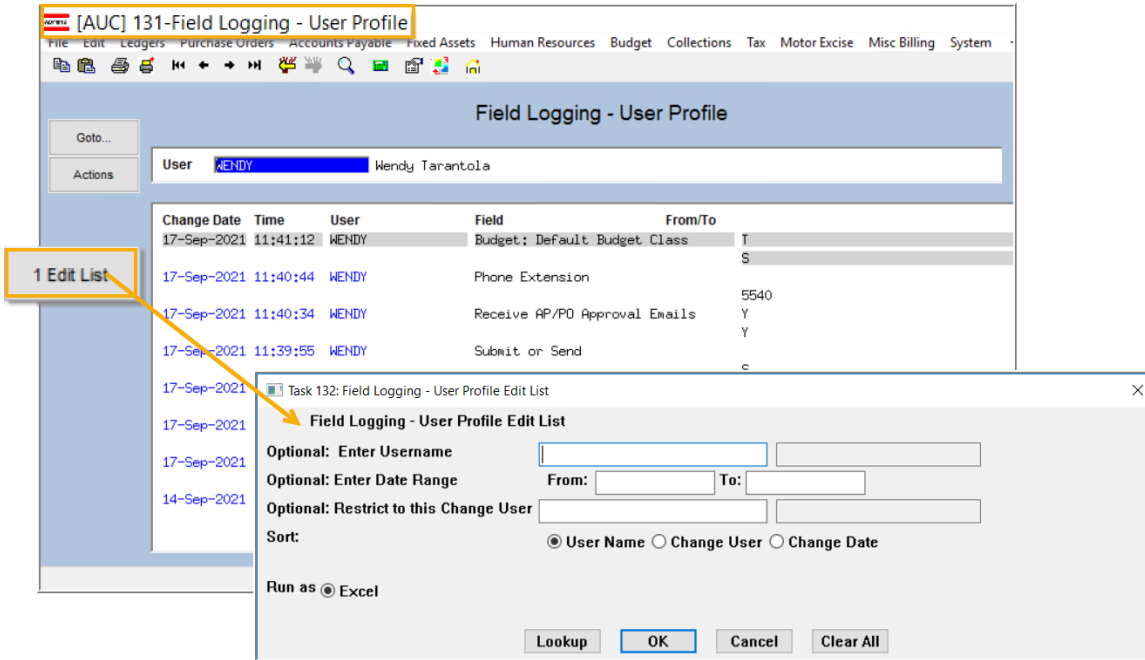
5 FIELD LOGGING OF CHANGES TO USER PROFILE [Enhancement]



ADMINS added a new Field logging screen #131 and Edit List to track changes to User Profiles. The [1 Edit List] report, available in Excel®, is accessed right from this new screen.

The screen and report show the change date, time, the user making the change, the field description, the original value, and new value.

System ▶ User Menu ▶ Field Logging – User profile



5.1 [1 Edit List] – Field Logging – User Profile

There are three optional filters. “Enter Username”, “Enter Date Range”, and “Restrict to this Change User”. The Username refers to the user profile record that was changed; the “Change User” is the user making the change to the record. The dates may be entered directly in mmddyyyy format or chosen from a calendar lookup. If no filter criteria is entered, the report will list all changes for all user profiles.

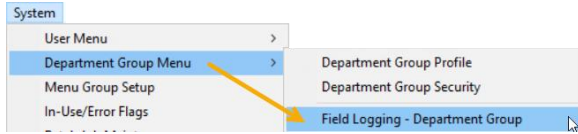
1	User_name	Description	Change_Date	Time	User	Description	Old_Value	New_Value
2	THERESA	Theresa	9/17/2021	11:57	WENDY	Dept Group	ADM	COLLECT
3	WENDY	Wendy Tarantola	9/17/2021	11:41	WENDY	Budget: Default Budget Class	T	S
4	WENDY	Wendy Tarantola	9/17/2021	11:40	WENDY	Phone Extension		5540
5	WENDY	Wendy Tarantola	9/17/2021	11:40	WENDY	Receive AP/PO Approval Emails	Y	Y
6	WENDY	Wendy Tarantola	9/17/2021	11:39	WENDY	Submit or Send		S
7	WENDY	Wendy Tarantola	9/17/2021	11:39	WENDY	PO Chg Order Post	N	Y
8	WENDY	Wendy Tarantola	9/17/2021	11:39	WENDY	PO Chg Order Post	Y	N
9	WENDY	Wendy Tarantola	9/17/2021	11:38	WENDY	Dept Group	ADM	ADMIN
10	WENDY	Wendy Tarantola	9/14/2021	13:04	WENDY	Restrict Journals to BT Type only		Y
11	WENDY	ADMIN	9/20/2021	10:47	WENDY	User Name		Profile copied from WENDY

Figure 11 Field Logging Edit List

[ADM-AUC-SY-8192]



6 FIELD LOGGING CHANGES TO DEPARTMENT PROFILE [Enhancement]



ADMINS added a new screen #133 to track changes made to the Department Group Profile.

Department Group Menu ▶ Field Logging – Department Group

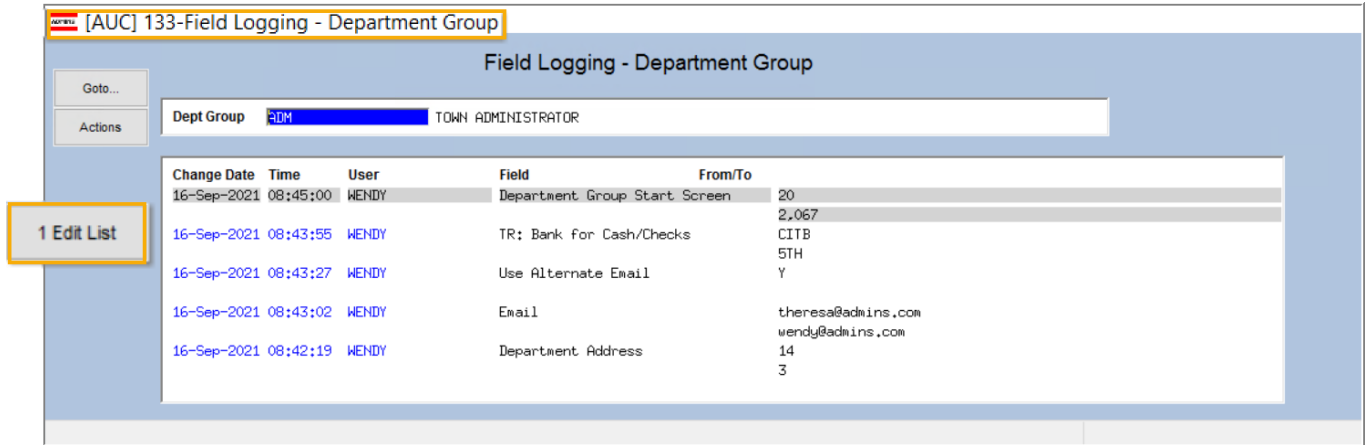
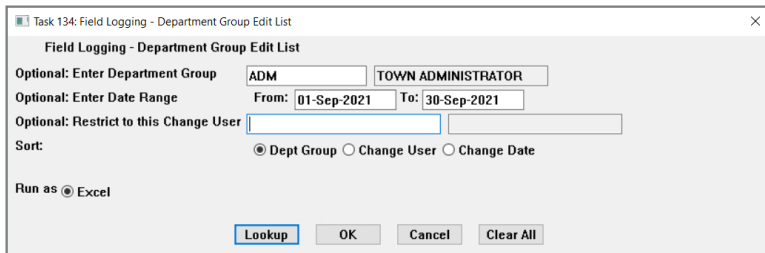


Figure 12 The Department Group Field Logging screen shows Change Date, Time, User, Field, and the old and new values

The [1 Edit List] report, available in Excel®, is accessed right from this new screen.



There are three optional filters. Enter Department Group, Enter Date Range, and Restrict to this Change User.

The Department Group field may be specified and refers to the Department Group record that was changed; the “Change User” is the user making the change to the record.

The dates may be entered directly in mmddyyyy format or chosen from a calendar lookup. If the fields are left blank, the report will show records for all changes made to all department groups. Sort by Department Group, Change User, or Change Date.

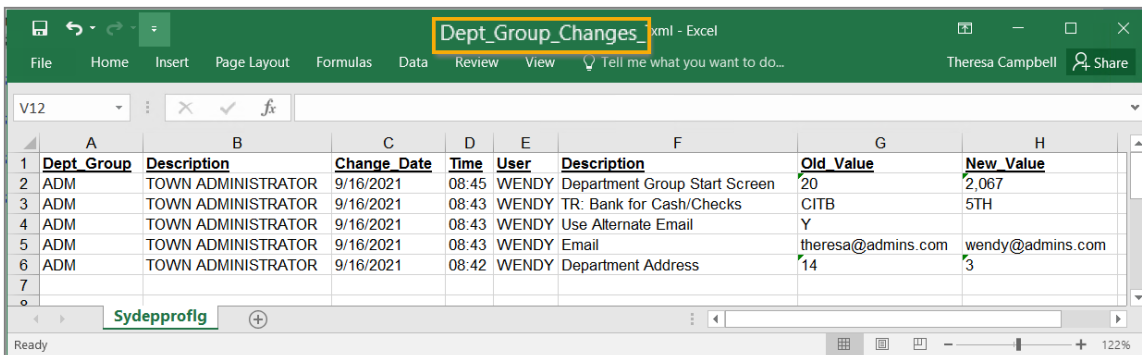


Figure 13 The Department Group Profile Edit List “Run as” Excel®

[ADM-AUC-SY-8193]



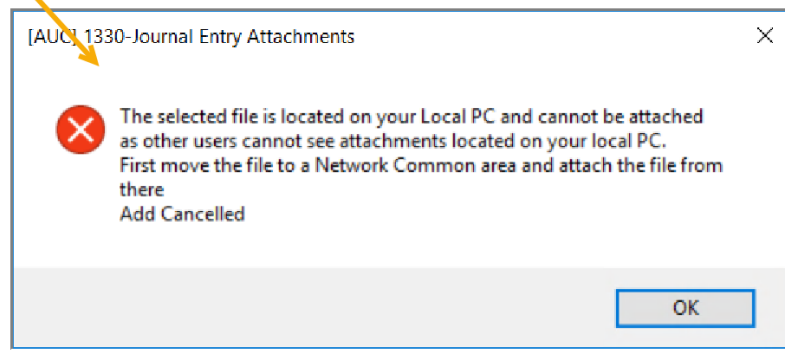
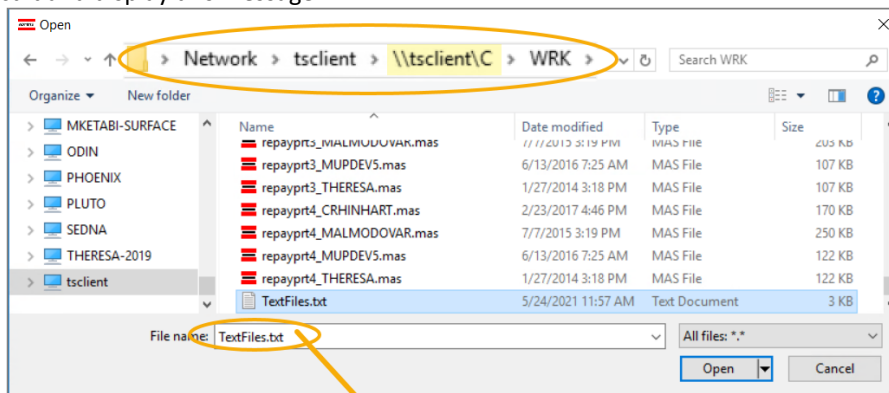
7 ATTACHMENTS [Enhancement]

Users occasionally find that an attachment listed on one of the many attachment screens is not available. **ADMINS** found that this frequently is due to the attached file residing on a local client workstation or location that is not available to all users.

7.1 Prevent Attaching Files Residing on Local Workstations

ADMINS made a change to prevent users attaching files from local workstations:

On the Attachment entry screens, if the file being attached has “TSCLIENT” in the path (or even the filename), the system will reject it and display this message:



Users still need access to the TSCLIENT area to be able to **download** files to their local workstations, such as files to be transmitted to 3rd parties.

7.1.1 Screens Using the New Feature

Figure 14 The following screens will use the new feature:

Modules	Task#	Description	Modules	Task#	Description
AP PO	2000	Enter Vendors	HR	6126	Employee Attachments
AP	2054	Change Order Attachments	HR	6127	Employee Position Attachments
AP	2059	In Progress - Attachments	HR	6128	Check Form
AP	2066	Posted - Attachments	HR	6815	Warrant History
AP	2081	Voucher Entry Attachments	ME	8508	Excise Account Attachments



Modules	Task#	Description	Modules	Task#	Description
AP	2224	Warrant History	ME	8512	Excise Bill Attachments
PO	3034	PO Query - In Progress	ME	8520	Excise Commitment Attachments
PO	3048	Change Order Attachment Entry	PP RE	9160	PP Abatement History
PO	3057	PO Query - In-Progress - Attachments	MB RC	10000	Customer Maintenance
PO	3058	PO Query - Attachments	MB	10171	Customer Query - Attachments
RC	4107	Attach Documents to Treasury Receipt	MB	10225	Attachments
RC	4108	Treasury Receipt Attachments	TT RC	11321	Tax Title Attachments
RC	4138	Attachments	TT RC	11322	TT Mail Attachments
RC	4217	Add Attachments to Posted Batch	TT	11323	Setup Table Attachments
RC	4286	TR Batch Attachments	TT	11324	TT Mail Attachments
RC	4306	MLC History - Attachments	FA	13007	Asset Entry [Attachments]
RC	4315	Attorney Attachments	FA	13050	Maintain Assets [Attachments]
RE PP ME	4321	Billing History	PO	14008	Contract Attachments
RC	4486	Cash Book - Attachments	PO	14063	Contract Query - Attachments
RC	4821	Deferral Attachments	PO	14073	Contract Query - Attachments
RE PP	5365	RE Deduction History	PO	14208	Change Order Attachments
RE	5817	Betterment Project Attachments	PO	15090	Bid Entry Attachments
RE	5839	Betterment Parcel Attachment	PO	15210	Open and Awarded Bid Attachments

[ADM-AUC-SY-8206]

7.2 Weekly Error Check Report

ADMINS changed the weekly error check on attachments to report only selected broken attachments:

1. If attachments are system generated, or
2. If "TSCIENT" is present in the file name

Note: Attachments from network common areas will not be error checked since each site establishes a network common area to which the ADMINS account running the process does not necessarily have access.

The weekly error check report is sent to the members of the BROKENATT email distribution list. To add users to the list, follow the instructions found in SY-150 AUC Email Distribution Lists in each Help Reference Library. If the weekly process identifies missing TSCIENT attachments, contact the owner of the source document; if the missing attachments are system generated, contact support@admins.com.

The screenshot shows the 'Email Distribution Lists' configuration page. The 'Distribution Code' is set to 'BROKENATT' and the 'Default Distribution List' is 'Broken Attachments List'. A table lists active users:

User Name	First Name	Last Name	Email	Status
MUPDEV2	ADMINS, Inc.	[LuAnn]	support@admins.com	Active
THERESA	Theresa		theresa@admins.com	Active
WENDY	Wendy	Tarantola	wendy@admins.com	Active

[ADM-AUC-SY-8206]



8 HELP REFERENCE LIBRARY

ADMINS added the following new or updated documents to the Help Reference Libraries.

8.1 Accounts Payable

- ENTER VOUCHERS/PROCESS PAYMENTS
 - AP-155 Create a Voucher that Pays a PO [New]
 - AP-170 Manual Checks [Updated]
 - AP-180 ACH Payments to Vendors [Updated]
- YEAR END PROCESSING
 - AP-710 1099 Processing [Updated]
- SITE SPECIFIC
 - AP-1260 Middletown, CT AP Weekly Check Run [Updated]

8.2 Human Resources

- YEAR END
 - HR-650 W4 Percentage Method Tables [Updated]
- SITE SPECIFIC
 - HR-900 Allentown, PA 26/27 Pay Period Processing [New]

8.3 Miscellaneous Billing

- COLLECTIONS
 - MB-130 Enter Receipts [New]
- BILLING
 - MB-310 Subscription Billing [Updated]
- MAINTENANCE
 - MB-410 Customer Maintenance [Updated]
 - MB-320 Special Invoice Billing [Updated]

8.4 Purchase Orders

- CONTRACTS/BIDS
 - PO-510 Contracts [Updated]

8.5 Revenue Collections ▶ Tax Title

- TAX TITLE
 - RC-450 Original Tax Taking [Updated]
 - RC-460 Town Possession of Foreclosed Property [New]

8.6 System

This document was added to all the modules:

- SYSTEM
 - SY-123 Department Groups [New]