

SYSTEM (ALL MODULES)

# **RELEASE NOTES – SEPTEMBER 2021**

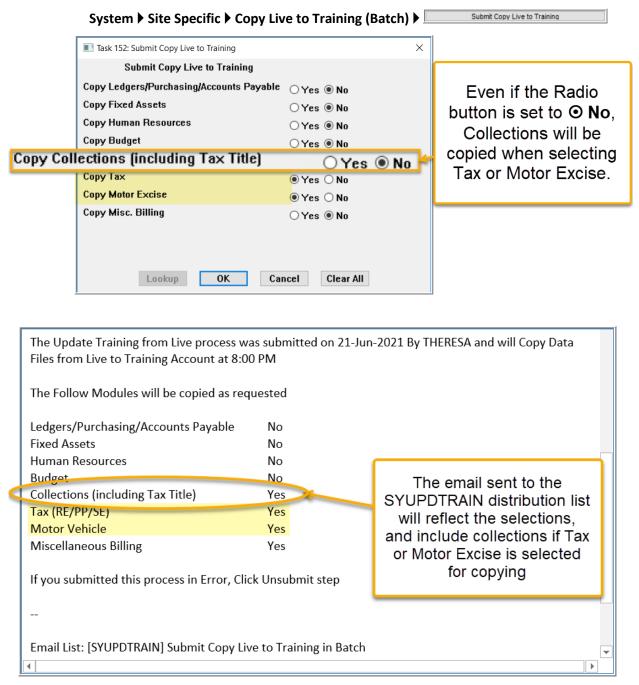
This document explains new product enhancements added to the ADMINS Unified Community (AUC) for Windows SYSTEM LIBRARY.

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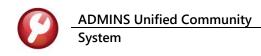
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# **1 COPY SELECTED MODULES FROM LIVE TO TRAINING [Enhancement]**

"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 **O** No, the **Revenue Collections** module will be copied.



[ADM-AUC-SY-8201]



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

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	
Сору Тах	● Yes ○ No	
Copy Motor Excise	● Yes ○ No	
Copy Misc. Billing	🔾 Yes 🖲 No	
Lookup OK Car	Clear All	

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

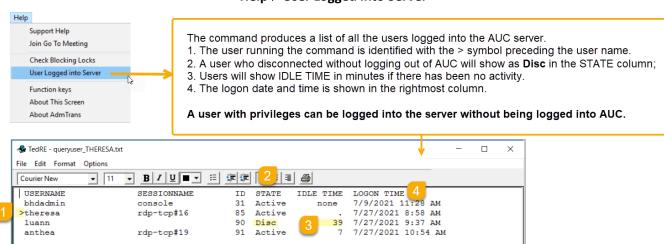
For example, the HR Manager will only be interested in copying Human Resources each time. With the software update, settings will be saved, and the same selections will be presented with any subsequent request by the user to **Submit Copy Live to Training** 

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

Figure 1 Running the new Users Logged onto the Server command

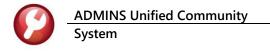


This command will show ALL users logged into the server, not just those logged into AUC

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

<sup>&</sup>lt;sup>1</sup> If the Session Name is CONSOLE, this is the system user and should be ignored.

system Favorites



2. The STATE will show Disc for Disconnected; this indicates the user did not exit from AUC prior to disconnecting from the server. This can ions Tax Motor Excise Misc Billing 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.)

3. 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.

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4. The **LOGON TIME** shows the date and time the user initiated the session.

[ADM-AUC-SY-8211]

#### **REPORT COMPARING USER ACCESS TO ELEMENTS [Enhancement]** 3

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 2<sup>nd</sup> account segment, comparing all values, and so forth. Run the report by selecting:

#### System Viser Menu Viser Profile [2 Account Security] [Actions]

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

🚾 [AUC] 1030-Maintain A	ccount Security		- 0 ×
Goto	Username	Maintain Account Security	
Actions Rebuild Security By User Rebuild Security By FY Rebuild Security By User By	Type	Access Codes         Default           ORead         @)Write         No-Access         No-Access           ORead         @)Write         No-Access         No-Access           ORead         @)Write         No-Access         No-Access	
Rebuild Security by Use By Rebuild Multiple User Securi Update Default Record Copy (add-on) User Security Copy (replace) User Security Edit List User Security Setup Report	ty By Year Sect 1 Fi 2 Deca 3 Fin 4 Pro 5 Loc	Required: Enter Username 1 DIMOND Required: Enter Username 2 JSMTH Include	Anthea Dimond (alternate) joe smith
User Security Comparison R	eport Tra	Run as @ Preview O Print O PDF O Excel Il Printing use Duplex @Yes O No Lookup OK Cancel	Clear All

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:

"O 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.

ADMINS Unified Community System

Task 1746: User Account Security Comparison	×
User Account Security Comparison Compares Account Security Setup between 2 Users Required: Enter Username 1 LUANN_ADMIN LuAnn Moore - Administrator Required: Enter Username 2 WENDY_ADMIN Wendy Admin acct Include O All Elements © Only Differences	User 1: WENDY has access all accounts on profile. Choose different user User 2: ANTHEA has access all accounts on profile. Choose different user
Include O All Elements   O Only Differences	ОК
Run as O Preview O Print O PDF	
If Printing use Duplex   Yes  No	
Lookup OK Cancel Clear All	×
Figure 3 Comparing LUANN_ADMIN to WENDY_ADMIN	User 1 cannot be the same user as User 2. Choose different users

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

In the example, the differences are identified – for five Funds WENDY\_ADMIN has "No Access"; LUANN\_ADMIN has "Write

- ب ا		GL_AccSec_Comparison_174	46_THERESA[3].xml - Excel	1	3 — C	
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522	• : ×	√ fx				
A	В	С	D	E	F	G
			User-1	User-2		
Type	Element	Description	WENDY_ADMIN	LUANN_ADMIN	Different	
Fund						
	2000	SPECIAL REVENUE	No Access	Write	Yes	
	2030	SCHOOL SECURITY 2013 GRANT	No Access	Write	Yes	
i	2070	BIG YELLOW SCH BUS (MA CULT CNCL GRTS)	No Access	Write	Yes	
	2095	SPED RESERVE C.40 S.13E	No Access	Write	Yes	
6 - C	2120	SCHOOL SPECIAL ASSISTANCE	No Access	Write	Yes	
1						
Department						
1	001	GENERAL GOVERNMENT	Read	Write	Yes	
2	002	PUBLIC SAFETY	Read	Write	Yes	
3	003	EDUCATION	Read	Write	Yes	
1	004	PUBLIC WORKS	Read	Write	Yes	
5	005	HUMAN SERVICES	Read	Write	Yes	
5	006	CULTURE AND RECREATION	Read	Write	Yes	
7	007	INTEREST ON LONG TERM DEBT	Read	Write	Yes	
3	008	INTERGOVERNMENTAL	Read	Write	Yes	
9	009	MISCELLANEOUS	Read	Write	Yes	
0	010	JUDGEMENTS/AWARDS	Read	Write	Yes	
1						
< >	Glactsecrptcon	np (+)	E			Þ

Access" to those five funds.

OK

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.

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

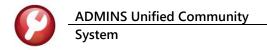
[ADM-AUC-GL-8456]

# **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]

Goto		Departn	nent Group Security				
Actions	Username	THERESA Theresa					
T. P. L.	Department	Description	Access Code	Status	On User		
Edit List	ABC1	abc1	Read-Only      Access     ONo-Access	Active			
	ABC2	abc2	Read-Only      Access     ONo-Access	Active			
2 Set Access	ADM	TOWN ADMINISTRATOR	Read-Only  Access No-Access	Active			
	ADMIN	TOWN ADMINISTRATOR	Read-Only  Access No-Access	Active			
and the second	ADUSER	TOWN ADMINISTRATOR	Read-Only  Access No-Access	Active			
Comparison Rpt	AFFORD	AFFORDABLE HOUSING	Read-Only  Access No-Access	Active			
	ARCAND	ARCAND PARK	Q Read-Only @ Access Q No-Access	Active			
	CURRICULUM	CURRICULUM	Read-Only Access ONo-Access	Active			
	DAMAGES	DAMAGES TO PERSONS/P	Read-Only Access ONo-Access	Active			
	DEBTI	DEBT-INTEREST	Read-Only      Access     ONo-Access	Active		1~1	

### 4.1.1 Added "Run as" • Excel<sup>®</sup> Option to Allow Filtering [Enhancement]

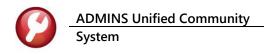


<b>□ 5</b> • ♂ -		DeptSec_25_THE	RESA[1].xml - Excel		<b>m</b> –	
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Α					Ž↓	Sort A to Z
1 Username	. √ User	С			s ▼	Sort Z to A
46 ADMTEST 4	Activ Depa	artment 3	Access			
193 ANTHEA	Activ				ZĄZ	C <u>u</u> stom Sort
340 ANTHEA ADMIN	ActivEINA	NCE	Access		2	Filter
487 AUCBATCH	Active	FINANCE	Access	Active		<u>r</u> inter
634 BD	Active	FINANCE	Access	Active	X	<u>C</u> lear
781 BILL	Active	FINANCE	Access	Active	5	Description
928 BILL_ADMIN	Active	FINANCE	Access	Active	C D	Reapply
1222 CHUCK	Active	FINANCE	Access	Active		
1369 CPIECHAM	Active	FINANCE	Access	Active		
1516 DAGFINN	Active	FINANCE	Access	Active		
1663 DIMOND	Active	FINANCE	Access	Active		
1810 DSAET	Active	FINANCE	Access	Active		Use the built in filter in Ex
2104 LUANN	Active	FINANCE	Access	Active		to limit the view to select
2251 LUANN_ADMIN	Active	FINANCE	Access	Active	Default	departments and access t
2398 LUANN_TEST	Active	FINANCE	Access	Active	Default	
2545 MOORE	Active	FINANCE	Access	Active		- this example shows a lis
2692 MUPDEV	Active	FINANCE	Access	Active		the users with Access to
2839 MUPDEV1	Active	FINANCE	Access	Active		FINANCE Department
2986 MUPDEV2	Active	FINANCE	Access	Active		
3133 MUPDEV3	Active	FINANCE	Access	Active		<b>_</b>
Syusrdepsec	(+)	EINIANICE	A	Antivo		
eady 34 of 6027 recor	de found					+ 150%

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	Page 1
Dep	artment Group	Security Tal	ble Listing	
-			-	
Haormano	Dopartmont	100000	Status	
Username	Deparcment	Access	Status	
			======	
	ARTSCULTUR	No-Access	A	
	BOE	No-Access	A	
	CENTRALCOM	No-Access	A	
	COMMON	No-Access	A	
		No-Access	A	
	CONSUMER		A	
		No-Access	A	
	DTSTATE	No-Access	A	
	ECD	Access	A	
	ECD GRANTS	Access	A	
	EDUCATION		A	
		No-Access	A	
	ELECIRIC	NO-ACCESS	A	



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 ADMI		
4		Department Gro	oup Security	y Table Listi	ng
				2	
Username	Status	Department	Access	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	
and addition	men S.	ASUSER	Access	Active	S . S
Jsername	User Status	ASUSER Department		Active Department Status	On User
Jsername				== Department	
Jsername			Access	== Department	
	Status	Department	Access		
	Status	Department UNCLASSIFIED	Access Access	== Department Status Active	
	Status	Department UNCLASSIFIED UNEMPINS	Access Access Access	== Department Status Active Active	
	Status	Department UNCLASSIFIED UNEMPINS VALLEYVOC	Access Access Access Access Access	== Department Status Active Active Active Active	
	Status	Department UNCLASSIFIED UNEMPINS VALLEYVOC VETERANS	Access Access Access Access Access Access	== Department Status Active Active Active Active Active	
	Status	Department UNCLASSIFIED UNEMPINS VALLEYVOC VETERANS WASTE	Access Access Access Access Access Access Access Access	== Department Status Active Active Active Active Active Active Active	
	Status	Department UNCLASSIFIED UNEMPINS VALLEYVOC VETERANS WASTE WATER	Access Access Access Access Access Access Access Access Access Access	Department Status Active Active Active Active Active Active Active Active Active	
	Status	Department UNCLASSIFIED UNEMPINS VALLEYVOC VETERANS WASTE WATER WORKCOMP	Access Access Access Access Access Access Access Access Access Access Access	Department Status Active Active Active Active Active Active Active Active Active Active	
VENDY	Status Active	Department UNCLASSIFIED UNEMPINS VALLEYVOC VETERANS WASTE WATER WORKCOMP WWWTP ZONING	Access Access Access Access Access Access Access Access Access Access Access Access Access	Department Status Active Active Active Active Active Active Active Active Active Active	
VENDY	Status	Department UNCLASSIFIED UNEMPINS VALLEYVOC VETERANS WASTE WATER WORKCOMP WWWTP ZONING	Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access	== Department Status Active Active Active Active Active Active Active Active Active ess	
VENDY	Status Active	Department UNCLASSIFIED UNEMPINS VALLEYVOC VETERANS WASTE WATER WORKCOMP WWWTP ZONING	Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access	== Department Status Active Active Active Active Active Active Active Active Active ess	On User
VENDY	Status Active	Department UNCLASSIFIED UNEMPINS VALLEYVOC VETERANS WASTE WATER WORKCOMP WWWTP ZONING	Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access Access	== Department Status Active Active Active Active Active Active Active Active Active ess	

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	<b>Group Security</b>

Department Group Security								
Username	THERESA Theresa							
Department	Description	Access Code	Status	On User				
ABC1	abc1	Read-Only OAccess ONo-Acce	ss Active					
ABC2	abc2	Read-Only      Access     ONo-Acce	ss Active					
ABS	ABS RECREATION DEPT	Read-Only Access No-Acce	ss Inactive					
ADM	TOWN ADMINISTRATOR	Read-Only Access ONo-Acce	ss Active	Default				
ADMIN	TOWN ADMINISTRATOR	Read-Only      Access      No-Acce	ss Active					
ADUSER	TOWN ADMINISTRATOR	Read-Only Access ONo-Acce	ss Active					
AFFORD	AFFORDABLE HOUSING	Read-Only      Access      No-Acce	ss Active					
ANIMAL	ANIMAL CONTROL	Read-Only Access ONo-Acce	ss Inactive					
ARCAND	ARCAND PARK	Read-Only      Access     ONo-Acce	ss Active					
ARTS	ARTS COUNCIL	Read-Only Access No-Acce	ss Active					
ASSESSMENT	ASSESSMENT	Read-Only Access No-Acce	ss Inactive					
ASSESSORS	ASSESSORS	Pead-C V Access ONo-Acce	ss ortive					

'n	nucional de la T	purter units and a second seco	ORead-Only	Auros	UNU	ctive		
	CLERK	TOWN CLERK	Read-Only	Access	O No-Access	Inactive	1	
	CRI	CranstonTestPO	Read-Only	Access	No-Access	Active	<b> </b> ~	
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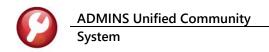
#### Figure 8 Before – Inactive departments were shown on the screen

Goto		Departn	nent Group Security				
Actions	Username	MENDY Wendy Tarantol	la				
	Department	Description	Access Code	Status	On User	^	
Copy Security	ABC1	abc1	Read-Only      Access     No-Access	Active		1	
	ABC2	abc2	Read-Only Access No-Access	Active		1	
2 Set Access	ADM	TOWN ADMINISTRATOR	Read-Only Access ONo-Access	Active		1	
	ADMIN	TOWN ADMINISTRATOR	Read-Only Access No-Access	Active	Default	1	
	ADUSER	TOWN ADMINISTRATOR	○ Read-Only ○ Access ● No-Access	Active		1	
Comparison Rpt	AFFORD	AFFORDABLE HOUSING	Read-Only      Access     ONo-Access	Active		1	
	ARCAND	ARCAND PARK	O Read-Only  Access ONo-Access	Active		1	
	ARTS	ARTS COUNCIL	O Read-Only  Access ONo-Access	Active		1	
	OSSE FORS	OSSESS	v OAccess ONo-A	Pctive	al a star of the	الممل	Jour of
- A series and	juki	Li answillest. 0	Discussioning Access ONO-Access	INCLIVE		1	and and and
	CRPCD	CRPCD	Read-Only Access ONO-Access	Active		1	
	CURRICULUM	CURRICULUM	Read-Only Access ONo-Access	Active		1	
	DAMAGES	DAMAGES TO PERSONS/P	Read-Only Access ONo-Access	Active		1	
	DEBTI	DEBT-INTEREST	O Read-Only  Access ONo-Access	Active			

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]

	Goto	Department Group Security	
	Actions	Username THERESA Theresa	
	A Come Comerte	Department Description Access Code Status On User	~
	1 Copy Security	All     Image: Task 601: Department Group Security Comparison Report     X     Detive       All     Image: Comparison Report     X	
	2 Set Access	AI Department Group Security Comparison Report ctive	
		AT Company Department Security between 2 users	
3.00	mparison Rpt	Required: Enter Username 1	
500		Required: Enter Username 2	
		AR btive	
		es Include	
		AT Stive	
		Run as  Preview  Print  PDF  Excel	
		L If Printing use Duplex  Yes No	
		BL CF Lookup OK Cancel Clear All ctive	
		COA SENIOR CENTER O Read-Only   Access O No-Access Active	
		COLLECT COLLECTOR ORead-Only Access No-Access Active Default	
		COLLECTOR TOWN COLLECTOR ORead-Only OAccess ONo-Access Active	

Figure 10 The Comparison report requires two usernames to be entered

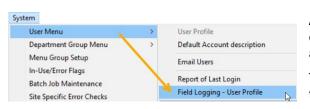
The usernames can be selected from a lookup or entered directly. Run the report to **Include O All Groups** or to only show groups where the users do not have the same access by selecting **Include O Only Differences**.

TedRE - Department_Security_Comparison_601_ File_tdit Format_Options								
Courier New		[]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]]						
601-SYREP:SYDEPSECCOMP.REP Printed 21-Sep-2021 at 15:11:57 by THERESA Page 1 City of ADMINS Department Group Security Comparison Report								
		User 1	User 2					
Department	Description	1 JSMITH	Default ADMINISTRATOR	2 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	4 Default Yes				
AFFORD	AFFORDABLE HOUSING	No Access	Access	Yes				
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					
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**<sup>®</sup>, 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 Viser Menu Field Logging – User profile

File Edit Lede		lers Accounts	r Profile Payable Fixed As		Resources	Budget (	Collections	Tax	Motor Excise	Misc Billing	System ·	
Goto					.ogging	- User I	Profile					
Actions	User <b>NENDY</b>		Wendy Tara	ntola								
	Change Date 17-Sep-2021		ser ENDY	Field Budget:	Default Bu		rom/To ss	T				
1 Edit List	17-Sep-2021	11:40:44 WE	ENDY	Phone Ex	tension			S 5540				
	17-Sep-2021				AP/PO Appr	roval Ema	ils	Y Y				
	17-Sep-2021		Field Logging - Use	Submit o				c				×
	17-Sep-2021		l Logging - User									^
	17-Sep-2021		Enter Username Inter Date Range		From:		To	_		7		
	14-Sep-2021		lestrict to this Cl				10.					
		Sort:			User I	Name ()	Change U	ser (	Change D	ate		
		Run as 🖲	Excel									
					Lookup	OK	С	ance	Clear	All		

# 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.

	Image: Section of the section of t									
11	3 User	record that was cha	inged	D	E	User who made the change to the record	G	н		
1	User Name	Description	Change Da		User 🦯	Description	Old Value	New Value		
	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	Т	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	Wendy Admin acct	9/20/2021	10:47	WENDY	User Name		Profile copied from WENDY		
12		-								

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

Field Logging - Department Group							
Actions Dept Group ADM TOWN ADMINISTRATOR							
	Change Date		User	Field From/T			
	16-Sep-2021	08:45:00	WENDY	Department Group Start Screen	20		
dit List	16-Sep-2021	08:43:55	WENDY	TR: Bank for Cash/Checks	2,067 CITB 5TH		
	16-Sep-2021	08:43:27	WENDY	Use Alternate Email	Ŷ		
	16-Sep-2021	08:43:02	WENDY	Email	theresa@admins.com wendy@admins.com	_	
	16-Sep-2021	08:42:19	WENDY	Department Address	14 3		

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**<sup>®</sup>, is accessed right from this new screen.

Task 134: Field Logging - Department Group	p Edit List	×
Field Logging - Department Grou	) Edit List	
Optional: Enter Department Group	ADM TOWN ADMINISTRATOR	
Optional: Enter Date Range	From: 01-Sep-2021 To: 30-Sep-2021	
Optional: Restrict to this Change User		
Sort:	${old o}$ Dept Group ${igcarrow}$ Change User ${igcarrow}$ Change Date	
Run as   Excel		
[ [	Lookup OK Cancel Clear All	

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.

	ile Home	₹ Insert Page Layout Fo	ormulas Data	Dept_ Reviev		Changes_xml - Excel Q Tell me what you want to do		函 — □ neresa Campbell 🔉 Sha	×
V1	2 -	$\times \checkmark f_x$							٣
	А	В	С	D	Е	F	G	н	
1	Dept_Group	Description	Change_Date	Time	User	Description	Old_Value	New_Value	
2	ADM	TOWN ADMINISTRATOR	9/16/2021	08:45	WENDY	Department Group Start Screen	20	2,067	
3	ADM	TOWN ADMINISTRATOR	9/16/2021	08:43	WENDY	TR: Bank for Cash/Checks	CITB	5TH	
4	ADM	TOWN ADMINISTRATOR	9/16/2021	08:43	WENDY	Use Alternate Email	Υ		
5	ADM	TOWN ADMINISTRATOR	9/16/2021	08:43	WENDY	Email	theresa@admins.com	wendy@admins.com	
6	ADM	TOWN ADMINISTRATOR	9/16/2021	08:42	WENDY	Department Address	14	3	
7									
•	Svd	lepprofig (+)							
Read		tebbiolia (+)				: 4	III II -		2%

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

[ADM-AUC-SY-8193]

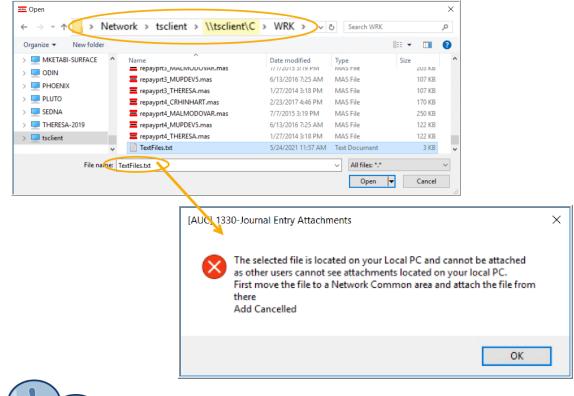
# 7 ATTACHMENTS [Enhancement]

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 3<sup>rd</sup> 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
АР	2054	Change Order Attachments	HR	6127	Employee Position Attachments
АР	2059	In Progress - Attachments	HR	6128	Check Form
АР	2066	Posted - Attachments	HR	6815	Warrant History
АР	2081	Voucher Entry Attachments	ME	8508	Excise Account Attachments

**ADMINS Unified Community** 

System

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Modules	Task#	Description	Modules	Task#	Description
АР	2224	Warrant History	ME	8512	Excise Bill Attachments
РО	3034	PO Query - In Progress	ME	8520	Excise Commitment Attachments
РО	3048	Change Order Attachment Entry	PP RE	9160	PP Abatement History
РО	3057	PO Query - In-Progress - Attachments	MB RC	10000	Customer Maintenance
РО	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	РО	14063	Contract Query - Attachments
RC	4821	Deferral Attachments	РО	14073	Contract Query - Attachments
RE PP	5365	RE Deduction History	PO	14208	Change Order Attachments
RE	5817	Betterment Project Attachments	РО	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:

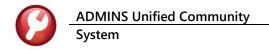
- 1. If attachments are system generated, or
- 2. If "TSCLIENT" is present in the file name

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 **TSCLIENT** attachments, contact the owner of the source document; if the missing attachments are system generated, contact <u>support@admins.com</u>.

📼 [AUC] 20-E	mail Distribution L	ists		
		Email Dis	tribution Lists	
Goto				Default Distribution List
Actions		n Code BROKENATT Bro	oken Attachments List	Default Distribution List
	User Name	p www.energy		Status 🔥
	MUPDEV2	ADMINS, Inc. [LuAnn]	support@admins.com	Active
	THERESA	Theresa	theresa@admins.com	Active
1 Add Email	WENDY	Wendy Tarantola	Wendy@admins.com	Active
2 Remove Email				

[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

٠	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]
٠	YEAR END PROCESSING	AP-710 1099 Processing	[Updated]
٠	SITE SPECIFIC	AP-1260 Middletown, CT AP Weekly Check Run	[Updated]

### 8.2 Human Resources

•	YEAR END	HR–650 W4 Percentage Method Tables	[Updated]
٠	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

٠	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]
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