

# AUC 2021 Virtual Site Visit



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<https://global.gotomeeting.com/join/608966445>

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***Wednesday, October 27, 2021***

***2:00PM***



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**ADMINS Unified Community**  
Fiscal Year 2021 Highlights

Among the new features ADMINS has incorporated this past Fiscal Year:

**SYSTEM WIDE CHANGES (OUR TOP TEN)**

- Copy Live to Training feature for Super Users with Module Selection June 2021
- Release notes structure mirrors that of the Help Reference Library June 2021
- Consolidated the Forms Text & Parameters table to make updates a breeze June 2021
- Enhanced hover text on attachments June 2021
- Converted ADMINS.com training videos to use YouTube features June 2021
- Most attachments are now scheduled tasks to speed up processing December 2020
- Added multiple features for sites working from home due to Covid19 pandemic Throughout 2020
- Email simultaneously to multiple email addresses for reports and documents December 2020
- Added a [Reset Password] button to allow users to reset their own AUC passwords September 2020
- Miscellaneous Billing Module a true "Accounts Receivables" Module March 2021

**ACCOUNTS PAYABLE MODULE**

- Improved the voucher entry process with Batch only checking & more June 2021
- Multiple manual checks in a single batch June 2021
- Report to identify commodity codes with no posted history June 2021
- Upload non-sequential check numbers via a spreadsheet for voiding June 2021
- Merge Process - Error checking for unmatched TINs for selected vendors June 2021
- Certified Payroll Checkbox for Prevailing Wage POs and Contracts June 2021
- TIN Truncation (Mask SSN & Fed ID Numbers) on 1099s December 2020
- Email an encrypted, password protected 1099 on demand December 2020
- Added 1099NEC processing for Non-Employee Compensation reporting December 2020
- Added 1099G processing for certain Government Grants (COVID/CARES) March 2021
- Report #2609 to identify duplicate payment amounts, vendor #s, and dates December 2020
- "Change Type" & "Copy Address" Buttons on Vendor Maintenance Screen December 2020
- Vendor field on Vendor Maintenance Screen displays the first active remit address December 2020
- Remit number, address type, & status fields added to Vendor Name Query screen December 2020
- Source documents attached to all vouchers in a batch December 2020
- Optimized the Accounts Payable → Warrant [Print Checks] process -- reduces time to print checks September 2020
- Warrant History screen includes optional reports run for a given warrant September 2020
- Enhanced Vendor Check History screen to display meta-data / hover text to help users with limited access understand how the system displays or restricts information September 2020
- Added checking to the Interfaces/Imports → Upload Vouchers from a Spreadsheet process -- zip code format, blank lines, re-titled column headers, COVID 19 Refunds September 2020
- Added Form 1099-NEC processing September 2020
- Added Form 1099G processing for Government Grants (COVID) March 2021
- Added a "Batch Owner" column to the Voucher Posting Selection screen. March 2021
- Added an "Active Items Only" option to the Commodity Items lookup menu March 2021
- The Create Vendor Check Attachments email includes the dollar amount for the warrant March 2021
- Added a "sort by User Batch" option to the Disbursement Edit List March 2021
- Improved the search function on the Bank Account Management by Check Number screen March 2021

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Legend - Red = September 2020, Green = December 2020, Purple = March 2021, Blue = June 2021

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# Agenda



**Welcome**

**FY2021 Highlights**

**General**

**Accounts Payable**

**Human Resources**

**Revenue Collections**

**Calendar Year End, ADMINS.com, Support**

**Future Features**



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# General



**Real Estate**

**Fixed Assets**

**System**

**Human Resources**

Grade Schedules – our “go to” report

Import Timesheets from a Spreadsheet

Improved Warrant Analysis

Federal 941 & Regulatory Changes

Detail Billing for Custodial, Police, Fire services, etc..



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# Real Estate



Suppress public safety names from appearing on publicly available commitment reports

See page 2 of the June, 2021 Real Estate Tax Release Notes

[AUC] 5009-Commitment Report - Hide Owner Name on Selected Parcels

Commitment Report - Hide Owner Name on Selected Parcels

Line	Parcel	Owner	Current Owner	Location
1	0070 -0099 -0000	ALARIE, RAYMOND J + DONNA M	ALARIE, RAYMOND J + DONNA M	3 ANDREW ST
2	0002 -0001 -0000	FOUR NINETY FIVE ASSOCIATE	FOUR NINETY FIVE ASSOCIATES	ROUTE 495
3	0093 -022A -001A	MCLELLAN, TINA & BRYAN W	MCLELLAN, TINA & BRYAN W	1 BROOKFIELD LN
4	0002 -002A	GAGNE, MICHAEL P	GAGNE, MICHAEL P	208 FARM ST 208
5	-			

1 Listing

1: Parcel Master by Parcel#  
2: Parcel Master by Location  
3: Parcel Master by Street

Up to 5000 parcels can be selected or directly entered into the screen; use right click or the lookup button to search the Parcel Master file by Parcel number, location , or street:

Use the [1 Listing] button to produce the #5010 Report of Hidden Owner Names.

# Fixed Assets



## Land



## Buildings



## Equipment



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# System

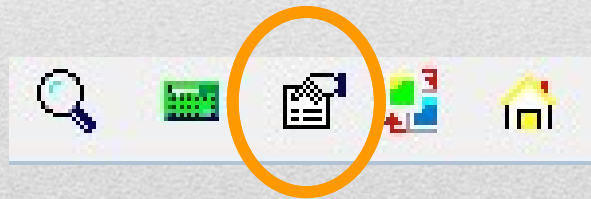


- **SY-175 Copy Live to Training (Batch)**

System ► Administrator ► Copy Live to Training (Batch)

SY June 2021 Release Notes

- **SY-117 Quick Report Selector**



SY September 2020 Release Notes

- **SY-157 Software Update Completion Email Notice**

SY March 2021 Release Notes



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# Human Resources



- #6714 – Employee List – Grade Schedule


Emp#	TimesheetGroup	Alt Rate5 Desc	GLPct Typ
Name	PayGroup	Account #1	Budget Amt#4
Position#	ShiftCod	GLPct Typ	Actual Amt#4
Description	OrigHireDt	Budget Amt#1	Account #5
BargainingUnit	PosHireDate	Actual Amt#1	GLPct Typ
Schedule	Alt Rate1	Account #2	Budget Amt#5
Grade	Alt Rate1 Desc.	GLPct Typ	Actual Amt#5
Step	Alt Rate2	Budget Amt#2	Reporting Location
FTE	Alt Rate2 Desc.	Actual Amt#2	Location Grade
Annual Salary	Alt Rate3	Account #3	EmpType
Period Salary	Alt Rate3 Desc.	GLPct Typ	PeriodHrs
Daily Salary	Alt Rate4	Budget Amt#3	DOB
Hourly Rate	Alt Rate4 Desc.	Actual Amt#3	Gender
Per Diem Rate	Alt Rate5	Account #4	



# Human Resources



- **HR-345 Import Timesheets from a Spreadsheet**

 [AUC] 6764-Timesheet Import from Spreadsheet

## Timesheet Import from Spreadsheet

Description

Email Timesheet Import Template to User
Employee List - Import Timesheets
Import Timesheets

# Human Resources



- Report 6199 – Warrant Analysis

6199-HRWARRANTANALYSIS.REP Printed 08-Oct-2021 at 09:40:23 by LUANN  
City of ADMIN  
Warrant Summary Report

Batch: 3494

Warrant: 903554 Check Date: 01-Oct-2021 Period 07-Oct-2021 thru 10-Oct-2021

Gross:	5,508.49
Paid Benefits:	75.22
Total Expenses:	5,583.71
=====	
Employee Net Pay:	
Employee Net Direct Deposits:	3,901.99
Employee Other Direct Deposits:	
Employee Direct Deposits Not in ACH File:	(Void/manual checks without a bank code)
Vendor Vouchers:	886.78
Vendor Checks:	
Vendor Wires:	
Vendor Direct Deposits:	794.94
Total Disbursements:	5,583.71
=====	
Gross:	5,508.49
Paid Benefits:	75.22
Less Vendor Vouchers:	886.78
Total Funding:	4,696.93
=====	

6221-HRTRNPST.REP Printed 08-Oct-2021 at 09:43:57 by LUANN  
City of ADMIN  
Labor Distribution GL Posting Report

FY	User	Batch	Date	Refer#	Code	Account	Description	Budget/BegBal	Debit	Credit
Batch#: 903554										
2022	903554		01-Oct-2021	3494	HR01	1000-000-0000-000-00-00-10400	CASH, GENERAL FUND			4696.93
							Warrant: 903554 Payroll Batch: 3494			
2022	903554		01-Oct-2021	3494	HR01	1000-000-0000-000-00-00-20210	ACCRUED PAYROLL, GEN		4696.93	
							Warrant: 903554 Payroll Batch: 3494			





# Human Resources – Detail Billing



Human Resources

- Maintenance >
- Payroll Processing >
- Timesheet Entry >
- Special Processing >
- Void/Manual/Figure Paycheck
- Billing and Invoicing >**
  - Customer Query
  - Customer Update
  - Generate Invoices
  - Credit Balance Processing
  - Correct Invoice Customer Number
  - Batch Entry
  - Detail Payment
  - Receipt Edit List
  - Submit Batch
  - Post Batches
  - Batch Entry
  - Adjustment Entry
  - Adjustment Edit List
  - Submit Adjustment Batch
  - Post Adjustments
  - Print Customer Statements
  - Print Aging Report
  - Invoice Transaction History
  - Invoice Transaction History as of Report
  - Detail Billing Bill Type
  - Detail Billing Bill Category
  - Detail Billing Transaction Codes
  - Batch Query Screen
- Bank Reconciliation >
- Queries >
- Reports >
- Tables >
- Quarterly Processing >
- Year-End Processing >
- Module Maintenance >
- Interfaces/Imports >
- Site Specific >
- Help Reference Library



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# Human Resources



- Enhancement to Paycheck History Detail screen
- [Delete Step Range] button to Salary Schedule tab on Bargaining Unit Table
- Process to Add a Cost Code to all positions in a Bargaining Unit
- Ability to print direct deposit advices, W2 and 1095C documents from smartphone
- Manual check screen – Reset All Deductions button added.



# Paycheck History Detail Screen



The Paycheck History - Check Detail screen now includes the position #.

If an employee received two checks in a warrant, it is easy to determine which position each check is for.

**Paycheck History-Inquiry**

Highlight desired check and click the button labeled View Check to view check detail information

1 Employee	2 Bank	3 Warrant	4 WarCkDate	5 Ck#	6 Check Type	Net Pay
009846	TRUDEAU, KAREN A	PAYC	903463		Deposit Advi	1405.91
009846	TRUDEAU, KAREN A	PAYC	903463		Printed	16.26
009846	TRUDEAU, KAREN A	PAYC	903463	13-Feb-2021	0904072	1405.91
009846	TRUDEAU, KAREN A	PAYC	903463	13-Feb-2021	0001222	1405.91

**Paycheck History-Check Detail**

1

Employee #	009846	TRUDEAU, KAREN A	Check Date	13-Feb-2021	Gross Pay	2382.35
Check	0904072	Deposit Advice	Warrant	903463 Batch 3341	Deductions	2382.35
Bank	PAYROLL - CITIZENS BANK NEW	Period Ending	07-Feb-2021	Net Pay		
Number Pays	1	Period	WE	Pos S006NURSCHO-01	Benefits	33.16

**Paycheck History-Check Detail**

2

Employee #	009846	TRUDEAU, KAREN A	Check Date	13-Feb-2021	Gross Pay	16.50
Check	0001222	Printed	Warrant	903463 Batch 3341	Deductions	.24
Bank	PAYROLL - CITIZENS BANK NEW	Period Ending	07-Feb-2021	Net Pay	16.26	
Number Pays	1	Period	WE	Pos T634COAVAN -01	Benefits	.24

# Bargaining Unit – Salary Schedule



ADMINS added a **Delete Step Range** button to the Salary Schedule screen.

[AUC] 6438-Bargaining Unit - Salary [theresa]

### Bargaining Unit - Salary

Goto...  
Actions  
7 Summary  
8 Add New  
9 Delete  
E Add Step  
D Delete Step  
Z Edit List

Bargaining Unit: DPW - DP  
Schedule: DPW  
Grade: 1  
Effective Date: 01-Jul-2019  
dpw afscme  
Department of Public Works - laborers  
fy20 dpw laborers 40 h/w  
7.1.2019 2% increase laborers 40 h/w

Calculator Fields  
Salary Base: H Hourly  
Hourly/Salaried/Per Diem: S Salaried

1 Cost Codes  
2 Holidays  
3 Longevity Pay  
4 Retroactive Pay  
5 Salary Sched  
6 Other Info  
Benefit Statements  
Affordable CareAct

Steps	Annual	Period	Daily	Hourly	Per Diem	Tier
1	53888,16	1028,40	205,68	25,7100	205,68	1
2	55334,40	1056,00	211,20	26,4000	211,20	1
3	55606,88	1061,20	212,24	26,5300	212,24	1
4	57346,56	1094,40	218,88	27,3600	218,88	1
5	60008,48	1145,20	229,04	28,6300	229,04	1
6	45818,56	874,40	174,88	21,8600	174,88	1

Calculator Fields  
Hours in Year: 2096,00  
Days in Period: 5,00  
Periods in Year: 52,400000  
Days for Per Diem: 262,000000  
Hourly Digits: 4  
UDF Calculator 1  
UDF Calculator 2  
User Defined #3  
User Defined #4  
User Defined #5

1 %Table Change  
Y New Salary Schedule  
W Show Employees

Del. Step Range

Added a Delete Step Range Button


# Add Code to All Positions



Human Resources ► Maintenance ► Add Cost Code to Bargaining Unit Positions

**ADMINS** offers a feature to add a cost code to all *Active* employees assigned to positions in a bargaining unit.

[Help Reference HR-527 Add a Cost Code en masse to Existing Employees](#)

 Task 6898: Add Cost Code to Bargaining Unit Positions

**Add Cost Code to Bargaining Unit Positions**

Optional: Enter up to 9 Bargaining Units Edit 2 values: POL ADM PO, PROF 01,

Required: Enter Cost Code MEDIOVR MEDICARE OVER \$200,000

Required: Enter Effective Date (mmddyyyy) 01-Jan-2021

Run as ☒ Preview ☐ Print ☐ PDF ☐ Excel

If Printing use Duplex ☒ Yes ☐ No

Lookup OK Cancel Clear All

# Smartphone HR Documents



**ADMINS** produces and emails encrypted, password-protected Direct Deposit Advice, W2, and 1095C documents that employees may print from their smartphone (iPhone or Android).



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HR March 2021 Release Notes

# Manual Check

## Reset All Deductions Button



**ADMINS** added a **[Reset All Deds]** button to the **Manual Check** screen to remove all deductions from the manual check and refresh with the deductions from the employee's maintenance screen. See **HR-430 Manual Checks** for details.

**[AUC] 6203-Void/Manual/Figure Paycheck**

**Manual Entry-Timesheets**

Goto... Actions

Warrant: 000000, Employee: 000040, Period: 01-Mar-2021 to 07-Mar-2021, MOORE, KEITH F, Bank: Check, Figure Check: UNCALCULATED, Base Adj. ☒

---Tax Table--- Exemptions

Fed	FED2020	M		Gross	2498,50
State	MA	M	2	Deductions	2498,50
Other				Net Pay	
				Benefits	34,57

1 Timesheets 2 Wages 3 Deduction Entry 4 Benefit Entry 5 Base Buckets

Cost Code	Description	Amount	PreTax	Order	Bank	Account	Type	Additional Information
NC-PN8	NORFOLK CTY PEN 8%	199,88	Y	100			<input type="radio"/> Checking <input type="radio"/> Saving	NOT EDITABLE - % OF BASEBU
NC2%	NORFOLK CTY 2%	38,43	Y	100			<input checked="" type="radio"/> Checking <input type="radio"/> Saving	NOT EDITABLE - % OF BASEBU
PLGF-FUN	RT-FUN FAMILY TOWN	114,49	Y	102			<input type="radio"/> Checking <input type="radio"/> Saving	
<b>Totals</b>		2498,50						

0 Recalculate Reset All Deds

6 Add Void 7 Add Manual 8 Add Cost Code 9 Del Cost Code 0 Recalculate Reset All Deds Pay Register Print Check Print Multiple Checks Remove Check VM Warrant List

-- Added 20-Apr-2021 By WENDY Changed by



# Accounts Payable



- Improve Voucher Entry process with “Batch Only Checking”
- Multiple Manual Checks in Single batch
- Voiding multiple non-sequential check numbers via a spreadsheet
- View most recent attachments to Vendor



# Improve Voucher Entry Process with “Batch Only checking”



Prior to June 2021 the **[Check Voucher]** button on the voucher entry screen was causing some user confusion when trying to complete a batch. Each individual voucher was being checked but the **[Check Batch]** step was being missed, prompting support calls when the batch wasn't being moved into the approval process.

By removing the **[Check Voucher]** button from the screen, it has streamlined checking a batch and reduced user confusion

Before

After



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AP June 2021 Release Notes

# Multiple Manual Checks in a Single Batch



Prior to June 2021 a Voucher batch could only contain a single manual check, so if more than 1 manual check needed to be issued, a new batch needed to be created for each check.

Voucher Batches can now contain multiple manual checks that can be processed and printed at the same time

**Voucher Batch Entry**

Batch: 17018 Default Bank: EAST EASTERN BANK FOR A/P  
Default Dept: FIRE Fire Department  
Voucher Date: 15-Oct-2021  
Default Type: P Payment Voucher ☐ Check/Wire/ACH ☐ No Check ☒ Manual Check

	Expected	Entered	Balance
Price			
Freight			
Other			

Submit Batch for Processing ☐ Yes ☒ No

**Manual Check Batch**

Entry Began 2  
Error Status  
Ready for Release  
Disapproved  
Ready for Posting  
Awaiting Approval  
Change Orders  
Open  
Closed

Voucher#	Vendor	Type	Total	Status
482065	001833-01 ADMIN INC	Payment Vouch		Entry Began
482064	003609-01 AAO-HNS	Payment Vouch		Entry Began

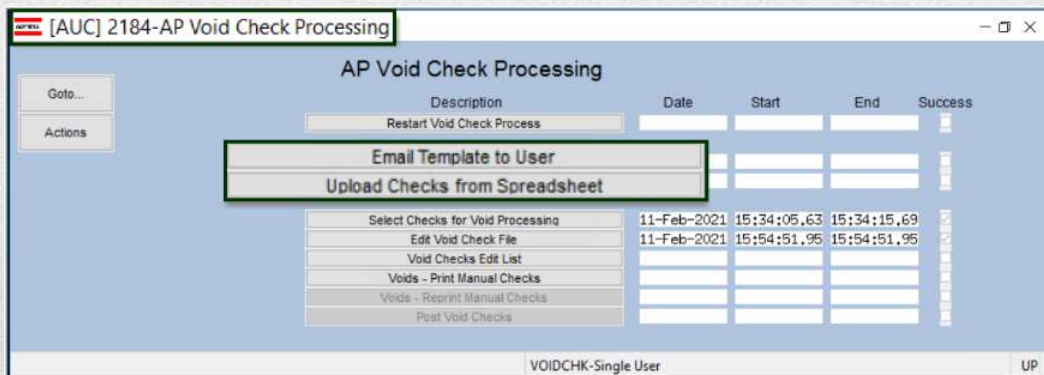
Edit Voucher Lines Edit Voucher Lines Up



# Voiding Multiple Non-sequential Check Numbers Via A Spreadsheet



June 2021 a new feature was added to Void Check process to allow uploading of a random series of checks via a spreadsheet. This will help when recovering unclaimed property in the form of uncashed checks.



	A	B	C
1	REQUIRED: Check# to Void	OPTIONAL: Check Date	
2	359014		
3	259014		
4	359043		
5	359394		
6	359356		
7	359365		
8	359356		
9	359371		
10	359377		
11	359386		
12	359032		
13	359019		
14	359040		



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AP-250 Voiding Checks

# View Most Recent Attachments to Vendor



Vendors can have many attachments between Check copies, Purchase Orders, 1099s, and user attachments, there could be 100's of attachments for a vendor.

Prior to June 2021, the user would have to page down multiple times to see the last attachments for a Vendor. The new **[X Goto Last]** button will now display the last 10 attachments, making it a lot faster to see the newest attachments.

1 Name/Address   2 Addresses   3 Classification   4 Attachments   8 Items   9 User Defined				
5 Add Vendor 6 Add Address  7 Add Attachment  <b>X Goto Last</b>	Seq#	Description	Filename	Buttons
	257	Check Print Warrant 006715	APCK_EAST0365017.PDF	
	258	Check Print Warrant 006727	APCK_EAST0365760.PDF	
	259	Check Print Warrant 006743	APCK_EAST0366514.PDF	
	260	Check Print Warrant 006762	APCK_EAST0367285.PDF	
	261	Check Print Warrant 006777	APCK_EAST0367846.PDF	
	262	Check Print Warrant 006787	APCK_EAST0368210.PDF	
	263	Check Print Warrant 006795	APCK_EAST0368474.PDF	
	264	Check Print Warrant 006803	APCK_EAST0368900.PDF	
	265	Check Print Warrant 006805	APCK_EAST0369016.PDF	
	266	Check Print Warrant 006810	APCK_EAST0362610.PDF	V View   Z Email



# Purchase Orders



- PO Query improved notes when a check is voided and voucher cancelled
- PO Query shows Quantity Balances

# PO Query Improved Notes When a Check Is Voided / Voucher Cancelled



If a voided check / voucher cancellation re-opens a Purchase Order– the system stamps a note on the **[5 Status History]** tab of the **Purchase Order Query** screen to explain why the PO was re-opened. The note will include that the PO was re-opened, the check number that was voided, and a note that the voucher was cancelled.

[AUC] 3053-PO Query - Status History

File Edit Ledgers Purchase Orders Accounts Payable Fixed Assets Human Resources Budget Collections Tax Motor Excise Misc Billing System Favorites Help

PO # 194567

Vendor Code 027876 01  
GENERATION GENIUS  
14622 VENTURA BLVD #2026  
SHERMAN OAKS  
CA 91403-0000

Via Email ☐

Dept Code TECHNOLOGY TECHNOLOGY  
PO Date 31-Aug-2020 FY 2021  
Type Code R Regular  
Ship To Attn D Conroy

Deliver To 6 BELLINGHAM HIGH SCHOOL  
Invoice To 14 BELLINGHAM BUSINESS OFF

1 Delivery Notes  
D Conroy to order once PO# is assigned

J Internal Notes  
per Carolyn, transfer \$ from COVID funds

Expected Amt 795,00

2 Details (1) 3 Items 4 G 5 Status History 6 Vouchers (1) 7 Changes 8 Attachment (1)

Change Date	Time	User	Status	Notes
26-Jan-2021	12:16:27.15	THERESA	Open	Re-Open PO, Void Ck 0361533 , Cancel Vouc
03-Sep-2020	08:34:33.75	DDUBOIS	Open	
02-Sep-2020	15:59:25.06	JREBELD	Ready for Posting	
02-Sep-2020	15:55:12.87	MGAROFANO	Needs Department Head Appr	
02-Sep-2020	14:54:03.41	JREBELD	Needs Supervisor Approval	
31-Aug-2020	19:03:41.40	DCONROY	Needs Budget Override	
31-Aug-2020	19:03:35.81	DCONROY	Ready for Release	
31-Aug-2020	18:59:37.55	DCONROY	Entry Began	

Encumbered 795,00 Liquidated Relieved Paid Balance 795,00  
Retained Liquidated Relieved Paid

# PO Query Shows Quantity Balances



Purchase Orders created with a quantity can be paid on multiple vouchers using different quantities. To review what has been paid (posted vouchers) use the **[3 Items]** tab of the PO Query screen to see the remaining quantity balance to be paid.

To show quantity balances for purchase orders with in-progress vouchers, use the **[6 Vouchers]** tab and click the Excel button

[AUC] 3035-PO Query - Posted [theresa]

PO # 194791

Vendor Code 001833 01  
ADMINS INC  
219 LEWIS WHARF  
BOSTON  
MA 02110-3927

Dept Code FIRE Fire Department  
PO Date 11-Feb-2021 FY 2021  
Type Code R Regular  
Ship To Attn  
Ship Date

Deliver To 4 CLARA MACY ELEMENTARY S  
Invoice To 4 CLARA MACY ELEMENTARY S  
1 Delivery Notes  
No text available  
J Internal Notes  
No text available

2 Details (1) 3 Items 4 GL Details 5 Status History 6 Vouchers (2) 7 Changes 8 Attachment (1)

Line Item	Item Description	Qty	QtyBalance	Price	Freight	Other	Ext Amount
1	testing new error message	5000.00	4785.850	45.9000			229500.00

Contract # (MDT)  
Retain Amt  
Retain %

Encumbered 229500.00 Liquidated  
Retained Liquidated

Balance 219670.51



# General Ledger



- Copy Job stream from user to user
- Query in-progress Journals
- Safeguards for Audit Override Transactions
- If the *Account type* must be changed in the GL Chart



# Copy Job Stream from User to User



**ADMINS** added a feature to allow privileged users to copy job stream reports from one user to another. The privilege to use this copy screen is based on menu group.

Could be used when an employee leaves, a different user needs to run the job as someone is on vacation, or to be used as a base for use by another user.

## Ledgers ► Reports ► Job Stream Copy (Supervisors)

**ADMINS** [AUC] 1721-Job Stream Copy for Supervisors

Job Stream Copy for Supervisors

Goto... Actions 1 Copy

Username	Job Name	Description	#Rpt	Detail
THERESA	GENERAL REPORT	run report	1	Reports
WENDY	DEPARTMENT EXPENDITURE REPORTS	Department Expenditure Reports	10	Reports
WENDY	GENERAL REPORT	run report	1	Reports
WENDY	GROUP INSURANCE TRUST FUND	SUMMARY OF REVENUES & EXPENDITURES YTD	1	Reports
WENDY	MY JOB	My Job Stream	1	Reports
WENDY	SCHOOL-SOUTH	EXPENSE SUMMARY WIP	1	Reports
WENDY	SSS	aaaa	2	Reports



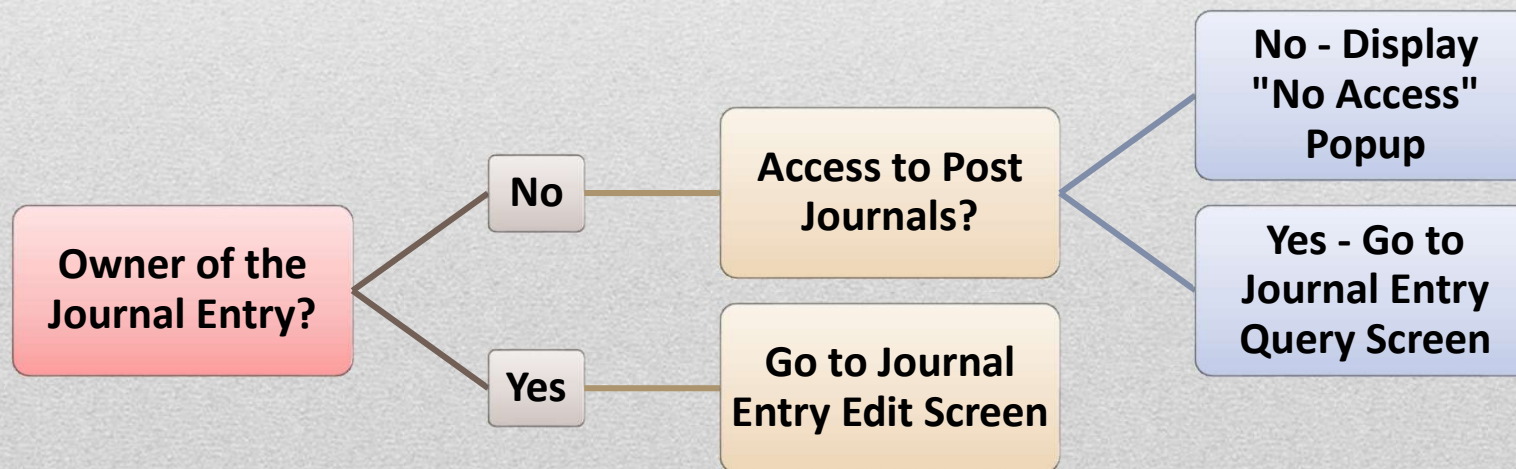
# Query In-progress Journals



When a journal entry is created, its owned by the user that created the journal. There is now a Journal Entry Query screen for users that have “Access to Post Journals” on their user profile, to be able to review these in-progress journals prior to being posted.

## Ledgers ► Journal Entry Processing ► Journal Entry Query

In addition, the Work In Progress Transaction Query will drill down to the Journal Entry Query screen if the user has access to post journals



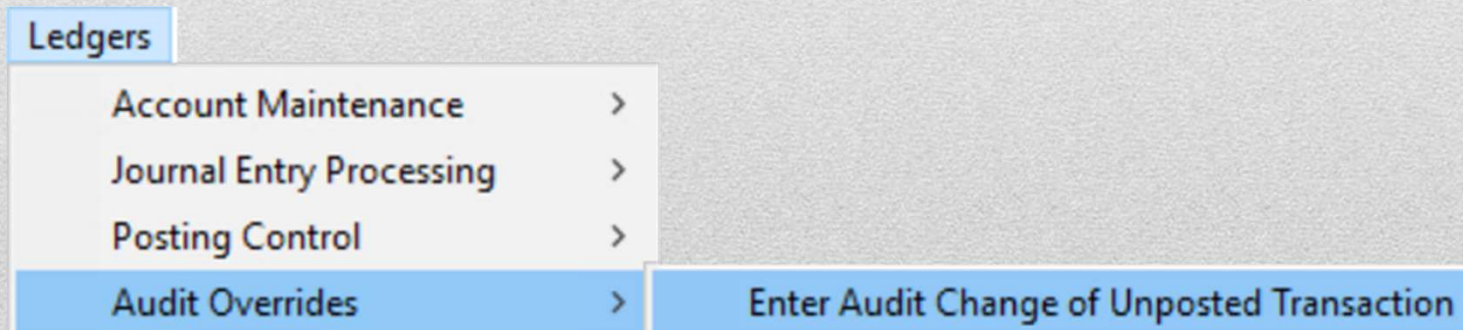
# Safeguards for Audit Override Transactions



*ADMINS* provides the Audit Override feature to allow corrections to accounts and amounts that are waiting in the unposted file. Enhancements were made to the process to prevent accidentally causing a previously balanced transaction to become out of balance

The system will not allow account changes from a *subsidiary ledger (Revenue or Expenditure)* account to a *Balance Sheet (Asset, Liability, Fund)* Account or vice versa.

Summary accounts will no longer be allowed for use in an Audit Override



# If the *Account Type* Must Change in the GL Chart



Account types (**A, L, F, R, E**) are assigned in **AUC** when the account is created. **ADMINS** advises that account types not be changed mid-year; if the account type must be changed, safeguards are in place, to help prevent unintended consequences such as out of balance situations.

Maintain Chart of Accounts

Last Changed THERESA  
25-Nov-2020  
Last Trx in FY 25-Nov-2020

FY 2021 Account 0200-921-0000-000-00-00-69392  
Description CROSS ST WATER MAIN LOOP - LAKE ST TO BLA

Account Type R

Valid Account types are A(sset), L(iab), F(und Equity)  
R(evenue), E(xpenditure)

Per Svcs Account ☐ Yes ☒ No

Exclude from Budget Mill Rate

TEST

Account Types

Type	Description	Status	Tof
A	Asset	A	
E	Expenditure	A	
F	Fund Equity	A	
L	Liability	A	
R	Revenue	A	

OK Find Search Cancel Help Eof

# Revenue/Collections



- **Automated Supplemental Journals Appropriations for Treasury Receipts**
- **Treasury Receipt Codes – added a [Copy Code] button**
- **Improved *Notes* feature on Tax Inquiry screens**



# Automated Supplemental Appropriations Journals for Treasury Receipts



Municipalities receive monies for contingencies which is entered as a Treasury Receipt (TR) –for example, a construction company provides a performance bond of \$5,000 (the money is usually booked to a “revenue” account).

**[AUC] 4009-Treasury Receipt Codes**

**Treasury Receipt Codes**

Goto...  
Actions

Cash Account \*\*\*\*\*000-0000-000-00-00-10400  
Override Cash Account

Year 2021 Do Not Post? ☐ Require Line Note? ☐ Default Amount  
Code PERFBOND1 30 KING STREET DEMOLITION Allow Override? ☒

	Accounts	Description	Amount
1st Debit	1000-000-0000-000-00-00-10400	CASH, GENERAL FUND	
1st Credit	1000-000-0000-000-00-00-42080	DEMOLITION LIENS	
2nd Debit	0000-000-0000-000-00-00-00000		
2nd Credit	0000-000-0000-000-00-00-00000		
3rd Debit	0000-000-0000-000-00-00-00000		
3rd Credit	0000-000-0000-000-00-00-00000		
4th Debit	0000-000-0000-000-00-00-00000		
4th Credit	0000-000-0000-000-00-00-00000		

**1 Summary**  
**2 Edit List**  
**3 Error List**

**Create Supplement Appropriation JE** ☒  
**Mapped SA Account** 0000-000-0000-000-00-00-00000 Account not mapped for 1st Credit

-- Added 06-May-2021 By THERESA Changed 06-May-2021 by THERESA

New checkbox on the screen - if the box is checked, and the account is not set up with a corresponding expense account, the system notifies the user that the account is *not mapped* for the 1st credit - Go to the TR Code Account Map Screen to establish the account mapping

This new feature allows creating an appropriation to an “expense” account of the amount received in the TR module, which reduces the chance of over-expending the expenditure account.

# Treasury Receipts – Copy Code



When creating new Treasury Receipt codes, sometimes the code is very similar to a code that already exists in the table. There is now a feature to copy the Treasury Receipt code to a new code

[AUC] 4009-Treasury Receipt Codes [theresa]

File Edit Ledgers Purchase Orders Accounts Payable Fixed Assets Human Resources Budget Collections Tax Motor Excise Misc Billing System Favorites Help

Treasury Receipt Codes

Goto... Actions

Cash Account: \*\*\*\*-000-0000-000-00-10400

Override Cash Account:

1 Add Code **3 Copy Code** Edit List 9 Error List View Account

4 Year	5 Code	6 Description	7 Revenue Account#	8 Detail
2021	AAFGIFTS	ANDERSON ATHLETIC FIELD G	5105-000-0000-000-00-48300	
2021	AAFGIFTS2	Copy of AAFGIFTS	5105-000-0000-000-00-48300	
2021	AAFMISC	ANDERSON ATHLETIC FIELD MT	5105-000-0000-000-00-48400	
2021	AAFRENT	ANDERSON ATHLETIC FIELD RE	5105-000-0000-000-00-42500	
2021	ABANDON	ABANDONED PROP-UNCL ITM	RENTAL RECEIPTS	
2021	ABANDONST	ABANDONED PROPERTY-STATE	Inactive Account. To use, go to the Chart of Accounts and activate this account #	
2021	ASCREF3	ABANDONED PROPERTY-STATE		
2021	ASCREF4	GROUP INSURANCE REIMB		
2021	ASENGSTMRV	RETIREE HEALTH INS 50%		

Inactive accounts on TR codes are identified by the highlighting. Hover text advises how to resolve.

Inactive Account. To use, go to the Chart of Accounts and activate this account #

# Enhanced Notes on Tax Inquiry



The Bill Notes/Tickler query screen for Tax Inquiry fixed the issue with adding and deleting notes

Payments ► Batch Entry ► [Enter Receipts] ► [Bill Payment] ► [T Bill Notes/Tickler]

**[AUC] 4149-View Notes/Tickler**

2020 Motor Excise View Notes/Tickler

Goto... Actions

9 Add A Note

Bill# 000002-00 Year 2020

Owner [REDACTED]

Location BX 111

Account - -

Parcel - -

Balance as of 28-May-2021 \$ 368.58

Bill Payment Detail Payment Transactions Q Trx Summary 0 Attachments Z MLCs Y Parcel/Acct Notes T Bill Notes/Tickler

Date	Time	Entered By	Note	Remind?	Remind On?	Remind Who?	Remind Sent?	Buttons
28-May-2021	11:41:42.	THERESA	Friday, 28 May, 2021	<input checked="" type="radio"/> N <input type="radio"/> Y				8 Edit Note 0 Email 9 Delete
	00:00:00.	SSILVA		<input type="radio"/> N <input type="radio"/> Y				

CY DELINQ

Buttons  
8 Edit Note 0 Email 9 Delete



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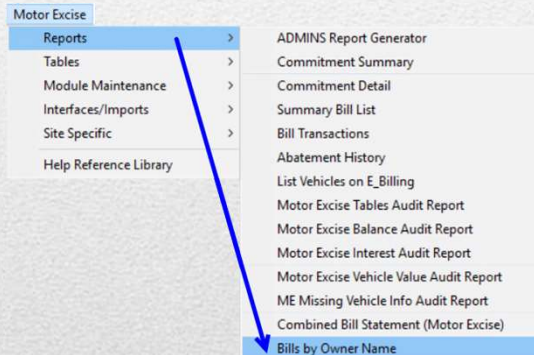
Collections June 2021 Release Notes

# Motor Excise Bills by Owner Name



For large companies that have multiple vehicles, this report will combine them together and report on balances for all vehicles that are registered under the same name.

## Motor Excise ► Reports ► Bills by Owner Name



Bills_By_OwnerName_THERESA[3].xml - Excel															
2019															
Year	Commit#	Seq#	Bill#	Owner Name	Bill_Net	Net_Amt	Chg_Amt	Adj_Amt	Ref_Amt	Ded_Amt	Pay_Amt	Abt_Amt	Bal_Amt	Reg#	
532	2020	03	018487-00	TOYOTA LEASE TRUST	657.07	657.07	657.07	0.00	0.00	0.00	657.07	0.00	0.00	1AAH92	
533	2020	03	018488-00	TOYOTA LEASE TRUST	526.88	526.88	526.88	0.00	0.00	0.00	526.88	0.00	0.00	7YYY412	
534	2020	03	018489-00	TOYOTA LEASE TRUST	510.94	510.94	510.94	0.00	0.00	0.00	510.94	0.00	0.00	6XP264	
Total Bill Run: 3					2,092.24	2,092.24	2,092.24	0.00	0.00	0.00	2,092.24	0.00	0.00		
537	2020	04	019209-00	TOYOTA LEASE TRUST	357.66	357.66	357.66	0.00	0.00	0.00	357.66	0.00	0.00	6MM995	
538	2020	04	019210-00	TOYOTA LEASE TRUST	370.78	370.78	370.78	0.00	0.00	0.00	370.78	0.00	0.00	2AEE84	
539	2020	04	019211-00	TOYOTA LEASE TRUST	306.57	306.57	306.57	0.00	0.00	0.00	306.57	0.00	0.00	2ALB14	
540	2020	04	019212-00	TOYOTA LEASE TRUST	326.03	326.03	326.03	0.00	0.00	0.00	326.03	0.00	0.00	12HR14	
541	2020	04	019213-00	TOYOTA LEASE TRUST	382.26	382.26	382.26	0.00	0.00	0.00	382.26	0.00	0.00	2AED14	
542	2020	04	019214-00	TOYOTA LEASE TRUST	261.85	261.85	261.85	0.00	0.00	0.00	261.85	0.00	0.00	12LM54	
543	2020	04	019215-00	TOYOTA LEASE TRUST	374.65	374.65	374.65	0.00	0.00	0.00	374.65	0.00	0.00	1CTT92	
544	2020	04	019216-00	TOYOTA LEASE TRUST	408.75	408.75	408.75	0.00	0.00	0.00	408.75	0.00	0.00	6MM945	
545	2020	04	019217-00	TOYOTA LEASE TRUST	375.96	375.96	375.96	0.00	0.00	0.00	375.96	0.00	0.00	47178	
546	2020	04	019218-00	TOYOTA LEASE TRUST	374.65	374.65	374.65	0.00	0.00	0.00	374.65	0.00	0.00	1YAZ34	
Total Bill Run: 4					3,539.16	3,539.16	3,539.16	0.00	0.00	0.00	3,539.16	0.00	0.00		
549	2020	05	019914-00	TOYOTA LEASE TRUST	268.55	268.55	268.55	0.00	0.00	0.00	0.00	0.00	0.00	268.55 7DE357	
550	2020	05	019915-00	TOYOTA LEASE TRUST	327.65	327.65	327.65	0.00	0.00	0.00	0.00	0.00	0.00	327.65 6VY689	
551	2020	05	019916-00	TOYOTA LEASE TRUST	225.57	225.57	225.57	0.00	0.00	0.00	0.00	0.00	0.00	225.57 2ALM34	
552	2020	05	019917-00	TOYOTA LEASE TRUST	214.84	214.84	214.84	0.00	0.00	0.00	0.00	0.00	0.00	214.84 7DE297	
553	2020	05	019918-00	TOYOTA LEASE TRUST	268.55	268.55	268.55	0.00	0.00	0.00	0.00	0.00	0.00	268.55 2HWN35	
554	2020	05	019919-00	TOYOTA LEASE TRUST	84.48	84.48	84.48	0.00	0.00	0.00	0.00	0.00	0.00	84.48 1XZT55	
555	2020	05	019920-00	TOYOTA LEASE TRUST	296.67	296.67	296.67	0.00	0.00	0.00	0.00	0.00	0.00	296.67 1LR992	
556	2020	05	019921-00	TOYOTA LEASE TRUST	317.59	317.59	317.59	0.00	0.00	0.00	0.00	0.00	0.00	317.59 2KL855	
557	2020	05	019922-00	TOYOTA LEASE TRUST	408.94	408.94	408.94	0.00	0.00	0.00	0.00	0.00	0.00	408.94 1XWJ95	
558	2020	05	019923-00	TOYOTA LEASE TRUST	242.36	242.36	242.36	0.00	0.00	0.00	0.00	0.00	0.00	242.36 1XZT45	
559	2020	05	019924-00	TOYOTA LEASE TRUST	214.84	214.84	214.84	0.00	0.00	0.00	0.00	0.00	0.00	214.84 2PMX84	
560	2020	05	019925-00	TOYOTA LEASE TRUST	234.10	234.10	234.10	0.00	0.00	0.00	0.00	0.00	0.00	234.10 6NH587	
Total Bill Run: 5					3,104.14	3,104.14	3,104.14	0.00	0.00	0.00	0.00	0.00	0.00	3,104.14	
Total Bill Year 2020					78,733.19	75,659.33	78,733.19	0.00	3,073.86	0.00	75,629.05	3,073.86	3,104.14		
Grand Total #Bills: 533					176,963.68	167,305.61	176,963.68	0.00	9,658.07	0.00	173,859.54	9,658.07	3,104.14		



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Motor Excise March 2021 Release Notes

# Email Simultaneously to Multiple Email Addresses



Emailing reports or documents to multiple email addresses at the same time.

Enter the first email address followed by a COMMA and immediately followed by the second address. Continue to add email addresses until the line is filled

Task 360: Email Reports

**Email Reports**

Required: Enter Email Address

Optional: Enter Email Subject

Optional: Enter Note 1

Optional: Enter Note 2

Optional: Enter Note 3

Optional: Enter Note 4



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System December 2020 Release Notes

# Miscellaneous Billing




The AUC Miscellaneous Billing System was designed to provide billing capabilities for municipal charges that are outside regular Tax and Utility Billing. Charges to be billed can be either repetitive or "single use" in nature. Ability to receive Lockbox payments of these Invoices. Detailed customer search options and complete billing and payment history make it easy to answer customers' questions about their account balance. The system is also fully integrated with the AUC Accounting System.

- Provides all invoicing and receipting capabilities, for both repetitive and "single use" charges
- Detailed customer search and history functions
- Process Lockbox payments for Invoices
- Completely integrated with the AUC Financials
- Ability to deliver Invoices via email



# Miscellaneous Billing





**TOWN OF ADMINS  
FIRE DEPARTMENT**  
215 Lewis Wharf  
BOSTON MA 02110  
[fire@admins.com](mailto:fire@admins.com)

Page 1 of 1  
INVOICE #: 000204  
INVOICE DATE: 18-Oct-2021  
DUE & PAYABLE UPON RECEIPT  
AMOUNT DUE: \$350.00

Service Address

**Invoice Fire Alarm Inspection**

Description of Services Rendered	Qty	Rate	Amount Billed
Quarterly Fire Alarm Inspection			\$350.00
<b>Total Due:</b>			<b>\$350.00</b>

Invoice #: 000204  
Customer #: 00000046  
Description: Commercial Fire Alarm Inspection  
Service Address: 98839 HAWTHORNE BLVD #6101  
#6101  
Amount Due: \$350.00

**For Service Questions Contact:**  
**FIRE DEPARTMENT**  
8-4 M-F  
☎ 617-494-5100  
✉ [fire@admins.com](mailto:fire@admins.com)

**For Payment Questions Contact:**  
Treasurer/Collector  
MON - TH 8:30-4:30 PM  
FRI 8:30AM - 1:00PM  
☎ 508-657-2840  
✉ [collector@bellinghamma.org](mailto:collector@bellinghamma.org)


**DETACH AND RETURN WITH YOUR PAYMENT**

LOWY LIMOUSINE SERVICE  
98839 HAWTHORNE BLVD #6101  
BOSTON, MA 02110-0000

**REMIT COPY**

Mail Payments & Make Payable to:  
  
TOWN OF ADMINS  
Attn: Director of Finance  
219 Lewis Wharf  
BOSTON, MA 02110-0000

INVOICE #: 000204  
INVOICE DATE: 18-Oct-2021  
DUE & PAYABLE UPON RECEIPT  
AMOUNT DUE: \$350.00



**TOWN OF ADMINS  
Water/Sewer Department**  
215 Lewis Wharf  
BOSTON MA 02010  
[water@admins.com](mailto:water@admins.com)

Page 1 of 1  
INVOICE #: 000203  
INVOICE DATE: 18-Oct-2021  
DUE & PAYABLE UPON RECEIPT  
AMOUNT DUE: \$895.00

Service Address

**Invoice for Special Services**

Sample Invoice message that will print above the data grid

Description of Services Rendered	Qty	Rate	Amount Billed
Application Fee			\$35.00
Life Cycle Fee			\$45.00
<b>Subtotal:</b>			<b>\$80.00</b>
Sewer Application Fee			\$35.00
Sewer Inspection Fee			\$80.00
Sewer Other Fees (Service Calls)			\$120.00
<b>Subtotal:</b>			<b>\$235.00</b>
Water Application Fee			\$35.00
Water Connection Fee			\$150.00
Water Inspection Fee			\$125.00
Water New Meter Fee			\$150.00
Water Other Fees (Service Calls)			\$120.00
<b>Subtotal:</b>			<b>\$580.00</b>
<b>Total Due:</b>			<b>\$895.00</b>

Invoice #: 000203  
Customer #: 00000088  
Description: Water/Sewer Special Services  
Service Address: 99385 CHARITY ST #840  
Amount Due: \$895.00

**For Service Questions Contact:**  
**Water/Sewer Department**  
9-4 M-F  
☎ 671-494-5100  
✉ [water@admins.com](mailto:water@admins.com)

**For Payment Questions Contact:**  
Treasurer/Collector  
MON - TH 8:30-4:30 PM  
FRI 8:30AM - 1:00PM  
☎ 508-657-2840  
✉ [collector@bellinghamma.org](mailto:collector@bellinghamma.org)

**DETACH AND RETURN WITH YOUR PAYMENT**

TREE MUSKETEERS  
99385 CHARITY ST #840  
BOSTON, MA 08831-0000

**REMIT COPY**

Mail Payments & Make Payable to:  
  
TOWN OF ADMINS  
219 Lewis Wharf  
BOSTON, MA 02110-0000

INVOICE #: 000203  
INVOICE DATE: 18-Oct-2021  
DUE & PAYABLE UPON RECEIPT  
AMOUNT DUE: \$895.00



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MB-320 Misc Billing Special Invoices

# AUC User Experience



IRS TIN Matching

Searching by Keyword/Topic

ADMINS.com Video Features

New Users

Support Best Practices

Effective Email Signatures

– Gmail, Outlook, AOL Mail



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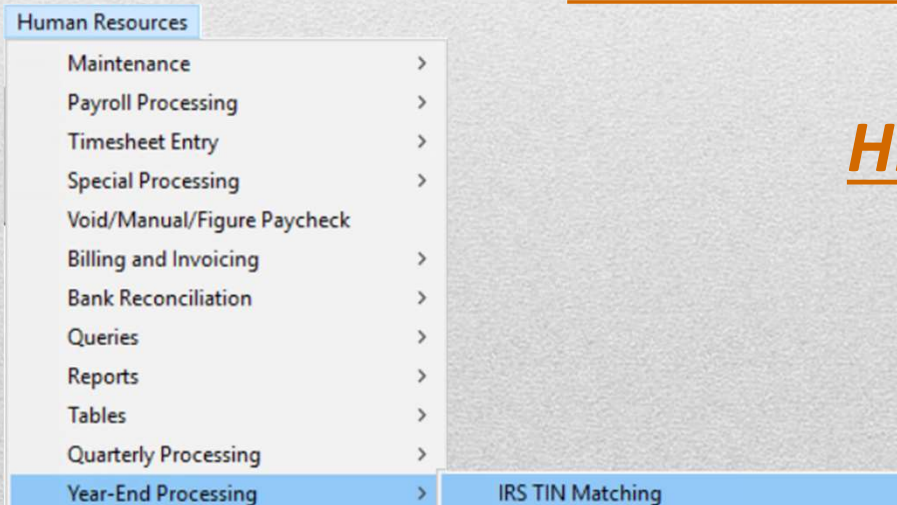
# IRS TIN Matching



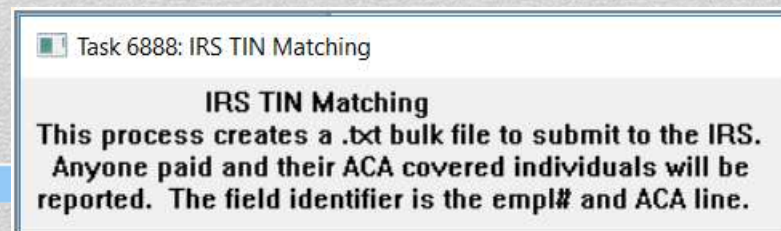
The IRS accepts a file to check Social Security and Federal ID Numbers to ensure that the AUC data matches what the IRS has on file; interactive TIN matching for “one-offs” is also available

**Human Resources ► Year End Processing ► IRS TIN Matching**

[Taxpayer Identification Number TIN On Line Matching 1 | Internal Revenue Service \(irs.gov\)](#)



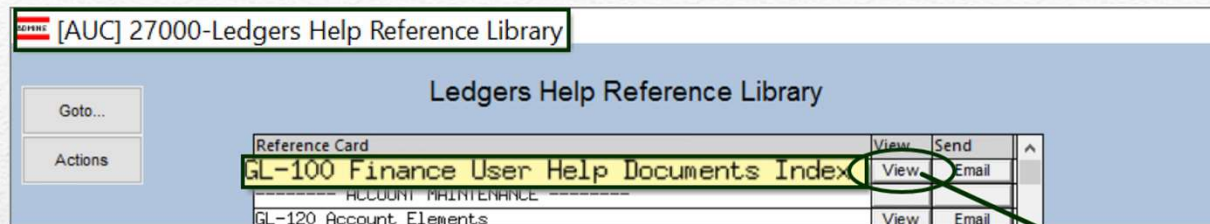
## **HR-780 Bulk Tin Matching**



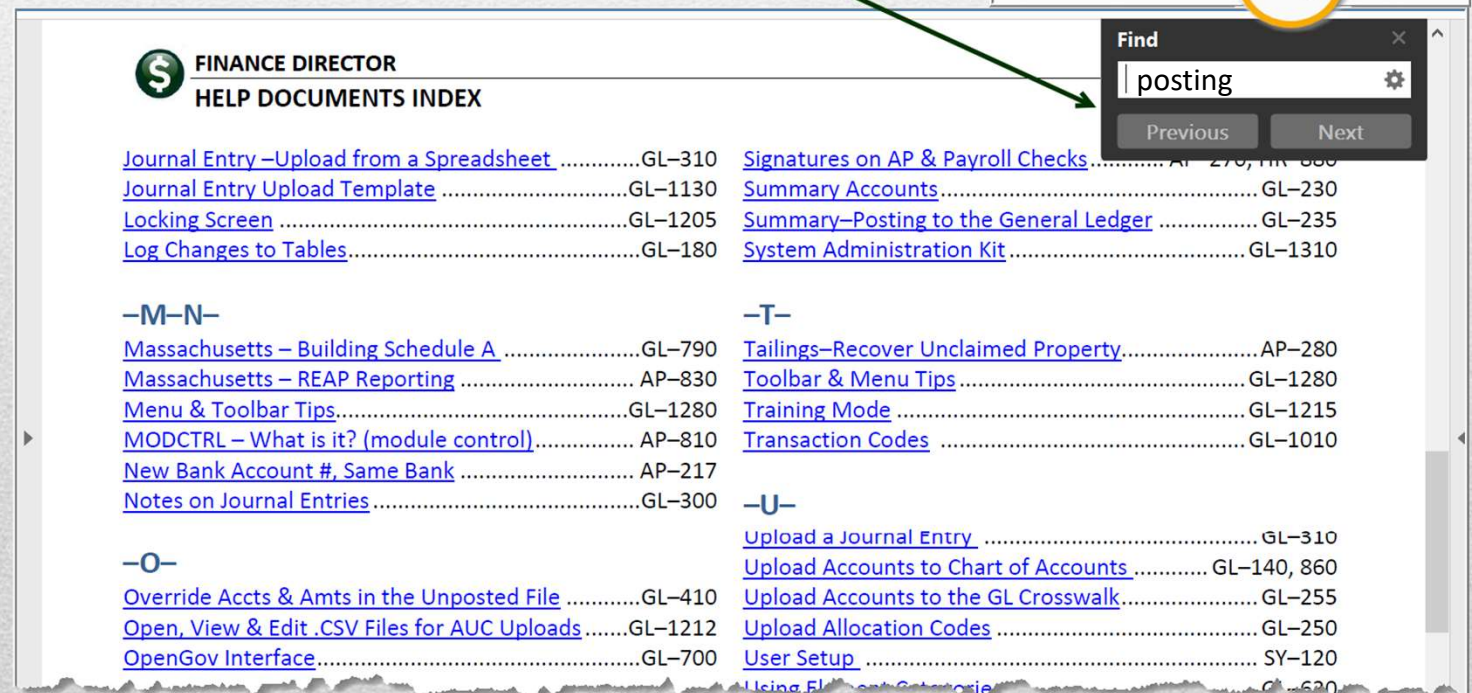
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Human Resources March 2021 Release Notes

# Searching by Keyword/Topic



Use the Index at the top of each Help Reference Library to search by keyword or topic.



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# admins.com/videos



## Create Account (admins.com)

“Customers only”

Requires a quick  
registration process

## Videos (admins.com)

Now fast forward,  
rewind, pause, etc....

The screenshot displays the 'admins.com/videos' website. The browser address bar shows 'https://admins.com/videos'. The website header includes the 'ADMINS' logo and navigation links: Home, About, Contact Us, What's New, Products, Support Services, and More. A user profile icon is highlighted with a yellow box. The main content area features several video thumbnails and titles:

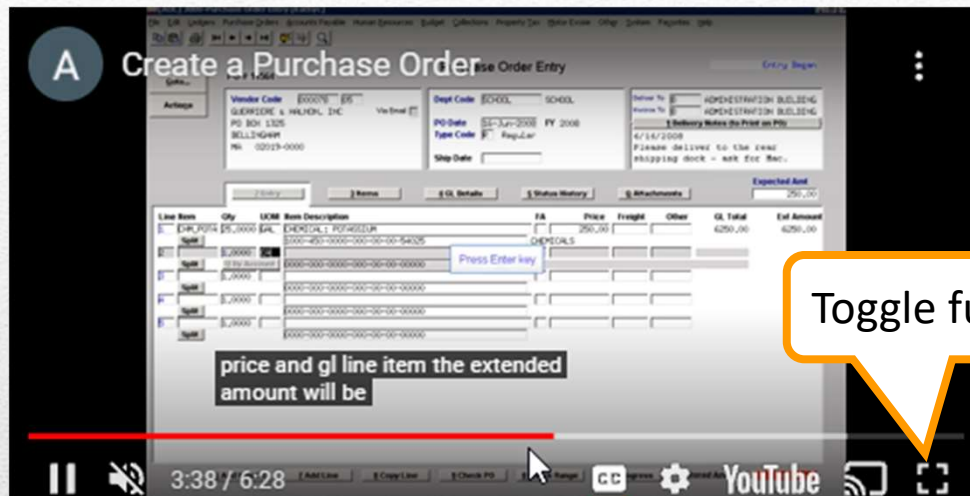
- Fiscal Year End**: A video titled 'PO Rollover at the end of the Fiscal Year FY21 to FY22' with a play button icon. Below it, text reads 'PO Rollover Processing' and 'Rolling purchase orders at year end'.
- PO Rollovers**: A section with a YouTube logo and the text 'Rolling purchase orders at year end'.
- FY End Split Labor Posting**: A video titled 'How to manage split posting of labor and benefits at Fiscal Year End'.
- Best Labor Distribution Screen**: A video titled 'Split Year End Labor Benefits Distributi...'.
- Training for Departmental Users**: A video titled 'AUC 101 - Logging in to AUC and Basic...'.

The bottom of the page shows a footer with the 'ADMINS' logo and the text 'IDEAS. RELATIONSHIPS. RESULTS. www.admins.com'.



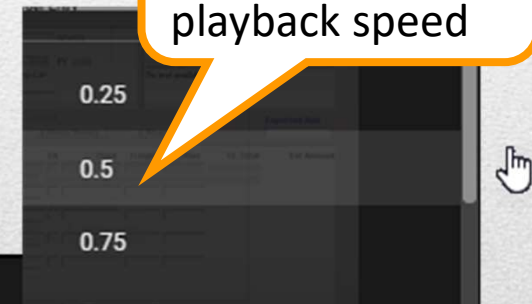
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# Improved Video Features



Toggle full screen

Increase or decrease playback speed



Pause, rewind & fast forward



Turn on closed captions

Use this gear to control playback speed, subtitles, & video resolution



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# New AUC Users



## New User Request:

Domain Username

(AUC Username must be the same)

Email Address (so we can send a welcome message)

Phone Number With Extension

Current User To Model For Menu, Department, &  
Account Access

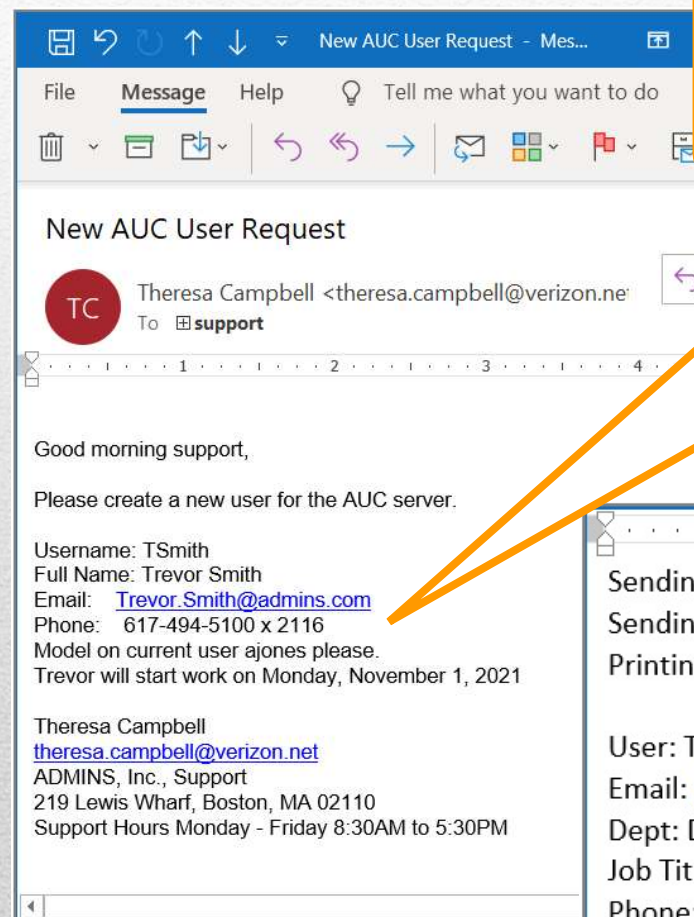
**Register for Admins.com access**

**View the training videos**



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# New User Request Sample Email



Providing complete information allows us to quickly process the new user request and enter complete information on the user profile

We stamp the information from the user profile on log files so we can rapidly respond to the user requesting assistance

Sending email to: e:\admhome\auc\SYMODO\...  
Sending E-Mail...  
Printing Contact Information  
  
User: TSMITH Trevor Smith  
Email: [trevor.smith@admins.com](mailto:trevor.smith@admins.com)  
Dept: DISTRICT  
Job Title:  
Phone: (617) 494-5100 Ext: 2116



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# Support Best Practices



Who? – everyone on site or just one user

What? – new subject for each issue

When? – how soon is this needed

Which? – screen/report#/task #

How did it happen? – posting, data entry, query


Include a PDF of any referenced report



# Sample Email




Use an effective email signature that includes a phone # & extension, and working hours

 To: support@admins.com **Send to support@admins.com**

Cc: **Meaningful subject**

Subject: FW: Journal #24270

 GL\_Journal\_Entry\_Errors\_THERESA[3].pdf 56 KB **Attached PDF Report**

Please assist me with this journal entry. I am having trouble with it being out of balance but I cannot see the error.

1134-PMREP:GLJNERR.RFP Printed 20-Oct-2021 at 16:04:22 by THERESA  
City of ADMINS  
Journal Entry Error Edit List

JES	JE Type	Date	Type	JE Errors:
24270	BT	27-Oct-2021	Regular	*** Entered Credit Amount does not equal Expected Credit Amo *** Entered Debit Amount does not equal Entered Credit Amount

Line	Error	Accounts
1	No Line Item Errors	1000-300-4130-492-00-00-82100
2	No Line Item Errors	1000-300-4130-492-14-00-82110
3	No Line Item Errors	1000-300-4130-531-00-00-52030
4	No Line Item Errors	1000-300-4130-531-09-00-52030
5	Warning: Insufficient Funds in Account to Transfer	1000-300-2330-124-09-00-51470
6	Warning: Insufficient Funds in Account to Transfer	1000-300-3300-129-09-00-51470

This is on the #1100 Enter One-Time Journals, and I get the error message as shown below. I need to have this finished for the auditor's review on Friday of this week. I am here until 5PM today.

--  
Theresa Campbell [campbellt189@gmail.com](mailto:campbellt189@gmail.com)  
Town of ADMINS, INC, Finance Department  
219 Lewis Wharf, Boston, MA 02110  
978-501-6416 ext 1234  
Monday - Wednesday, 9AM - 5PM; Thursday 9AM - 7PM; Friday 9

**Describe the issue, with the task #, include a screen shot, and when it is needed**



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# Effective Email Signatures



To see examples of creating an effective email signature, visit the [admins.com](http://admins.com) website

Include a phone number and extension, and hours you are available

Theresa Campbell [campbellt189@gmail.com](mailto:campbellt189@gmail.com)

Town of ADMINS, INC, Finance Department

219 Lewis Wharf, Boston, MA 02110

978-501-6416 ext 1234

Monday - Wednesday, 9AM - 5PM; Thursday 9AM - 7PM; Friday 9AM - 1PM



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# Current Focus



- **Tax Year 2021 Reporting and Webinars**
  - W2 Reporting
  - 1099-R Reporting
  - 1099 AP Reporting
  - 1095 Reporting
- **Forms Ordering**



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HR-635 Emailing W2s, 1095Cs, 1099Rs  
SS# Masking December 2020 Release Notes

# Wrap Up



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