FINANCIAL MANAGEMENT

TURN OFF ACCESS TO POS FOR YEAR END

1. CHANGE MENU ACCESS FOR PO ENTRY/CHANGE ORDERS

A menu item exists to allow the super user on a site to turn off access to purchase order and purchase change order entry for all users. This change may only be initiated by a user with a security level of 20 or above. Select the feature by clicking on **Purchase Orders ▶ Year End Processing ▶ Change Menu Access for PO Entry/Change Orders**.

1.1. What Will Users See When Purchase & Change Orders are Disabled?

When set to "Grey", the Purchase Order Entry and Change Orders menu options will be unavailable to the users.

When the Rollover processing or testing is complete, the Menu Access may be turned back on. This may be done as frequently as necessary during the year–end processing.

In addition, ADMINS modified the lookup from the AP/PO Dashboard to check if the menus have been disabled.

1.2. Purchase Orders on the AP/PO Dashboard

In the example, the access has been disabled to allow for PO Rollover processing.

If a user attempts to access a Purchase Order from the lookup (under the **[View]** button) on the dashboard, this message will be displayed alerting the user that PO Entry is currently disabled.

1.3.　Purchase Change Orders on the AP/PO Dashboard

Similarly, if a user tries to select a Change Order from the lookup (under the **[View]** button) on the dashboard, this message will appear alerting the user that Change Orders are currently disabled.
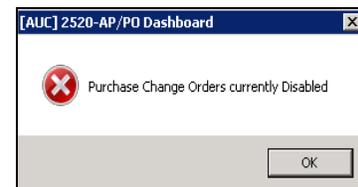
Note: If this change is made while users are logged on to the system, they must log off of AUC and back in again for the change to be in effect. See the following pages if access needs to be fine tuned by menu groups.

The above streamlines the following procedure that was used prior to this new feature being made available. If the super user wishes to turn off access in a more granular way, for example, for just certain menu groups, this process is still available .This process may be run only by users with System menu access.

2. IDENTIFY WHICH MENU GROUPS NEED TO BE CHANGED

2.1.   Run Users by Menu Group report
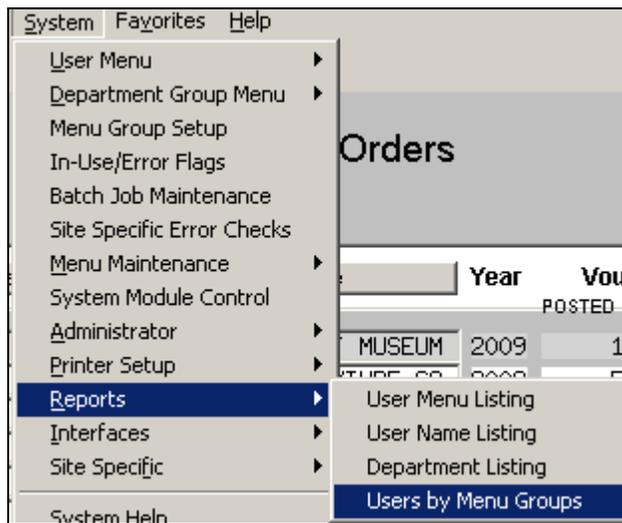
2.2.   Review Report

Review the report and identify if any users under each menu group require restricted access to PO Entry and PO Change Orders. Once you have identified all the menu groups that will need to be updated.

IMPORTANT NOTE
If there are both users that need restricted access and those that need to be able to perform entry, then you should split those users into 2 separate menu groups before continuing.

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252-SYUSRBYMNU.REP          Printed 17-Jun-2010 at 10:23:32 by MUPDEV4        Page 1
                                 CITY OF MIDDLETOWN, CT
                                 Users by Menu Groups

Menu Group: APPO_ENTRY          Receivable and Purchasing
------------------------------------------------------------------
      UserName          FullName                              Status
      ----------------- ------------------------------------- ---------
      ADMTEST_1         AUC Testing 1                         Inactive
      ADMTEST_2         AUC Testing 2                         Inactive
      ADMTEST_3         AUC Testing 3                         Inactive
      ADMTEST_4         AUC Testing 4                         Inactive

Menu Group: DEPT_AP_PO_GL       Dept ap po gl
------------------------------------------------------------------
      UserName          FullName                              Status
      ----------------- ------------------------------------- ---------
      FARACIS           Sandra Faraci                         Active
      GIONFRJ           Janice Gionfriddo                     Active
      HUTTONS           Sandra Russo-Driska                   Inactive
      LABBADJ           Joe Labbadia                          Active
      MOREYK            KATHY MOREY                           Active
      RUSSODS           Sandra                                Active
      SNEEDG            Gregory                               Active

Menu Group: DEPT_FULL           Dept full access
------------------------------------------------------------------
      UserName          FullName                              Status
      ----------------- ------------------------------------- ---------
      BALDONL           Lynn Baldoni                          Active
      BALISCP           Pam Balisciano                        Active
      BEDNARL           LORI BEDNARZ                          Active
      BOYCED            David Boyce                           Active
      BRAASCD           DAMON BRAASCH                         Active
      BRUTONJ           Jerry Bruton                          Active
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Menu Group Name

3. UPDATING MENUS

System menu expanded showing:
- User Menu ▶
- Department Group Menu ▶
- Menu Group Setup
- In-Use/Error Flags
- Batch Job Maintenance
- Site Specific Error Checks
- Menu Maintenance ▶ → Menu Group/User Menu Maintenance
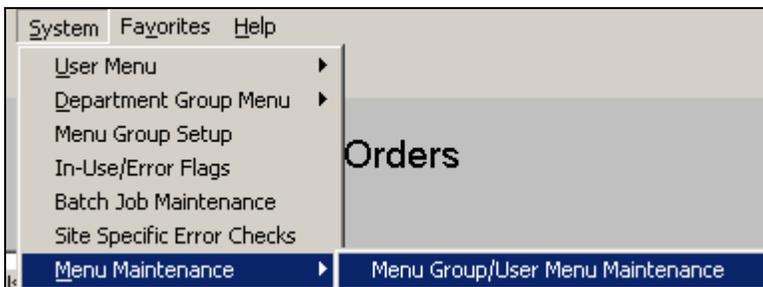
3.1. Type in Menu Group to Update

Type in the name of the menu group or select it from the lookup.

3.2. Click [GoTo]… button and select Purchase Orders

Navigate quickly to the Purchase Order menus using the **[GoTo…]** button.

3.3. Select "Gray"Radio Buttons for PO Entry & Changes

Click the Gray radio button for Purchase Order Entry and Change Orders

3.4. Message to Update All Items Under the Menu

When the radio button on a menu level task is changed, a message box will be displayed on the screen allowing you to select how you want the menu to be updated.

Yes	update all items under that menu
No	Only the menu itself will be change keeping all the items under that menu with the same settings
Cancel	No change will be made to the menu and it will be set back to its previous setting

3.5. Keep Track of Changes

Make note of the updated Menu Group(s) so they can be changed back when allowing access to Purchase Orders again.