



# 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

AP/PO Dashboard	
Purchase Orders	Accounts Payable
<b>In-Progress</b>	
In Entry Began	In Entry Began 313 <a href="#">View</a>
In Error Status 3 <a href="#">View</a>	In Error Status 1 <a href="#">View</a>
Ready for Release	Ready for Release
Disapproved	Disapproved
Ready for Posting 1 <a href="#">View</a>	Ready for Posting 1 <a href="#">View</a>
Awaiting Approval 3 <a href="#">View</a>	Awaiting Approval



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PO#	Dept	Type	Date	Vendor	Expected Amt	Status	In Use?	Primary Approve	Tof
11472	PRESCHOOL	Regular	15-Mar-2018	DISCOUNT SCHOOL SUPPLY	\$900.00	Needs Budget Overrid		WENDY	
11471	FINANCE	Regular	13-Mar-2018	ADCHRE EDUCATIONAL INST I	2000.00	Needs Finance Depart		WENDY	
11463	ARTS	Regular	08-Mar-2018	ADMINS INC	2000.00	Needs Supervisor App		ANTHEA	



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

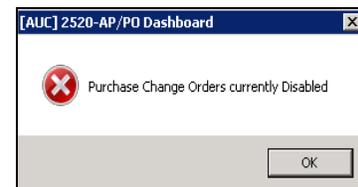
If a user attempts to access a Purchase Order from the lookup (under the **[View]** button) on the dashboard, this message will be displayed alerting the user that PO Entry is currently disabled.

### 1.3. Purchase Change Orders on the AP/PO Dashboard

AP/PO Dashboard	
Purchase Orders	Accounts Payable
<b>Change Orders</b> In Entry Began In Error Status Ready for Release Disapproved Ready to Post 1 <a href="#">View</a> Awaiting Approval	<b>Change Orders</b> In Entry Began 1 <a href="#">View</a> In Error Status Ready for Release Disapproved Ready to Post Awaiting Approval

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.

PO#	Dept	Vendor	Date	Expected Amt	Changed Amt	Last Changed	In Use?	Tof
9047115	HIGHSCHOOL	01-Dec-2017	AMY REMY	319.00	-10.00	THERESA		



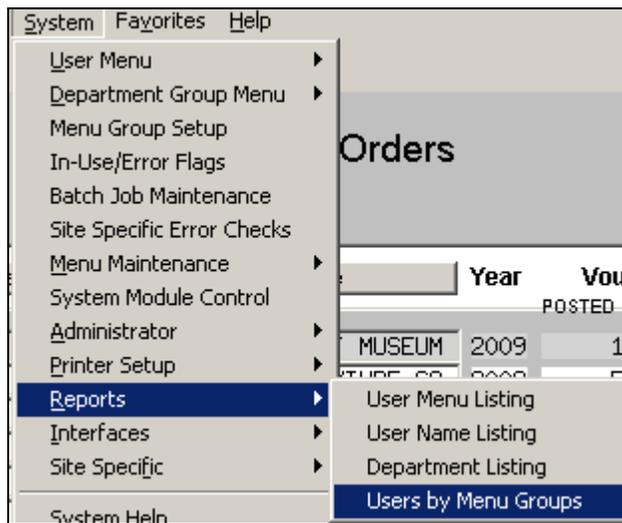
**Note:** If this change is made while users are logged on to the system, they must log off of AUC and back in again for the change to be in effect. See the following pages if access needs to be fine tuned by menu groups.



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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TURNING OFF ACCESS TO PURCHASE ORDERS FOR YEAR END

PO-790

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 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

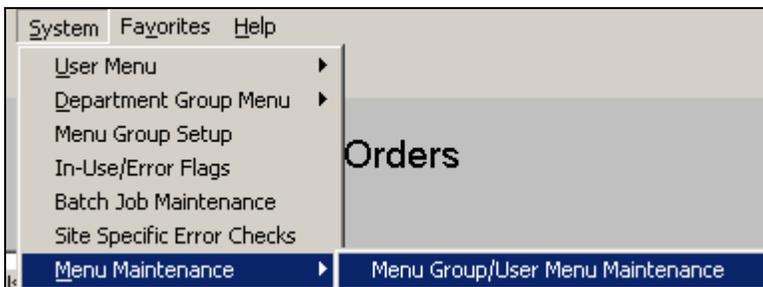
UserName	FullName	Status
FARACIS	Sandra Faraci	Active
GIONFRJ	Janice Gionfriddo	Active
HUTTONS	Sandra Russo-Driska	Inactive
LABBADJ	Joe Labbadia	Active
MOREYK	KATHY MOREY	Active
RUSSODS	Sandra	Active
SNEEDG	Gregory	Active

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

Menu Group Name

### 3. UPDATING MENUS





### 3.1. Type in Menu Group to Update

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

	Display	Hide	Gray
Purchase Orders	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
&Purchase Order Entry	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entry	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Edit List	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Release	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Print and Post	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
-----	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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

	Display	Hide	Gray
Ledgers			
&Account Maintenance			
Chart of Accounts			
Account Elements			
Fiscal Periods			
General Ledger Controls			
General Ledger Controls by Account#			
DT/DF Accounts			
Summary Accounts			
Allocation Codes			
Account Security			

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

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



Menu Group/User Menu Maintenance			
TESTMENU	Display	Hide	Gray
Purchase Orders	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
&Purchase Order Entry	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Entry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Edit List	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Release	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Print and Post	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
-----	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase Order Entry Process	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
-----	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create New from Posted PO	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
-----	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reprint Purchase Orders	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reprint Requisition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change &Orders	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Entry	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

### 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.