



This document explains new product enhancements added to the **ADMINS Unified Community (AUC)** for **Windows PURCHASE ORDER** system.

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1 Purchase Order Entry Error Check # 19 [Enhancement]

ADMINIS added error check #19 to Purchase Order Entry.

When creating a PO for "freight" or "other" items, the system will ask on the error report "Should Qty be zero?" if a quantity is entered but no price is specified.

Seq#	Description	Action Code	Value	Buttons
1	Vendor (in Hold)	<input type="radio"/> Warning <input checked="" type="radio"/> Hard Error <input type="radio"/> No Message		
17	Allow Regular Use	<input type="radio"/> Warning <input type="radio"/> Hard Error <input checked="" type="radio"/> No Message		
18	PO not in Current Fiscal Year	<input type="radio"/> Warning <input checked="" type="radio"/> Hard Error <input type="radio"/> No Message		
19	No Price but Freight/Other and Qty Set	<input checked="" type="radio"/> Warning <input type="radio"/> Hard Error <input type="radio"/> No Message		

When the value of PO #19 is set to **Warning**, and the error condition is met, the Error Check PO Report #3690 will appear as shown.

3690-FMREP:POPOERR.REP Printed 11-Nov-2024 at 10:38:37 Page 1
Town of Admins
Error Check PO

PO# Vendor PO Errors:
240008 ABC OFFICE Warning: P3501-Remit Address type not for Purchase Orders.
Warning: P3504-Ship Date Blank.

Line GL Line Error
1 1 Warning: P3125-No Price Set, but Freight/Other & Qty set. Should Qty be zero?
Warning: P3125-No Price Set, but Freight/Other & Qty set. Should Qty be zero?

Message Legend:
[Warning:] This is a warning of a possible issue, no action is required and the Purchase Order will continue with the approval process.
[***] Indicates this is a HARD ERROR and will stop any further approval processing of this Purchase Order until the issue has been corrected and will be marked as Correct Errors.

This reminds the user that it may be better to remove the quantity.

Set PO #19 to **Hard Error** to instruct the system to halt processing until the error is corrected. This is required, rather than a suggestion.

Seq#	Description	Action Code	Value	Buttons
18	PO not in Current Fiscal Year	<input type="radio"/> Warning <input checked="" type="radio"/> Hard Error <input type="radio"/> No Message		
19	No Price but Freight/Other and Qty Set	<input type="radio"/> Warning <input checked="" type="radio"/> Hard Error <input type="radio"/> No Message		

Three asterisks "***" in the report indicate a "hard error" that must be resolved before processing the PO.

3690-FMREP:POPOERR.REP Printed 11-Nov-2024 at 15:11:03 Page 1
Town of Admins
Error Check PO

PO# Vendor PO Errors:
240003 REPLACEMENT AUTO PARTS Warning: P3501-Remit Address type not for Purchase Orders.

Line GL Line Error
1 1 *** P3125-No Price Set, but Freight/Other & Qty set. Should Qty be zero?
*** P3125-No Price Set, but Freight/Other & Qty set. Should Qty be zero?

Message Legend:
[Warning:] This is a warning of a possible issue, no action is required and the Purchase Order will continue with the approval process.
[***] Indicates this is a HARD ERROR and will stop any further approval processing of this Purchase Order until the issue has been corrected and will be marked as Correct Errors.



Purchase Orders
Purchase Order Entry > Entry

Go to the PO entry screen, place the cursor in the Qty field, and press {spacebar and enter} to clear out the quantity.

[ADM-AUC-PO-658]

2 #3627 Posted POs – Balance by GL Account [Enhancement]

ADMINIS added this PO report showing accounts and entry users, with sorting and filtering available on all columns in Excel. To run the report, select it from the menu:

Purchase Orders ► Reports ► Report Library ►
#3627 Posted POs – Balance by GL Account #

Select up to nine Department Groups, Funds, Account Departments, Entry Users, or Vendors.

The prompt requires a date range, with other filters being optional. The report can include either All POs or only Rolled POs, and it can be sorted by Account number or PO #. The report can be run with Details or using the available Summary option. Examples are shown below:

Notice that Dept Groups are not the same as Acct Departments



2.1 PDF Detail

Running the report this way details each line on the PO and the individual encumbrance, relief and balance.

3627-POHISBAEVL REP

Town of Admins
Posted POs - Balances by GL#

Page 1

Format: Detail
Order: By Account#

Include only PO's dated between: 07012024 and 10312024

Account & Description	PO#	Line#	PO Date	Department	Vendor# Name	Encumbered	Retained	Relieved	Balance
0100-430-0000-004-00-00-52700 TRASH REMOVAL	240005	1	30-Oct-2024	FIRE	019325 ABC OFFICE	426.35			419.15
0100-430-0000-004-00-00-52700 TRASH REMOVAL	240006	1	30-Oct-2024	FIRE	019325 ABC OFFICE	426.35		7.20	426.35
Account Total						852.70	.00	7.20	845.50
Account Total						852.70	.00	7.20	845.50
1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR	199310	1	01-Jul-2024	DFW	023331 TRI STATE TRUCK CENTER INC	308,600.00			308,600.00
1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR	200900	1	01-Jul-2024	TECHNOLOGY	027483 AMAZON CAPITAL SERVICES	359.80			359.80
1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR	200901	1	01-Jul-2024	ATHLETICS	027483 AMAZON CAPITAL SERVICES	1,148.00			1,148.00
1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR	200901	2	01-Jul-2024	ATHLETICS	027483 AMAZON CAPITAL SERVICES	36.99			36.99
1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR	200901	3	01-Jul-2024	ATHLETICS	027483 AMAZON CAPITAL SERVICES	529.99			529.99
1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR	200903	1	01-Jul-2024	TRANSP	031869 DOVE TRANSPORTATION, LLC	6,750.00			6,750.00
1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR	200951	1	01-Jul-2024	MIDDLE	027483 AMAZON CAPITAL SERVICES	10.99			10.99
Account Total						317,435.77	.00	.00	317,435.77
*** Fund Total 1000						317,435.77	.00	.00	317,435.77

2.2 Summary Run as PDF

The summary selection totals to the PO for that account. Individual lines are not printed out.

3627-POHISBAEVL REP

Printed 06-Nov-2024 at 14:30:23 by ANTHEA

Town of Admins
Posted POs - Balances by GL#

Page 1

Format: Summary
Order: By Account#

Include only PO's dated between: 07012024 and 11012024

Department	PO# Account	Vendor Name	Encumbered	Retained	Relieved	Balance	PO Type	Status	Closed On
FIRE	240005 0100-430-0000-004-00-00-52700 TRASH REMOVAL	019325 ABC OFFICE	426.35	.00	7.20	419.15	Regular	OP	
FIRE	240006 0100-430-0000-004-00-00-52700 TRASH REMOVAL	019325 ABC OFFICE	426.35	.00	.00	426.35	Regular	OP	
Account Total			852.70	.00	7.20	845.50			
**** Fund Total 0100			852.70	.00	7.20	845.50			
DFW	199310 1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR EXPENSES	023331 TRI STATE TRUCK CENTER INC	308,600.00	.00	.00	308,600.00	Regular	OP	
TECHNOLOGY	200900 1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR EXPENSES	027483 AMAZON CAPITAL SERVICES	359.80	.00	.00	359.80	Regular	OP	
ATHLETICS	200901 1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR EXPENSES	027483 AMAZON CAPITAL SERVICES	1,714.98	.00	.00	1,714.98	Regular	OP	
TRANSP	200903 1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR EXPENSES	031869 DOVE TRANSPORTATION, LLC	6,750.00	.00	.00	6,750.00	Regular	OP	
MIDDLE	200951 1000-301-0000-000-00-00-52085 SCHOOL PRIOR YEAR EXPENSES	027483 AMAZON CAPITAL SERVICES	10.99	.00	.00	10.99	Regular	OP	
Account Total			317,435.77	.00	.00	317,435.77			

2.3 Excel Detail

Run the report as Excel in Detail to include breakdown of each element of the account structure, showing amount by PO line # for each account.

Account Number	Account Description	Vendor	Vendor Name	Encumbered Amount	Encumbered Retained	Relief	PO Balance	PO#	Line#	PO Date	Original PO Date	Department	Entry User	Status	Fund	Department	Function	Program	Location
0100-430-0000-004-00-00-52700	TRASH REMOVAL	019325	ABC OFFICE	426.35	0.00	7.20	419.15	240005	1	30-Oct-2024	13-Oct-2024	FIRE	ANTHEA	Open	0100	430	0000	004	00
0100-430-0000-004-00-00-52700	TRASH REMOVAL	019325	ABC OFFICE	426.35	0.00	7.20	426.35	240006	1	30-Oct-2024	13-Oct-2024	FIRE	ANTHEA	Open	0100	430	0000	004	00
Account Total				852.70	0.00	7.20	845.50												
Total Fund 0100				852.70	0.00	7.20	845.50												
1000-301-0000-000-00-00-52085	SCHOOL PRIOR YEAR EXPENSES	023331	TRI STATE TRUCK CENTER INC	308,600.00	0.00	0.00	308,600.00	199310	1	01-Jul-2024	16-Nov-2022	DFW	PSALEA	Open	1000	301	0000	000	00
1000-301-0000-000-00-00-52085	SCHOOL PRIOR YEAR EXPENSES	027483	AMAZON CAPITAL SERVICES	359.80	0.00	0.00	359.80	200900	1	01-Jul-2024	11-Sep-2023	TECHNOLOGY	DOONROY	Open	1000	301	0000	000	00
1000-301-0000-000-00-00-52085	SCHOOL PRIOR YEAR EXPENSES	027483	AMAZON CAPITAL SERVICES	1,148.00	0.00	0.00	1,148.00	200901	1	01-Jul-2024	11-Sep-2023	ATHLETICS	DOUBOIS	Open	1000	301	0000	000	00
1000-301-0000-000-00-00-52085	SCHOOL PRIOR YEAR EXPENSES	027483	AMAZON CAPITAL SERVICES	36.99	0.00	0.00	36.99	200901	2	01-Jul-2024	11-Sep-2023	ATHLETICS	DOUBOIS	Open	1000	301	0000	000	00
1000-301-0000-000-00-00-52085	SCHOOL PRIOR YEAR EXPENSES	027483	AMAZON CAPITAL SERVICES	529.99	0.00	0.00	529.99	200901	3	01-Jul-2024	11-Sep-2023	ATHLETICS	DOUBOIS	Open	1000	301	0000	000	00
1000-301-0000-000-00-00-52085	SCHOOL PRIOR YEAR EXPENSES	031869	DOVE TRANSPORTATION, LLC	6,750.00	0.00	0.00	6,750.00	200903	1	01-Jul-2024	11-Sep-2023	TRANSP	DOUBOIS	Open	1000	301	0000	000	00
1000-301-0000-000-00-00-52085	SCHOOL PRIOR YEAR EXPENSES	027483	AMAZON CAPITAL SERVICES	10.99	0.00	0.00	10.99	200951	1	01-Jul-2024	16-Sep-2023	MIDDLE	KFORSTER	Open	1000	301	0000	000	00
Account Total				317,435.77	0.00	0.00	317,435.77												
Total Fund 1000				317,435.77	0.00	0.00	317,435.77												



2.4 Excel Summary

Run the report as Excel, using the summary radio button summarizes by account# by PO#. Notice there are five POs for this one account.

Selection Legend:

Sorted by: By Account#
Print Format: Summary
PO's dated between: 07012024 and 10312024
All or Rolled POs: A

Task 3627: Posted POs - Balances by GL#

Required: Purchase Orders Dated (mmddyyyy) From: 07012024 To: 10312024

Optional: Enter up to 9 Department Groups Edit 0 values:
Optional: Enter up to 9 Vendor#'s Edit 0 values:
Optional: Enter up to 9 Users Edit 0 values:
Optional: Enter Fund Edit 0 values:
Optional: Enter up to 9 Acct Departments Edit 0 values:

Include
Sort Report By: Account# PO#
Print Report as: Detail Summary

Run as Preview Print PDF Excel
If Printing use Duplex Yes No

Lookup OK Cancel Clear All

There is a legend at the bottom of each report showing which selections were made.

[MDF-SUP-SAPLAUC-1281]



3 Email Notice of Intent to Suspend an Account [Enhancement]

Users are inactivated if they have not logged in before their expiration date.

For instance, on sites with a six month expiration window, users who haven't logged in since 20-May-2024 would be “suspended” or “marked inactive” on 20-November-2024.

The notification period is 14 days from the suspension date, in this example, from 05-November-2024 through 20-November-2024.

Up to two reminder emails are sent: the first ~14 days before account expiration, and the second ~5 days before. If users do not log in when reminded, their accounts will be deactivated.

The notification is sent if there is an email address present on the User Profile screen:

[AUC] 3-User Profile Screen

User Profile Screen

Entered: 07-Sep-2009 MUPDEV1
Changed: 11-Nov-2024 THERESA
Last Login: 09-Dec-2024 08:40:22.80 Live

Last Login: 09-Dec-2024 08:40:22.80 Live

This user account is currently active.

Email Address: theresa@admins.com

Two emails are sent to allow for users on vacation, etc., to have time to respond. Log in before the expiration date to prevent the suspension.

The emails include expiration dates, steps to prevent suspension, and instructions for requesting reactivation after suspension.

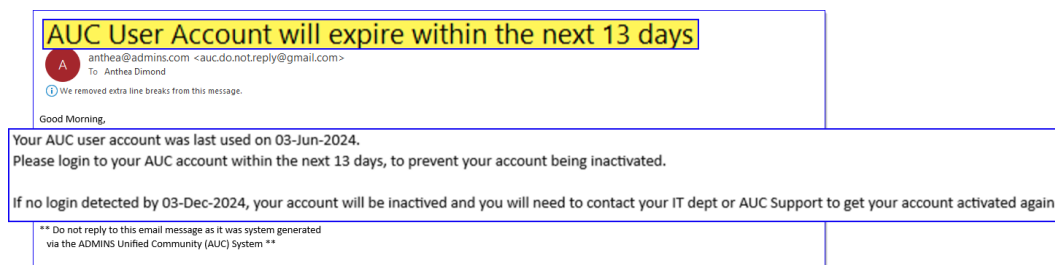


Figure 1 Email example sent two weeks before the username expiration date

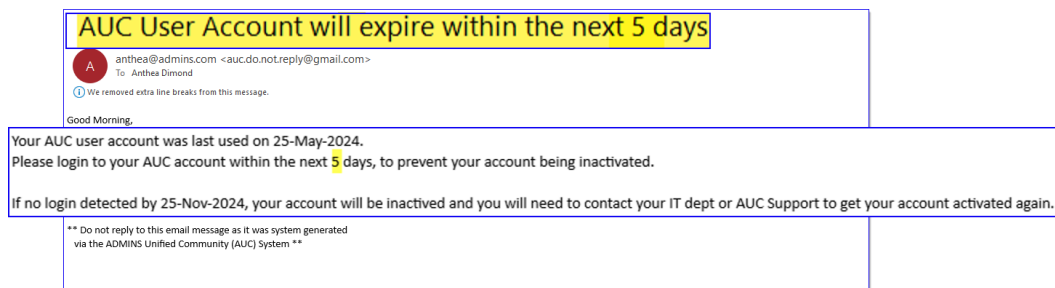


Figure 2 Email example sent the following week

[ADM-AUC-SY-8356]



4 Help Reference Library & ADMINs Website

This section lists the new and updated documents that are available in the Help Reference Library and the ADMINs website.

4.1 New & Updated Documentation in the Help Reference Library

Site Specific	PO-850 HVMA Receiver	[Updated]
	PO-860 HVMA Department Action	

4.2 New Content on ADMINs.com

[User Account Security Inquiry Screen](#) (2:38)