Stock, Garber & Associates
support@sgasoftware.com
814-472-5158

SGA Fund Accounting
Version 12.6 Release Guide

New Features:

Login screen features:

Entry save features:

Digital Invoice Capture features:

Enhancements:

New Features:

Login Screen:

Settings > Authentication > Web Accounting System > Log out after # minutes of inactivity

Existing functionality allows for users to be logged out of the system due to inactivity by using the setting above. With this release, the login functionality has changed in an effort to preserve any in-progress entries that were not saved prior to the session time-out.

When logged out due to inactivity, the user will be prompted to login with the username entered for the previous session. For security reasons, the username cannot be changed from this view. After logging in, the user will return to the previously opened screens to resume work.

Settings > General Settings > Authentication

If "Disable user account after # login attempts" is selected in system settings; users will now receive a warning prior to running out of login attempts.

On the Login screen, users will receive warning messages indicating they have "2 login attempts remaining" and "1 login attempt remaining before your account is locked".
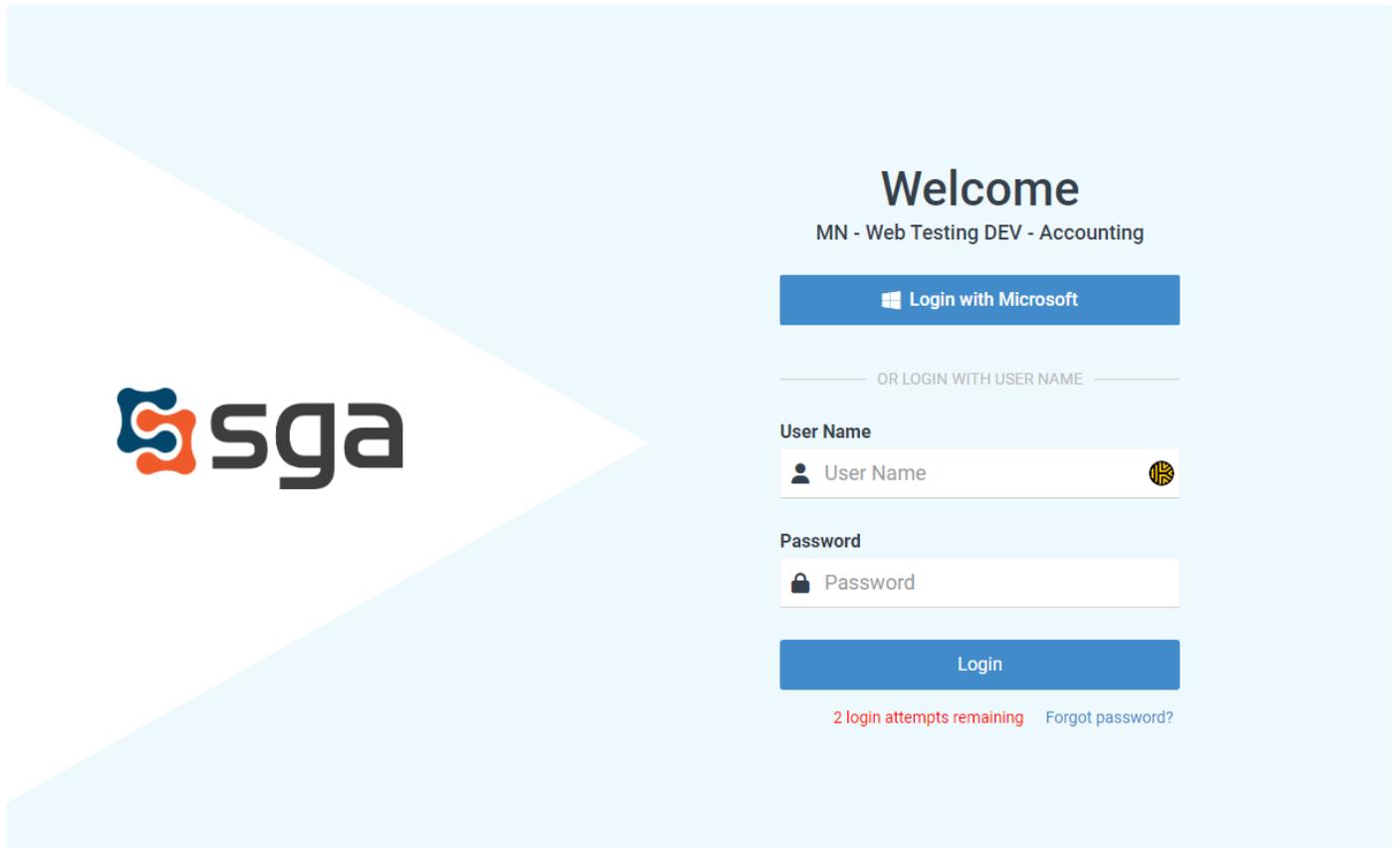
New Design for "Entry Saved" Messages

A smaller, temporary "Changes saved" message will appear in the lower right corner when changes are successfully saved.

This message will appear when an entry is successfully saved for budgets (*Budgets > Account / Budget Entry and Multi-Account Entry),* Account Payable invoices (*Daily > Accounts Payable Invoices > A/P Invoice Batch List > New/Edit invoice*), journal entries (*Daily > General Ledger > Journal Entry*), and purchase orders (*Daily > Purchasing > Purchase Order Entry*).

Digital Invoice Capture:

New/Edit Digital Invoice Capture Template > Settings

An option has been added titled "Append images not matched to any template page to last invoice created for same filename". When checked, the system will combine any unrecognized images with the last invoice created for the file being captured. This option removes the need to create capture templates for invoice support pages unless those pages contain information related to the invoice's GL distributions.

A/P Invoice List

A new menu option has been added titled "Split Attachments" which will be available for unposted invoices with more than one file attached. When selected, a "Tag attachment(s) to move to a new invoice" window will appear. Users can multi-select attachments from the selected invoice with image previews available. After confirming the split on a warning screen, the selected attachments will be

removed from the original invoice and added to a blank invoice that will be created in a temporary invoice batch.

Enhancements:

Users > Permissions

Application: Accounts Payable > Invoices; Purchasing > Purchase Order Entry
A new permission level, 10-Modify Reviewer and Submit, has been added giving users other than the creator the ability to submit and/or change the reviewer. Permissions greater than 10-Modify Reviewer and Submit have also been given the ability to change reviewers.

Application: Accounts Payable > Approve Payment Batches
Permission settings have been adjusted to allow approval of payment batches without requiring the ability to create check runs.

Application: Vendor Portal
Vendor Portal users may now only be assigned permissions under the Vendor Portal application, and may only be added to the "Vendor Portal User" user group. The vendor audit log has been updated to include if any changes were made via the Vendor Portal and to indicate the SGA user who approved the change. Additionally, a separate "Skip Single Sign on login" has been added that only applies to vendor portal users, enabling the removal of the SSO requirement for non-client users

Application: General Ledger > Journal Entry
Users with "Level 70 - Edit Comments" will now be able to edit comments on a posted journal entry. Users with "Level 80 - Modify any batch" will now be able to edit the period on a posted journal entry; periods available for selection are limited to those within the user's allowed entry period range.

Settings > General Settings > Authentication

Users with administrator permissions will now have access to the "OAuth2 Login Providers" section. This will allow users to more easily maintain their credentials and configuration when using OAuth for SSO login.

Users > System Users

The "Name" field has been changed to "User" when adding or editing a system user.

Document Approval

Settings > Document Approval > General Options > Approval Sources

Added system option to "Require Send to Reviewer comment" for all approval sources.

Settings > Document Approval > General Options > Approval Tables

Options have been added to approval table user conditions to allow for assignment of approvers when invoice amounts differ from the invoice's associated PO by a $ or % threshold.
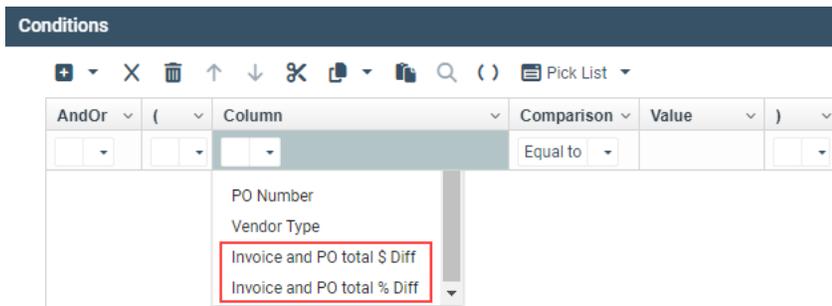
Settings > Accounts Payable > Entry Options

When the "auto-post once approved" option is selected, upon approval, invoices outside of the allowed entry period range will not auto-post. They will be left in "approved" status and an email will be generated to administrators indicating an approved invoice remains unposted and requires evaluation by an authorized user.
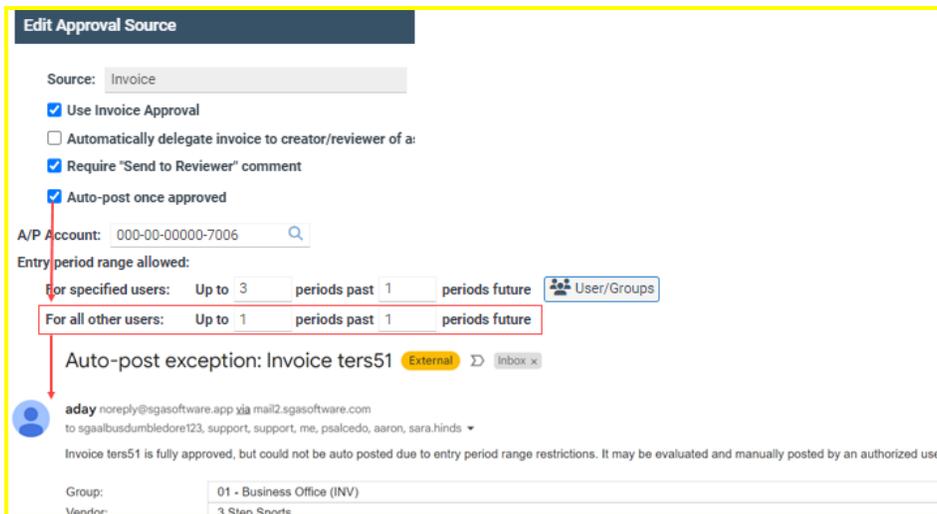
Settings > Document Approval > Approval Groups

When user groups are included in approval tables, in the event an entry requires approval by a user group, and that user group contains only the submitting user, the system will automatically bypass the submitting user. In addition, if the submitter is the only required approver they will no longer receive an email indicating when the entry has been fully approved.

Vendor Portal

Settings > Accounts Payable > Vendor Portal Options

Added system option to "Override Company Name for Payment Acknowledgement Form". When checked, the company name may be hardcoded or set by variable selection. If not checked, the company name will default to "YMCA" in the acknowledgement form.

A/P Distributions

Daily > AP Invoice Batch List > Distributions Grid

Users can select the "Customize View" icon next to the View drop-down menu to add additional columns of information to display on the grid. View can be saved using the "Save View" icon.