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[MU-EX-7-A] [MU-EX-8-A]

[MU-EX-12-A] [MU-EX-13-A]

Munis 101 Part 1 & 2

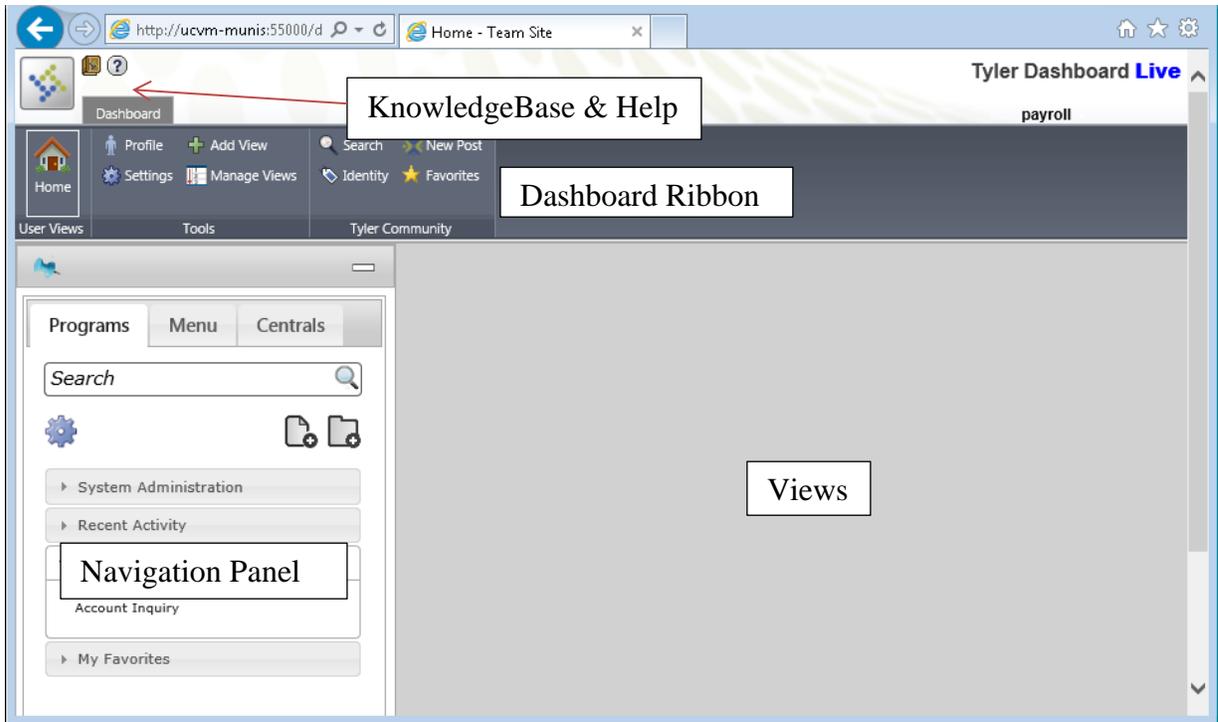
Munis Basics

CLASS DESCRIPTION

Presented in conjunction with Munis 101 – Part 2. Maybe you are new to Munis or you have used it for a while. Often times during the course of a busy day it is easy to overlook new and different Munis functionality. Let me take you on a guided tour of Munis where we'll review Dashboard, discover action keys, wizards, Central programs and tools to facilitate understanding Munis features and capabilities. There is so much good information we had to make it a 2 part session! Please join me for both parts.

MUNIS DASHBOARD

The Tyler Dashboard represents a window to your Munis environment. It is a dashboard that is customizable and as such allows each user to tailor the dashboard to their needs resulting in a better user experience. Example of the Tyler Dashboard:



Tyler Dashboard Ribbon Buttons used to customize your dashboard and views and navigate the views.

Navigation Panel Provides access to:
 Programs: user customizable menu options
 Menu: Munis menus. Users see and navigate menus they've been granted access
 Central Search: Used to search various Munis tables for information
 Search: Search function available in Programs and Menu tabs

Views Display area for web parts. The default view is 

KnowledgeBase Link to the Munis KnowledgeBase. Requires login credentials to access documents. Use Tyler Community ribbon options to establish quick access.

Help Help for the dashboard/ program currently open. Includes field descriptions, tasks, a resource area and even video/eLearning recordings. Provides version specific documentation.

Navigation Panel

Munis Dashboard runs within the Internet Explorer browser. Here are a few significant points in navigating the dashboard:

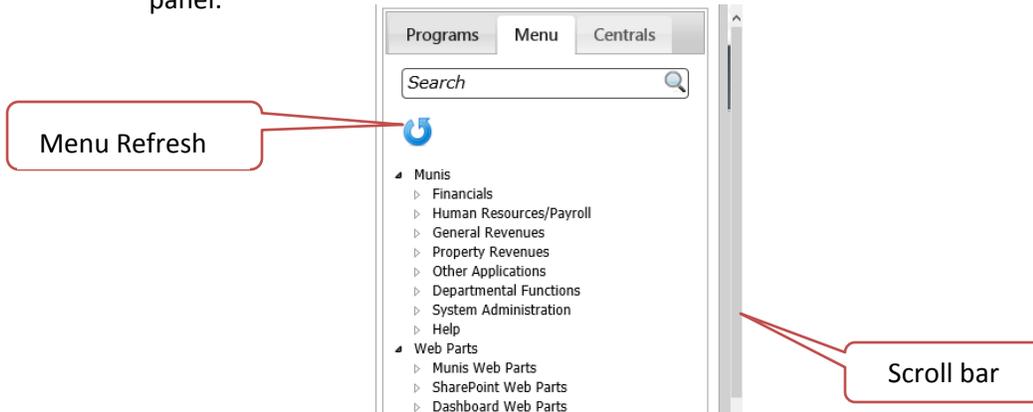
- Most all items in the dashboard are links and as such require just a single click to select

- Selecting a menu option may delay displaying the menu for a moment as the menu or program loads

MENU

The Menu contains all of the Munis menu options available to the user based upon their permissions.

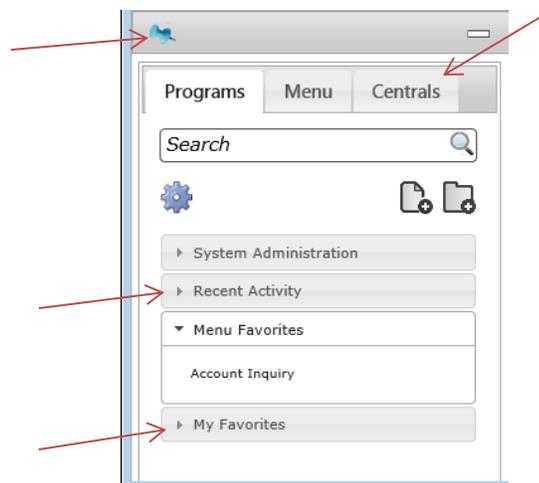
Note: If the menu does not appear or load properly, click the Menu Refresh icon at the top of the panel.



- Click on the menu text or ▶ to expand and display the options in the menu.
- Upon selecting a top level menu (Financials, Human Resources/Payroll etc.) you will see an activity bar  and experience a slight delay while the submenu loads
- If menu options extend beyond the bottom of the navigation panel, simply scroll using the scroll wheel on the mouse or click the scroll bar on the far right of the dashboard.

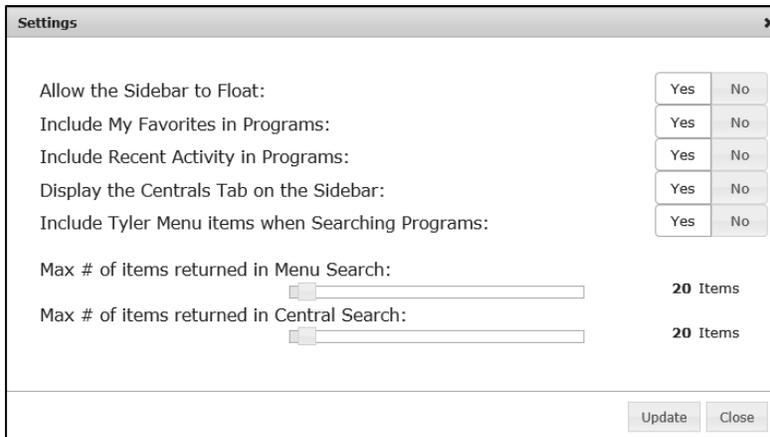
PROGRAMS

The Programs tab is completely customizable and allows each user to create a custom menu to facilitate access to programs. Each user decides which programs appear and how they are grouped. The Programs tab appears by default each time a user logs into Munis and will initially appear blank until a user adds programs.



Settings

The  icon on the Programs tab opens Settings.



The screenshot shows a 'Settings' dialog box with the following options:

Allow the Sidebar to Float:	Yes	No
Include My Favorites in Programs:	Yes	No
Include Recent Activity in Programs:	Yes	No
Display the Centrals Tab on the Sidebar:	Yes	No
Include Tyler Menu Items when Searching Programs:	Yes	No
Max # of items returned in Menu Search:	<input type="text" value="20"/>	20 Items
Max # of items returned in Central Search:	<input type="text" value="20"/>	20 Items

At the bottom right of the dialog box are 'Update' and 'Close' buttons.

Sidebar Float: Allows user to relocate the navigation panel

My Favorites: Older style program favorites. Limited

Recent Activity: Last 10 programs you accessed

Centrals Tab: Can exclude this from navigation panel

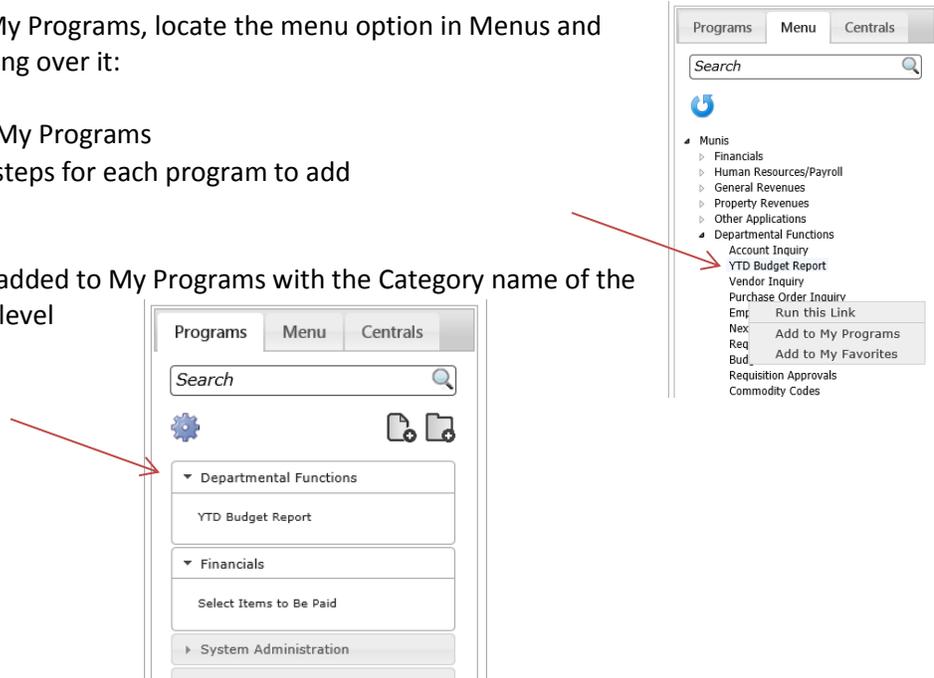
Include Tyler Menu Items: Search both My Programs and Menu for match

CUSTOM MENUS

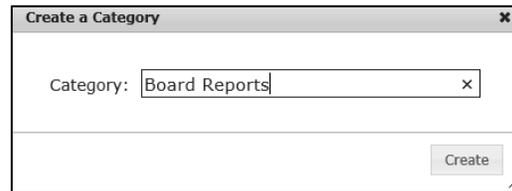
Creating menus within My Programs and organizing the programs within them is easy and provides some great benefits. Since Recent Activity provides quick access to your frequently used programs you may want to create menus organized around tasks.

To add a program to My Programs, locate the menu option in Menus and right click while hovering over it:

- Select Add to My Programs
- Repeat these steps for each program to add
- Programs are added to My Programs with the Category name of the highest menu level

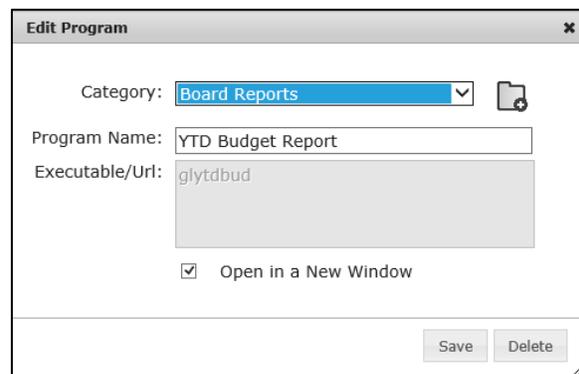


Create a custom category to house this and other menu options click the Create Category icon and enter a new category.



Move the programs you desire to the new category. To do this locate a program in the Programs tab, right click and select Edit.

- Click the Category dropdown and select the new Category

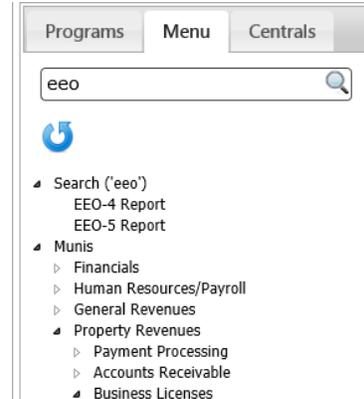
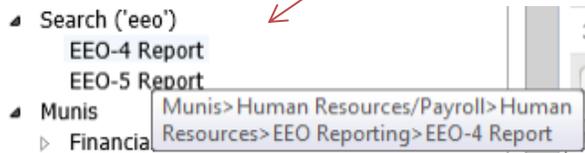


Rearrange programs/categories by left clicking and dragging the category or menu option.

SEARCH MENU/PROGRAMS

The Search function is very powerful and can virtually eliminate wandering through menus looking for a particular program. You only have to know part of the text in the menu option or provide a portion of the program name.

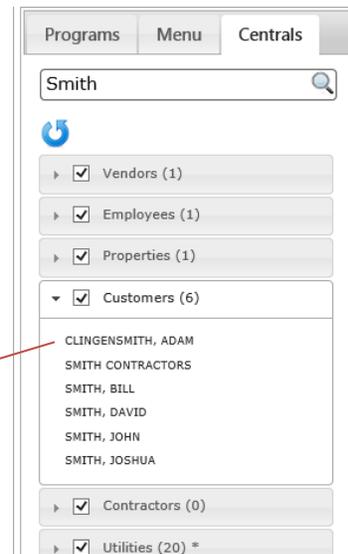
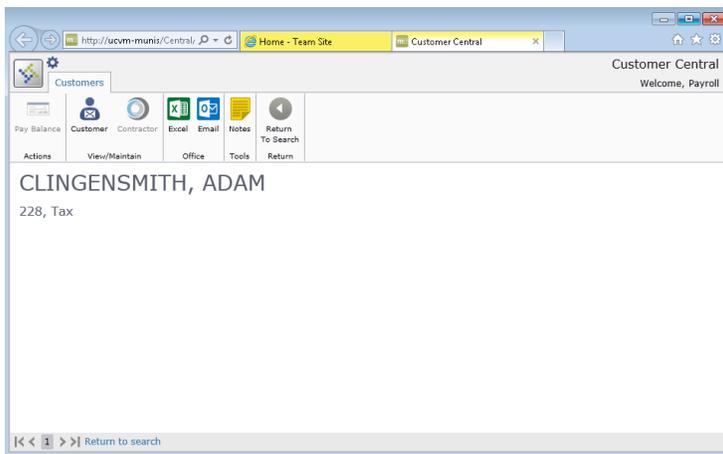
- Search results now appear in a menu heading!
- The maximum number of results returned is set in the Settings option in My Programs
- Hovering over a menu option displays the path to the program



CENTRAL

This function provides a way to search a text pattern (name, customer etc.) across many areas of Munis with a single search. Results can be viewed and detailed records retrieved and viewed in their source program

- Uncheck areas if you wish to exclude them from the search

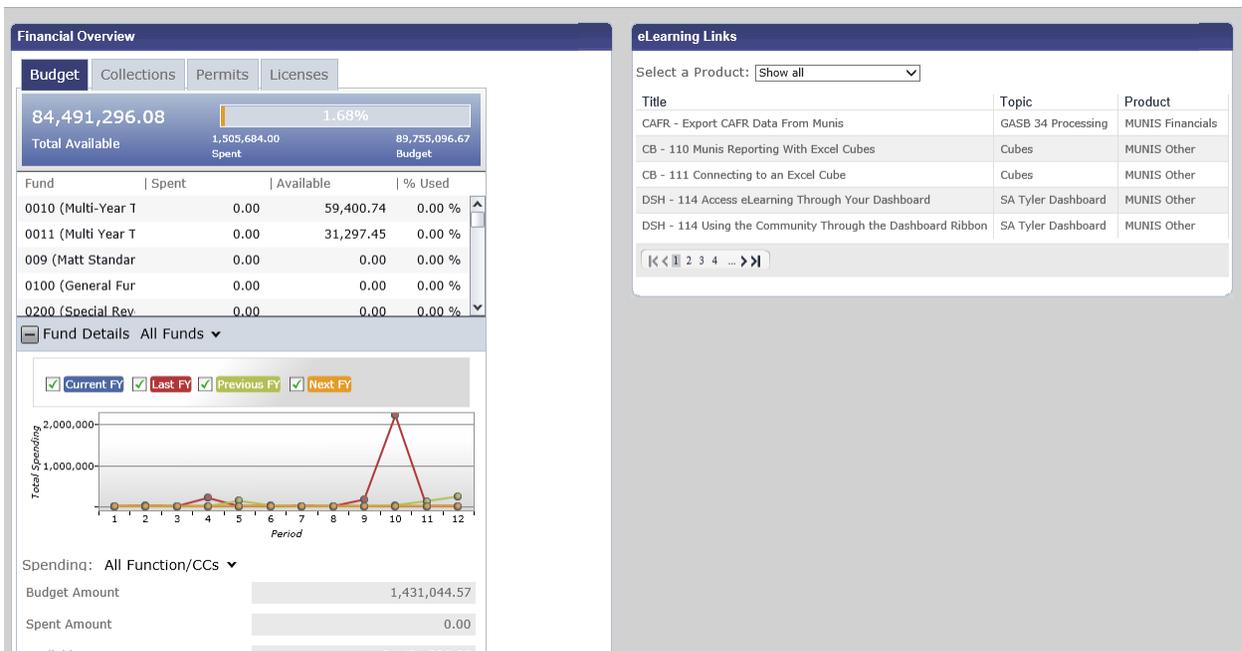
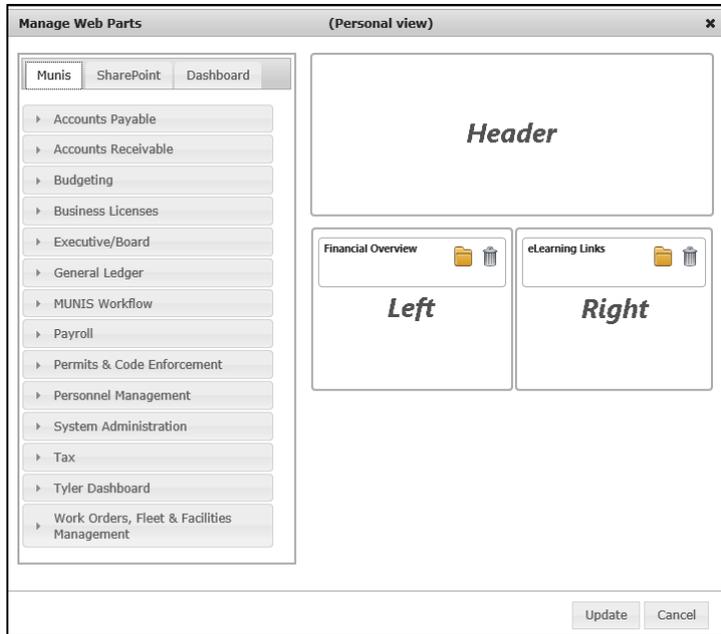


VIEWS & WEB PARTS

Web Parts are small web based programs that display information from Munis. Over 50 web parts spanning various functional areas are available to incorporate into your Dashboard. Web Parts appear in the Views area of the dashboard.

NOTE/TIP Ensure you have permissions to access web parts

- Web parts are grouped by category
- Click a category to expand the list of available web parts
- The view is divided into the Header, Left and Right portions of the screen
- Click and drag a web part to the area you choose
- Update saves the changes. Changes are made to the current view!



CUSTOMIZING/MANAGING WEB PARTS

Some web parts can be customized or require additional information to display information. In some instances, a web part may require customization if it displays “Required parameters have not been defined”. Additionally, any web part with these icons  at the bottom of the web part can be customized.



Refreshes the information presented in the web part. Web part information is refreshed when the part is opened or manually through this button. It can also be scheduled to refresh.



Resets the web part to its initial state



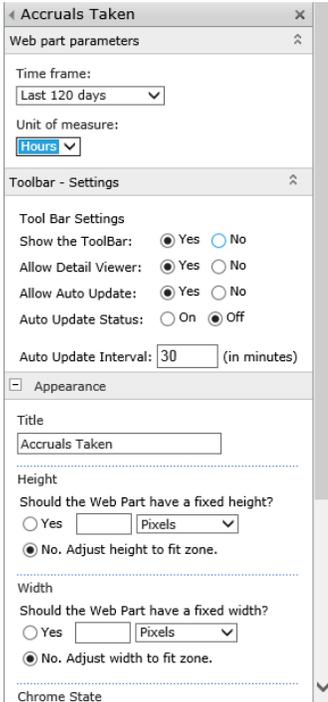
The Auto Timer icon allows you to automatically refresh the data at predetermined intervals



The Detail Viewer Control takes the current web part and opens it into a new Dashboard page making it easier to see all of the information



The Modify Web Part icon allows for customization of the current web part. A pane opens displaying various parameters that may be adjusted/established



Accruals Taken

Web part parameters

Time frame:
Last 120 days

Unit of measure:
Hours

Toolbar - Settings

Tool Bar Settings

Show the ToolBar: Yes No

Allow Detail Viewer: Yes No

Allow Auto Update: Yes No

Auto Update Status: On Off

Auto Update Interval: 30 (in minutes)

Appearance

Title
Accruals Taken

Height

Should the Web Part have a fixed height?

Yes Pixels

No. Adjust height to fit zone.

Width

Should the Web Part have a fixed width?

Yes Pixels

No. Adjust width to fit zone.

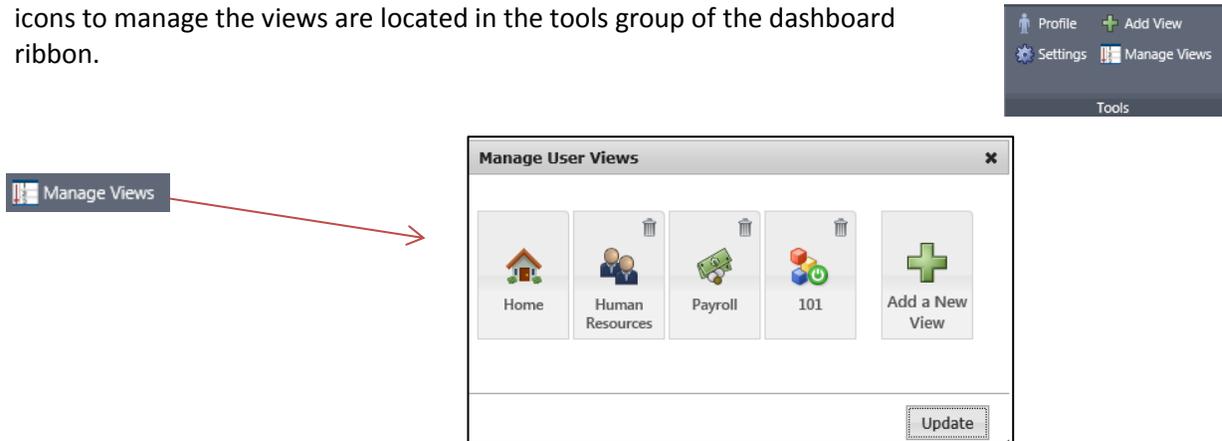
Chrome State

Updated: 3/22/2011 1:53 PM

- Indicates the last time the data presented in web part was refreshed.

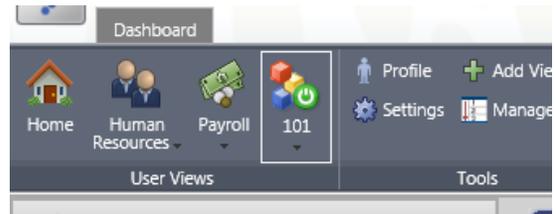
VIEWS

Views represent an area where one or more web parts are displayed. It is advantageous to limit the number of web parts per view and to gather web parts into functional groups for each view. The icons to manage the views are located in the tools group of the dashboard ribbon.



NOTE/TIP Add views before adding web parts

To move between views simply click on an icon in the User Views group of the dashboard ribbon.

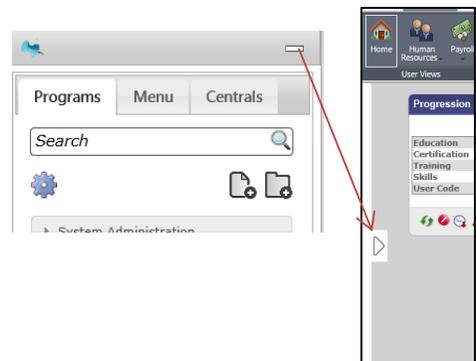


SCREEN REAL ESTATE

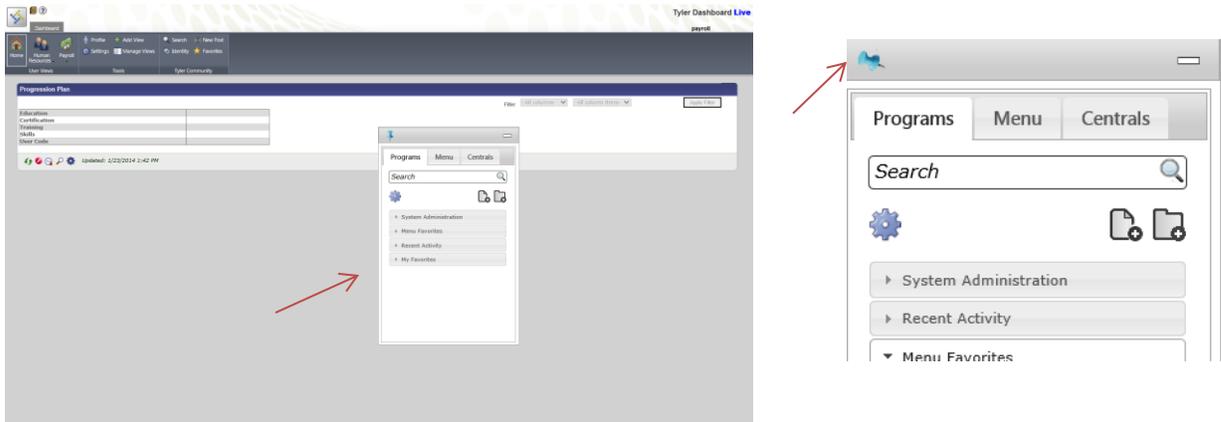
Sometimes you need must a little more space on the screen to see the last detail or you just want to minimize scrolling your screen to see all information. Munis provides a couple of options in the Dashboard and Internet Explorer provides an option also.

Navigation Panel

The Navigation Panel can be minimized or unpinned and relocated. To minimize, click the minimize icon at the top of the Navigation Panel.



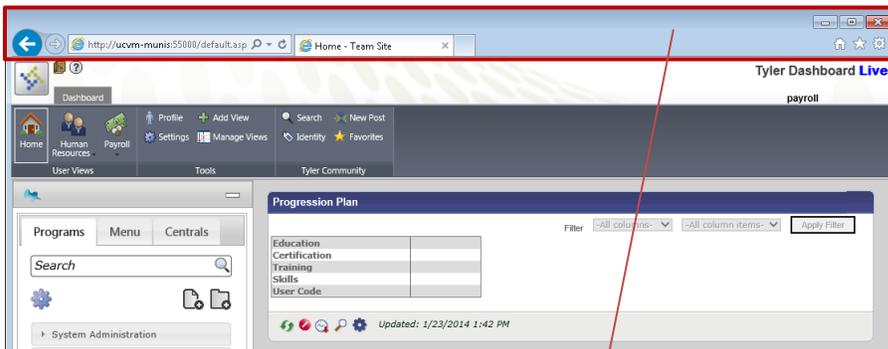
The Navigation Panel can also be relocated. First unpin the panel then drag it anywhere in the view. If the Pin does not appear, go into My Program Settings and change “Allow the Sidebar to Float”.



Internet Explorer

Internet Explorer has a Full Screen – Enable/Disable function that maximizes the window and removes the toolbars providing additional vertical window space. Simply press the F11 (Function key 11) to enable Full Screen mode. Pressing F11 a second time disables Full Screen and returns the toolbars. While enabled you can always move your cursor to the top of the screen to see the toolbars etc.

Disabled:



Enabled:



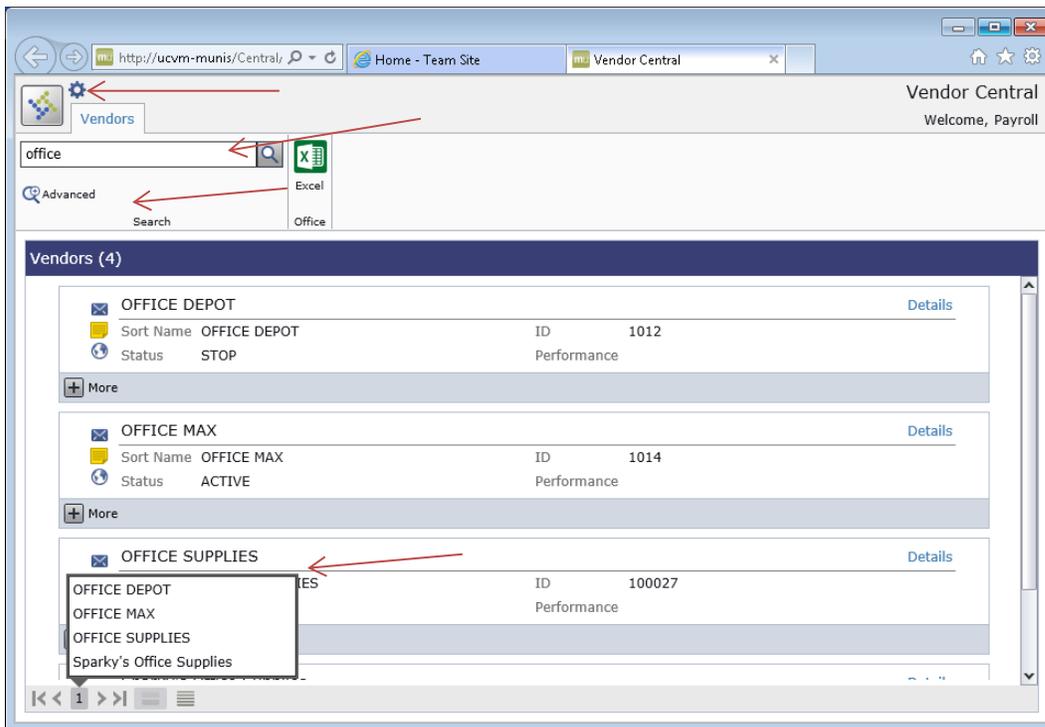
CENTRAL PROGRAMS

Central programs (not to be confused with Central search) are written in a web based language, allowing improved presentation of the data. Several of the programs mimic existing Munis programs and others offer different information. Munis V10 contains over 30 “Central” programs.

One of the key benefits of Central programs is their ability to provide a 360 degree view of your data. More of the data you need to see and work with is displayed on the screen without extra clicking and drilling down. Many of the Central programs are also configurable so you can view the information most important to you.

Most Central programs can be found: Other Applications > Centrals

VENDOR CENTRAL



Features:

Basic search – Enter a portion of the vendor name in upper or lower case. Implied wildcard finds all matches



Advanced Search – Provides access to additional selection criteria

Number	<input type="text"/>	W9 Received	All <input type="button" value="v"/>
Name	<input type="text"/>	Payroll Employee	<input type="text"/>
DBA	<input type="text"/>	Status	All <input type="button" value="v"/>
City	<input type="text"/>	Zip	<input type="text"/>
State	<input type="text"/>	DUNS	<input type="text"/>
SSN	<input type="text"/>		
FID	<input type="text"/>		

Hovering over the page number displays the vendors on the page.
 Moving the cursor to the vendor displays the vendor details.



Settings – Customize the search and panels in the detail screen

Settings

Application Settings Wildcard implied on quick search

Settings

Application Settings Panel Settings

Available panels	Left column <input type="button" value="v"/>	Loaded panels
<ul style="list-style-type: none"> Attachments Commodities Contracts Remits Vendor 	<input type="button" value=">"/> <input type="button" value="<"/>	<ul style="list-style-type: none"> Checks Invoices Purchase Orders

Invoice time frame: 60 Days

Check time frame: 120 Days

PO time frame: 30 Days

Settings saved at 01/20/2014 04:04:41 PM

Loaded panels are viewed in the Details screen.

NOTE/TIP If the screen is blank upon opening the program, go into settings and load panels

After changing settings click Save and close the pane.

Vendor Central
Welcome, Payroll

Vendors

Vendor Excel Email Notes Return To Search

View/Maintain Office Tools Return

OFFICE MAX
ACTIVE

Checks
Time frame: 90 Days

Check	Date	Amount	Cleared
3	01/23/2014	946.25	No

Invoices
Time frame: 60 Days

Invoice	Date	Amount	Check	Check Date	Voucher	PO
6026	01/23/2014	946.25	3	01/23/2014	2013002	

Purchase Orders
Time frame: 30 Days

PO	Date	Ordered
2013002	01/23/2014	896.25
2013001	01/20/2014	1,070.00

Return to search



With appropriate permissions you can maintain the vendor



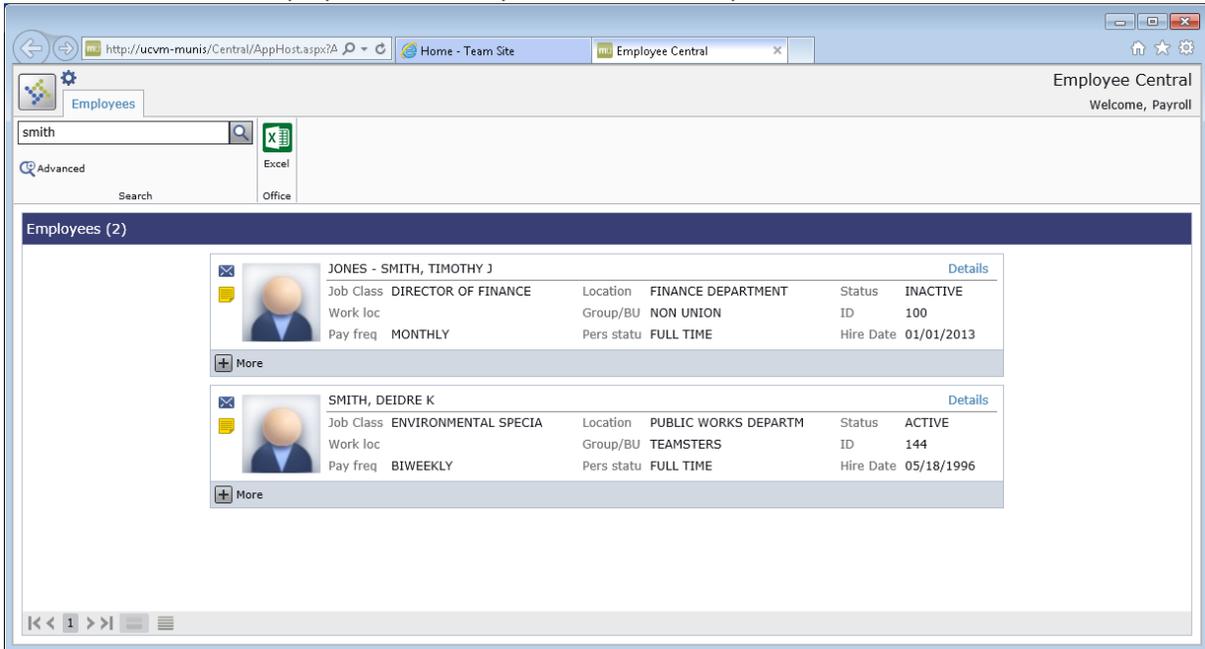
Excel output of current vendor

- Loaded Panels: Checks, Invoices, Purchase Orders
- Panels can be dragged/dropped in the location you desire
- Many panels contain [links](#) to drill down into the details of the data displayed

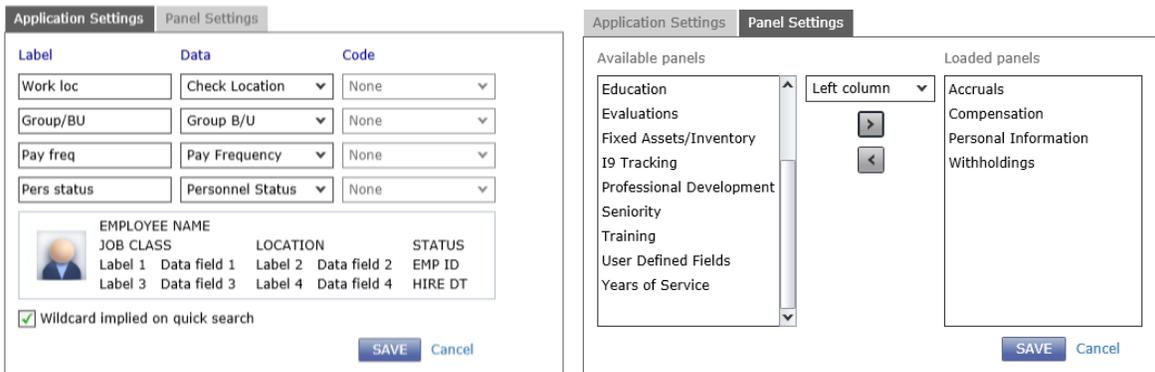
Return to search - Move through selected vendors detail or return to Search window

EMPLOYEE CENTRAL

Program provides a place to view and maintain employee information from one central program. Detail information is displayed in summary with drill down capabilities.



Settings: The settings option in this Central program allows greater customization of the search screen and contains many panels



Type	Available	Limit
VACATION	75.00	150.00
SICK	16.00	60.00
PERSONAL	-3.00	24.00

Job Class	Position	Salary
DIRECTOR OF FINANCE	DIRECTOR OF FINANCE	68,076.26

Description	Amt/Pct	YTD Amt
FICA	6.2000	0.00
FICA	6.2000	0.00
MEDICARE	1.4500	0.00
401K	125.0000	0.00
DELTA DENTAL	4.0000	0.00

Employment	Contact	Demographics
Check Location	Status	INACTIVE
Group/BU	ID	100
NON UNION	Supervisor	



Profile Change launches the Employee Changes Wizard to make changes to an employee



Leave launches the Employee Leave Wizard to record an employee going on extended leave or returning from leave



Terminate launches Employee Terminate Wizard to note an employees retirement or termination



Employee allows you to view/maintain employee master record as well as access to other employee functions (I-9, Accruals, Withholdings, User Defined Fields)



Qualifications allows you to view/maintain employee job qualifications (Certifications, Education, Skills, Training, Professional Development)



Employment allows you to view/maintain employee details (Actions Entry, Assignments, Benefits, Enrollment, Evaluations, Fixed Asset/Inventory, Issues, Job Salary, Retirement, Seniority, Years of Service)



History

History allows you to view/maintain employee history (Application Data, Deduction/Pay, Actions, Time & Attendance, Retro Pay)

MUNIS PROGRAMS

Munis programs have a consistent layout, functions and other consistencies to facilitate learning and using the broad array of programs available in Munis.

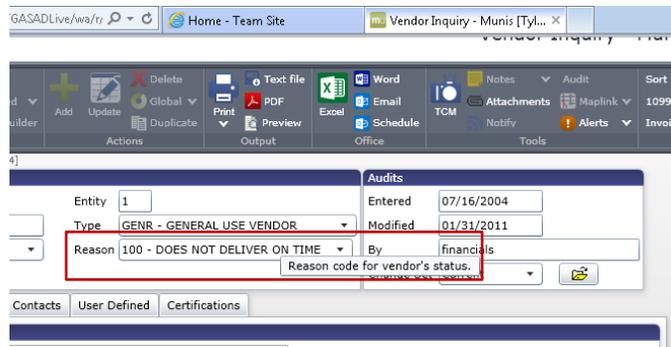
The screenshot displays the 'Vendor Inquiry - Munis [Tyler Connect 2014]' application window. The interface is divided into several key sections:

- Ribbon:** A top navigation bar containing various action buttons such as 'Accept', 'Cancel', 'Search', 'Advanced', 'Add', 'Update', 'Delete', 'Print', 'PDF', 'Excel', 'Word', 'Email', 'Schedule', 'Office', 'Tools', 'Alerts', 'Menu', and 'Return'.
- Tabs:** A set of tabs below the ribbon, including 'Main', 'General', 'Miscellaneous', 'Contacts', 'User Defined', and 'Certifications'. The 'General' tab is currently selected.
- Work area:** The main content area containing 'General Vendor Information' (with fields for Vendor ID, Alpha, Status, Entity, Type, Reason, Audits, etc.), 'Contact Information' (with fields for Company Name, DBA, Address, City, State, etc.), 'Identification' (with fields for SSN, FID, DUNS), and 'Additional' (with buttons for Performance and Commodity).
- Navigation area:** A bottom bar with navigation controls (back, forward, search, etc.) and an 'Attachments (0)' section.

Callouts with arrows point to these specific areas: 'Ribbon' points to the top bar; 'Tabs' points to the 'General' tab; 'Embedded links/buttons' points to the 'Performance' and 'Commodity' buttons; 'Work area' points to the main data entry fields; and 'Navigation area' points to the bottom bar.

Learning the available functions and fields

Each program has an icon to allow access to the KnowledgeBase  and Help  commands in the toolbar to gain additional information about a program. Another source of information is tool tips. Tool tips are the small text boxes that appear when hovering over a button, icon or field in Munis.



Work Area Screen Fields

The work area is where you enter, update or define information. This area contains several types of fields.

Free form entry allows entry of alpha-numeric characters. If the field contains a “.00” or other decimal then only numeric values are accepted.

Dropdown presents a limited number of predefined values. Click on the arrow to select a value or start typing the value and the matching acceptable value appears.

Ellipsis presents a list of predefined values that appear in their own pane. Click the ellipses to open a pane or type in an acceptable value. If the value you type in is invalid you will receive a warning message in the lower left corner of the screen

Printed check

Radio Button is used when the user has two or more options only one of which may be selected. Just click the radio button adjacent to the option you wish to use.

W-9 sent

Checkbox indicates either a yes, no or not selected. A check mark indicates Yes, blank is No and if the center is grey it has not been established.

Date fields require a valid date and if clicked presents a calendar to select a date. Dates may be entered in a few formats: 12312010, 12/31/2010, 123110 etc.

Alpha

ABC SL

Required fields have a **Alpha** field label indicating you must place information in these fields to complete the addition of a new record or when updating a record.

Embedded Screen Buttons/Icons/Links

Embedded screen buttons  icons and links appear where additional, optional information is housed. Some buttons appear in yellow if additional information is present and others show the number of entries. Clicking a button/icon/link opens a pane allowing you to enter or view information.

Examples:



The folder icon allows drilling into the information presented in the field to the left of this icon.



The email icon appears adjacent to a field that contains an email address. If an email address is present, clicking this icon opens your email and starts an email with this address.

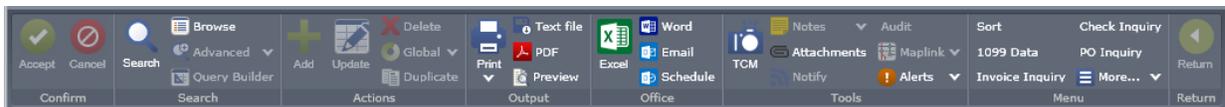


The WWW icon appears adjacent to a field that contains a URL. If a web address is present, clicking this icon opens your default browser with the address in the field.

Tabs

When there is insufficient space to display all necessary fields on a single screen, the data is organized by tabs. The most important information appears on the first tab.

TOOLBAR RIBBON



The toolbar ribbon places functions in a ribbon style presentation and logically groups the icons. Each grouping of icons is called a “group” and the icons are referred to as “commands”.

In various programs and at various points in time, you will notice the commands on the ribbon may appear sharp and colorful (in focus) or faded (out of focus). The in focus commands are available for use and the out of focus commands are not.

Confirm group:



Accept: accept selection criteria in a find, update or define



Cancel: cancel a find, update or define

Search group:



Search: select data records with user entered criteria. Criteria entered depends on the type of field:

- “*” represents any number of characters and can be used at the beginning, end or middle of a string. e.g. “A*”, “A* Co.” or “*Industries”. Only valid for character fields.
- “?” represents a single character and can be used anywhere in the string. e.g. “001?075”, “370?”, “????075”. Each “?” represents one character. Only valid for character fields.
- “<” locates character strings or numbers less than a value. e.g. “<1000”, “<R”
- “<=” locates character strings or numbers less than or equal to a value.
- “>” locates character strings or numbers greater than a value. e.g. “>80”, “>ME”
- “>=” locates character strings or numbers greater than or equal to a value.
- “<>” or “!=” locates a string or numbers not equal to a particular value. e.g. “<>0”, “!=A”
- “:” or “..” allows entry of a range of values to locate. e.g. “1:100” or “A..FZZZ”
- “|” allows a search for multiple entries in a field. e.g. “10|20|34”, “A|I”



Browse: Allows a user to view records in the data set in a one line per record format. The browse screen is used to select a record, review info in summary, export data to Excel and can be customized to each user’s desire.

Vendor Inquiry - Munis [Tyler Connect 2014] > Vendor Inquiry

Vendor	Alpha Sort Name	Company Name	Status	Doing Business As
1	One Time Vendor	one time vendor		
2	RT Test Vendor	RT Test Vendor		
		st Vendor EFT		
		st Vendor ACI		
		Y VENDOR		
		serve	Active	OR -USA
1000	ABC SUPPLY COMPANY	ABC SUPPLY	Active	ABC SUPPLY
1002	ABLE CONCRETE	ABLE CONCRETE	Active	
1003	MUNIS	MUNIS, INC.	Active	MUNIS
1004	BMI SYSTEMS GROUP	BMI SYSTEMS GROUP	Active	
1005	CRYSTAL DECISIONS	CRYSTAL DECISIONS	Active	
1006	KRONOS	KRONOS	Active	
1007	FORD MOTOR	FORD MOTOR COMPANY	Active	
1008	CHEVROLET	CHEVROLET	Active	
1009	GENERAL MOTORS	GENERAL MOTORS	Active	
1010	DELL	DELL	Active	
1011	HEWLETT-PACKARD	HEWLETT-PACKARD COMPANY	Active	

Search / Filter: [Search] [Filter] [Go] [Previous] [Next]

Record: 1 of 33



Query Builder: Function used to build and save queries that may be run later by author or other users



Advanced Query: Available in select programs. Presents an alternate query screen.

Actions group:



Add: Add a new record



Update: Update the current record in the find set



Delete: Deletes the current record only. Note: If a program includes the ability to mass delete it will be represented as a command in the Menu category.



Global: Global change certain predefined fields. Available in select programs



Duplicate: Creates a duplicate of the current record. Available in select programs.

Output group:



Print: Prints report to a user designated or the user's "default" printer. A user's default printer is established in System Administration > Security > User Attributes.



Text File: Saves a text output file of a report to the server where it can be archived, printed, displayed etc. Text files are accessible from the menu Departmental Functions > Saved Reports.



PDF: Creates the report in Adobe Reader (pdf) format. Improved report quality includes an ornate heading, bolded column headings etc. Also allows flexibility in saving and distributing the report. Once generated you have Adobe options to print or email to others a better quality report.



Print Preview: Displays one or more reports in a pane on the user screen

Office group:



Excel: Opens an Excel spreadsheet with the data in the current set. (Select programs)



Word: Create a mail merge with data in current set. (Select programs)



Email: Email a link to the current data record. Users with appropriate Munis access can open the link and view the data. (Select programs)



Schedule: Schedule processing and report generation. (Select programs)

Tools group:

The commands in the Tools group are available in select programs



TCM: Retrieve documents linked to information stored in Tyler Content Manager



Notes: Enter notes associated with a data record



Attachment: Attach a document, picture, etc. to a data record



Audit: Lists audit records associated with a data record



Maplink: Retrieves a map associated with a data record



Alerts: Establish an alert associated with a data record

Menu group:

Menu group contains options specific to managing data in the program. If  appears, click the down arrow adjacent to More to select additional options. The options available vary from program to program.

Return group:

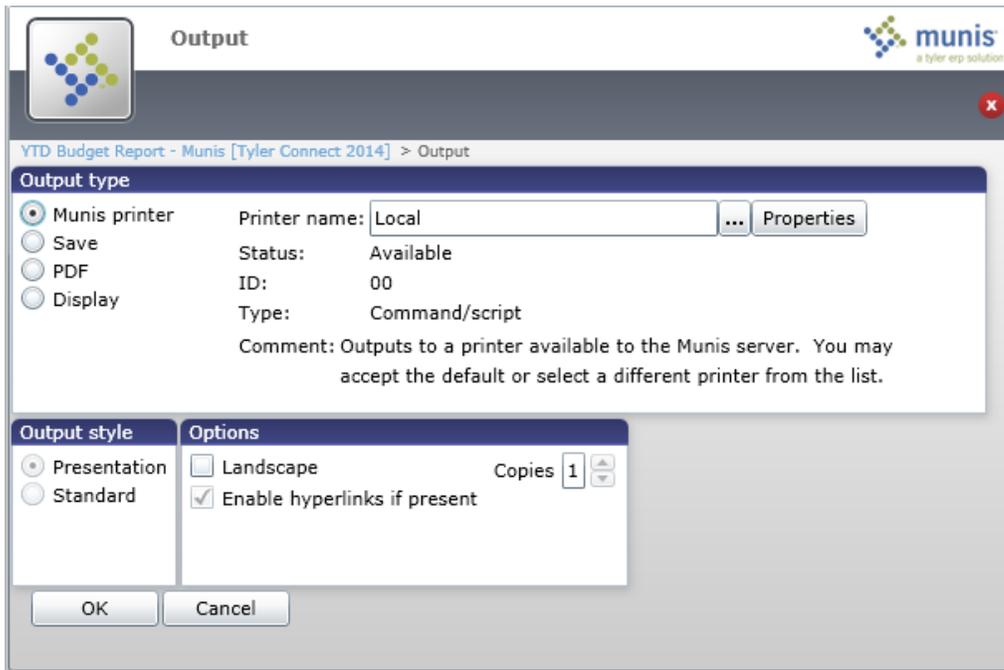
The  icon is available if a user selects an option within a program which results in opening a new screen. The Return option closes the current screen and returns to the previous screen.

OUTPUT

Munis provides the ability to generate output several different ways as noted in the Output group. Each of the options warrants some review to explain the breadth of the capabilities.



Print – The print command dropdown provides the option to print to your default printer (as defined in User Attribute for your ID) or present an output panel with output choices. Clicking the print command (no dropdown) also presents the output panel.



Output

YTD Budget Report - Munis [Tyler Connect 2014] > Output

Output type

- Munis printer Printer name: Local ... Properties
- Save Status: Available
- PDF ID: 00
- Display Type: Command/script

Comment: Outputs to a printer available to the Munis server. You may accept the default or select a different printer from the list.

Output style	Options
<input checked="" type="radio"/> Presentation	<input type="checkbox"/> Landscape Copies 1
<input type="radio"/> Standard	<input checked="" type="checkbox"/> Enable hyperlinks if present

OK Cancel

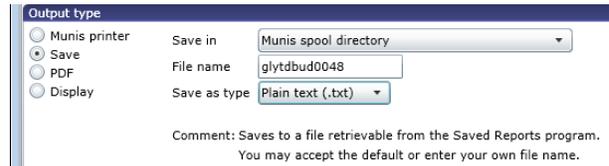
Output types

Munis Printer – This option allows you to select a designated printer. Printers are defined in Munis typically by Tyler/Munis or your Munis Administrator.

- Landscape output in Options allows you to create the output in Landscape format

Save - allows saving the output to a file

- Save in: allows saving report on server, TCM or both
- File name: default appears but you may change it
- Save as type: Plain text or PDF
- Enable hyperlinks is available if the Save as type is PDF



PDF – generates a report in PDF format and displays it in Adobe Acrobat

- Enable hyperlinks is the only option available
- Once Adobe Acrobat opens you can save, print, share, email and do various other functions from this application.

Display – opens a separate window and displays the report to the screen. You may scroll through the report to view it or move the cursor to the bottom of the window to select various navigation/output options.



Occasionally a Report Title or other option may appear above the Output style. This allows you to change this information before saving the report.

Output style options show the output format and are not available to change

SAVED REPORTS

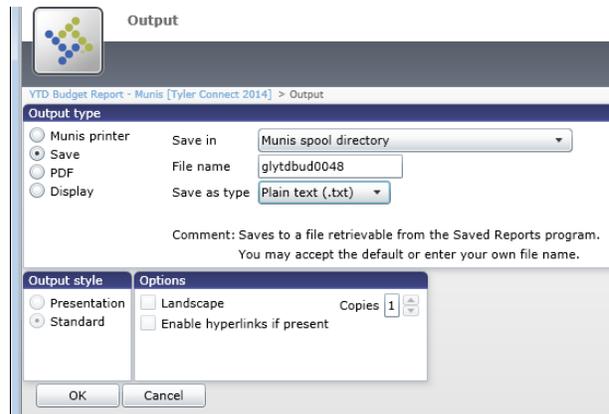
There may be instances where you desire an electronic snapshot of a report or maybe save rather than print the report. One form of output, the Text file, saves the report in a designated folder on your server for later retrieval and viewing. Munis provides two options (My Saved Reports, Saved Reports) to allow reviewing and managing saved reports.

Creating a saved report is as simple as clicking the Text file command  in the program ribbon or by selecting the Print command. Upon clicking the Text file the name of the report and number of pages appears at the bottom of the screen.



If you desire additional save report options select the Print command. When the panel appears select the Save radio button:

- Save in: allows saving report on server or in TCM.
- File name: default appears but you may change it.
- Save as type: Plain text or PDF.
- Occasionally a Report Title or other option may appear above the Output style. This allows you to change this information before saving the report.



Output style & options not available to change.

Viewing and/or printing saved reports:

The Saved Reports or My Saved Reports programs found in the Departmental Functions menu allow you to view, print and manage your saved reports. Add it to your My Programs tab for quicker/easier access!

- My Saved Reports provides access only to your saved reports. This is the menu option typically assigned to most users. Opening this program automatically displays all of the reports you have saved.
- Saved Reports provides access to all saved reports. This menu option is typically available to Munis administrators or managers needing broader access.

Saved Reports File Naming Convention:

Munis uses a particular file naming convention used when saving a report.

<u>Report Name</u>	<u>Program</u>
poinquiry0001.txt	Purchase Order Inquiry
glytdbud0259.txt	GL YTD Budget Report
prempmst0049.txt	Payroll Employee Master

- The first 8 characters of the filename typically reflect the name of the program that generated the file.
- A 4 digit sequence number follows the name and the report and ends with a “.txt” extension (or “pdf” if you’ve specifically chosen to Save the output and selected a “Save as type” of “PDF”). The sequence number increments with each report saved, thereby allowing up to 10,000 unique copies of a report generated from the same program. These files must be periodically cleaned out by IT or a System Administrator in order to avoid programmatic errors when the threshold is reached.
- The “.txt” extension allows the report to be easily opened with Notepad or other applications while “pdf” opens with Adobe Acrobat Reader.

Several fields are available to enter criteria to find saved report(s). Clicking on any column heading sorts the data in rows in ascending or descending order; This is one way to locate a report.

User ID	Report File Name	Report Title	Date	Time	Pages
payroll	apchecks0001.txt	EXPORTED A/P CHECKS	01/23/2014	11:46	1
payroll	apcshdsb0001.txt	A/P CASH DISBURSEMENTS JOURNAL - CASH FLOW	01/23/2014	11:50	5
payroll	apinvent0002.txt	INVOICE ENTRY PROOF LIST	01/23/2014	11:28	5
payroll	apvdrmt0001.txt	VENDOR 1-REFERENCE	01/24/2014	16:37	1
payroll	apwarrmt0005.txt	CHECK RUN LIST	01/23/2014	11:46	3
payroll	glytdbud0047.txt	YEAR-TO-DATE BUDGET REPORT	01/27/2014	08:55	7

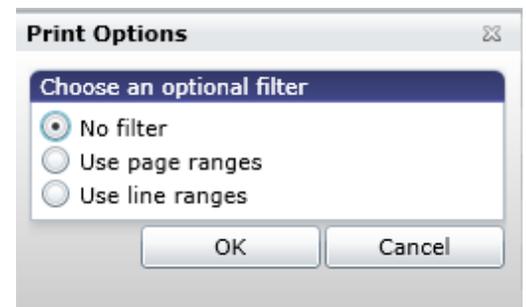
Display a report:

- Double click anywhere on the line to open the report in the Munis viewer.
- Select a report then click the Preview, PDF, Word or the Display Reports commands to open the report in one of these applications.
- You may also select the Text as PDF to display a report saved as a text file (.txt) and open it in PDF. If the report is a txt report it places your header on the report in PDF. No other report enhancements are included.

Print Reports:

- Any report may be printed by first opening it with one of the display reports options above and selecting the print option (in Munis viewer right click in viewer and select Print).
- The Print Reports command is found in the More... option found in the Output group. This allows printing of the report and includes additional print options. You need not select a report before selecting this option

- No filter prints the entire report
- Use page ranges allows you to print a select range of pages (the file must have page numbers for this option to function)
- Use line ranges allows you to print a select range of lines



Print Reports - No filter: selecting results in the following screen:

Mode								
-- PRINT MODE --								
Please select files to print including number of copies, printer, and landscape mode. You may use 'Select All' to select all of the saved files.								
X	Cpy	Printer Name	Lnd	User ID	Report File Name	Report Title	Date	Time
<input checked="" type="checkbox"/>	1	13W2CS	<input type="checkbox"/>	payroll	glytdbud0048.txt	YEAR-TO-DATE BUDGET REPORT	01/27/2014	09:07
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	glytdbud0047.txt	YEAR-TO-DATE BUDGET REPORT	01/27/2014	08:55
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	apvdrmt0001.txt	VENDOR 1-REFERENCE	01/24/2014	16:37
<input checked="" type="checkbox"/>	1	guivalid	<input checked="" type="checkbox"/>	munis	poprints0001.txt	PURCHASE ORDER PRINT EXPORT	01/24/2014	12:15
<input type="checkbox"/>	1		<input type="checkbox"/>	munis	poentpst0017.txt	PURCHASE ORDER PROOF	01/24/2014	12:13
<input checked="" type="checkbox"/>	1		<input type="checkbox"/>	munis	apinvent0003.txt	INVOICE ENTRY PROOF LIST	01/24/2014	10:43
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	poentpst0011.txt	PURCHASE ORDER PROOF	01/23/2014	11:20
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	poentpst0001.txt	PURCHASE ORDER PROOF	01/23/2014	11:19
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	apwarrnt0005.txt	CHECK RUN LIST	01/23/2014	11:46
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	apinvent0002.txt	INVOICE ENTRY PROOF LIST	01/23/2014	11:28
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	apcshdsb0001.txt	A/P CASH DISBURSEMENTS JOURNAL - CASH FLOW	01/23/2014	11:50
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	apchecks0001.txt	EXPORTED A/P CHECKS	01/23/2014	11:46
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	prchecks0017.txt	PAYROLL CHECKS	01/20/2014	07:33
<input type="checkbox"/>	1		<input type="checkbox"/>	payroll	pmparmnt0001.txt	PERSONNEL SETTINGS	01/20/2014	11:18

- Select a report by checking the box in the X column
- Change the number of copies if you desire more than one
- Select a printer for each report
- Optionally select the Lnd box to print the report landscape

Print Reports – Use page ranges/line ranges: selecting results in the following screen:

Mode								
-- PRINT PAGE RANGE MODE --								
Please select files to print including copies, printer, landscape mode, and page range. You may use 'Select All' to select all of the saved files.								
X	Cpy	Printer Name	Lnd	Start	End	User ID	Report File Name	Report Title
<input checked="" type="checkbox"/>	1		<input type="checkbox"/>	1	4	munis	apinvent0003.txt	INVOICE ENTRY PROOF LIST
<input type="checkbox"/>	1		<input type="checkbox"/>	1	4	payroll	poentpst0011.txt	PURCHASE ORDER PROOF
<input type="checkbox"/>	1		<input type="checkbox"/>	1	4	payroll	poentpst0001.txt	PURCHASE ORDER PROOF
<input type="checkbox"/>	1		<input type="checkbox"/>	1	3	payroll	apwarrnt0005.txt	CHECK RUN LIST
<input type="checkbox"/>	1		<input type="checkbox"/>	1	5	payroll	apinvent0002.txt	INVOICE ENTRY PROOF LIST
<input type="checkbox"/>	1		<input type="checkbox"/>	1	5	payroll	apcshdsb0001.txt	A/P CASH DISBURSEMENTS JOURNAL - CASH FLOW
<input type="checkbox"/>	1		<input type="checkbox"/>	1	1	payroll	apchecks0001.txt	EXPORTED A/P CHECKS
<input type="checkbox"/>	1		<input type="checkbox"/>	1	1	payroll	prchecks0017.txt	PAYROLL CHECKS
<input type="checkbox"/>	1		<input type="checkbox"/>	1	1	payroll	pmparmnt0001.txt	PERSONNEL SETTINGS
<input type="checkbox"/>	1		<input type="checkbox"/>	1	1	payroll	pmbrnpt0002.txt	EMPLOYEE BENEFITS 834 EXPORT
<input type="checkbox"/>	1		<input type="checkbox"/>	1	4	payroll	prpyddpf0029.txt	DETAIL PROOF - FINAL REPORT
<input type="checkbox"/>	1		<input type="checkbox"/>	1	3	payroll	prpyddpf0028.txt	DETAIL PROOF - FINAL REPORT
<input type="checkbox"/>	1		<input type="checkbox"/>	1	1	payroll	prchkrmg0005.txt	PAYROLL CHECK REGISTER EXPORT FILE
<input type="checkbox"/>	1		<input type="checkbox"/>	1	1	payroll	prchkrmg0004.txt	PAYROLL CHECK REGISTER EXPORT FILE

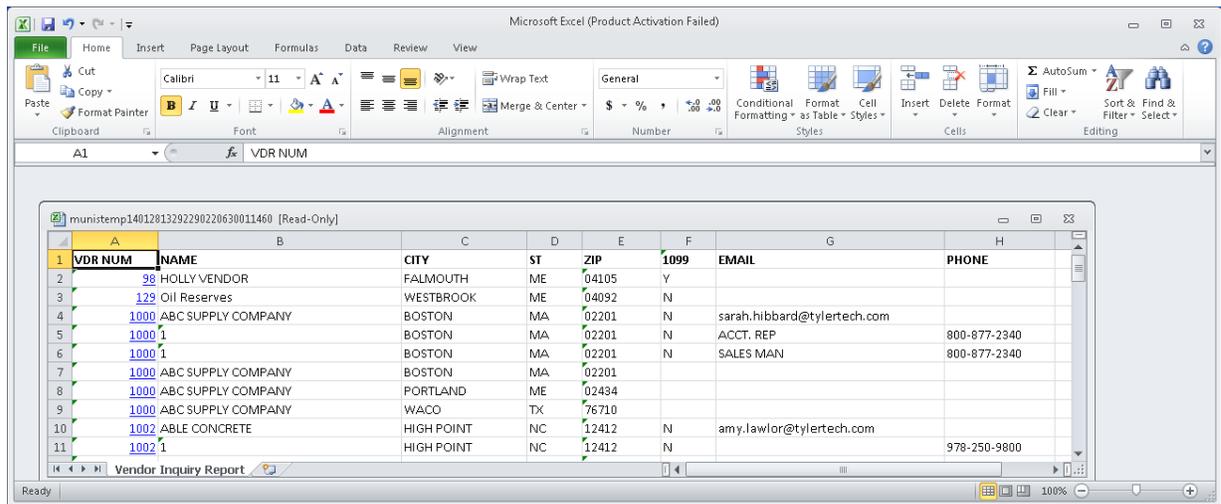
- Options similar to No Filter except you specify a start/end page/line range
- Each report shows the beginning/ending page/line range to assist in selecting ranges

MUNIS OFFICE

Munis Office provides users with an ability to extract Munis data into an Excel spreadsheet  or mail merge the data into a Word template . In using either option you first find the data to report then click the appropriate command.

Munis Office for Excel

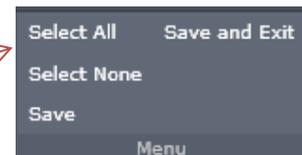
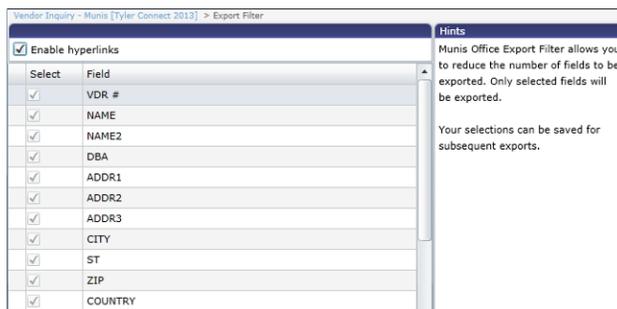
Clicking the Excel command may result in one of two actions. Many programs will simply open an Excel spreadsheet with the records you selected.



The attributes of the spreadsheet may vary however most share the following:

- Column headings appear in bold
- Some data cells may contain data in a blue font and underlined which represent hyperlinks to each record in the appropriate Munis program. If logged into the dashboard a user can click on the hyperlink and Munis will open the program and retrieve the data selected from the sheet provided they've been granted Munis access.

Some programs provide an Export Filter panel before opening Excel. The export filter window allows you to select the data elements to include on the sheet.

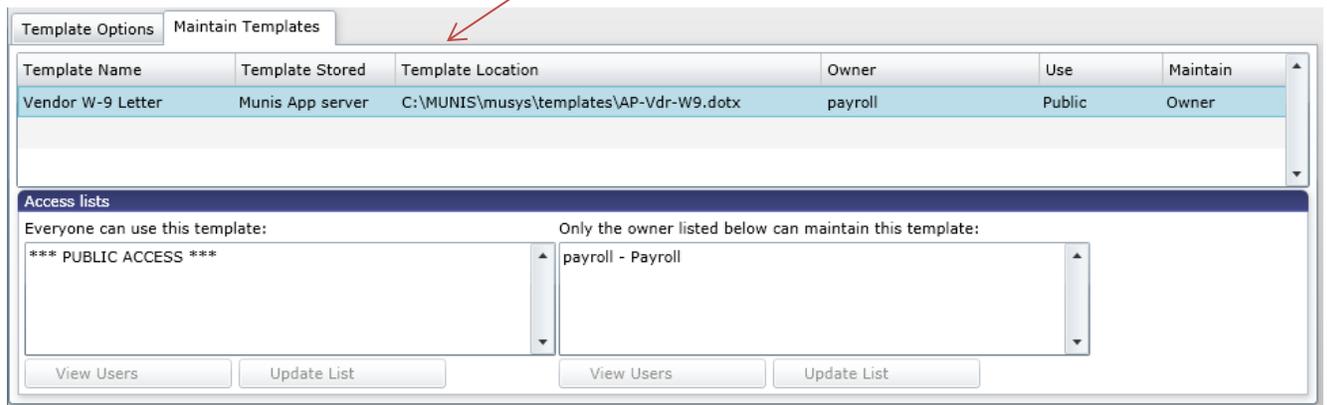
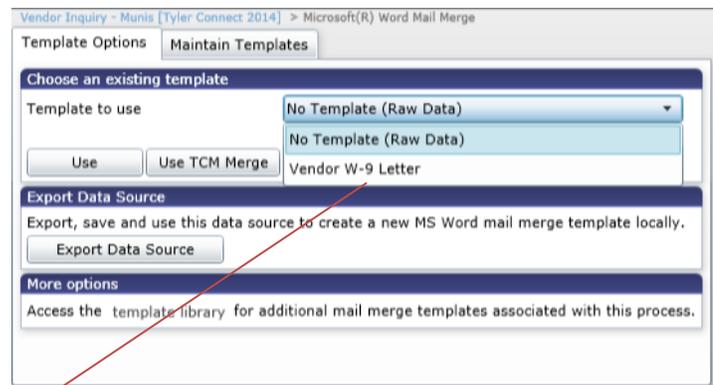


- Select All/Select None in the Menu group acts upon the fields in the export filter
- Save/Save and Exit saves the fields selected in the export filter. This is beneficial if you intend to produce an Excel spreadsheet in the future and use the same fields.
- If Enable hyperlinks box is checked the Excel spreadsheet will contain hyperlinks for select columns

NOTE/TIP Munis Office for Excel is available in select programs however Excel output is available in **EVERY** Browse screen!

Munis Office for Word

Clicking the Word command opens a window to prepare to launch a mail merge.

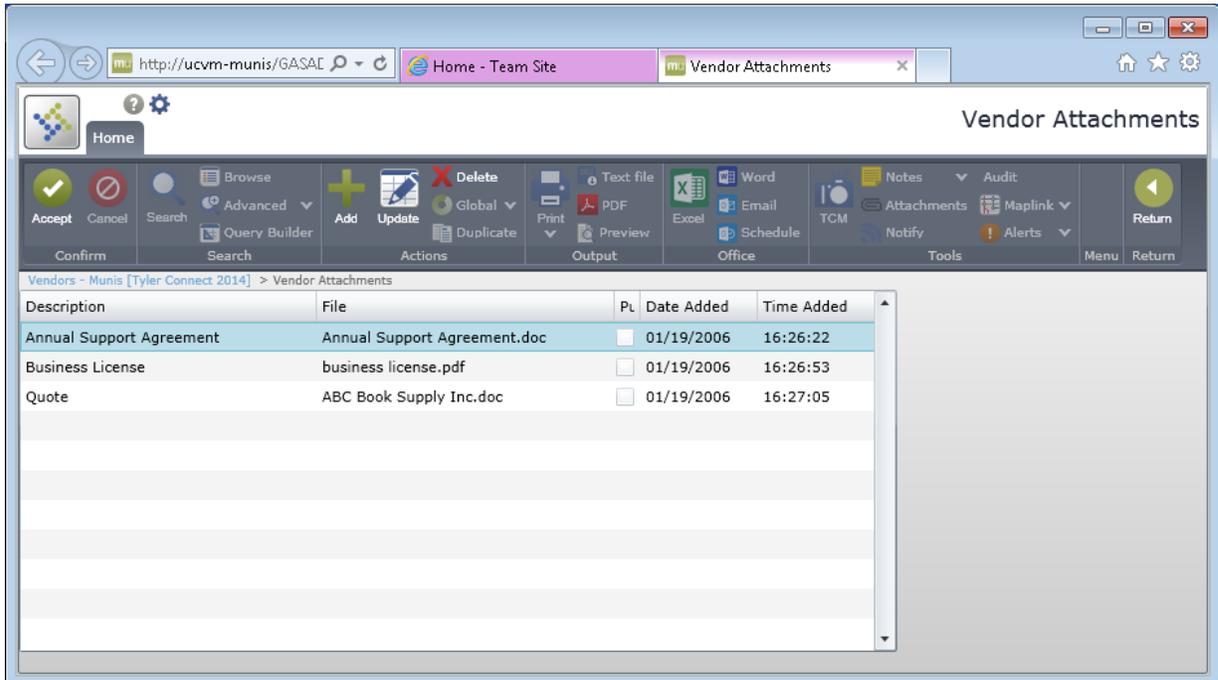


- Export Data Source to a file and use this to create one or more templates
- Once a template is saved add it to the list of available templates in Maintain Templates
- The individual that adds the template can restrict access to use and maintain the template

NOTE/TIP If you change a template you must remove and add it back to Maintain Templates since the template is stored on the Munis server

Munis Office Attachments

Select programs provide the ability to attach documents  to a record (e.g. AP Vendor, Employee, Journal Entry etc.). The attached documents may be viewed in other programs as well. The attachments capability represents basic functionality and does not require the use of Tyler Content Manager.



- Any type of document may be attached to a record once the file type has been setup in the System Miscellaneous Codes program using Code type AECT – Allowed Attachment Extensions. The program is located on the System Administration menu under Miscellaneous Administration. The Code added should correspond to the extension of the file type; For example, PDF, TXT, JPG, etc.
- Attaching a document uploads and stores it on your Munis server.
- Users with appropriate permissions can view the attached documents providing they have the application available to view the document on their workstation.

TYLER COMMUNITY

Tyler Community is a place to share information and collaborate with other users and Tyler employees. The Community is a central meeting place for Tyler customers to connect, collaborate and access support resources. You'll find useful information through announcements, blogs, forums, libraries and wiki pages.

V10 includes a group of commands in the dashboard to facilitate accessing and participating in Tyler Community. [How to Configure Tyler Community Links in Dashboard.pdf](#)

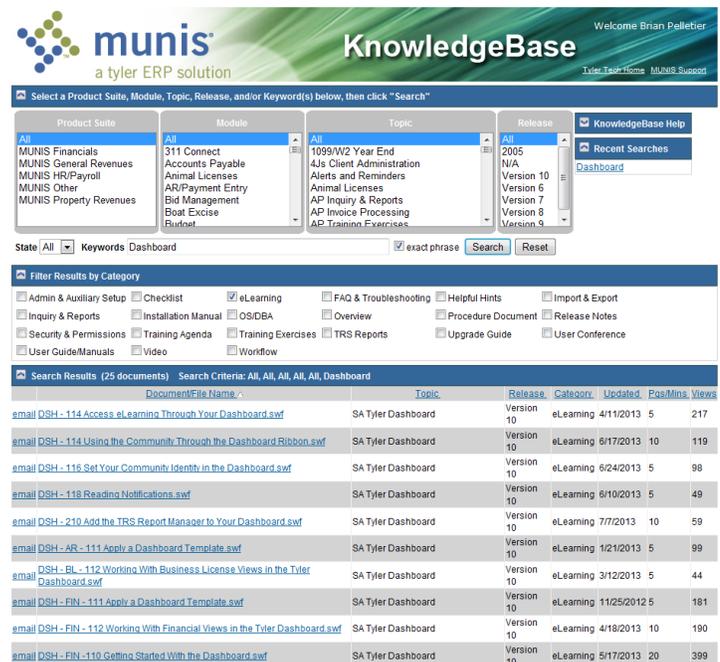


- Identity allows you to setup access to Community and eliminate manually logging in to participate
- Search allows you to search community items including forums, blogs, users, groups etc.
- New Post allows you to enter a question or discussion item
- Favorites provides quick access to the list of favorites that you have created within the Tyler Community application

Using Tyler Community requires initially registering on the Tyler Community web site. Follow <http://www.tylertech.com/client-support/munis-support> and click Register to setup an account.



The KnowledgeBase contains many documents to assist in learning new and existing Munis functionality. Included are release notes, new features for each release, eLearning recordings, PowerPoint presentations from Tyler Connect conferences etc.



Tyler Community is configurable and allows you to customize your profile and select the groups and forums you wish to participate. You can lookup topics and ask questions or search through to see if a question you have has been answered.



It's also a place to review your Support incidents and add new incidents!

