Munis Utility Billing – CIS

Major Enhancements
Version 10.1
March 9, 2012

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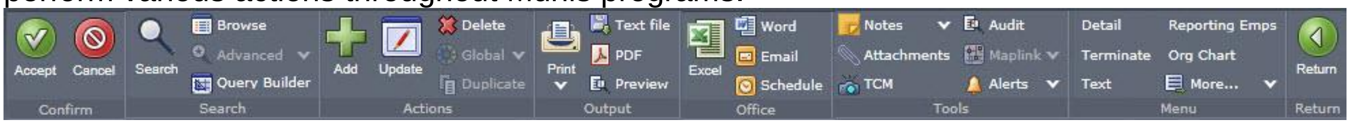
Munis Utility Billing – CIS

This document provides an overview of the major Utility Billing – CIS enhancements for Munis® Version 10.1.

Munis Ribbon

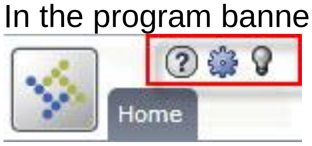
If your organization uses the GWC-SL interface, the Munis ribbon replaces the Munis toolbar. This ribbon contains tabs, which in turn, contain groups of related buttons that allow you to perform various actions throughout Munis programs.



The groups on the Munis ribbon are as follows:

- Confirm - Accept, Cancel.
- Search - Search, Browse, Advanced, Query Builder. Click the down arrow for the Advanced button to access advanced search options.
- Actions - Add, Update, Delete, Global, Duplicate. Click the down arrow for the Global button to view options.
- Output - Print, Text File, PDF, Preview.
- Office - Excel, Word, Email, Schedule.
- Tools - Notes, Attachments, TCM, Audit, MapLink, Alerts. Click the down arrow for the Notes, MapLink, and Alerts buttons to access specific options for each.
- Menu - Options specific to managing data in the active program and options for accessing related programs. Click the down arrow for the More button to view a complete list of menu options.
- Return - Closes the current screen. To close a program, close the Internet browser window.

In the program banner, the Munis Help, Settings, and Enhancements buttons are available.



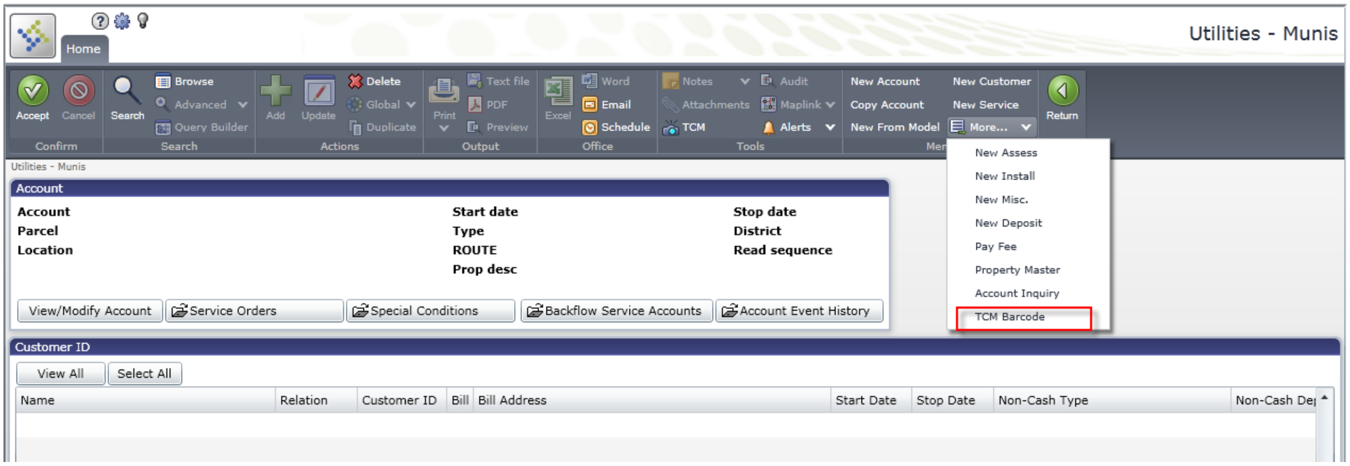
These buttons provide the following options specific to the active program:

- Help - Provides the Munis online help content, displays the Munis KnowledgeBase search screen with a list of documents related to the active program, and provides About Munis details.
- Settings - Provides the Customizable Field Label and View Database Column options.
- Enhancements - Displays the most recent enhancements to the active program.

Utility Billing

Accounts, Bill Adjustments, Utilities

The programs provide the option for using Tyler Content Manager to print bar code labels. For example, in the Utilities program, the TCM Barcode option is available from the Menu group in the ribbon.

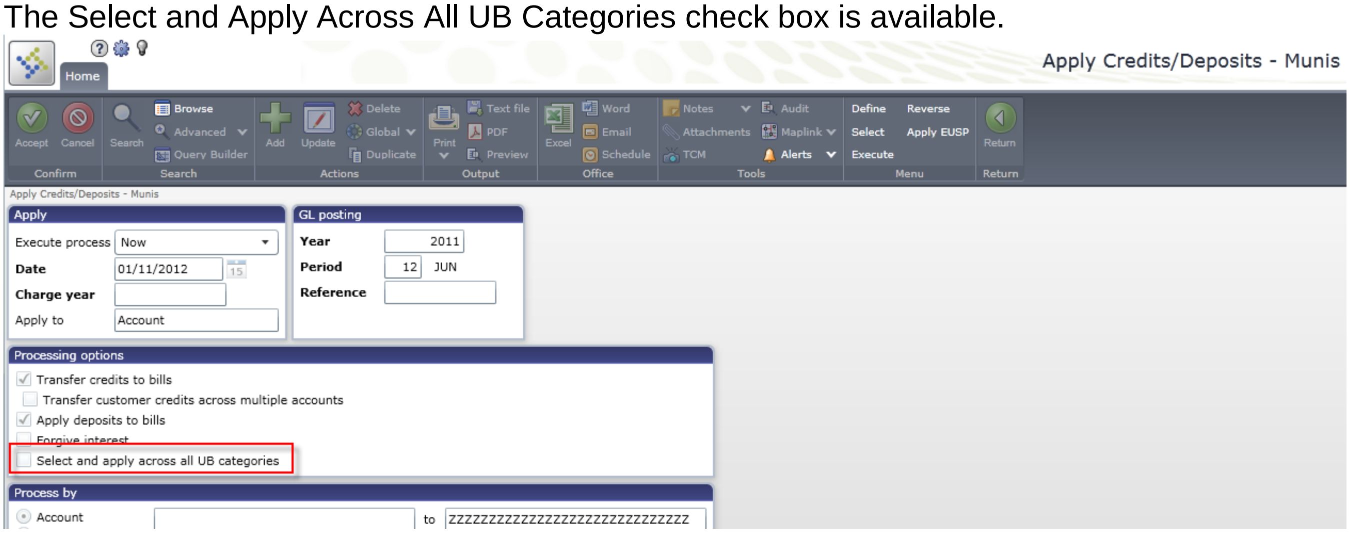


When you select TCM Barcode, the program displays the Label Page Count screen. Enter the number of bar code labels required and the click OK.

To use this option, the Print Barcode Labels for TCM permission must be granted in the Roles - Utility Billing program and your system must be configured to work with Tyler Content Manager (TCM).

Apply Credits/Deposits

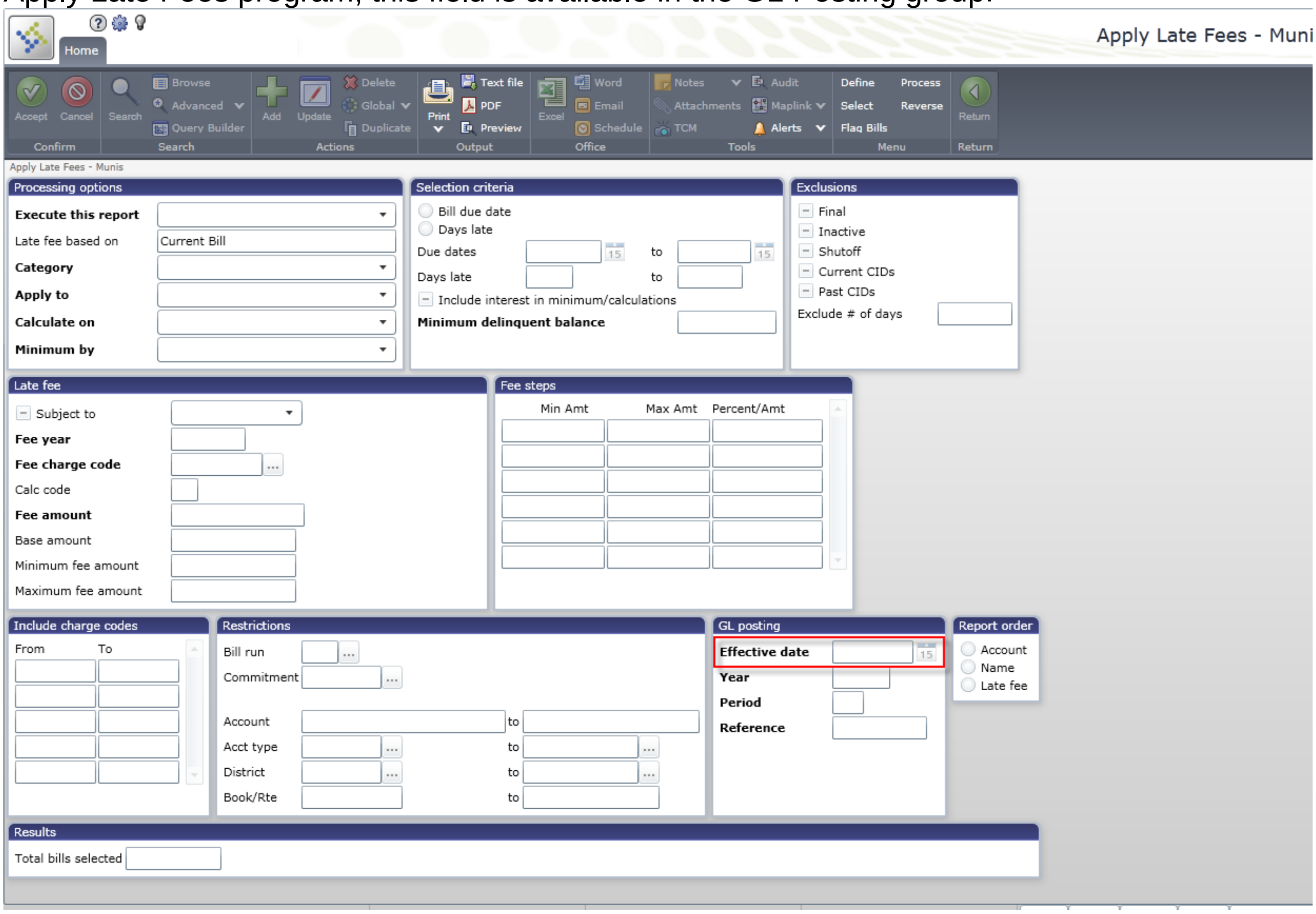
The Select and Apply Across All UB Categories check box is available.



If selected, this check box causes the program to allow credits to be transferred between the accounts receivable (AR) categories that apply to Utility Billing. Credits can be transferred across categories only if the accounting method for all categories is the same.

Apply Late Fees, Lien Delinquent Bills, Transfer Overpayments, Cut-off Process, Services, Transfer Delinquent to Tax, Deposits, Deposit Interest

The General Ledger Effective Date box is available in these programs. For example, in the Apply Late Fees program, this field is available in the GL Posting group.

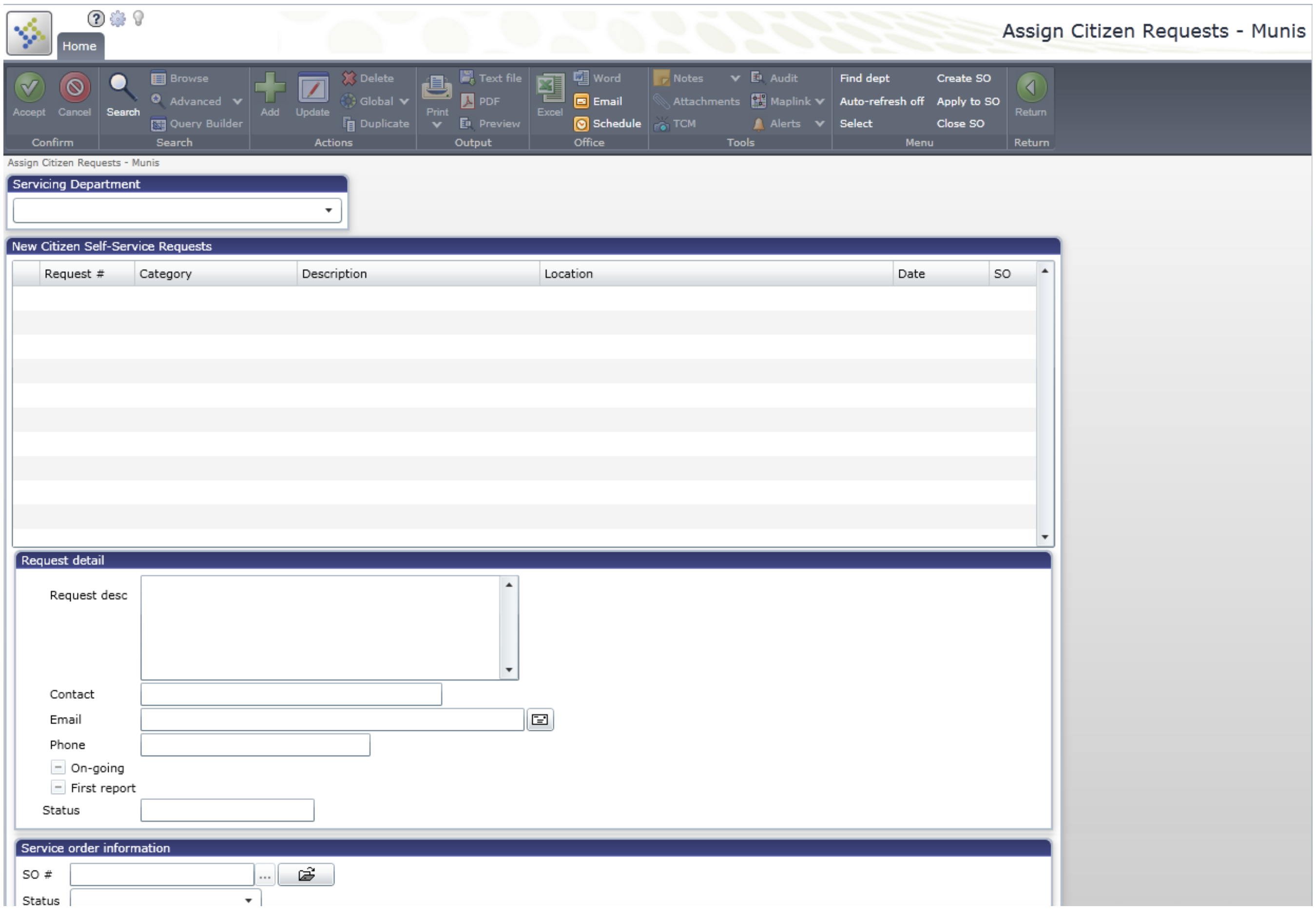


The Effective Date box allows you to specify the date that activity posts to the general ledger.

If these processes are scheduled to run as recurring jobs using Munis Scheduler, the Effective Date, Year, and Period are not accessible on the Define screen; the values default from the year and period in the General Ledger Settings program at the time the process is run. The effective date is set to the day the process is run.

Assign Citizen Requests

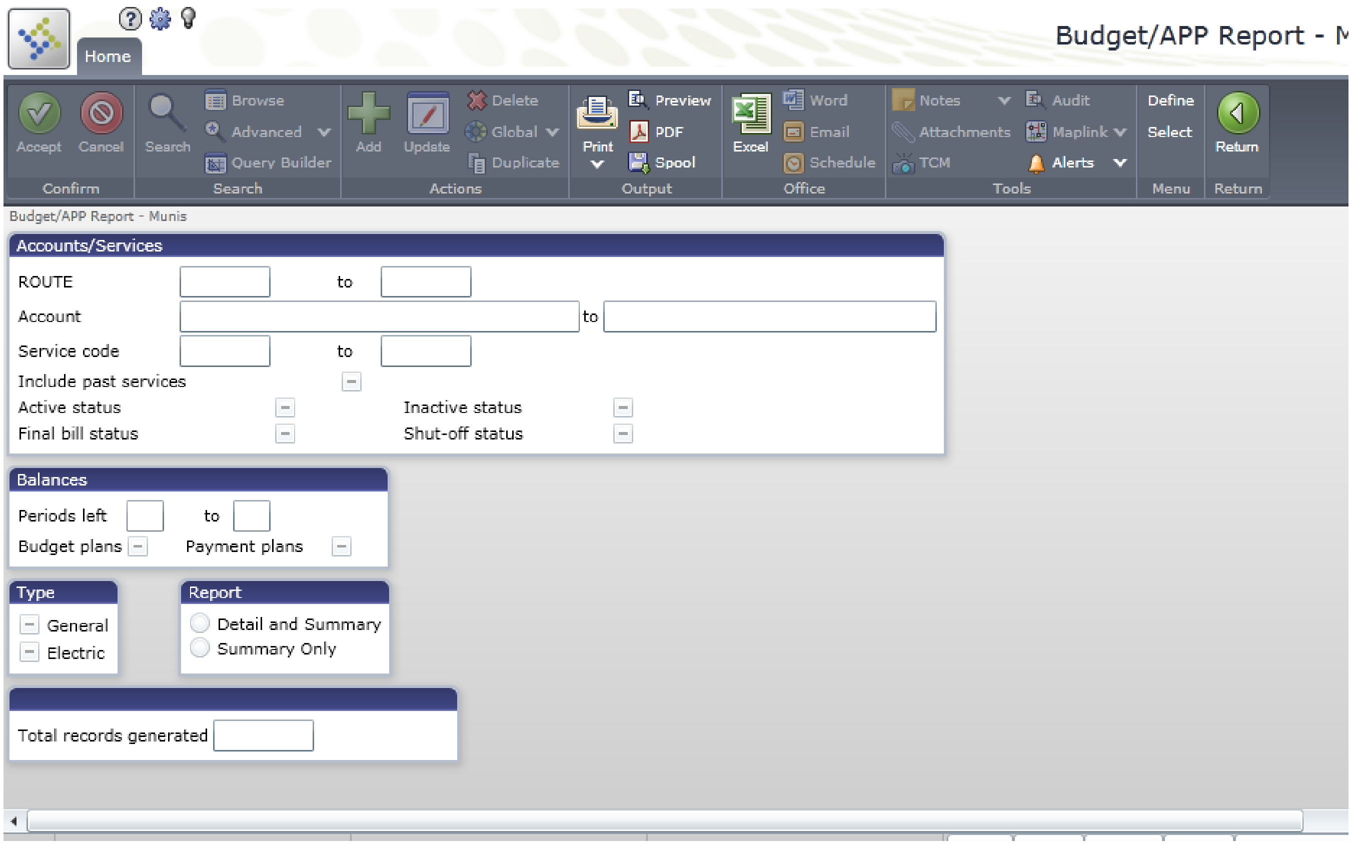
The Assign Citizen Requests program is available on the Special Processing menu. This program manages service orders generated by citizen requests entered using Munis 311 Connect .



Service-related calls are transferred to the Munis Service Orders/Print program once they are reviewed in Munis 311 Connect. Use the Assign Citizen Request program to update the tasks and status for a request. When the service order status changes throughout the life cycle, the status is also update in Munis 311 Connect.

Budget/APP Report

The Budget/APP Report program is available. The program creates a report of budget plan/payment plan balance data that is required to balance to the general ledger.

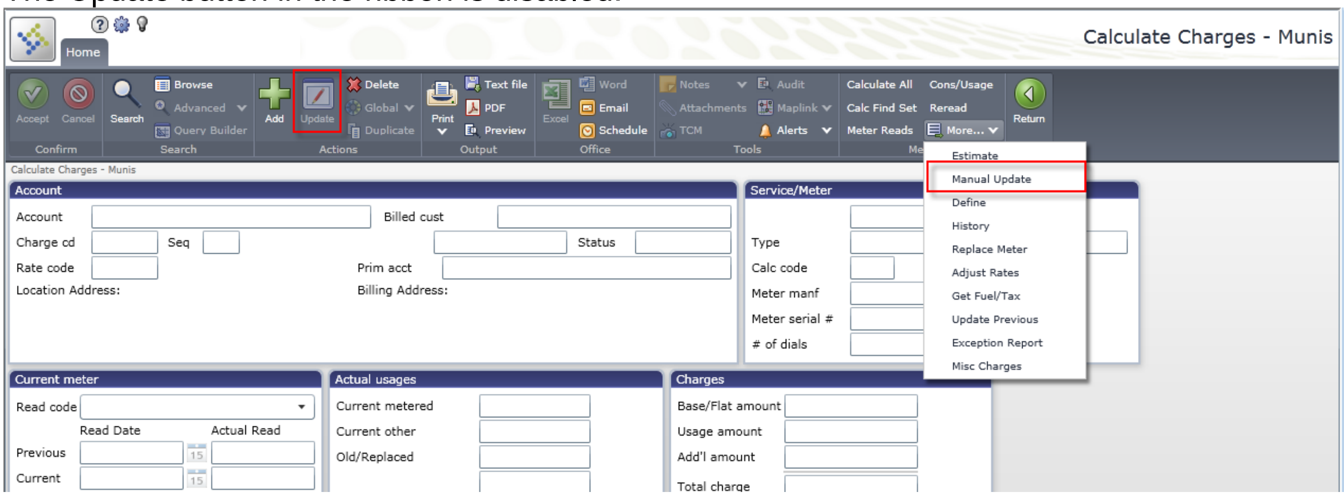


The report gathers data by route, account, or service codes. The options to include active or inactive services, as well as final bill and shut-off status services, are available.

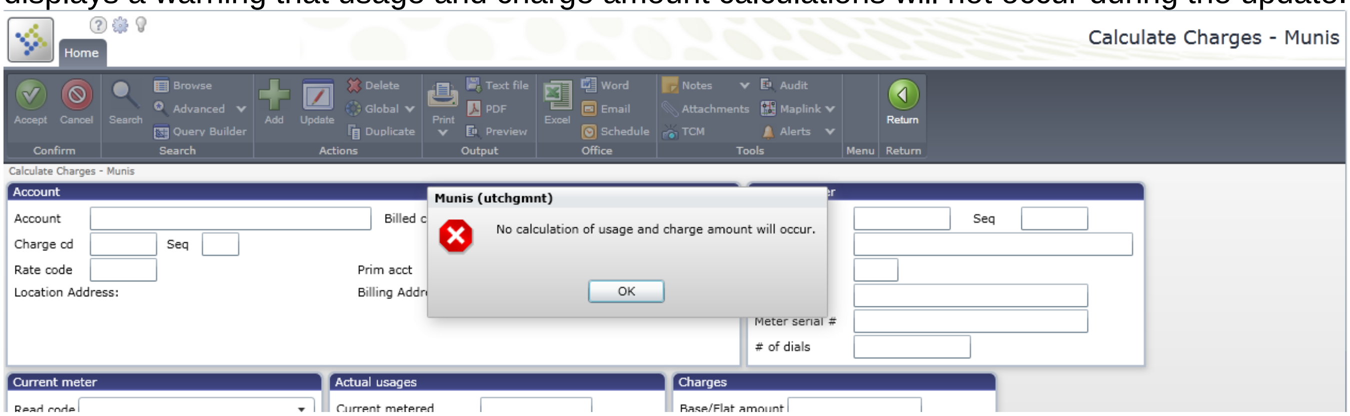
The Balances group includes the Periods Left fields, which contain the range of periods remaining to include on the report. The default values are 00 to 12. The Budget Plans and Payment Plans check boxes allow you to include only budget plans, payment plans, or both in the report. You can also define the report by general or electric services.

Calculate Charges

The Update button in the ribbon is disabled.



When you select the Manual Update option from the Menu group on the ribbon, the program displays a warning that usage and charge amount calculations will not occur during the update.

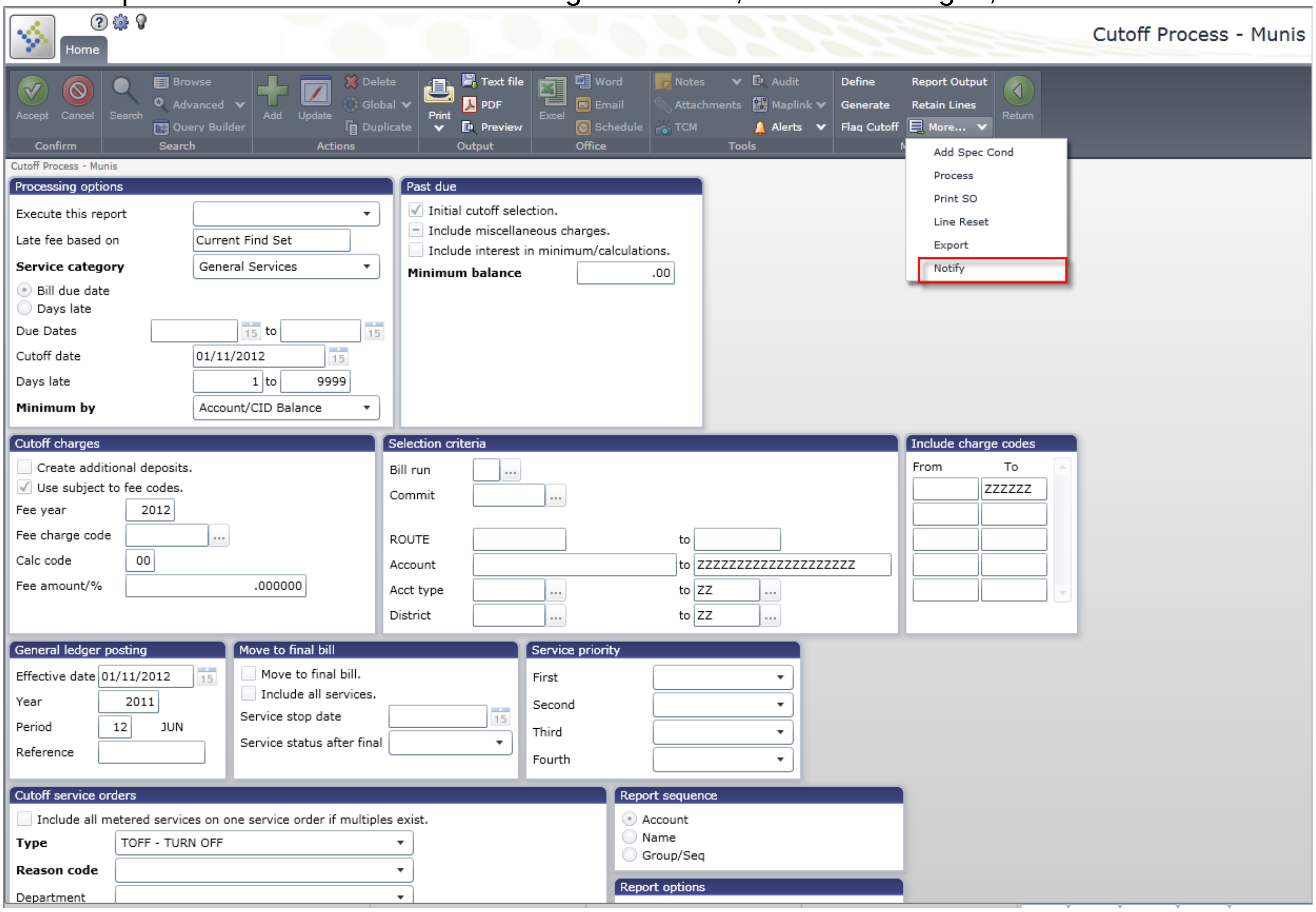


Calculate Interest

Interest calculation methods 46 - Monthly Interest on Bill Date with Minimum Amount and 47 - Monthly Interest from Bill Date on Interest Date with Minimum are available. These calculation methods are similar to Utility Billing Methods 42 - Monthly Interest on Bill Date and 43 - Monthly Interest from Bill Date on Interest Date. The new calculations evaluate the minimum amount defined in the Rate Information group in the Charges Codes program. If the calculated interest amount is less than the minimum amount, the minimum amount becomes the interest charge. If the calculated interest amount is greater than the minimum amount, the calculated interest amount becomes the interest charge.

Cutoff Process, Tyler Notify

The Utility Billing - CIS Cutoff Process is integrated with Tyler Notify to provide automated electronic notifications. When you select the Notify option in the Cutoff Process program, you can complete customer notifications using voice calls, e-mail messages, or both.

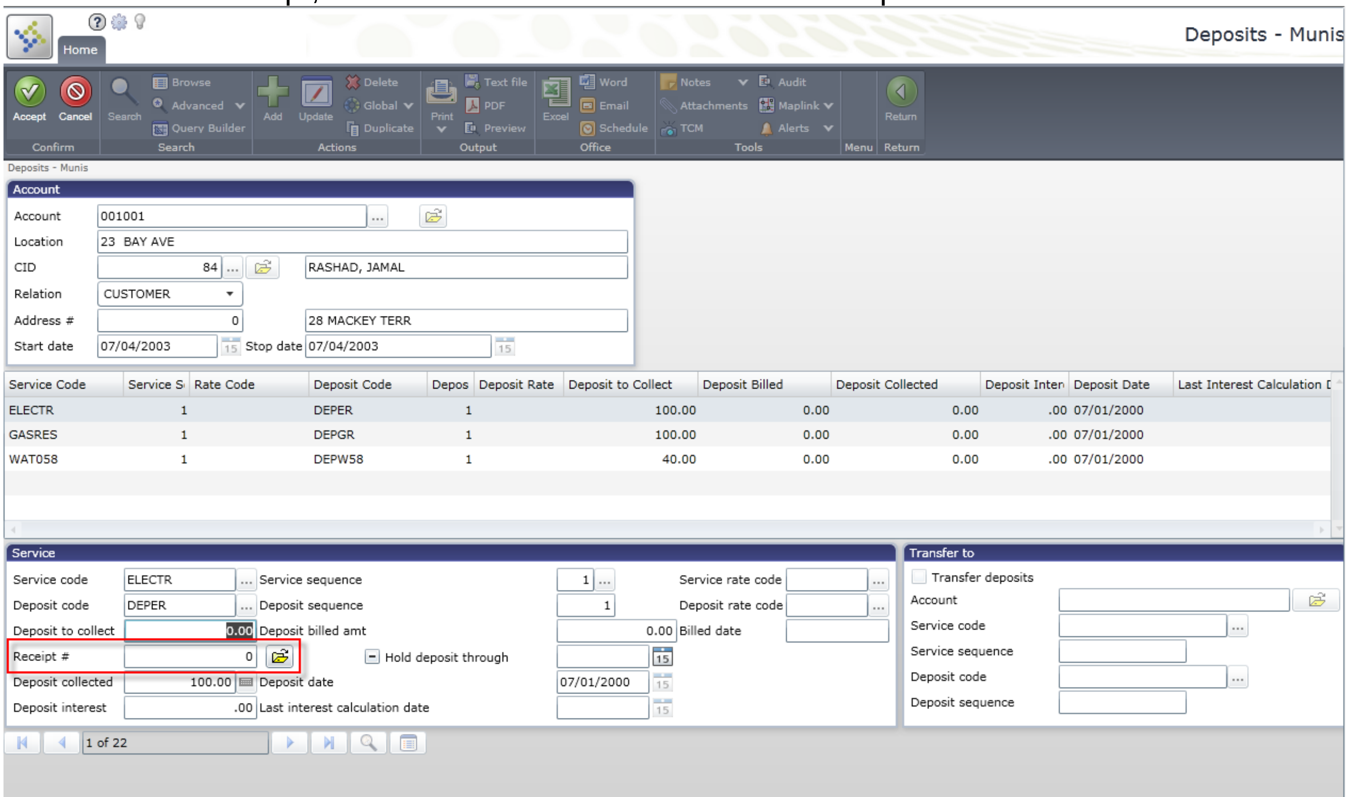


In order to use this feature, Tyler Notify must be installed and the Site Settings program must include the proper configuration values.

The NOC - Notified of Cutoff event history type works with the Cutoff Process to indicate that automatic e-mails or telephone calls have been generated using Tyler Notify. If an event record exists, the routine updates that record.

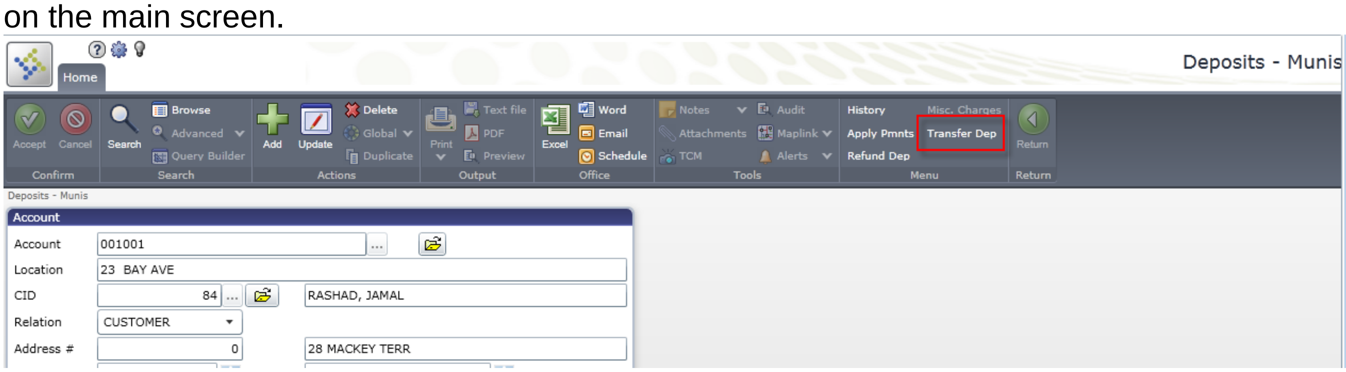
Deposits

The Deposits program provides a link to miscellaneous cash receipts. If miscellaneous receipts are entered using cash receipting, enter the receipt number in the Deposits program. To find a miscellaneous receipt, click the folder button next to the Receipt # box.



When you click the Receipt folder button, the program displays the Find Miscellaneous Receipts screen, where you can select the receipt to link to the deposit record.

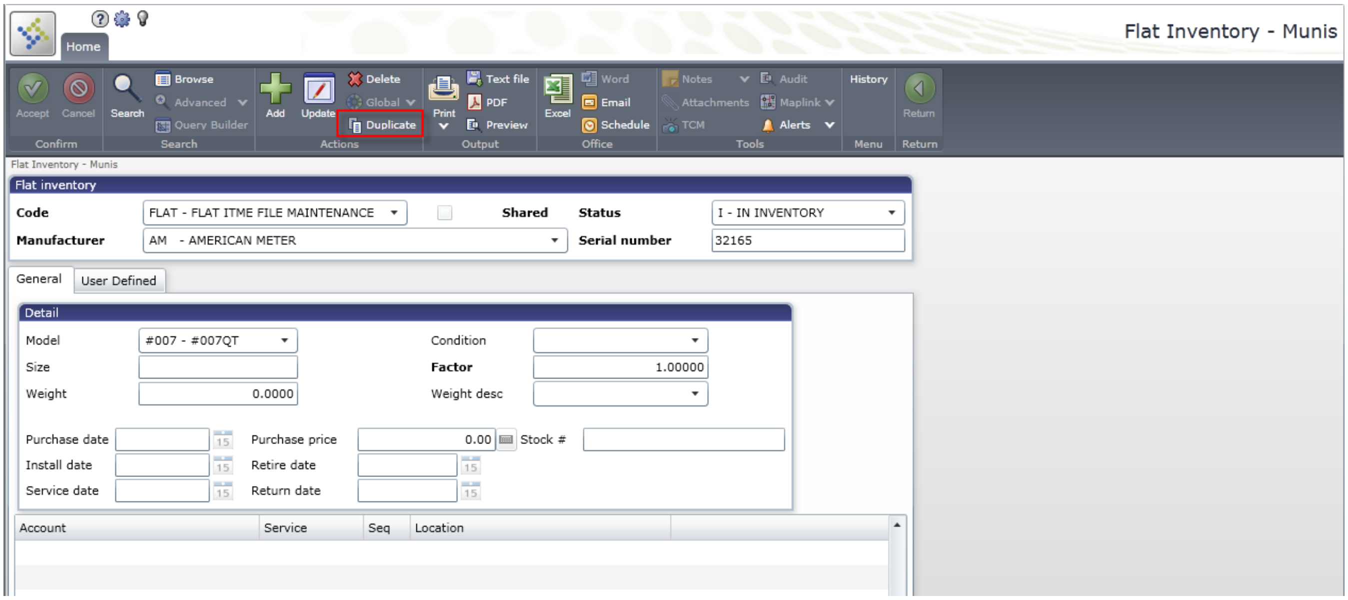
The Deposits program also includes the Transfer Dep option in the Menu group of the ribbon on the main screen.



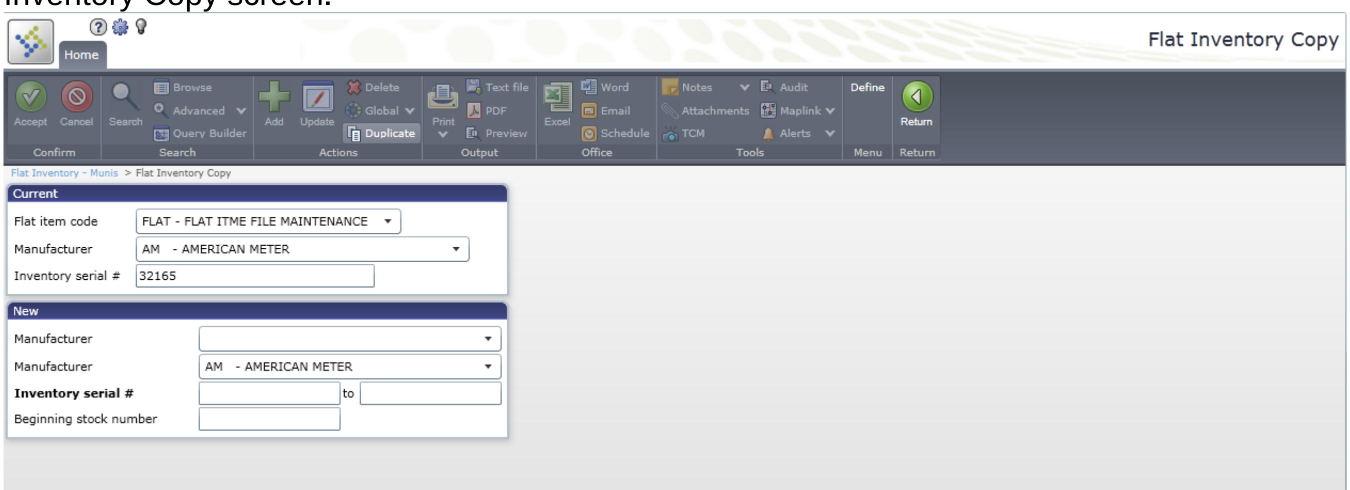
Click this option to display the Deposit Transfer screen, where you can define the From and To values for a deposit transfer. Audit records are created for deposit transfers.

Flat Inventory

In the Flat Inventory program, the Duplicate option is available in the Actions group of the ribbon.



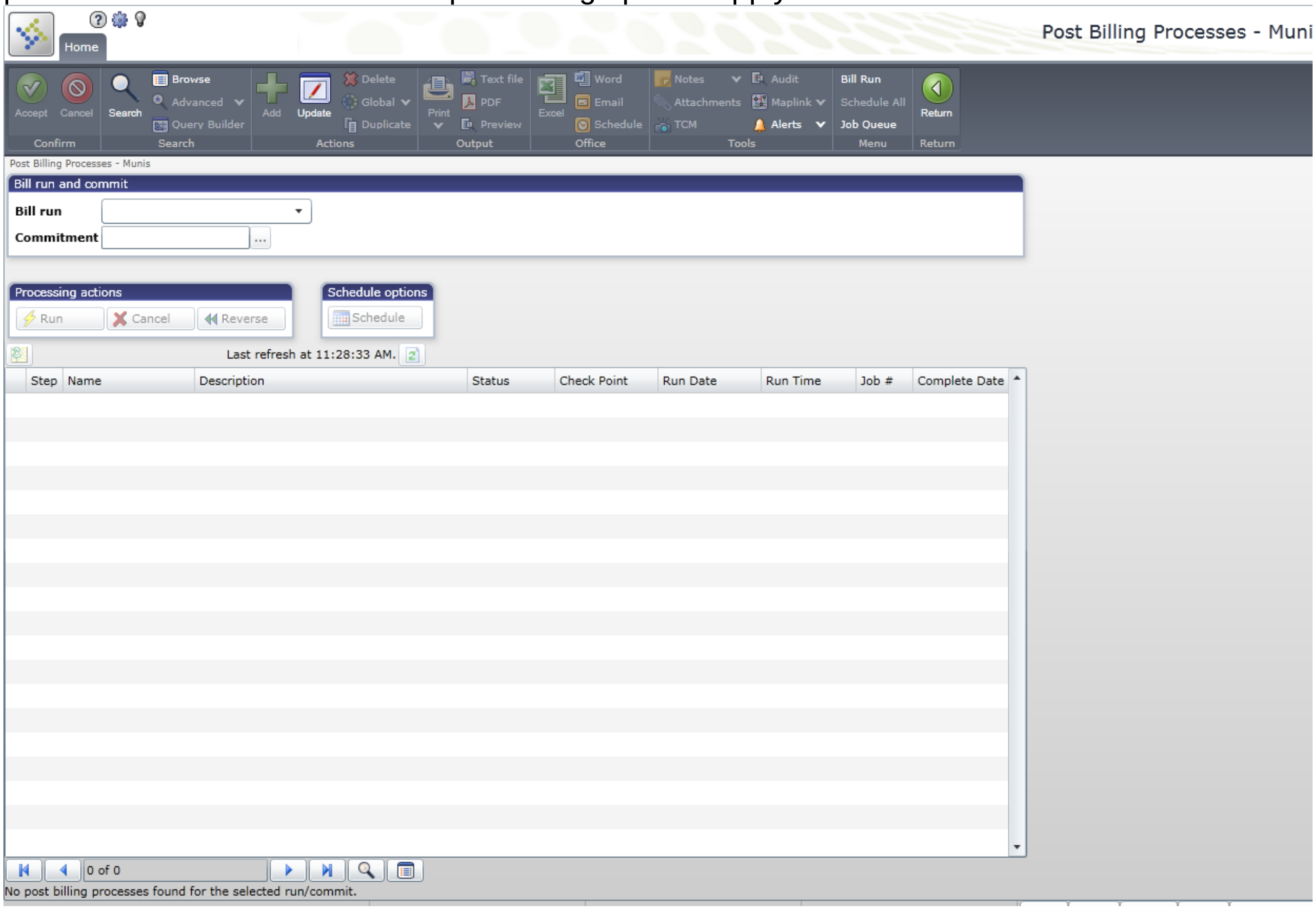
Use this option to create new flat inventory item records from existing records using the Flat Inventory Copy screen.



The Inventory Serial Number range allows you to create multiple records at one time.

Post Billing Processes

The Post Billing Processes program allows you to schedule and maintain billing post processes for a bill run to which post billing options apply.



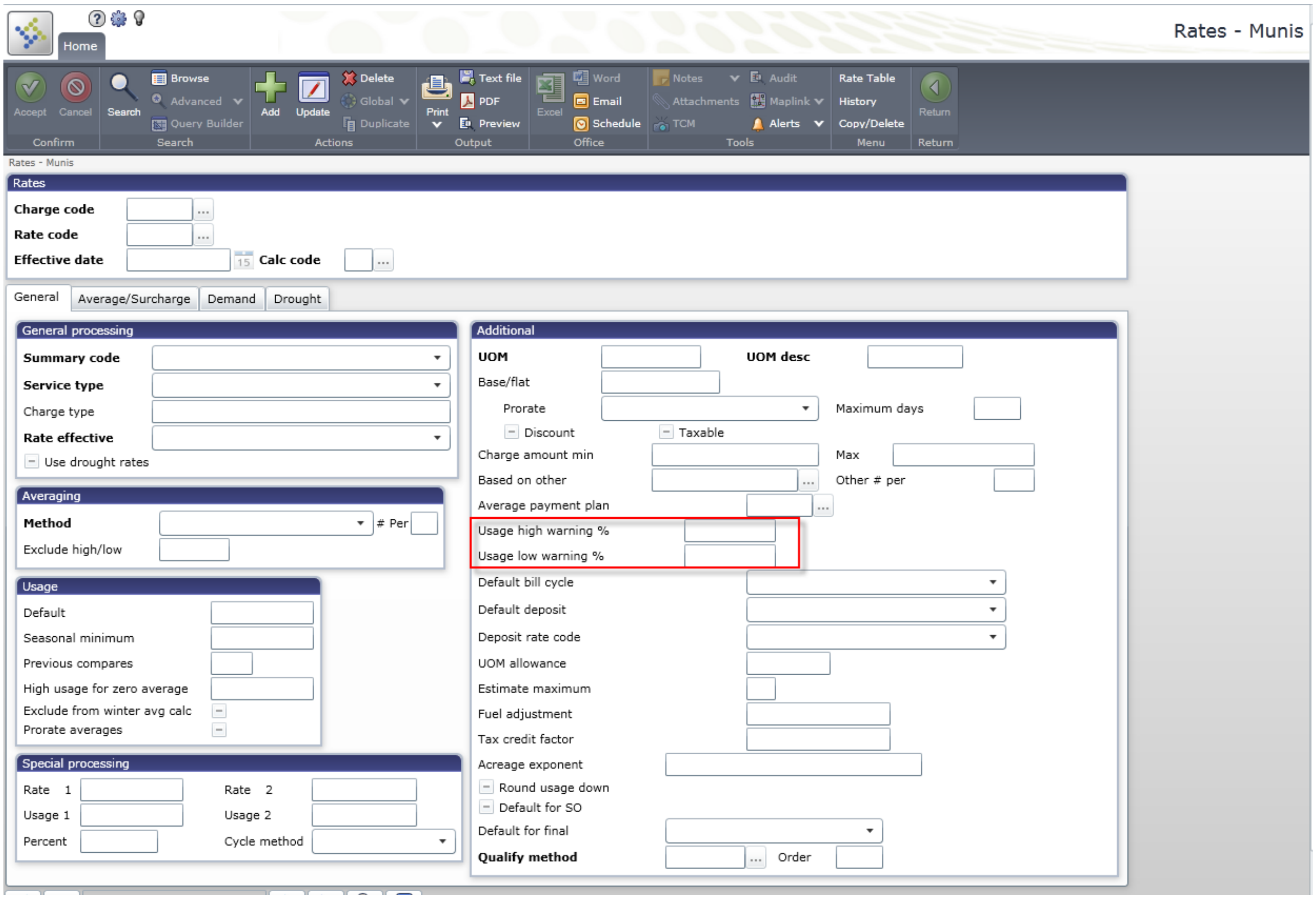
Enter the bill run type and commitment number for bill run/commitment combination. Highlight a program in the table, and then use the on-screen buttons to update processing options:

- Run: Complete the highlighted program now instead of waiting until the scheduled date and time.
- Cancel: Cancels the scheduled job related to the highlighted program.
- Reverse: Runs the reversal version of the highlighted program, if that program includes reversal functionality.

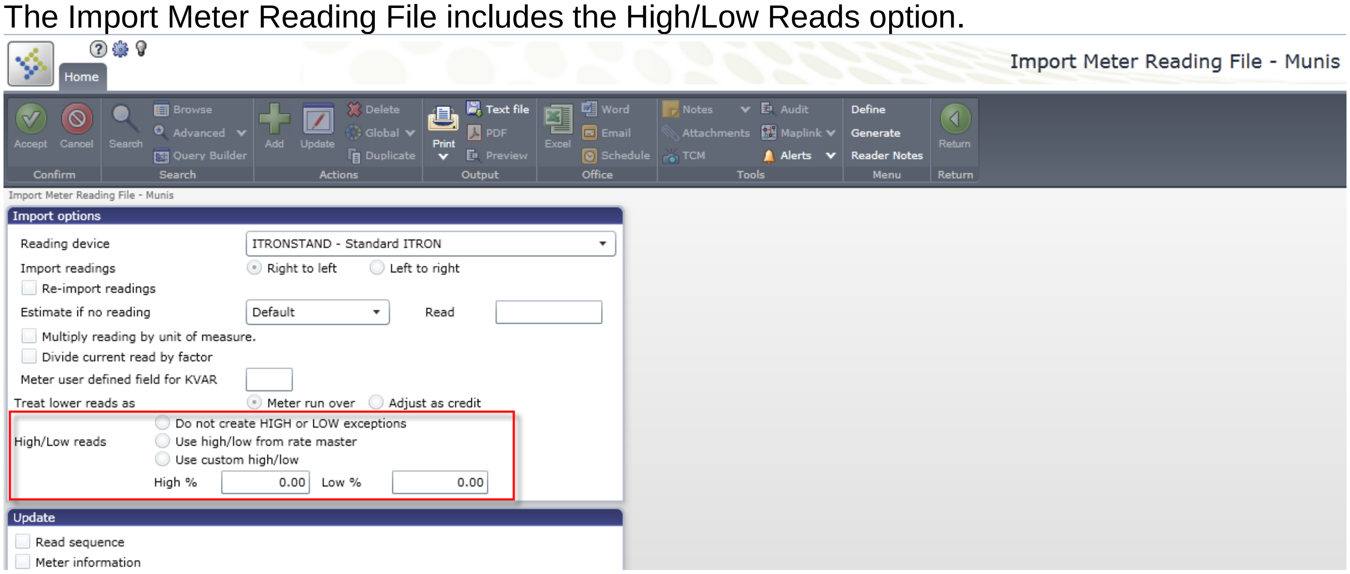
Click the Schedule button to manage processing details in Munis Scheduler.
Click Bill Run to open the Bill Run Process program for the selected bill run; click Schedule All to schedule all jobs at one time, and click Job Queue to display the Munis Scheduler job queue

Rate Masters, Import Meter File

The Rate Masters program includes the Usage High Warning Percent and Usage Low Warning Percent fields on the General tab. These boxes contain the percentage amount at which to issue a high or low consumption warning for metered services.



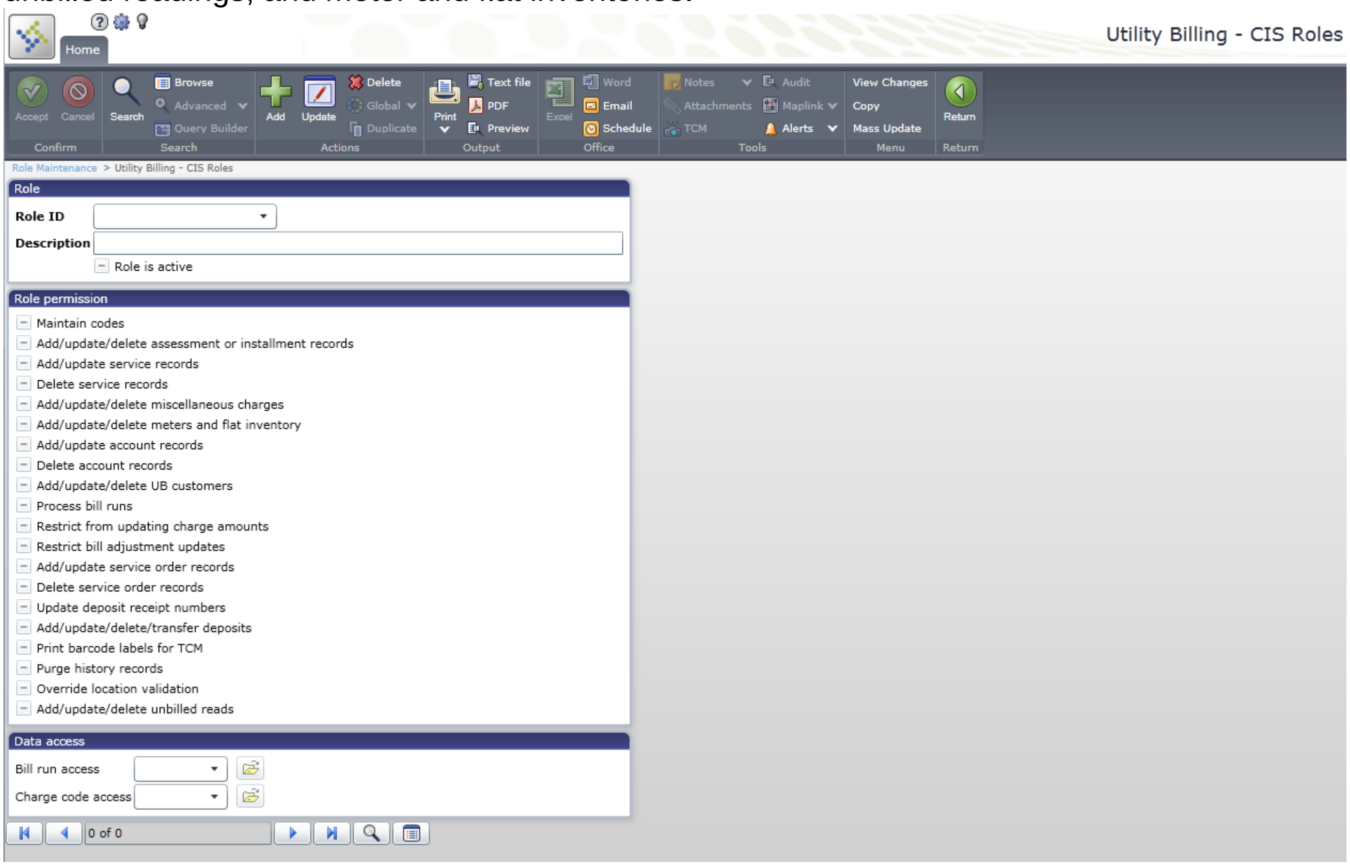
The Import Meter Reading File includes the High/Low Reads option.



This option allows you to select the origin of high and low percentages—from Rates Masters or from custom high/low values defined in the Import Meter Reading File program. Use the Do Not Create High and Low Exceptions option to exclude high and low reads from processing. All high, low, and estimate calculations use an average daily usage and also consider usage from old or replaced meters.

Roles – Utility Billing CIS

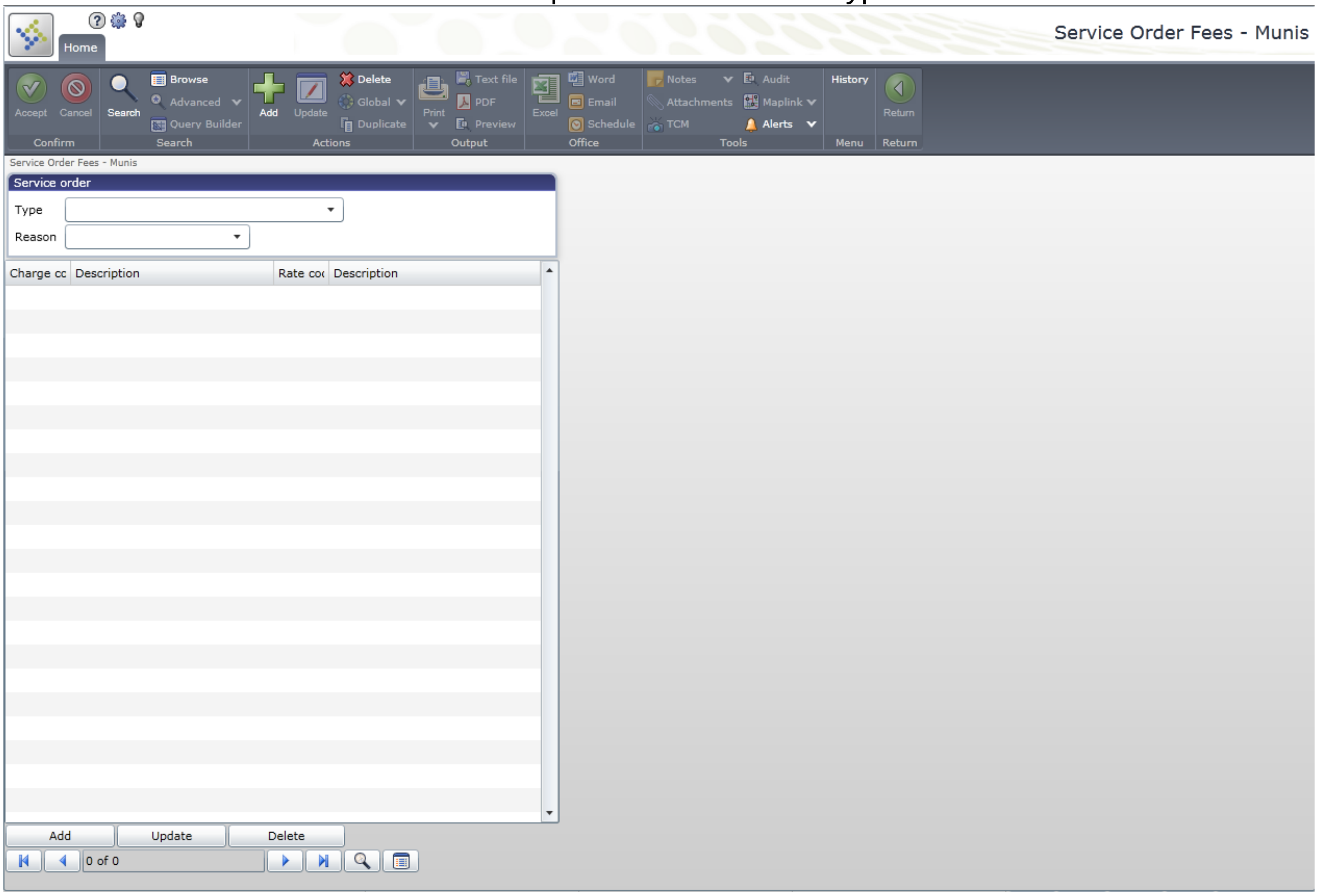
The System Administration Roles - Utility Billing CIS program does not include the Superuser permission. In the place of superuser permissions, this program includes individual permissions maintaining UB customers, miscellaneous charges, history, location validations, unbilled readings, and meter and flat inventories.



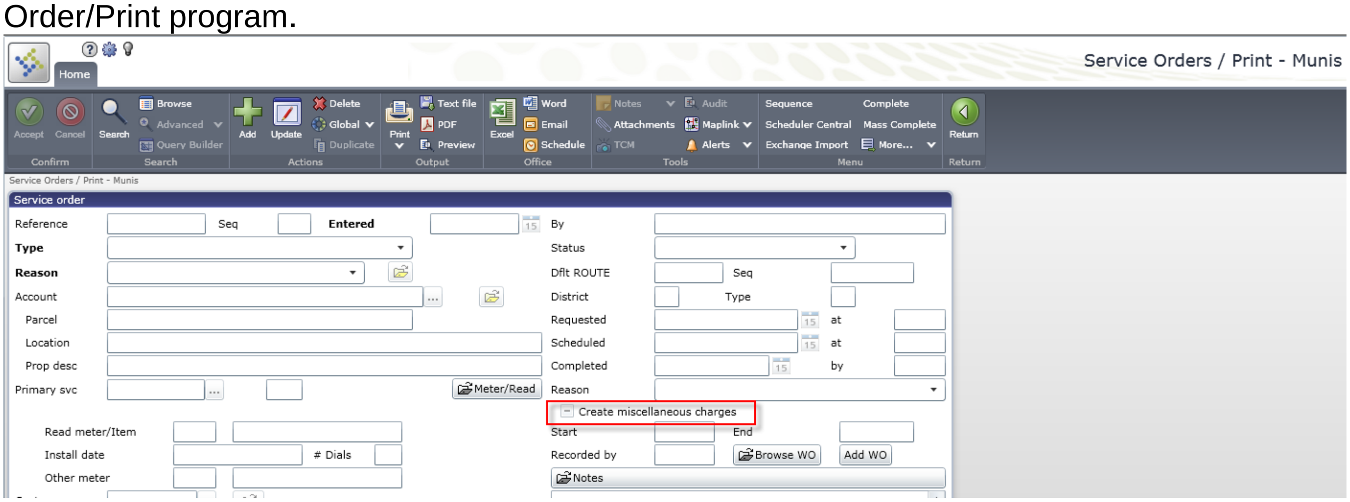
System administration personnel can assign one or more of the individual permissions to roles and users, as appropriate, for the tasks required by their positions.

Service Order Fees

The Service Order Fees program is available. This program defines miscellaneous charge codes and rates to be associated with specific service order types and reason codes.



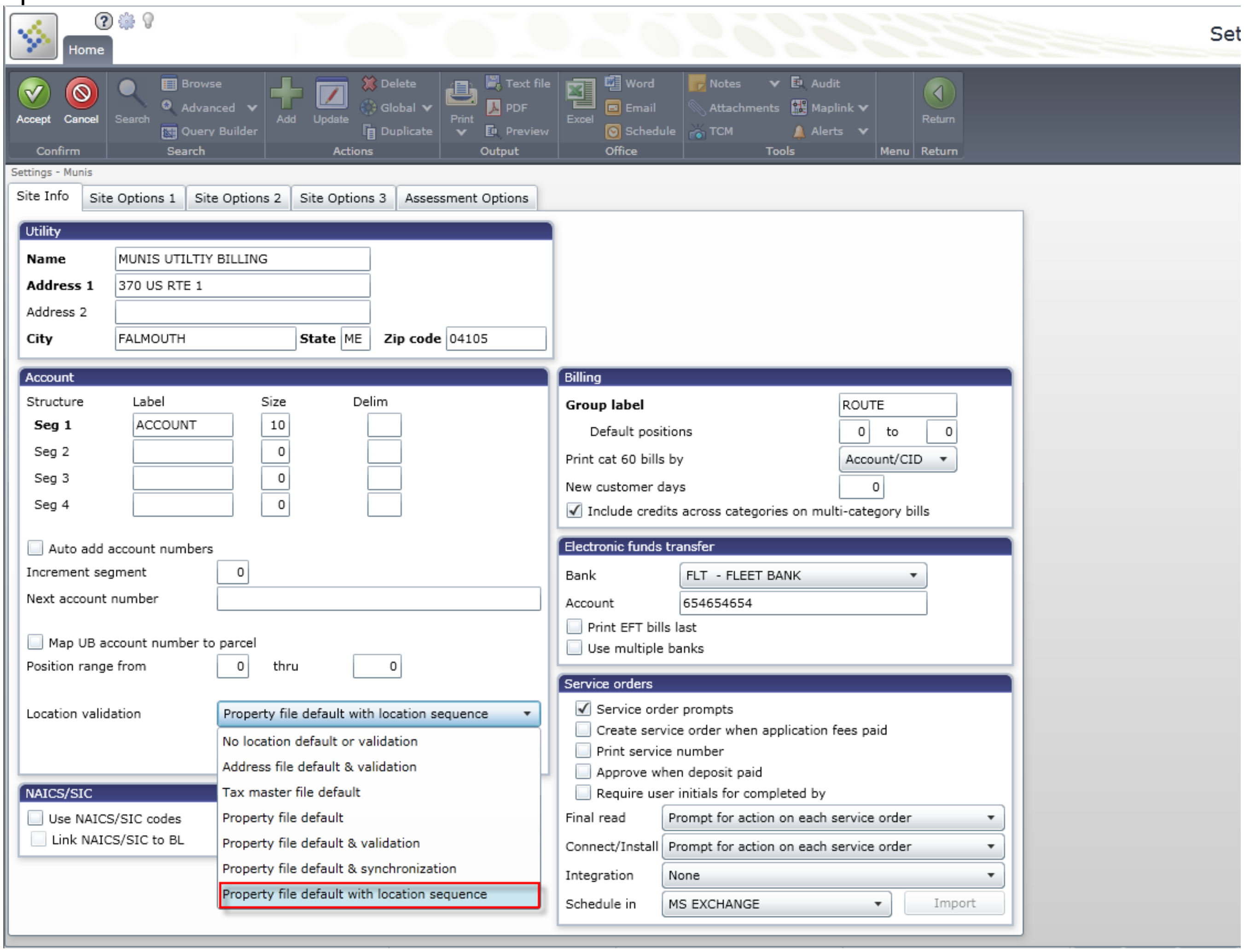
When service orders are completed, miscellaneous charges are created for the account/CID combination if the Create Miscellaneous Charges check box is selected in the Service Order/Print program.



Settings

Accounts

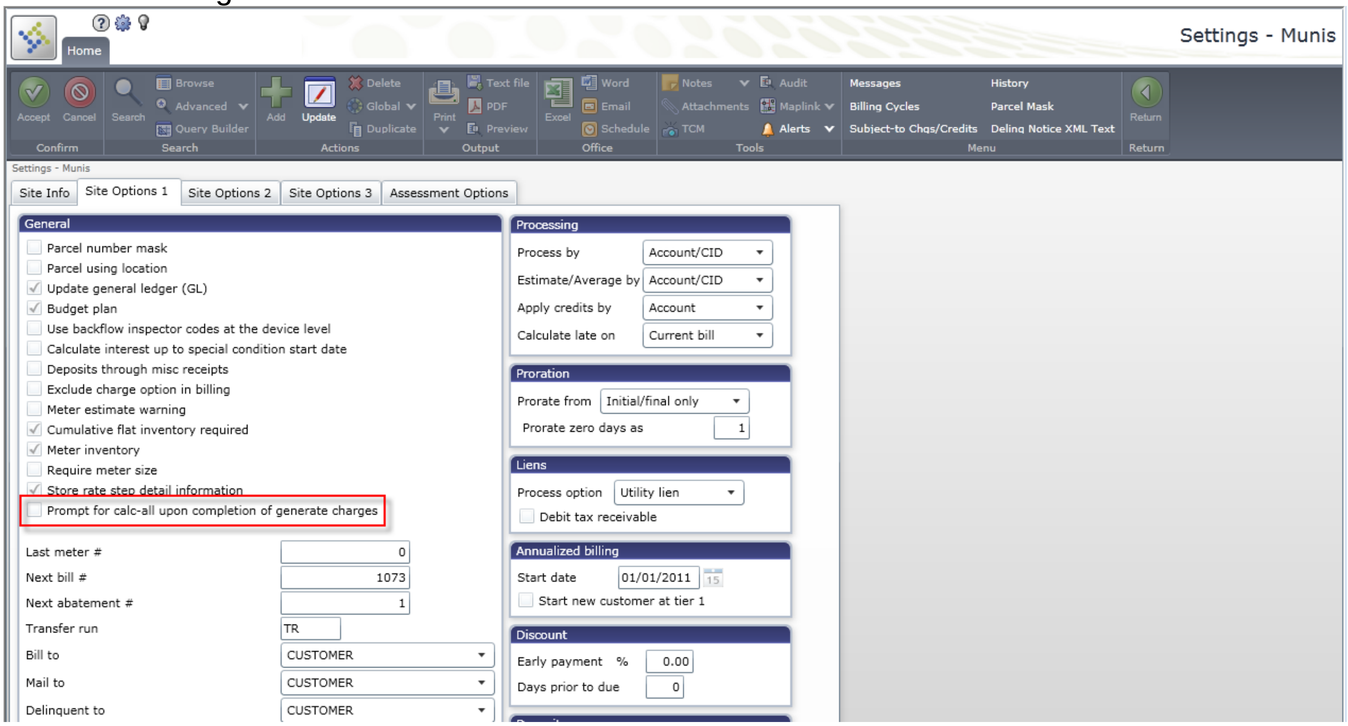
In the Account group on the Site Info tab, the Property File Default with Location Sequence option is available for the Location Validation list.



If this setting is selected and you select a central property location by clicking the field help button in the Parcel box in the Accounts program, the program displays the Location Help screen. If you select a location from Location Help results, the program completes the fields in the Address group according to the location selected. In this case, you must have specific permissions to update the address values.

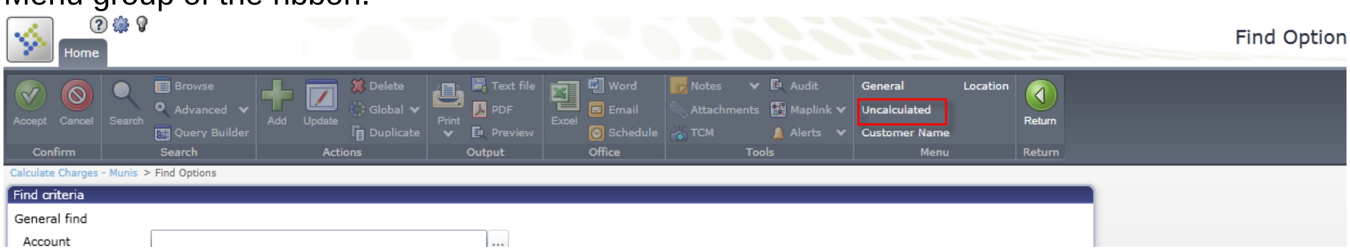
Calculate Charges

In the General group on the Site Options 1 tab, the Prompt for Calc-all Upon Completion of Generate Charges check box is available.



When you select this check box, the Generate Charges and Select Final processes display the "Do you want to run the calculate-all process" message after the Generate Charges or Select Final process completes.

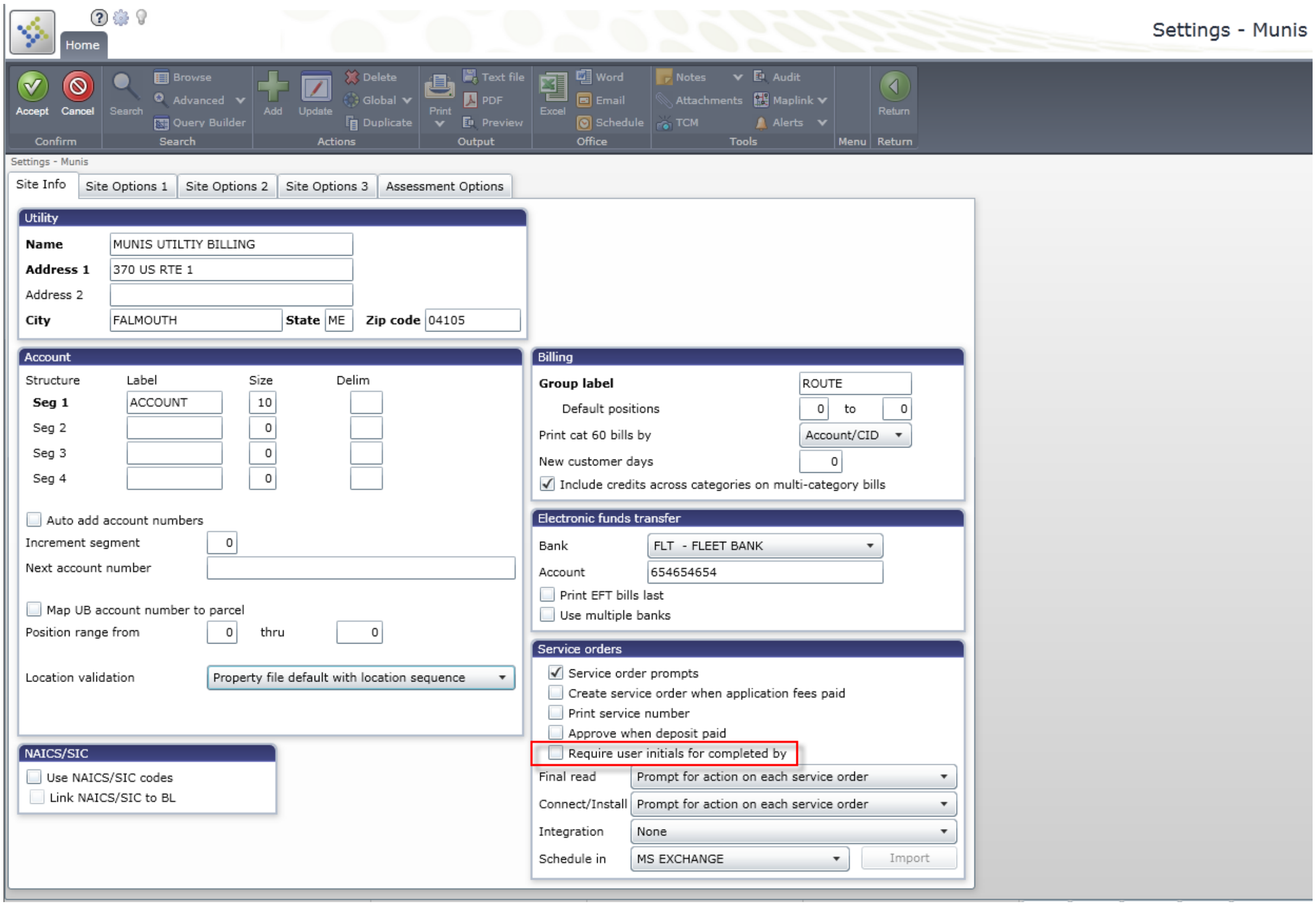
In the Calculate Charges program, the Find screen includes the Uncalculated option in the Menu group of the ribbon.



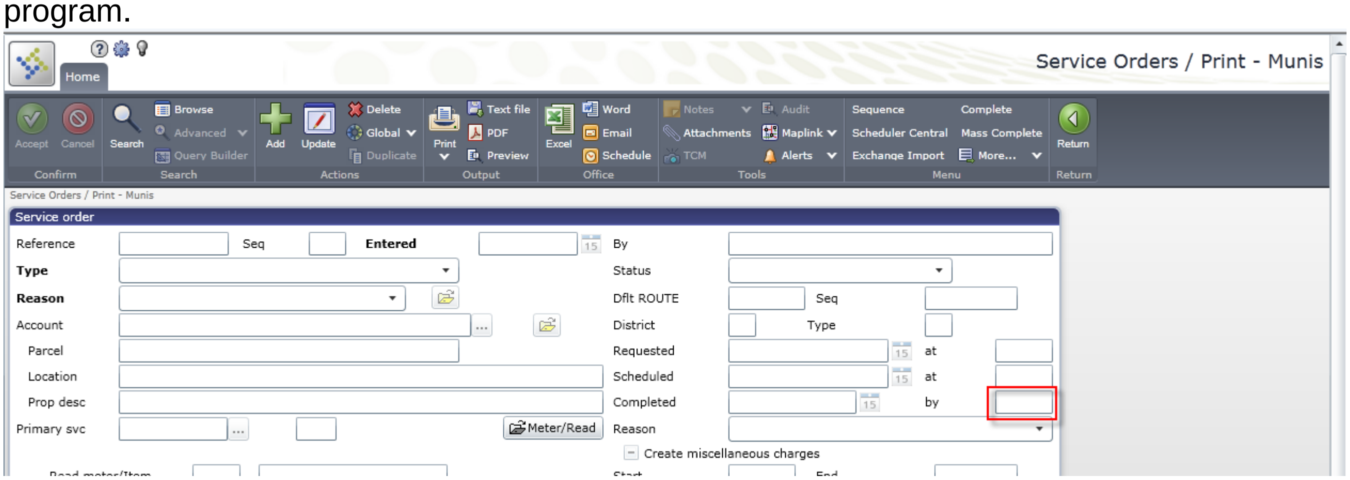
Select this option to find all uncalculated accounts in the bill run.

Service Order/Print

In the Service Orders group on the Site Info tab, the Require User Initials for Completed By check box is available.



If this check box is selected, when you complete a service order in the Service Order/Print program, you must enter your initials in the Completed By box in the Service Order/Print program.



Utility Billing – CIS Available Web Parts

Munis Web parts are applicable if your organization uses Tyler Dashboard. Currently, there are no Munis Web parts available specific to Utility Billing. The following table provides a description of Web parts available for Munis System Administration, Tyler Dashboard, and Munis Workflow.

Web Part	Description
General	
	Provides information about meetings that are scheduled for your organization, including agendas and discussions. You are also able to schedule meetings from this web part. Use the filter to view meetings for other weeks or months.
System Administration	
Audit Central	Displays a list of all of the changes made for the application, user ID, action, file, or field that you indicate on the Filter lists.
Program Activity Log	Displays information about programs that have completed running or that are currently running in Munis.
Tyler Dashboard	
Dashboard Configuration	Configures the Tyler Dashboard.
Dashboard Connections	Maintains the connection between the Tyler Dashboard and the Web services for each Tyler application, or Tenant, using the Dashboard.
Dashboard Sites	Maintains the pages that are connected to the Tyler Dashboard.
E-mail Settings	Configures the settings for sending e-mails from Web parts that have the e-mail button enabled, such as Exception Viewer or Workflow Manager.
Exception Viewer	Displays a list of exceptions encountered by the Tyler Dashboard. The exceptions are compiled according to date.
My Favorites	Creates links to frequently used Web sites, Tyler Dashboard views, or programs.
Tyler Menu	Displays the menus for the Tyler products, such as Munis®, that your organization uses.
User Control	Copies programs, views, and Web parts from one user to another.
User Profile	Maintains settings, such as your Workflow password and your Tyler program runner.
Munis Workflow	
My Work	Displays the number of Workflow approvals, notifications, and alerts currently pending.
My Work Detail	Displays a list of your pending approvals, notifications, or alerts.

Web Part	Description
Workflow Manager	Displays a list of Workflow items by process or approver compared to a specified date